



China Smart Parking Industry Report, 2016

Oct. 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

As the Chinese automobile market expands rapidly, parking problem becomes increasingly prominent with parking space gap exceeding an estimated 50 million. Meanwhile, the problem is exacerbated by low utilization because of difficult access to parking spot information caused by less intelligent parking lots. Additionally, as smart city and intelligent transportation emerge, the demand for smart parking system begins to rise.

In 2015, propelled by a number of favorable policies, the Chinese parking lot management system size was worth about RMB5.52 billion, up 47.2% from a year ago. It is expected the market will maintain a growth rate of over 30% over the next couple of years, arriving at RMB27.08 billion by 2020. Moreover, new sectors like parking data operation and Internet parking services will bring about new markets of RMB10 billion+. Smart parking industry enjoys a potential market of at least RMB100 billion, indicating broad prospects for development. Smart parking industry presents a relatively fragmented pattern on the whole, consisting mainly of smart parking equipment manufacturers, smart parking solution providers, and Internet parking enterprises.

Traditional smart parking software & hardware suppliers, with technological capabilities for software and hardware, primarily provide smart parking equipment and solutions for parking lots. Actuated by “Internet+”, some enterprises, represented by ETCP, JSST, Guangdong Anjubao Digital Technology, ZTE ITS, and Reformer Holding, have launched client-based smart parking APPs.

Featuring light asset and big data, Internet parking enterprises provide users with parking spot reservation, parking lot navigation, parking fees settlement, etc. by cooperating with parking lots and presenting real-time information on spare parking spots on APPs. Representative players include Parking We, 51Park, Tingchebao, and Uboche. Some of them have secured B round of financing, while some got few.

In addition, BAT have made their presence in smart parking industry with “Baidu Map + Baidu Wallet”, “Alipay + AutoNavi + Reformer Holding”, and “WeChat Official Account + WeChat Payment”, integrating and embedding parking APPs via map, payment applications, and traffic entrance applications. With participation of various types of enterprises, the Chinese smart parking market will become highly competitive and more mature.

China Smart Parking Industry Report, 2016 focuses on the followings:

- Overview of global smart parking industry and introduction to typical foreign projects;
- Smart parking industry in China (background, status quo, market size, competitive landscape, development trends);
- Smart parking-related industries in China (automobile, stereo garage, real estate, mobile payment);
- 14 smart parking enterprises in China (operation, financing, smart parking business, etc.)

Financing of Major Internet Parking Enterprises in China

Enterprise	Investor	Amount	Round
ETCP	Sequoia Capital, Matrix Partners China	Over RMB10 million	Angel
	SIG, Bitauto, Source Code Capital, Matrix Partners China, celebrities in commercial and business circles	USD50 million	A
	Wanda FFan	Undisclosed	B
Tingchebao	FutureCap, Plum Ventures, and Chen Hua	Nearly RMB10 million	Angel
	Ping An Ventures, Yonghua Capital	RMB16 million	A
51Park	Mali Angel Fund	Tens of millions of yuan	Angel
	Enjoyor	RMB10 million	A
DDTC	Undisclosed	Millions of yuan	Angel
	Undisclosed	Millions of yuan	Pre-A
Reformer Holding	Riverhill Fund	RMB67.50 million	A
	TTGG, JT Asset Management, E Fund	RMB141 million	B
Uboche	Histtone Capital	Undisclosed	Angel
	HGDS Investment Management (Beijing)	Undisclosed	Pre-A
	Dragon Pass	RMB ten million+	A

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