



REPORT

THE CAR AFTERMARKET IN CHINA 2019

Facts, Figures & Trends



TEASER

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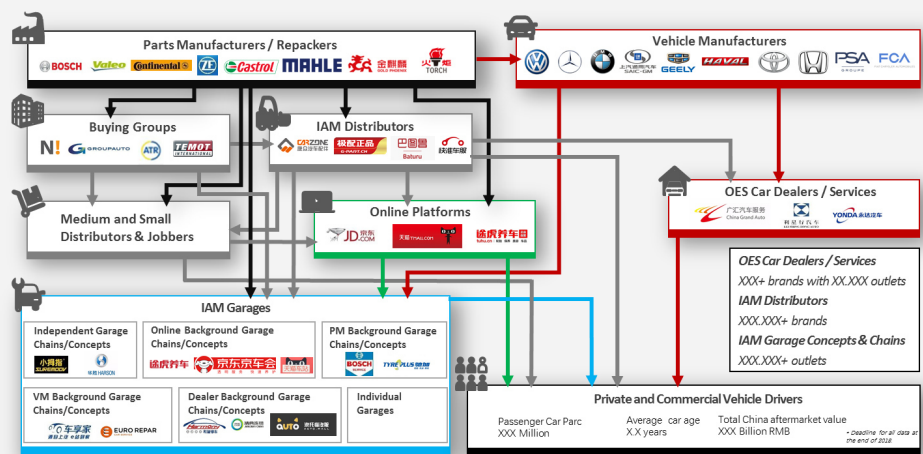
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Can you accurately predict how long the negative trend of the automotive market will continue in China? This question is bound to the ongoing global trade conflicts, the deteriorating economic climate and the political uncertainties which are driving global market changes. Hence, manufacturers and distributors are facing a wide range of challenges in 2019. Companies are adjusting their sales and profit targets, reflecting the change and uncertain market conditions. Due to this, the sales volumes of Chinese vehicle manufacturers were also shrinking recently (from January to September 2019 **sales of passenger cars decreased by 11,7%** compared with the same period last year). As it is the second largest economy in the world and most important trade partner for so many countries, economic indicators for China are particularly observed. Nevertheless the Chinese automotive aftermarket (AAM) will remain in the focus of international automotive players.

The average age of passenger cars in China now reached 5 years and will continue to increase. This will lead to an ever growing number of car related services no longer covered by warranties and thus creating **a huge demand gap in the aftermarket services of car repair and maintenance**. Besides, China plays an increasing role in the development of alternative powertrains and digital application systems. After the first half of this year **3,4 million new energy vehicles** (NEVs) were registered in China, making it the biggest NEV parc worldwide. Online giants like Baidu and Alibaba make large investments in autonomous driving technologies. And when it comes to state subsidies for these sectors, fully electric and fuel cell electric as well as intelligent vehicles are heavily backed by governmental support. This goes in line with China's general industrial policies. They are meant to level up the Chinese economy and position China as the leading manufacturing superpower.

Our new report **The Car Aftermarket in China 2019** is intended to show the connections between these political as well as economical megatrends and the Chinese AAM. It explores the current state of the Chinese economy and highlights the significance of the Chinese policy directives *Made in China 2025* and *One Belt One Road* and their impacts on the AAM. Backed by key VIO data, this report presents the **Chinese AAM and its most relevant players**.

The report outlines the various garage concepts existing in China and lists out the most important actors in the various market segments. The distribution landscape is also covered, describing the **unique features of the garage marketing systems present in China**, while focusing on the significance of e-commerce for both the workshops and distributors. These overviews and categorizations are followed by **detailed company profiles** including figures and descriptive information for each player. Intermediates such as insurance companies, mobility concepts, car rentals and other relevant actors are part of the report, too. At the end we show trends of the Chinese AAM and take into account how the market is directed to develop by the national policy makers in the near future.



This report offers readers a **practical guide in understanding the situation and characteristics of the Chinese Automotive Aftermarket**.

GENERAL MARKET SITUATION

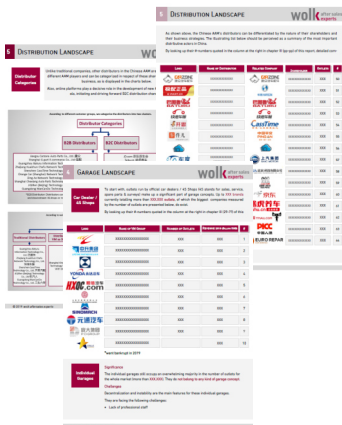
What does the current economical situation in China look like?

How does the Chinese industrial policy with its extensive projects like the *Belt & Road Initiative* and ambitious government directives such as *Made in China 2025* affect the AAM?



THE CHINESE AUTOMOTIVE AFTERMARKET: STRUCTURES, OVERVIEWS & ILLUSTRATIONS

Basic VIO data & comparisons with Europe/USA
Categorizing & building a general understanding of the different types and business models of:
Garage Concepts (50) & Distributors (16)



INTERMEDIATES & OTHER RELEVANT PLAYERS

Insurance companies
Mobility concepts (ride hailing, car sharing, lift sharing, designated driving service)
Car rental companies
Associations & governmental authorities
Others



DETAILED PROFILES FOR 60+ COMPANIES
Description, Categorizing, Dependencies & Figures

TRENDS & INFLUENCE FACTORS

Which targets does the Chinese government set for the development of alternative drives and autonomous driving systems?

How will these technologies affect the AAM?



The full report version (80+ pages) can be obtained in **PDF format**.

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