

# **China Intelligent Transportation System (ITS) Industry Report, 2011-2012**

**Nov. 2011**

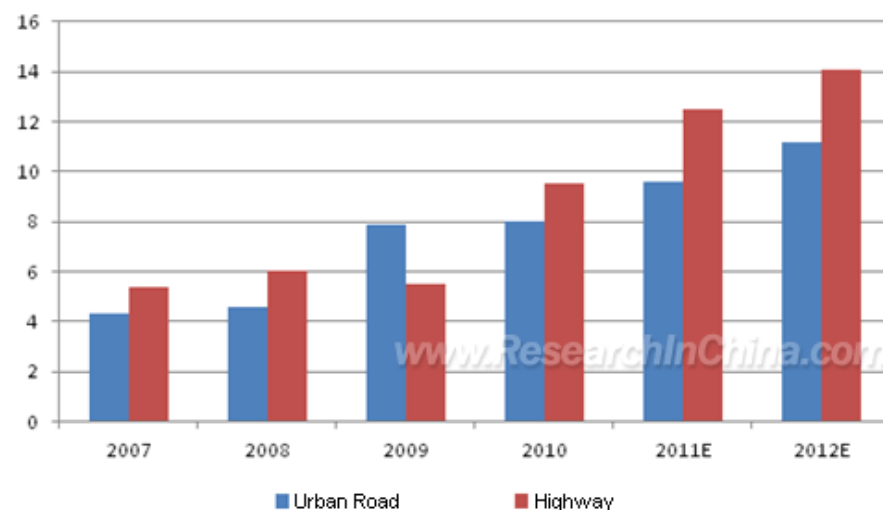
## Abstract

As China accelerates the progress of urbanization and the popularization of automobile, cities are suffering an increasingly serious traffic crunch. The urban road surface area per capita of China is only 10.6 m<sup>2</sup>, far less than foreign countries'.? Meanwhile, the urban motor vehicle ownership of China is growing at a rate of 15%, while the growth rate of urban road is only 3%. Intelligent transportation has become an important means to improve the efficiency of road use and ease the traffic tension.

As of 2011, all the first-tier Chinese cities made detailed Smart City plans; over 80% of the second-tier cities clearly stated goals of building Smart City. China is increasing the investment in intelligent transportation and Smart City. At present, the investment in intelligent transportation is more concentrated in urban road and highway.

There are 668 administrative cities in China. It's expected that the total investment in urban road intelligent transportation system (ITS) will reach RMB 11 billion in 2012. ITS will account for 1%-1.5% of the total investment in new highway construction, and it's expected that the investment in highway ITS will exceed RMB 14 billion in 2012.

**Investment in Urban Road and Highway ITS in China, 2007-2012E (Unit: RMB bn)**



Intelligent transportation industry chain includes equipment providers, content providers, system integrators and platform service providers. As the proportion of large projects in urban intelligent transportation construction has increased year by year, it's easier for ITS platform integrators to form large-scale nationwide companies, becoming the biggest beneficiaries of the entire intelligent transportation industry.

Enjoyor (300020.SZ) achieved operating revenue of RMB 366 million in H1 2011, up 39% year on year; E-Hualu (300212.SZ) achieved operating revenue of RMB 203 million in Q1-Q3 2011, up 39.02% year on year; Qiming Information (002232.SZ) achieved operating revenue of RMB 546 million in H1 2011, up 28.60% year on year. Other companies such as Wisisoft (002253.SZ), Baosight Software (600845.SH), Sunwin Intelligent (300044.SZ), China Shipping Network Technology (002401.SZ) and Wantong Technology (002331.SZ) achieved 15%-25% year-on-year growth in the operating revenue.

**China Intelligent Transportation System Industry Report 2011-2012 highlights:**

- ◆ China intelligent transportation industry characteristics and related policies
- ◆ China ITS industry chain and investment
- ◆ China ITS market research and forecast, including the scale of construction and investment
- ◆ ITS related enterprises in China, including their operation, financial data, market distribution, business and expected performance in 2012

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