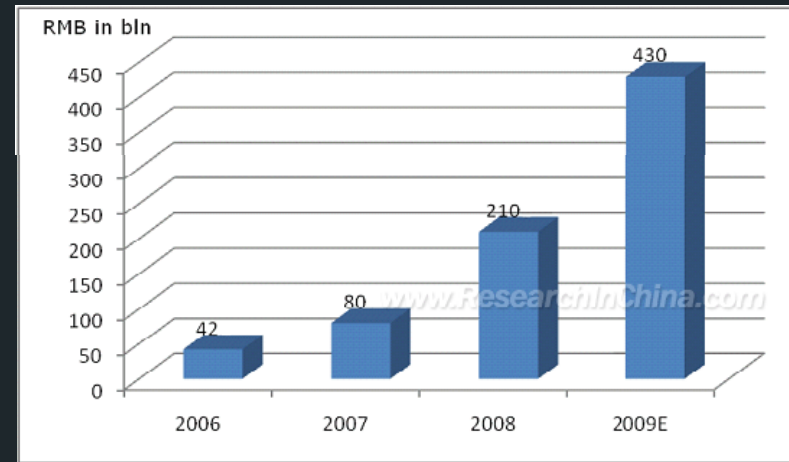


China Online Payment Industry Report, 2009



The global economic crisis has impacted on the majority of industries, but China online payment market is growing against the adversity, and has shown rapid growth trend in market scale and number of users. In 2008, the number of users registered 52 million, and in 2009 the figure will exceed 90 million. In 2008, the online payment market valued RMB210 billion, and will reach RMB430 billion in 2009.

China Online Payment Market Scale, 2002-2008

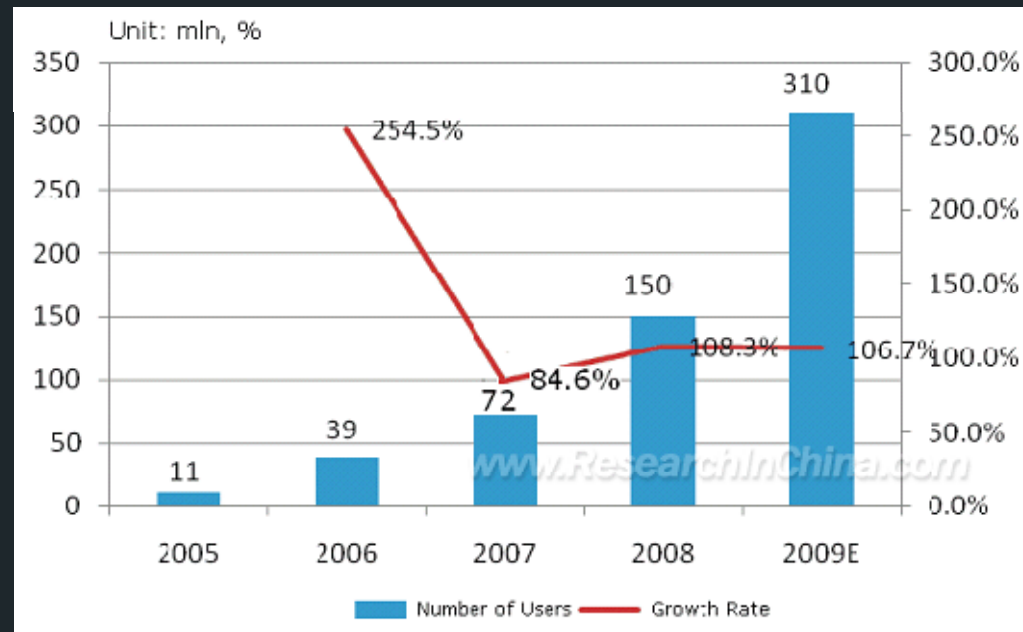


Source: ResearchInChina

With the issuance of Management Measures for Payment and Settlement Organizations, the supervision on online payment industry has been enhanced. The central bank will build up the payment service organization system which is led by the People's Bank, primarily supported by banking financial institutions, and assisted by payment and settlement organizations. The chaos once in payment industry will be controlled and malicious market competition alleviated. Those online payment enterprises in unfavorable operation will be eliminated, only the profit-making enterprises will survive, so the industry concentration will be further strengthened.

The largest third-party online payment platform in China -- Alipay announced the number of its users broke 200 million formally in July 2009, overrunning the giant Paypal to take the first position in online payment industry. As of July 6, 2009, AliPay had boasted of 200 million registered users, with daily trading volume of RMB700 million and daily four million transactions.

Alipay's Number of Users and Growth Rate, 2004-2009



Source: ResearchInChina

With the development of the Internet, particularly the further development of online shopping, the future competition among online payment enterprises will rest with individuation, accuracy and service.

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