

# China Vehicle Inspection Industry Report, 2020-2026

August 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

China's car ownership showed the CAGR of 12.9% during 2012-2019 and it is estimated to reach 272.13 million units in 2020 with a year-on-year spike of 7.2%, invigorating the motor vehicle inspection market and with a demanding on higher motor vehicle inspection capabilities.

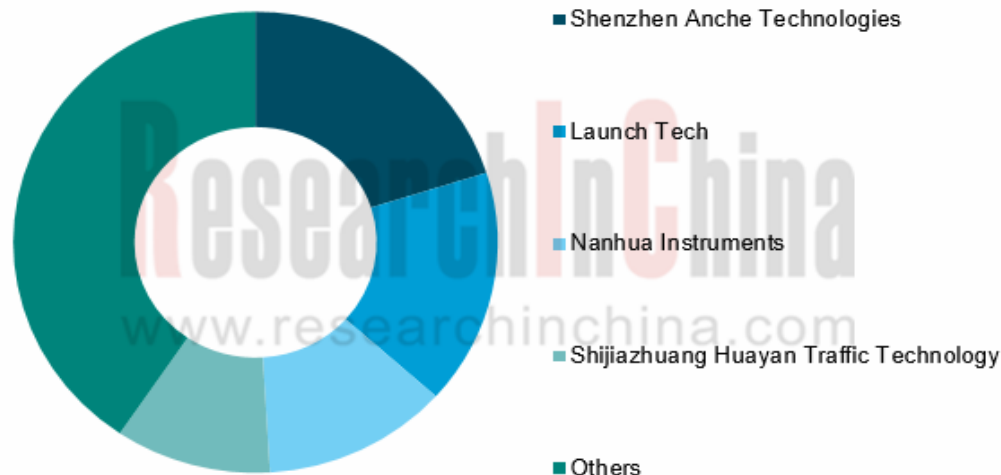
In recent years, regulatory authorities including the Ministry of Public Security and the Ministry of Environmental Protection have intensified their efforts for vehicle inspection, fueling a boom in the Chinese vehicle inspection market. In 2019, China's vehicle inspection market size was estimated at RMB38.05 billion with a year-on-year spurt of 17.6%, of which vehicle inspection systems and vehicle inspection services contributed RMB4.743 billion and RMB33.31 billion respectively, surging by 24.5% and 16.7% on an annualized basis. The substantial growth of vehicle inspection systems was largely bolstered by product renewal thanks to the implementation of new standards.

China's vehicle inspection is in the early stage of intelligence and networking, lagging behind developed countries in terms of technology and configuration. As of 2019, there had been more than 13,000 vehicle inspection stations across China, namely every 10,000 vehicles could be served by only 0.5 inspection station, far lower than the average of 2 or more in Japan, the United States and Europe. This indicates huge development potentials in China. As estimated, the number of vehicle inspection stations in China will maintain a growth rate of about 9% between 2020 and 2026, expectedly registering 25,000 by 2026. Thus, the new vehicle inspection stations will demand vehicle inspection equipment worth RMB3.6 billion.

With the tightening of industry supervision and the intensification of market competition, Chinese vehicle inspection equipment and system market has become ever more concentrated. Shenzhen Anche Technologies, Launch Tech, Shijiazhuang Huayan Traffic Technology, Foshan Nanhua Instruments and Chengdu Chengbao Development have high market shares, strong R&D capabilities, and wide business coverage.

In 2019, Shenzhen Anche Technologies, Launch Tech, Nanhua Instruments and Shijiazhuang Huayan Traffic Technology seized 59.5% shares of Chinese vehicle inspection system market together. Especially, Shenzhen Anche Technologies and Nanhua Instruments quickly evolved into the industry's leaders, with their revenue soaring by 287.0% and 82.4% year-on-year respectively.

## Competitive Landscape of China's Vehicle Inspection Equipment and System Industry, 2019



Source: ResearchInChina

The motor vehicle inspection service industry features geographical limitations, and the competitors can be bifurcated into state-owned enterprises and private ones, among which the former is superior in comprehensive strength, equipment and technology, but a number of third-party inspection agencies have emerged with the advancement of the vehicle inspection industry, and private vehicle inspection companies have been seizing more market share by unique competitive edges.

In 2018, Shenzhen Anche Technologies entered the motor vehicle inspection service market by acquiring 70% stake of XingChe Motor Vehicle Inspection. In September 2019, Duolun Technology established a wholly-owned subsidiary, Jiangsu Duolun Vehicle Inspection Industry Holding Co., Ltd., with a registered capital of RMB300 million, marking the company's official foray into the motor vehicle inspection industry. With the stricter requirements of new standards on inspection services as well as the involvement of private capital, the competition in Chinese vehicle inspection service market will, undoubtedly, prick up.

