



Global and China Mobile Payment Industry Report, 2020-2026

Apr.2020

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

In the past decade, mobile payment burgeoned and payment institutions mushroomed in the world, accompanied by a growing number of users and the fast-growing transactions. In 2018, the global mobile payment transactions fetched \$4.296 trillion, a year-on-year spurt of 38.4%. The outbreak of COVID-19 pandemic worldwide has bolstered robust growth of mobile payment transactions. A high growth rate of global mobile payments is expected in the next few years, and the transaction amount will be \$26.341 trillion by 2026.

China now stays ahead of other nations in mobile payment, with about 47 percent of mobile users using mobile & digital wallets; the ranking No.2 Norway sees a utilization rate of 42%, a figure far higher than other European countries.

At present, the world-renowned mobile payment platforms encompass Apple Pay, Google Pay, Alipay, WeChat Pay, etc., among which the largest one Alipay together with local wallet partners has served at least 1.2 billion users worldwide as of June 2019.

China, the world's largest mobile payment market, handled a total of 532.814 billion mobile payment transactions worth RMB445.22 trillion in 2018, up 92.48% and 44.53% year-on-year respectively. After the outbreak of the COVID-19 epidemic in China in December 2019, Payment & Clearing Association of China issued an initiative on February 28, 2020 to encourage people to use mobile payment, online payment and barcode payment to avoid the risk of infection. This will tremendously boost mobile payment transactions in China where the amount of such transactions will reach RMB777.5 trillion in 2020, surging by 31.8% on an annualized basis.

Major Mobile Payment Platform Worldwide

Enterprise	Introduction
Apple Pay	Apple Pay, an NFC-based mobile payment function released by Apple, was officially launched in the United States on October 20, 2014. On February 18, 2016, Apple Pay landed in China. An estimated 43% of iPhone users across the globe have enabled Apple Pay, which means there are approximately 383 million Apple Pay users. By the end of 2019, Apple Pay had been available in more than 50 countries and regions around the world.
Mi Pay	On September 1, 2016, Chinese smartphone maker Xiaomi launched its Mi Pay NFC- based mobile payments service in its domestic market, in collaboration with bankcard association China UnionPay. It supports debit and credit cards, as well as public transportation cards across the country via its phones supporting NFC. On December 20, 2018, BusinessLine reported that Xiaomi received an approval from the National Payment Corporation of India (NPCI) to launch its payment service, Mi Pay, in India.
Samsung Pay	On March 29, 2016, Samsung Pay was officially launched. Samsung Pay uses Near Field Communication (NFC) and Magnetic Secure Transmission (MST) technologies, meaning users can simply swipe cards with their Samsung mobile phones. As of May 2019, Samsung Pay had attracted more than 14 million users in more than 25 countries worldwide.
Google Pay	Google officially launched the NFC payment service Android Pay on September 11, 2015. On January 8, 2018, Google announced a rebrand of its consumer payment products and merged Android Pay and Google Wallet into a single, unified service known as Google Pay. As of 2019, Google Pay had provided services in more than 30 countries and regions around the world.
Alipay	In 2004, Alipay separated itself from Taobao and gradually offered payment services to more partners. In December 8, 2004, Zhejiang Alipay Network Technology Co., Ltd. was established. In February 27, 2008, Alipay launched the mobile e-commerce strategy and launched the mobile payment business. Alipay has established strategic cooperative relations with more than 180 banks at home and abroad, as well as VISA, MasterCard international organizations and other institutions. As of June 2019, Alipay and its local wallet partners had served over 1.2 billion users worldwide.
WeChat Pay	On August 5, 2013, Tenpay and WeChat launched WeChat Pay officially, allowing users to perform peer-to-peer transactions and mobile payments online and offline. In June 2018, WeChat Pay had more than 800 million active accounts.
PayPal	Founded in December 1998, PayPal is an Internet-based third-party payment service provider headquartered in San Jose, California, U.S.A., allowing transfer of funds between users who use e-mail to identify themselves without mailing a check or remittance in the traditional way. PayPal now reports a total user base of 277 million accounts — of which 255 million are consumers and 22 million are merchants

Source: ResearchInChina

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With the boom of the third-party mobile payment industry, third-party mobile payments have seen a rising market share year by year and squeezed mobile banking progressively. In 2018, the scale of China's third-party mobile payment transactions reported RMB167.83 trillion, soaring by 59.7% year-on-year and holding 37.7% shares. As expected, third-party mobile payments will enjoy higher market share than mobile banking by 2021 and occupy 58.1% by 2026.

