

China Automotive Financial Leasing Industry Report, 2020-2026

May 2020

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.

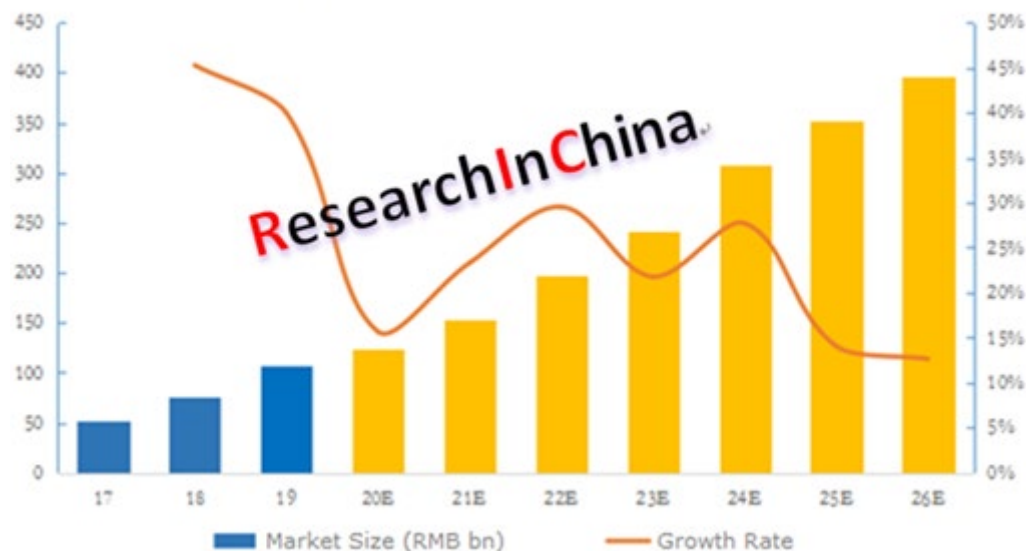
INFORMATION SOURCES

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

Abstract

After ceaseless decline in 2018 and 2019, the Chinese automobile industry ushers in a period of recovery when the consumers are more prudent to buy cars and automobile consumer finance draws more attention, especially financial leasing as a key form of auto finance has a lower threshold for access than auto consumer credit and is advantaged and rooted in the third-line-below cities and rural markets, beneficial to both consumers and automakers. Following the galloping automobile industry in China over the past decade, auto financial leasing industry has sprung up with a market size in 2019 up to RMB107.3 billion, a figure projected to reach RMB396 billion amid the price cut of cars, the maturing industry and consumers' growing acceptance of auto financial leasing.

Auto Financial Leasing Market Size and Growth Rate in China, 2017-2026E



Auto financial leasing started late in China, and the players in the industry are seeking for a suitable development route for own peculiarities. Not a leader has emerged in the industry that characterizes scattered development and mild competition and that desires to be concentrated. Nowadays, the most active internet-based auto financial leasing companies within the industry are expanding business presence most rapidly, while automakers and dealers are progressing slowly with limited input of resources in auto financial leasing since they still focus on traditional automobile credit business. Besides, professional leasing companies keep a low profile and have been making great strides in the industry thanks to its mature financial leasing business model.

Automaker-backed: such type of auto finance companies is advantageous in capital now that they can raise funds via stakeholders' deposits, interbank borrowing, among others; additionally, it costs least for them to get cars but there are not so many car models;

Professional leasing companies: with mature business model and be competent enough for risk control;

Dealership companies: they are superior in the richness of car models and enjoy absolute advantage in customer acquisition for its full-fledged marketing channels;

Internet-based: such kind of financial leasing companies rapidly build own channels for customer acquisition by ways of mass advertising, ground promotion, the spread of outlets, etc.

Highlights in this report:

- ◆ Automotive financial leasing (definition, classification, main models, development history, etc.);
- ◆ China's automobile industry (production & sales, ownership, competitive landscape, used car trade);
- ◆ Automotive financing leasing development in China (policies, market size, competition pattern, financing channels, main products, development tendencies, etc.);
- ◆ 17 Chinese auto financial leasing companies including five automaker-backed financial leasing companies, five dealership companies, four internet-based companies and three professional leasing companies (operation, financial leasing business, financing channels, dynamics, etc.)

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