Chinese vehicle inspection market will continue to expand, and it is expected to worth RMB72.05 billion by 2026 under the drive of vehicle ownership growth, longer vehicle usage time, the growing number of vehicle inspection agencies, the continuous expansion of applied fields, and the upgrading of emission standards.

China Vehicle Inspection Industry Report, 2020-2026 focuses on the following:

- ◆ Vehicle inspection, including definition, classification, industry chain, laws and policies;
- ◆ Automobile industry, including output, sales volume and ownership;
- ◆ Vehicle inspection market, including overseas market overview, status quo, market size, competition pattern, and development trend;
- ◆ Analysis on vehicle inspection system suppliers and vehicle inspection service providers.

### 1 Vehicle Inspection

- 1.1 Definition
- 1.2 Classification
  - 1.2.1 Offline Inspection of New Car
  - 1.2.2 In-service Vehicle Inspection
- 1.3 Industry Chain
- 1.4 Laws and Policies
  - 1.4.1 Motor Vehicle Inspection Equipment & System Regulators and Service Supervisors
  - 1.4.2 Laws and Regulations
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### 2 Automobile Industry

- 2.1 Output
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- 2.3 Ownership

### 3 Vehicle Inspection Market

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  - 3.1.1 Status Quo
  - 3.1.2 Competitive Landscape
- 3.2 Status Quo
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- 3.2.3 Industry Regulation System towards Cyberization
- 3.2.4 Technology Gap with Foreign Countries
- 3.2.5 Decentralized Industry Structure, Low Service and Operation Levels
- 3.2.6 Status Quo of Used Vehicle Inspection
- 3.3 Market Size
  - 3.3.1 Market Segments
  - 3.3.2 Forecast
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- 3.5 Development Trend

### 4 Vehicle Inspection System Providers

- 4.1 Launch Tech
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  - 4.1.2 Operation
  - 4.1.3 Diagnosis System Based on the Golo Automotive Cloud Platform
- 4.2 Nanhua Instruments
  - 4.2.1 Vehicle Inspection Products
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  - 4.3.1 Operation
  - 4.3.2 R&D Costs

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- 4.4 Shijiazhuang Huayan Traffic Technology
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  - 4.5.2 QZD-5 Motor Vehicle Safety (Performance) Testing System
  - 4.5.3 PB-1000 Series Flat Test Bench
- 4.6 Bosch Diagnostics
- 4.7 Zhejiang Jiangxi Automobile Inspection Equipment
  - 4.7.1 DCG-2000ASM Automotive Chassis Dynamometer
  - 4.7.2 PB Series Automotive Flat Brake Inspection Line
- 4.8 Cosber
  - 4.8.1 Main Products
  - 4.8.2 New National Standard Eco-friendly Inspection Line Solution
- 4.9 Qingdao Hongsheng Automobile Testing Equipment
- 4.10 Chengdu Iyasaka Technology Development
  - 4.10.1 ASS-300FS Automobile Side Slip Test Bench
  - 4.10.2 CDM-1300LE1 Automotive Chassis Dynamometer (Three Shafts and Six Rollers)
  - 4.10.3 CDM-300DA (Loaded Mode) Automotive Chassis Dynamometer and Emission Inspection System
  - 4.10.4 CDM-300DA (Loaded Mode) Automotive Chassis Dynamometer and Emission Inspection System
- 4.11 J-Blue Tech

- 4.11.1 Motor Vehicle Inspection Equipment
- 4.11.2 Inspection System
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- 5.1 China Automotive Engineering Research Institute Co., Ltd. (CAERI)
  - 5.1.1 Layout
  - 5.1.2 Organizational Structure
  - 5.1.3 National Motor Vehicle Quality Supervision and Inspection Center (Chongqing)
  - 5.1.4 Core Competence
- 5.2 Guangdong Automotive Test Center Co., Ltd. (GATC)
  - 5.2.1 Operation
  - 5.2.2 Scope of Services
- 5.3 Shanghai Motor Vehicle Inspection Certification & Tech Innovation Center Co., Ltd. (SMVIC)
  - 5.3.1 Development History
  - 5.3.2 Qualification Authorization
  - 5.3.3 Metrology and Physics & Chemistry
  - 5.3.4 Vehicle and Parts
  - 5.3.5 Vehicle Inspection Research Laboratory

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- 5.3.7 Research on New Energy Vehicle Testing Technology
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- 5.3.9 Dynamics
- 5.4 Xiangyang Da An Automobile Test Center
  - 5.4.1 Inspection Qualification and Test Sites
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  - 5.6.3 Inspection Services
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- 5.7 Jiangsu Jiecheng Motor Vehicle Inspection Co., Ltd.
- 5.8 Tangshan Jingdong Grand Health
  - 5.8.1 Operation
- 5.9 Duolun Technology
  - 5.9.1 Layout in Vehicle Inspection Industry



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