Amid the cut-throat competition in Chinese mobile payment market, the key players include China UnionPay, banks and other financial institutions, third-party payment companies, operators and terminal mobile phone vendors. With a tighter national control, the quota of third-party payment licenses in China has gradually decreased. As of the end of 2019, a total of 237 enterprises had obtained payment licenses in China, and the 34 licensees had been revoked. Some companies can only win third-party payment licenses through acquisitions or mergers.

Mobile payments in China are QR code centric ones. According to the "FinTech" Development Plan (2019-2021) issued by the People's Bank of China, QR code payments will be interconnected with a universal code before the end of 2021. Thus, QR code payments will head toward aggregate payments whose transaction size was RMB5.5 trillion in 2018 and is expected to reach RMB58.1 trillion by 2026.

With the maturity of AI technology, face-scanning payment is quite popular among youngsters. By the end of 2019, there had been 110 million Chinese users of face-scanning payment in scenarios like supermarket, convenience store, shopping mall, vending machine and restaurant.

Global and China Mobile Payment Industry Report, 2020-2026 highlights the following:

- ◆ Global mobile payments market (size, enterprise pattern, development in countries like the US, Japan and India, etc.);
- ◆ China mobile payments market (regulatory policies, size, structure, enterprise pattern, etc.);
- ◆ Mobile payment market segments (mobile banking, third-party mobile payment, NFC payment, QR code payment, etc.);
- ◆ Characteristics of Chinese mobile payment users;
- ◆ Industries related to mobile payment in China (mobile netizens, smartphone, smart POS device, etc.);
- ◆ 16 key global and Chinese mobile payment companies (operation, development strategy, etc.).

1. Overview

- 1.1 Definition
- 1.2 Classification
- 1.3 Industry Chain

2. Global Mobile Payment Market

- 2.1 Overview
- 2.2 Market Size
- 2.3 Regional Development
 - 2.3.1 United States
 - 2.3.2 Japan
 - 2.3.3 India
- 2.4 Competitive Landscape
- 2.5 Development Trend

3. Chinese Mobile Payment Market

- 3.1 Overview
- 3.2 Regulatory Policies
 - 3.2.1 Industry Access
 - 3.2.2 Main Polices
 - 3.2.3 Payment License
- 3.3 Market Size
- 3.4 Market Structure
- 3.5 Enterprise Pattern
- 3.6 Mobile Payment Overseas Layout

3.7 Development Trend

- 3.7.1 Tougher Regulation of and Tighter Access to Payment Market
- 3.7.2 Security Issue Is Taken Seriously
- 3.7.3 Industry Trend

4. Mobile Payment Market Segments

- 4.1 Third-party Mobile Payment
 - 4.1.1 Overview
 - 4.1.2 Market Size
 - 4.1.3 Market Structure
 - 4.1.4 Competitive Landscape
- 4.2 Mobile Banking
 - 4.2.1 Overview
 - 4.2.2 Market Size
 - 4.2.3 Competitive Landscape
 - 4.2.4 Development Trend
- 4.3 Operators' Mobile Payment
- 4.4 Barcode Payment
 - 4.4.1 Technology
 - 4.4.2 Status Quo
 - 4.4.3 Presence of Enterprises
- 4.5 NFC Payment
 - 4.5.1 Technology
 - 4.5.2 Market Size
 - 4.5.3 Presence of Enterprises

