

China Vehicle Rental - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 100 pages | Mordor Intelligence

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Report description:

China Vehicle Rental Market Analysis

The China Vehicle Rental Market size is estimated at USD 21.15 billion in 2025, and is expected to reach USD 27.11 billion by 2030, at a CAGR of 5.13% during the forecast period (2025-2030). A rebound in domestic leisure travel, stricter license-plate quotas in tier-1 cities, and a nationwide 80% new-energy fleet mandate are aligning to keep demand elevated across consumer and corporate channels. Rising middle-class licensed-driver numbers in tier-2 and tier-3 cities, the rapid diffusion of AI-enabled booking apps, and a policy tilt toward electric models are reshaping fleet composition faster than in any prior five-year period.

China Vehicle Rental Market Trends and Insights

Domestic Tourism Rebound Fuels Leisure Rentals

Leisure bookings surged after authorities reported 295 million domestic trips during the 2024 May Day holiday, spending more than 20 billion and lifting vehicle demand in county-level destinations. Cities such as Liuzhou and Zibo attracted first-time visitors who preferred self-drive access over public transport, pushing average rental duration above four days in many inland locations. Zuzuche responded by onboarding 3,000 domestic supplier partners inside four months, demonstrating the platform scalability advantage of digital marketplaces. Cultural-nighttime tourism at heritage sites kept utilization high into late evenings, supporting premium pricing windows. Momentum remains intact as the Ministry of Culture and Tourism forecasts domestic trips to exceed 6 billion in 2025, cementing leisure as the backbone of the China vehicle rental market.

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License-Plate Quotas in Tier-1 Cities Spur Rental Demand

Beijing's annual lottery caps private cars at 100,000 new plates, 70% reserved for EVs, while Shanghai auctions often exceed CNY 95,000 per plate. These restrictions make daily rental cheaper than ownership for many commuters. Tianjin plans to issue 80,000 more green plates yearly but retains fossil-fuel limits, keeping cost pressure in place. Plate quotas have cut fuel consumption and tailpipe emissions by nearly 50% in affected cities, but they have simultaneously created a reliable flow of renters who view cars as occasional utilities rather than assets. The policy also skews fleets toward EVs, reinforcing government carbon goals and reshaping the China vehicle rental market.

Ride-Hailing & Robotaxi Substitution Risk

Baidu's Apollo Go completed 839,000 autonomous rides in Q4 2023 at fares 60-70% beneath traditional taxis, illustrating a disruptive price gap. Pony.ai targets a 1,000-vehicle fleet by 2025, while WeRide launched unmanned services linking Beijing Daxing International Airport in February 2025. Robotaxi operators benefit from 24/7 availability and lower driver-related expenses, diverting demand that historically favored rentals for airport transfers and intra-city errands. Consultancy forecasts place the robotaxi segment at nearly USD 76 billion by 2030, signalling competitive headwinds for the China vehicle rental market if incumbents cannot secure autonomous partnerships.

Other drivers and restraints analyzed in the detailed report include:

Growing Licensed-Driver Middle Class / Shift to Digital & Mobile Booking Platforms / Rising Vehicle Acquisition & Financing Costs /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Leisure and tourism held 51.27% of China vehicle rental market share in 2024, underpinned by a 7.6% jump in holiday trips and renewed interest in county-level cultural sites. Short road vacations and family reunions make self-drive cars the preferred option, driving average utilization to 74% during peak weeks. Business travel trails in absolute size but records the highest growth; its projected 5.22% CAGR benefits from border reopenings and corporate ESG targets favoring rental over owned fleets.

Second-order effects are already visible in spending patterns: leisure customers reserve 2.1 days longer than pre-pandemic averages, while business travelers increasingly opt for chauffeur-driven packages that bundle telematics and emissions dashboards for reporting purposes. Platform integrations with tourist attractions enable one-click car plus ticket bundles, extending the monetization window per rental.

Online reservations captured 64.38% of revenue in 2024-proof that frictionless mobile journeys have become table stakes, it is also growing at a CAGR of 5.41% through 2030. Predictive pricing engines reduce search-to-booking windows to four minutes on average and increase ancillary upselling by 18%, raising lifetime value per customer. Offline stores still matter in lower-tier cities where walk-in foot traffic remains notable, but omnichannel hand-over stations now allow QR-code key retrieval without staff, closing the convenience gap.

Investment continues to tilt toward cloud CRM and in-car IoT sensors that feed usage data back to the platform, enabling same-day inventory rotation across multiple districts. As a result, fleet operators using dynamic online allocation achieve 12% higher revenue-per-vehicle than peers relying on static offline reservations, a differential expected to expand in the China vehicle rental market.

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Self-drive contracts controlled 71.32% of total revenue in 2024, fuelled by the cultural preference for independent travel and growing confidence behind the wheel. Yet chauffeur-driven packages advance at 5.45% annually because corporate procurement teams view them as safer and more compliant with ESG audit trails. Chauffeur fleets feature NEV penetration above 60%, exceeding the broader average and positioning them well for low-emission zones in Beijing or Shenzhen Central Business Districts.

Self-drive growth remains robust through family-oriented itineraries, outdoor camping trends, and the ease of app-based navigation in unfamiliar provinces. Simultaneously, chauffeur products diversify into event logistics and cross-border shuttles into Hong Kong, expanding addressable demand inside the China vehicle rental market.

The China Vehicle Rental Market Report is Segmented by Application (Leisure/Tourism and Business Travel), Booking Type (Offline Access and Online Access), End-User Type (Self-Driven and Chauffeur-Driven), Vehicle Class (Economy and More), Powertrain (ICE, HEV and BEV), Rental Duration (Short-Term and More), Service Channel (On-Airport and More), and Region. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Beijing China Auto Rental (CAR Inc.) / eHi Car Service / Shouqi Car Rental / Avis Budget Group / Hertz Corporation / Shenzhen Topone Car Rental / Didi Car Rental / EVCARD / Gofun Travel / Xiangdao Chuxing / UCAR Inc. / Zuzuche / Caocao Mobility / PonyCar / T3 Go Mobility / Shenzhen Joy Travel / Tongcheng-Elong Car Rental / Huizuche / Hello Chuxing Car Rental / Meituan Car Rental /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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