



**China ETC (Electronic Toll Collection)
Industry Report, 2015-2019**

Jan. 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

Electronic toll collection (ETC) is a commonly-used means of road tolling in the world. By the end of 2014, the mileage of toll highways in China amounted to 162,600 km, including 106,700 km of toll expressways, accounting for 65.7%; there were 1,665 mainline toll stations on toll highways nationwide, 696.5 of which were the ones on expressways, making up 41.8%.

By the end of Oct 2015, China had had 25.15 million ETC users; except for Hainan and Tibet, 29 provinces across the country had realized the networking of expressway ETC and cumulatively built 12,772 ETC lanes with 98.8% of mainline toll stations equipped with ETC lanes and 89.2% of ramp toll stations with ETC lanes.

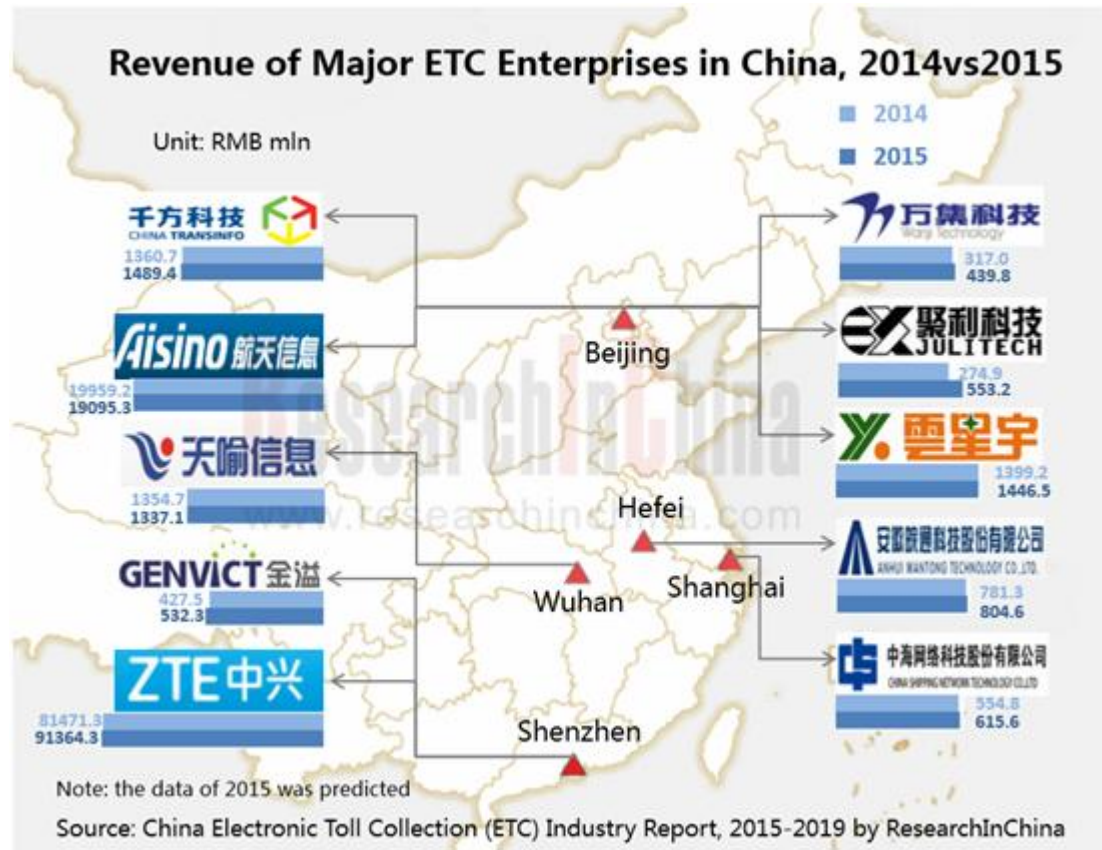
The Chinese ETC equipment (OBU, RSU) market size has expanded rapidly in recent years, growing at a CAGR of 33.5% during 2012-2014. With advances in networked ETC nationwide, the Chinese ETC equipment market size is estimated to be up to RMB1.35 billion in 2015, presenting a year-on-year jump of 40.5%.

Companies in ETC industry in China can be categorized into equipment providers and system integrators with the former represented by GENVICT, Juli Science & Technology, Wanji Technology, and ZTE, of which the former three have made their presence in ETC OEM market, and the latter represented by Beijing Yunxingyu Traffic Technology, Anhui Wantong Technology, China TransInfo Technology, ZTE, and China Shipping Network Technology.

GENVICT is a leader among equipment suppliers in ETC industry in China. It had sold more than 5.5 million sets of OBU by the end of 2014, around 40% of OBU stock market. The company has introduced multiple intelligent front-mounted ETC electronic tags, of which ETC rearview mirror integrated electronic tag is being jointly tested by many companies.

Beijing Yunxingyu Traffic Technology Ltd. is a corporate champion among system integrators in ETC industry in China. Relying on powerful strength and resources of Beijing Capital Highway Development Group, the company holds a higher share in expressway intelligent transportation market in Beijing and is expected to record revenue of RMB1.447 billion throughout the year 2015. Sutong Technology, a subsidiary of Beijing Yunxingyu Traffic Technology, is the operator of ETC systems in Beijing and the service agency for networked sorting of ETC systems in Beijing, Tianjin, Hebei, Shandong, and Shanxi. The subsidiary made revenue of RMB179 million in 2014, and the figure is predicted to be up to RMB200 million in 2015.

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China ETC (Electronic Toll Collection) Industry Report, 2015-2019 by ResearchInChina focuses on the followings:

- Environment for ETC industry in China, including policy environment, development of expressway industry, automobile industry, intelligent transportation industry, and foreign experience in development of ETC industry;
- Development of ETC industry in China, covering status quo, market size, competitive pattern, development forecast;
- Operation, ETC business, etc. of 10 companies in ETC industry in China.

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