- 4.5.4 HCE Cloud-based QuickPass
- 4.6 Biometric Identification Payment

5. Mobile Payment Users in China

- 5.1 Overview
- 5.2 Characteristics of Mobile Payment Users
- 5.3 Using Behaviors of Mobile Payment Users
- 5.4 Attributes and Behavior Preferences of Mobile Payment Users

6. Mobile Payment-related Industry Chain

- 6.1 Mobile Netizens
- 6.2 Consumer Terminal Devices
- 6.3 Intelligent POS Machine
 - 6.3.1 Overview of Products
 - 6.3.2 Market Size
 - 6.3.3 Trend of Products

7. Major Global Mobile Payment Users

- 7.1 PayPal
 - 7.1.1 Profile
 - 7.1.2 Operation
 - 7.1.3 Mobile Payment Business
 - 7.1.4 Business in China
 - 7.1.5 Development Prospects
- 7.2 Paytm

- 7.2.1 Profile
- 7.2.2 Partners
- 7.2.3 Operation
- 7.2.4 SWOT
- 7.3 Stripe
- 7.4 MobiKwik
- 7.5 Adyen

8. Major Chinese Mobile Payment Enterprises

- 8.1 AliPay
 - 8.1.1 Profile
 - 8.1.2 Development Course
 - 8.1.3 Profit Model
 - 8.1.4 Operation
 - 8.1.5 Mobile Payment
 - 8.1.6 Partners
 - 8.1.7 Establishment of Ant Financial
 - 8.1.8 Expansion of Overseas Markets
 - 8.1.9 SWOT Analysis
- 8.2 TenPay
 - 8.2.1 Profile
 - 8.2.2 Development Course
 - 8.2.3 Mobile Payment Business
 - 8.2.4 Partners



8.3 99Bill	8.7.2 Development Course
8.3.1 Profile	8.7.3 Operation
8.3.2 Development Course	8.7.4 Mobile Payment Business
8.3.3 Mobile Payment Business	8.7.5 Partners
8.3.4 Partners	8.8 LianLianPay
8.4 YeePay	8.8.1 Profile
8.4.1 Profile	8.8.2 Mobile Payment Business
8.4.2 Development Course	8.9 PinganPay
8.4.3 Partners	8.10 Smartpay
8.4.4 Strategy	8.11 Qiandai
8.4.5 Mobile Payment Business	8.12 CHINAUMS
8.5 IPS	8.12.1 Profile
8.5.1 Profile	8.12.2 Partners
8.5.2 Development Course	8.12.3 Mobile Payment
8.5.3 Mobile Payment Business	
8.5.4 Partners	
8.6 Lakala	
8.6.1 Profile	
8.6.2 Development Course	
8.6.3 Operation	
8.6.4 Mobile Payment	
8.6.5 Partners	
8.6.6 Deepening Layout in Internet Finance	
8.7 UMPay	
8.7.1 Profile	



Development Trends of Payment
Classification of Payment Modes
Mobile Payment Industry Chain
Value Chain of NFC Mobile Payment
Global Mobile Payment Transaction Value and Growth, 2016-2026E
Ranking of Countries by Mobile Wallet Usage Rate
Payment methods in the U.S., 2018
P2P Mobile Payment Transaction Value in the US, 2018-2023E
Proximity Mobile Payment Transaction Value in the US, 2018-2023E
Proximity mobile payment users in the US, by Platform, 2019
Major Electronic Payment Products in Japan
Number of Cashless Payment Users in Japan, 2016-2021E
Mobile Payment Transaction Value Growth in India, 2015-2018
Development Status in India
Reasons for Choosing Digital Payment in India
Major Policies on Mobile Payment in India
Mobile Payment Trend in India
Potential Mobile Payment Users in India, 2015&2020E
Classification of Third-party Payment Licenses and Regulators
Number of Payment Licenses Issued to Non-Banking Institutions in China, 2015-2019
Number of Payment Licenses Issued in China by Type by the End of 2019
Chinese Mobile Payment Market Size, 2015-2026E
Chinese Mobile Payment Market Structure, 2015-2026E
Mobile Payment Transactions in China by Operating Model
The Enterprises with Cross-border Payment License in China



