

**China Auto Repair and Beauty Industry
Report, 2016-2020**

Oct. 2016

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

The huge Chinese automobile market always stimulates the demand for auto repair & beauty. According to the National Bureau of Statistics of China, the country's car ownership reached 172 million at the end of 2015, rising 11.7% over last year. Chinese auto repair & beauty market size amounted to RMB754.8 billion in 2015, jumping by 12.66% year on year. In future, the market size will show an annual growth rate of 19.17% during 2015-2020 with the consumers' enhanced maintenance awareness and longer ownership time, and the market scale will report RMB1.7364 trillion in 2020.

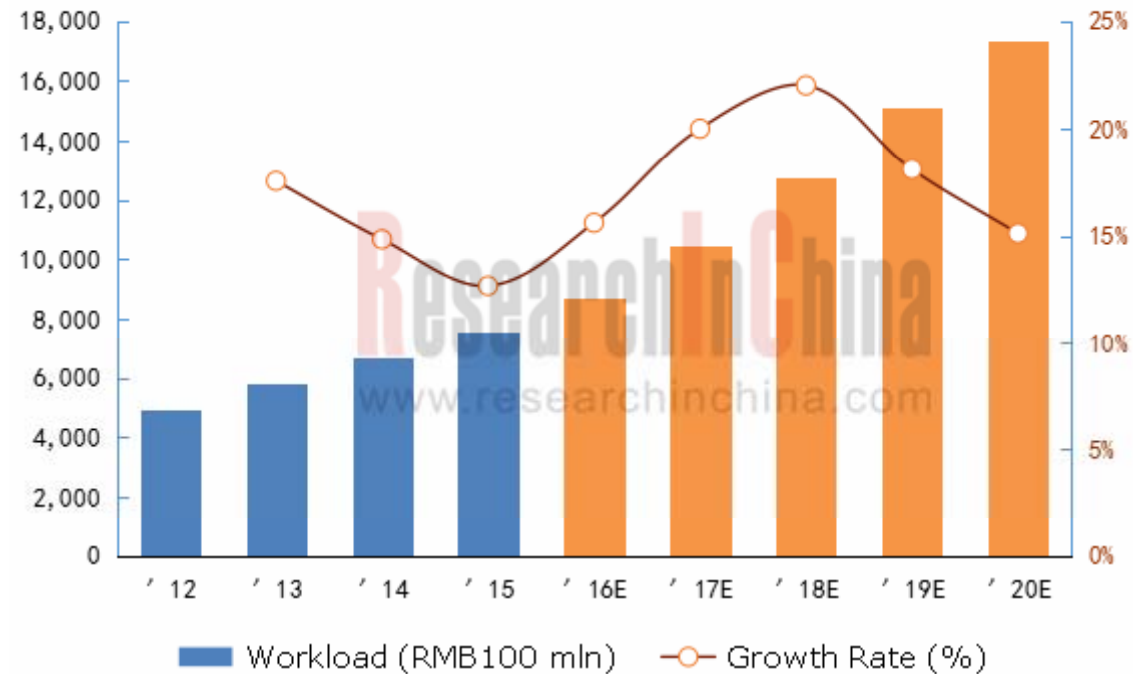
As for the competitive landscape, the main participants in China's auto repair industry include 4S stores, franchised maintenance service stations, comprehensive repair workshops, fast repair chain stores, special repair shops and a large number of roadside shops. There are more than 400,000 registered maintenance & repair enterprises which are divided into three categories with nearly 5 million employees in China, embracing at least 370,000 non-4S stores. The industry features a low concentration rate.

In China, auto 4S stores charge very high although their service quality is excellent, while repair shops and roadside repair shops claim low fees but their services vary dramatically, which cannot make consumers feel assured. Well-known chain stores offer the prices between 4S stores and roadside repair shops, embodying obvious cost advantages.

Currently, foreign brands Bosch and Michelin, as well as local brands Harson Service, Sure Moov and NFA have forged brand chain effect and enjoy better reputation. Bosch and Sure Moov have realized national layout, and other enterprises are actively expanding the network and making the layout rationally.

Under Bosch Group, Bosch Car Service is one of the largest independent automotive service networks in the world with a history of more than 95 years and boasting more than 17,000 service stations in over 150 countries. Its services consist mainly of comprehensive services and fast services, involving "vehicle maintenance inclusive of sheet metal & paint business and fast repair services" and "car beauty, car maintenance and tire services". The two types of services adopt franchise mode. Up to now, Bosch Car Service has opened 2,000 franchised stores in China.

