

China Automotive Finance Industry Report, 2017-2021

August 2017

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

Auto finance found a penetration rate of roughly 38% in China in 2016, indicating still a vast room for growth compared with over 50% in the United States, Japan and European countries. Stimulated by favorable policies and changes in people's consumption habits, the penetration of auto finance will rise steadily in the next few years, reaching an estimated 55% in 2021.

The Chinese auto finance market approached RMB1 trillion in 2016 and is expected to be around RMB1.125 trillion in 2017. Along with the rising penetration, the market size will report RMB1.75 trillion in 2021.

The Chinese automotive finance market now is still dominated by commercial banks with a market share of approximately 50%. However, driven by favorable policies like the Guidance on Increasing Financial Support for New Consumer Sectors, auto finance companies, financial leasing firms and other enterprises have made great headway, squeezing the market share of commercial banks.

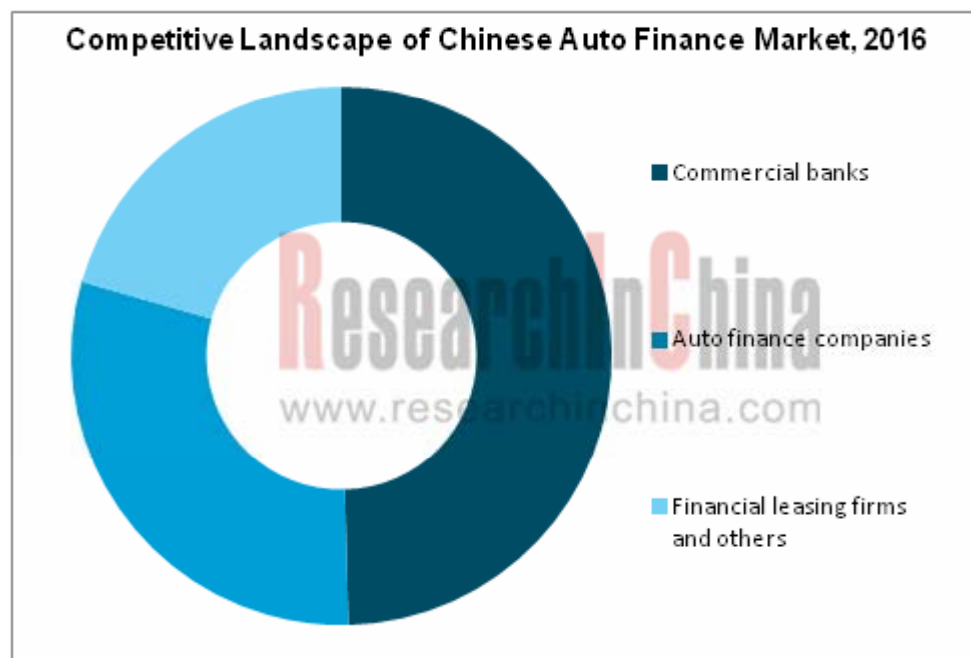
Thanks to favorable policies, used car finance and Internet auto finance have been bestowed with good opportunity for development.

Used car finance: With the implementation of policies like the Opinions on Promoting Convenient Transaction of Used Cars, the transactions of used cars have risen in recent two years, arriving at 4.80 million units in the first five months of 2017, representing a 20.7% growth over the same period of last year. A huge used car market offers space for the development of used car finance. Despite a penetration of only 8% for used car finance in 2016, the figure will increase steadily, touching 20% in 2021, promoted by the policies like the Guidance on Increasing Financial Support for New Consumer Sectors, gradual improvement of used car evaluation system and changes in consumption concept.

Internet auto finance: Thanks to the policies like the Guidance on Promoting the Healthy Development of Internet Finance, traditional carmakers and dealers start using the Internet to improve the procedures and experience of auto finance, and meanwhile Internet firms and Internet finance platforms including BAT, JD, and Autohome have also made their presence in Internet finance. Conventional auto financial services will move from offline to online and Internet auto finance will be a trend.

China Automotive Finance Industry Report, 2017-2021 focuses on the following:

- ◆ Global auto finance industry (development environment, status quo, development of auto finance in various countries, competitive landscape, etc.);
- ◆ Auto finance industry in China (development environment/course, status quo, market size, competitive landscape, operation of auto finance companies, development trends, etc.);
- ◆ Chinese auto finance market segments (auto financial leasing, used car finance, and Internet auto finance);
- ◆ 13 OEM-related auto finance companies, 5 auto finance-related dealers, and 8 other auto finance-related companies.



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