China Nets Union Clearing Corporation as a Regulator on Payment Institutions
Trends of Policies on Mobile Payment in China
Ways for Chinese Payment Users to Contact Defrauds, 2019
Trends of Presence in Mobile Payment Business
Development Trends of Mobile Payment Platform
Trends of Cooperation between Mobile Payment Enterprises
Mobile Payment Transactions in China, 2019-2026E
Chinese Mobile Payment Market Structure, 2026E
Main Characteristics of Third-party Mobile Payment
Third-party Mobile Payment Industry Chain in China
Chinese Third-party Mobile Payment Market Size, 2015-2026E
Structure of Third-party Mobile Payment Transactions in China by Type of Business, 2018-2019
Market Share of Third-party Mobile Payment in China, 2018-2019
Mobile Banking Industry Chain
Mobile Banking Transactions in China, 2015-2026E
Mobile Phone Bank Users Scales of Major Banks in China, as of the end of 2018
Market Share of Mobile Banking in China, 2017-2018
Operators' Operating Models of Mobile Payment
Mobile Operators Dominate Mobile Payment Value Chain
Framework of QR Code Payment System
2D Barcode Payment Industry Chain
Quarterly Transactions Scale of China's Off-Line Scan Payment, 2017-2019
Transaction Scale of China Integration Payment Market, 2016-2026E
Modes of Unionpay 2D Barcode Payment
Development Course of NFC Technology

Technical Framework of NFC

Operating Models and Components of NFC Reader/Writer

Main Implementations of SE in NFC

China Mobile NFC Payment Transaction Scale, 2017-2019

NFC Payment Industry Chain

Process of NFC Payment

Installation of Cloud QuickPass

Mobile Phone Flash Payment Products Supporting UnionPay Mobile Phone Flash Payment

Development Trend of No-cash Society in China

Mobile Payment Users Structure in China by Gender, 2017-2018

Mobile Payment Users Structure in China by Age, 2017-2018

Educational Background of Mobile Payment Users in China, 2017-2018

Distribution of Mobile Payment Users in China by Region, 2017-2018

Distribution of Mobile Payment Users in China by Region, 2017-2018

Frequency of Mobile Payment by Users in China, 2017-2018

Amount Per Payment of Mobile Payment Users in China, 2017-2018

Account Type Structure Used by Mobile Payment Users, 2018

Main Reasons for Using Mobile Payment in China, 2018

Proportion of Users Expecting Mobile Payment Development, 2018

Problems with Usage of Mobile Payment by Users in China, 2017-2018

Proportion of Security Problems Encountered by Mobile Payment Users, 2018

Proportion of Problems Mobile Payment Users Think to Solve in Client Terminals, 2018

Proportion of Customer Rights Protection Measures Expected by Mobile Payment Users, 2018

Proportion of Problems Mobile Payment Users Concerned, 2018

Analysis of Network Consumption Period, 2018



Major Industries to Which Mobile Payments Are Applied, 2018
Payment Methods of Mobile Payment in China, 2018
Proportion of Users Accepting Barcode Payment, 2018
Barcode Pay Scenarios of Chinese Mobile Payment Users, 2017-2018
Proportion of Payment Methods Used by China Mobile Payment Users to Take Public Transportation, 2018
Proportion of Payment Methods Used by China Mobile Payment Users for High Speed Payment, 2018
Proportion of China Mobile Payment Users Knowing about Mobile Payment Policies, 2018
Mobile Payment Users' Awareness of New Mobile Payment Technologies in China, 2017-2018
Mobile Payment Users' Acceptance of Biometric Recognition Technology in China, 2017-2018
Comparison of Users' Concerns in Mobile Payment Using Biometrics in China, 2018
Netizen Scale in China, 2015-2026E
Mobile Netizens in China, 2015-2026E
% of Mobile-terminal Online Payment Transactions in China, 2017-2018
Global Smartphone Shipment, 2015-2026E
Global NFC-enabled Mobile Phone Shipments, 2015-2018
Number of Merchants Joining the UnionPay Network in China and YoY Growth, 2007-2026E
Number of New Merchants Joining the UnionPay Network in China and YoY Growth, 2007-2026E
Number of POS Terminals Joined the UnionPay Network in China and YoY Growth, 2007-2026E
Number of New POS Terminals Joined the UnionPay Network in China and YoY Growth, 2007-2026E
Number of Bankcards for Every POS Terminal in China, 2007-2026E
POS Terminal Ownership per Thousand People in China, 2007-2026E
China's POS Terminal Shipments, 2015-2026E
Functional Evolution of Intelligent POS Terminal
Operating Model of PayPal
Main Business Platforms of PayPal



