



**Global and China Mobile Payment Industry
Report, 2017-2021**

Jan. 2018

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

Mobile payment is developing by leaps and bounds and getting very popular in China in 2017, being characterized as follows:

1. Mobile payment has spread rapidly, from online to offline, supermarkets to restaurants, taxis to high-speed railways, and even snack stands and vegetable markets, being applied everywhere. Mobile payment transactions approximated RMB294.97 trillion in China in 2017, an upsurge of 41.4% from RMB208.6 trillion in 2016, and are expected to hit RMB793 trillion in 2021.
2. Regulatory policies were introduced frequently, access to payment license was tightened and requirements on renewal became more stringent. The number of non-bank payment institutions was reduced to 247 in China; 24 institutions were deprived of licenses; and some players were fined because of operation violations. To strengthen supervision and management, the People's Bank Of China formulated and issued the System of Centralized Custody of Clients' Reserves of Payment Institutions, set up what is called "China Nets Union Clearing Corporation", built real-name management mechanism and made more efforts for clean-up of payment without license and for anti-money laundering in 2017, laying a solid foundation for sound and orderly development of mobile payment in China.
3. Against the backdrop of tighter access to payment license, M&As among payment enterprises still remained more frequent. DiDi acquired 19Pay, Nexgo (JLPay), 51 Credit Card (YACOL), Gome (Yinyingtong), IELPM (Guangdong Xinhui E-payment), and China Innovationpay (Youzan) in 2017.
4. A number of banks strategically partnered with Internet firms to accelerate payment layout in 2017, such as China Construction Bank (CCB) with Alibaba, Industrial and Commercial Bank of China (ICBC) with JD.com, Agricultural Bank of China (ABC) with Baidu, and Bank of China (BOE) with Tencent. In the future, integration or joint development of enterprises will be a trend.
5. Thanks to favorable policies like the "Belt and Road" Initiative and booming outbound tourism, overseas mobile-payment markets have been the apple of enterprises' eye. By the end of 2017, Alipay had obtained payment licenses in 36 countries/regions and WeChat Pay in more than 20 countries/regions; China UnionPay NFC QuickPass could be used on over 600,000 POS terminals in 16 countries/regions. Expanding presence in overseas markets will remain a priority of mobile payment firms in 2018.

6. Transportation is also a key sector where Chinese mobile payment giants made their presence in 2017. Alipay launched e-bus card function in over 30 cities where users get on buses via code-sweeping; Tencent launched “bus-taking code” in cities like Guangzhou, Chongqing, Qingdao, Sanya, Foshan and Zhuhai.

In addition, some enterprises launched unmanned supermarket concept in 2017, which is predicted to be a hotspot of mobile payment in 2018.

Technologically, as QR code was approved and regulations on barcode payment industry were issued, QR code payment technology will continue to take a lead. Cloud QuickPass products introduced in 2017 quickened the development of NFC payment. Moreover, biometric applications like fingerprint recognition and face-scanning payment have sprung up as well. With more demanding on payment security, NFC, HCE, Token and biometrics technologies will grow more mature.

Global and China Mobile Payment Industry Report, 2017-2021 highlights the followings:

- ◆ Global mobile payment market (size, enterprise landscape, development of mobile payment in the United States, Japan, India, etc.);
- ◆ Chinese mobile payment market (regulatory policies, market size, market structure, layout in overseas payment markets, enterprise landscape, development trends, etc.);
- ◆ Mobile payment segments (mobile banking, third-party mobile payment, NFC payment, barcode payment, etc.);
- ◆ Characteristics of mobile payment users in China;
- ◆ Development of mobile payment-related sectors (mobile internet users, smartphone, intelligent POS terminal, etc.);
- ◆ 16 major global and Chinese mobile payment giants (operation, development strategy, etc.)

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