Chinese Auto Repair & Beauty Market Size, 2012-2020E



Source: ResearchInChina

Comparison between Major Independent Chain Auto Repair & Beauty Brands in China

| | Brand | Business Scope | Store Size | Features |
|-----------------------|--|--|--|--|
| Local Brands | Sure Moov | Car paint fast repair, body shaping, windshield repair, Coins smart palette, auto insurance | Established in 2004, it has nearly 700 stores in more than 110 cities nationwide | Franchise; Focus on automotive micro-repair |
| | OCTAVE | Beauty, paint fast repair, car washing, conservation | Founded in 2007, it has nearly 600 stores in North, East, Central, South and Southwest China | Direct operation + franchise; Franchised stores are managed by different levels |
| | NFA | Car repair and maintenance, fine washing & beauty, sheet metal painting, insurance agency, sale of auto supplies and accessories | Founded in 1989, NFA has 100 direct auto repair & maintenance chain service stores and auto supplies wholesale outlets in Mainland China and Taiwan. | Growth via mergers and acquisitions; It has acquired Taiwan Richahaus, Shenzhen Yonglonghang Auto Service, Zhejiang OTL Industrial, etc.; Upstream and downstream business extension; balanced development of manufacturing, wholesale and retail business |
| | Chexiangjia (previously named as AC qiche) | Maintenance, beauty, conservation | Set up in 2014, it has 13 direct stores in Shanghai now, and plans to raise the number to 100 in 4 years; in first-tier cities, it intends to open 1,000 stores, with the final goal of 2,000 ones | Backed by SAIC; Online service reservation and payment, offline store consumption; Online sale + chain physical stores |
| | Harson Service | Repair and maintenance of Mercedes-Benz, BMW and Audi | Established in 1998, it has opened 90 stores in 53 cities of South China, East China, North China, Central China and other developed areas | Focus on high-end vehicle models; 3S repair chain operation (unified supply of accessories, unified service standards, unified chain management, unified training); all accessories comply with "original" quality |
| Foreign Brands | Bosch | Comprehensive, in-depth diagnostics and system services for Bosch's series products | Since it built China's first franchised repair station in 1926, it has erected nearly 2,000 car service stores in China so far. | "Three stations" mode meets different customer needs (central stations, maintenance stations, fast repair stations); Bosch series professional maintenance |
| | Tyreplus | Maintenance and replacement of tires and brakes, engine oil replacement | It set up its first service center in China in 2003; now, Tyreplus has nearly 1,000 stores. | Focus on tires, engine oil and brakes; Centralized procurement from suppliers. |

Source: ResearchInChina

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Founded in 1989, NFA is listed on the Hong Kong Stock Exchange (00360.HK) and has more than 100 direct auto repair & maintenance chain service stores and auto supplies wholesale outlets in Mainland China and Taiwan. Its domestic auto repair & beauty subsidiaries contain New Focus Aiyihang, Changchun Quangda, Shanghai New Focus and New FocusYonglonghang. In addition, the company also operates New Focus Lighting & Power Technology (Shanghai) Co., Ltd. which involves in the production of automotive products. Therefore, the company holds a perfect aftermarket industrial chain.

The enormous market potentials of the auto repair & beauty industry have attracted various investors to compete in the field, which not only injects adequate capital to the market, but also brings multiple innovative business models. For instance, Taobao, Jingdong (JD) and other Internet giant pump much capital in acquiring or creating start-ups, and then erect the O2O business model hereof. Meanwhile, some parts manufacturers and distributors move back into the downstream of the industry chain, so as to step in the auto repair & beauty industry; for example, Mobil No.1 keeps an eye on lubricating oil, and mailuntai.cn focuses on tire distribution; most of these companies expand the original product-based business to auto repair & beauty business.

The report highlights the following:

- ⇒ Overview of China auto repair & beauty industry (including definition, classification, industrial chain, industry policies and development trends, etc.);
- ⇒ The overall market size of China's auto aftermarket industry (including automobile industry, used car market, car rental, automobile insurance, etc.);
- ⇒ The overall market size of China auto repair & beauty industry (including market size, investment and financing, competition pattern, channels and regional analysis);
- ⇒ Innovative business models of China auto repair & beauty industry (including the Internet +, parts +, etc.);
- ⇒ Profile, financial standing, service facilities, service networks and financing of 11 auto repair & beauty chain enterprises including Bosch, Michelin Tyreplus, Sure Moov, OCTAVE, AutoPrince, AnjiAutobund, NFA, Harson Service, Taobao Car, Chexiangjia and y1s.cn.

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