Development Course of Paypal
Operation of PayPal, 2019
Revenue of Paypal, 2018-2019
Total Payment Volume of PayPal, 2018-2019
Merchant Services of PayPal, 2018-2019
Cross-Border Trade TPV of PayPal, 2018-2019
Active Users of PayPal, 2018-2019
Newly Increased Active Users of PayPal, 2018-2019
Customer Engagement of PayPal, 2018-2019
Revenue Structure of PayPal by Business/Region, 2018-2019
Payment Transaction of PayPal, 2018-2019
PayPal's Development of International Business
Milestones of PayPal's Global Expansion
Partners of PayPal, 2017
Mobile Phone Business-related Products of PayPal
Mobile Payment Solutions of PayPal
Mobile Payment Business Performance of PayPal, 2017-2018
PayPal Wallet
Development of PayPal APP, 2019
P2P Transaction Volume of PayPal, 2018
Business Outlook of PayPal, 2020E
Transaction Volume Prospect of PayPal by Business
Paytm's Major Investors
Paytm's Main Services
Paytm's Performance, by the end of September 2018

Paytm Wallet

Paytm's SWOT Analysis

Main Products of Strip

MobiKwik Wallet

Payment Options of MobiKwik

Facts of Adyen, 2018-2019

Models of Adyen

Payment Methods of Adyen

Plugins and Partners of Adyen

Processed Volume of Adyen, 2018-2019

Alipay's Shareholders before and after Equity Transfer

Operating Model of Alipay

Financial Development of Alipay

Transaction Volume of Alipay on November 11, 2009-2019

Alipay's Local Wallet Layout in Countries Joining the "Belt and Road" Initiative

Mobile Payment System of Alipay

Share of Mobile Payment on Alipay, 2015-2019

Provinces with Share of Mobile Payment Exceeding 90% on Alipay, 2019

Bank Partners of Alipay

Overseas Partners of Alipay

Other Partners of AliPay

Social Cooperation Partners of AliPay

Members of Ant Financial

Ant Financial Builds Its Financial Service Ecological Platform through Payment

Alipay SWOT Analysis




Main Payment Methods of Tenpay
Partners of QQ Wallet
Payment Products of WeChat Pay
Full Smart Services of WeChat
Wisdom Business Circle Model of WeChat
Industry Partners of TenPay
Cooperation Types and Partners of TenPay
Major Overseas Payment Partners of Tenpay
Presences of 99Bill in China
99Bill's One-stop Aggregated Payment Service
Industry Partners of 99Bill
Cooperative Banks of 99Bill
YeePay Payment Products System
Bank Partners of YeePay
Mobile Payment Products of YeePay
Open System of YeePay Electronic Wallet
Functions of YeePay Electronic Wallet
Application Scenario of YeePay Wallet Payment
Business Distribution of IPS
Cooperative Banks of IPS
Cooperation Merchants of IPS
Business Structure of Lakala
Revenue and Net Income of Lakala, 2014-2019
Bill Collection and Personal Payment Business Scale of Lakala, 2016-2018
Lakala 4.0 Strategic System



