



**Global and China Mobile Payment Industry
Report, 2016-2020**

Dec. 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

Increasingly popular smartphone, further implementation of “Internet +” program and continuous technological innovation have fueled the rapid growth of the Chinese mobile payment market with transaction volume for 2015 surging by 322.2% to RMB130.18 trillion and expected to maintain an AAGR of 142% over the next couple years to hit RMB13,776.5 trillion in 2020.

Mobile banking finds the largest transaction size, accounting for 83.1% in 2015 and estimated to decline to around 80.4% in 2020. China Construction Bank ranked first with a 23.1% market share, followed by Industrial and Commercial Bank of China (20.0%) and Agricultural Bank of China (13.9%). Faced with challenges and pressure from payment APPs, the banks will strengthen competitiveness by introducing differentiated services and products, such as joint issuance of cards and large payment with banking expertise.

With regard to third-party mobile payment, the transaction volume in China reported RMB21.96 trillion in 2015, an upsurge of 167% from a year ago, 90% of the market seized by Alipay and Tenpay. Supported by business data, third-party payment companies will continue to expand service functions, finally forming a development pattern of O2O (Online to Offline) services.

In addition, driven by mobile-payment interest chain and against the background of tighter access to payment, the mobile payment market has undergone an expedited reshuffle and mobile phone vendors and traditional enterprises have stepped up their presence in 2016, further intensifying market competition.

Technologically, as two-dimensional barcode (or QR code) is permitted, 2D barcode payment technology will keep having an edge. Meanwhile, with higher requirements on payment security, other technologies like NFC, HCE, Token and biological recognition will mature gradually.

Major Payment License Acquisitions in China, 2014-2016

Time	Acquirer	Acquiree	Consideration
Dec 2014	Wanda Group	68.7% stake of 99Bill	USD315 mln
Feb 2015	Ant Financial Services Group	25% stake of one97 communications	Over USD 500 mln
Jun 2015	Tibet Yunbai Investment Management	7.69% stake of Shanghai Handpay Information & Technology	RMB50 mln
Feb 2016	Xiaomi Technology	65% stake of Jiefu Ruitong Corporation Ltd	RMB600 mln
May 2016	Newland Computer	Fujian Guotong Xingyi Network Technology	RMB680 mln
Jun 2016	Haili Metal One	100% stake of Union Mobile Financial Technology	RMB3 bn
Aug 2016	Midea Group	50% stake of Shenzhen Shenzhou Tongfu Technology	Around RMB300 mln
Aug 2016	Evergrande Group	Jifutong Payment	RMB570 mln
Sept 2016	Vipshop	Zhejiang Ebatong Technology	Around RMB400 mln
Sept 2016	Xinli Finance	100% stake of Beijing Haike Rongtong Payment Service	RMB2.378 bn
Oct 2016	Keybridge Communications	45% stake (planned) of Shanghai JFPAL Information Technology	RMB945 mln

Source: Global and China Mobile Payment Industry Report, 2016-2020

Global and China Mobile Payment Industry Report, 2016-2020 focuses on the following:

- Global mobile payment market (size, enterprise pattern, development of mobile payment in United States, Japan, India, etc.);
- Chinese mobile payment market (regulatory policies, market size, market structure, enterprise pattern, etc.);
- Mobile payment segments (mobile banking, third-party mobile payment, NFC payment, 2D barcode payment, etc.);
- Characteristics of mobile payment users in China;
- Mobile internet users, smart phone, intelligent POS machine, etc.;
- 16 major global and Chinese mobile payment companies (operation, development strategy, etc.)

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