China Car Sharing Industry Report, 2016-2020

Description:

With a boom in sharing economy, car sharing companies represented by Zipcar, Uber, Getaround, and Car2go have flourished, pushing forward the development of car sharing around the world.

Fully-developed car sharing in foreign countries is primarily divided into three models: car-hailing apps, P2P car rental, and timeshare rental with the first represented by Uber, Lyft, and Ola Cabs, the middle Getaround, Turo, and Flightcar, and the latter Zipcar, Car2go, NriveNow, and Autolib.

Uber, the world's largest car-hailing app player, has so far obtained a dozen rounds of financing and now is valued at USD60 billion. The company has penetrated into a total of 447 cities in countries consisting of the United States, China, India, Singapore, Malaysia, etc.

The Chinese car sharing market is still in the phase of rapid growth but has showed huge potential. A series of laws & regulations and policies, including the Guidance on Promoting Green Consumption and the Guidance on Promoting the Development of New Energy Vehicle Timeshare Sector in Shanghai, have been introduced by the central government and local authorities so as to regulate and encourage the development of car sharing industry.

Car-hailing apps: A competitive landscape with DidiChuxing, Yidaoyongche, Uber, ShenzhouZhuanche, 51 Yongche, Dida Pinche, and TianTianYongche as major players have taken shape in the Chinese car-hailing apps market. Orders for car-hailing services totaled about 2 billion in China in 2015, including 1.43 billion or 71.5% of the total amount from DidiChuxing, followed by Uber with a percentage of 18.3%.

DidiChuxing, a result of the merger between DidiDache and KuaidiDache, combines their own advantages. Having raised more than USD5 billion, it is the largest domestic car-hailing app platform in China valued at USD20 billion. The number of drivers connected to the platform had exceeded 14 million and registered users amounted to 250 million by the end of 2015.

P2P car rental: With PP Zuche rolling out its services in China, PP car rental platforms like Atzuche, UU Cars, Baojia, and KuaikuaiZuche have sprung up around China. P2P car rental firms now rely heavily on financing for capital to expand business scope and grab customers. PP Zuche, with the largest amount of financing, got RMB500 million in financing in Sept 2015, the largest one in P2P car rental market.

Timeshare: With growing heat-up of new-energy vehicle timeshare, localities have been active in developing new energy vehicle timeshare rental sector. And, new energy vehicle timeshare programs are being carried out in dozens of cities including Beijing, Shanghai, Hangzhou, and Shenzhen.

Propelled by favorable policies, carmakers, telematics enterprises, and Internet firms have flooded into the field. In addition, P2P car rental company- UU Cars announced in Oct 2015 that it would transform to timeshare model, plan to put 1,000 vehicles into operation by the end of 2015 and raise the figure to more than 6,000 units in the first half of 2016.

Major timeshare rental companies include Feezu, YiYiZuche, EVCard, WK Zuche, Soda, and EkaZuche. In addition, BAIC BJEV have launched GreenGo timeshare program, SAIC Motor E-sharing car, GeelyWeigongjiao, LifanPand-Auto, and Shou Qi Group Gofun.

The Chinese car sharing market will still be complementarily composed of car-hailing app firms, P2P car rental companies, and timeshare enterprises in the future.

Car-hailing apps market will be dominated by comprehensive mobile platforms represented by DidiChuxing and Uber; P2P car rental market will be further regulated with only two to three players surviving fierce competition; blossoming timeshare market will grow more mature under the joint efforts of market participants.

China Car Sharing Industry Report, 2016-2020 highlights the followings:
- Global car sharing industry (development course, status quo, market segments (status quo, competitive landscape)
- China's car sharing industry (status quo of development, competitive landscape, and development trends of market segments (car-hailing apps, P2P car rental, timeshare)
- 11 global and 24 domestic car sharing-related companies (profile, financing, and developments)

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