UMF's Branches in China
Business Units of UMF
Ecological Layout of UMF
UMF's Standard Collection Products
Main Products of Union Mobile Pay E-Commerce
Partners of UMF
Mobile Payment Business Process of LianLianPay
Partners of Pingan YQB
YQB APP Mode
Fusion of Yiqianbao Finance with Scenarios
Partners of PinganPay
Position of Pinganpay Electronic Payment
Branches of Pinganpay Electronic Payment
Value of Pinganpay Electronic Payment
Partners of Pinganpay Electronic Payment
Partners of CHINA UMS
NFC Payment VS Remote Payment
Comparison of Main Mobile Payment Technologies
2D Barcode Payment VS NFC Payment
Main Applications of Mobile Payment
Mobile Wallet Usage Rate for Users of Different Ages Worldwide
Financing Cases of Paytm, 2015-2019
Events in Leading Mobile Payment Firms' Layout in India
Comparison of Major Mobile Payment Platform in India
Major Mobile Payment Enterprises and Products Worldwide by Country



Major Mobile Payment Platform Worldwide
Interpretations of Regulations on the Online Payment Business of Non-Banking Payment Institutions
Main Policies on Mobile Payment in China, 2011-2019
Enterprises Having been Cancelled Payment Business License by the End of 2019
Enterprises Having Obtained Payment Business License by the End of 2019
Major Operating Models and Participants of Mobile Payment in China, 2019
Major Payment License Acquisitions in China, 2014-2019
Overseas Layout of Mobile Payment Firms, 2019
Key Regulatory Policies & Contents on Chinese Payment Institutions
Vulnerabilities of Mobile Payment
Development Trends of Mobile Payment Business
Implementations and Merits & Demerits of Mobile Banking
Classification of Mobile Banking
Development Trends of Mobile Banking
Major Devices/Facilities for and Functions of 2D Barcode Payment
Development History of Barcode Payment
NFC-enabled Cellphone Models Officially Released in China, 2019
Development History of Cloud-based QuickPass in China, 2015-2020
Development of Chinese Face Payment Equipment
Comparison of Offline Mobile Payments
Imagpay Breakdown Products and Characteristics
Product Characteristics of Major Imagpay Manufacturers in China
Milestones in Adyen's Development
Key Financial Indices of Adyen, 2015-2018
Basic Information of Alipay's Business License



Development Course of Alipay
Main Profit Models of Alipay
Development History of Mobile Payment of Alipay
Alipay's Going-out Models
Basic Information of TenPay's Business License
Equity Structure of TenPay
Development Course of TenPay
Users Quantity of Wechat Payment and QQ Wallet, 2013-2016
Basic Information of 99Bill's Business License
Development Course of 99Bill
Development Course of 99Bill
Basic Information of YeePay's Business License
Development Course of YeePay
Industry Partners of YeePay
Basic Information of IPS's Business License
Development Course of IPS
Functions of Mobile Payment Products of IPS
Basic Information of Lakala's Business License
Development Course of Lakala
Revenue Structure of Lakala, 2016-2018
Lakala's Acquiring Business by Merchant, 2016-2018
Lakala's Acquiring Business by Region, 2016-2018
Number of Merchants and Transaction Amount in Lakala's Acquiring Business, 2014-2018
Expansion of Lakala through Direct Merchants and Channels (Non-direct Merchants), 2016-2018
Lakala's Deployment of POS Terminals, 2016-2018



- Mobile Payment Hardware Products Developed by Lakala
- Top Five Clients of Personal Payment Business of Lakala, 2016-2018
- Development Course of Mobile Payment of Lakala, 2013-2020
- Partners of Lakala
- Basic Information of UMF's Business License
- Development Course of UMF
- Operating Indicators of UMF, 2016-2019
- Basic Information of LianLianPay's Business License
- Milestones of LianLianPay, 2003-2020
- Milestones of Pingan YQB, 2012-2019
- Basic Information of PinganPay Technology Service's Business License
- Development Course of PinganPay
- Basic Information of PinganPay Electronic Payment's Business License
- Development Course of Pinganpay Electronic Payment
- Basic Information of Beijing Qiandai Payment Technology's Business License
- Partners of Beijing Qiandai Payment Technology
- Basic Information of CHINA UMS's Business License
- Milestones of CHINA UMS
- Products and Services of CHINA UMS
- Mobile Payment Services of CHINA UMS

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