

China Automotive Distribution and Aftermarket Report, 2016-2020

Dec. 2016

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Given fiercer competition, rising operating costs, huger inventory pressure and other factors, as well as the impact of the emerging e-business mode, the automotive distribution industry is facing an enormous challenge. In 2015, the number of 4S shops in China reduced by 920 year on year, and in the future the number will shrink further, while automotive e-business, automobile supermarkets and other multi-brand automotive business models will grow up.

Amid the weak development of the automotive distribution industry, the automotive aftermarket, covering automotive finance, auto repair & beauty and used cars, has sprung up with higher profit margins. In 2015, the overall size of Chinese automotive aftermarket reached RMB2,154 billion, of which RMB850 billion and RMB755 billion stemmed from automotive finance and auto repair & beauty respectively.

In recent years, Chinese car dealers have only garnered the car sales gross margin of less than 5%, with an overall downward trend; whereas, after-sales services enjoy the gross margin of above 40%.

Gross Margin Comparison between Car Marketing and After-sales Services of Major Chinese

Car Dealers

	2013		2014		2015		2016H1	
	Car Marketing	After-sales Services	Car Marketing	After-sales Services	Car Marketing	After-sales Services	Car Marketing	After-sales Services
Sinomach Automobile	1.5%	44.8%	2.3%	50.6%	3.6%	51.7%	2.7%	35.7%
Zhongsheng Group	4.2%	46.6%	3.3%	46.9%	2.6%	45.5%	--	--
ZhengTong Auto	4.7%	45.3%	4.2%	47.4%	3.3%	48.5%	3.1%	46.9%
Yongda Auto	4.2%	46.7%	3.3%	45.8%	3.1%	45.6%	3.0%	46.8%
Baoxin Auto Group	6.0%	47.5%	4.8%	47.3%	4.0%	45.2%	3.5%	46.0%
Harmony Auto	8.7%	45.9%	5.8%	45.8%	4.1%	45.1%	4.5%	46.8%

Source: ResearchInChina

In the face of lower gross margins, massive inventory and the gradual decline in economic benefits, some dealers have to seek further development through mergers and acquisitions, or expansion of the automotive aftermarket, or the combination of online and offline business, or layout in the field of new energy vehicles.

M & A: In 2016, China Grand Auto acquired Baoxin Auto Group, Dalian Zunrong Auto Trade Co., Ltd., Peng Feng Group and other car distribution groups to expand sales network and further consolidate its leading position.

Automotive Aftermarket Layout: In 2015, Sinomach Automobile and Federal-Mogul co-founded Federal-Mogul CAIEC Automotive Technology Services (Beijing) Co., Ltd. to establish a car repair & maintenance-based business network in the automotive aftermarket and an online + offline standardized ecosystem centering on "products + services", as well as provide comprehensive maintenance solutions for medium and high-end brand car customers.

Internet + Layout: In 2015, China Grand Auto cooperated with Alibaba, yiche.com and autohome.com.cn to set up an O2O platform serving consumers in car selection, loans, insurance, delivery, maintenance, replacement, second-hand car loans, and among others.

New Energy Vehicle Layout: In 2014, PANGDA Automobile Trade Group set up a joint venture – Pangda- BAIC New Energy Vehicle Sales Co, Ltd. with BAIC. In 2015, PANGDA Automobile sold about 14,000 new energy vehicles. In addition, PANGDA Automobile also erected an electric vehicle street and an electric vehicle test drive field in Wufangqiao, Beijing, a new energy vehicle hypermarket in Tianjin, a new energy vehicle leasing & sale experience center in Tangshan city, and a new energy vehicle supermarket in Shenyang city.

China Automotive Distribution and Aftermarket Report, 2016-2020 involves the following:

- Overview and competitive landscape of automotive distribution (including status quo, distribution mode, profit model, competitive landscape and development tendency) in China;
- Sales market of new vehicle in China (including overall market, passenger cars, commercial vehicles, new energy vehicles, development trends, etc.);
- Analysis on used car sales market, auto finance market, auto repair & beauty market and auto insurance market in China;
- Operation, layout, sale, development, etc. of 12 car dealers.

Layout of Major Chinese Car Dealers in Various Fields

	Automotive Finance	Internet +	Used Cars	New Energy Vehicles	Auto Repair & Beauty	Automotive Insurance
Pangda Automobile	✓	✓		✓	✓	
Sinomach Automobile		✓	✓	✓	✓	
Zhongsheng Group	✓		✓		✓	✓
DCH Holdings	✓					
China Grand Auto	✓	✓	✓		✓	✓
ZhengTong Auto	✓	✓	✓		✓	✓
Grand Orient	✓		✓			✓
Yongda Auto	✓	✓	✓	✓		
Harmony Auto	✓	✓		✓	✓	✓
Yaxia Automobile	✓	✓	✓		✓	✓
Materials Industry Zhongda Group Co., Ltd.		✓	✓		✓	

Source: ResearchInChina

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