



**China Automatic Fare Collection (AFC)
Machine Industry Report, 2010-2011**

Apr. 2011

This report

- ◆ **Analyzes the status quo and future development of high-speed railway AFC equipment market in Mainland China.**
- ◆ **Focuses on AFC Machine Market of Urban Subway/Light Rail Transit and Intercity High-speed Railway in China.**
- ◆ **Highlights the operation of major AFC equipment suppliers in China.**

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Abstract

Along with the accelerated investment and construction of subway and high-speed railway in Mainland China, Chinese AFC equipment market will embrace the rapid growth across 2011-2020. At the end of 2010, 12 cities in Chinese Mainland were equipped with subways whose total length hit 1395 km; it is predicted that the market size of urban rail transit AFC equipment in Mainland China will surpass RMB16.4 billion in 2020. Up till the end of 2010, China had been in possession of 27 in service high-speed railways with the total mileage of 8358 km; promisingly by 2015, the market size of high-speed railway AFC equipment will break through RMB4 billion.

Market Size of Urban Rail Transit AFC Equipment in Chinese Mainland, 2009-2020E

	Subway Mileage (km)	Station Quantity	AFC Machine Quantity			AFC Market Size (RMB bn)
			Ticket Vending Machine (TVM)	Automatic Ticket Checker (ATC)	Card Vending Machine (CVM)	
2009	1015	670	*****	*****	*****	2.10
2010 E	1395	890	*****	*****	*****	2.95
2020 F	7500	5000	35000	80000	20000	16.40
Planning	Subway Mileage (km)	Station Quantity	TVM	ATC	CVM	Newly-added Market Size (RMB bn)
2011-2015F	2000	1350	*****	*****	*****	4.20
2011-2020F	6000	4000	28000	64000	16000	13.45

Source: ResearchInChina

At the end of December 2010, the more than 890 stations of urban rail transit in Mainland China boasted over 5500 TVMs, over 14000 ATCs, and over 2500 CVMs; hereinto, the AFC equipment quantity in Shanghai, Beijing, and Guangzhou respectively took the Top 3 positions, occupying more than 70% of the mainland total.

In 2010, the launch of urban rail AFC equipment increased rapidly in Beijing. Up to the end of 2010, Beijing had launched more than 1200 TVMs among the urban rail AFC equipment. According to the local planning, the constructed mileage of urban rail in Beijing will arrive at 700 km in 2020, and the launch quantity of AFC equipment will correspondingly expand.

At the end of 2010, Shanghai urban rail acquired the in-service mileage of 425 km, and the launch quantity of TVM in AFC equipment surpassed 1700. Shanghai planning indicates that the city will accomplish the newly-added mileage of approximately 450 km in the following ten years, which will fuel the growth of AFC equipment market.

This report underlines the status quo and future development of high-speed railway AFC equipment market in Mainland China, including the current construction of high-speed railway, the under-construction projects and planning of high-speed railway, construction & investment of high-speed railway, AFC market size forecast, the AFC equipment launch quantity of constructed high-speed railway lines, etc.

In addition, the report casts light on the operation, AFC equipment applications, etc. of such major AFC equipment suppliers as GRG, Nanjing Thales Panda Transportation System Co., Ltd., Shanghai Potevio Co., Ltd., Shanghai Huahong Jitong Smart System Co., Ltd., Shenzhen Modern Computer Manufacturer Co., Ltd. (MCM), Cubic Transportation Systems (Beijing) Co., Ltd., Samsung SDS China (Samsung SDSC) Beijing Office, and China Academy of Railway Sciences (CARS).

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