
Description: The third-party payment industry led by internet payment, mobile payment, prepaid card, POS (Point of Sale), etc. has continued to flourish since 2014, with market transaction scale hitting RMB23.3 trillion, a year-on-year increase of 35.47%, and 270 licensed companies (as of April 10, 2015), of which, Beijing has the largest number of 58.

Third-party payment industry in China in the process of continuous development characterizes the followings:

Market segments perform differently: offline acquiring market shrinks while mobile payment market booms. In 2014, China's third-party offline acquiring market transaction scale dropped by 11.65% year on year, to RMB9.1 trillion. The tightening of regulatory policy towards third-party payment advanced the rectification of traditional offline acquiring market – a primary cause of shrinkage in the offline acquiring market. In the same year, China's third-party mobile payment market size reached RMB5.99247 trillion, soaring by 391.3% year on year, accounting for 25.72% of total transaction scale of third-party payment market (1.30% in 2009).

Third-party payment companies deepen the internet finance industry layout: represented by Alipay. On October 16, 2014, Zhejiang Ant Small & Micro Financial Services Group (Ant Financial) was established, in the possession of Alipay, Alipay Wallet, Yu Ebao, ZhaoCaiBao, Ant MicroCredit, Sesame Credit, etc.

More acquisitions will happen in third-party payment industry: there are 270 licensed companies in China's third-party payment market – a relatively saturated state no matter from the regulator's attitude in licensing or from the competition pattern. We can expect that acquisition will be an important way to break the pattern of market competition in the future.

At the end of 2014, China Wanda Group and 99Bill signed a strategic investment agreement, the former purchased a 68.7% stake in the latter at a price of USD 315 million (about RMB2 billion) to step into internet finance.

The report highlights the followings:

1. Environment for the development of third-party payment industry in China, including policy environment, economic environment, technical environment, and social environment;
2. Analysis of user attribute and user behaviors in internet payment and mobile payment markets;
3. Development history, market scale, market structure and competition pattern of third-party payment industry in China;
4. Analysis of third-party payment market segments e.g. offline acquiring, internet payment, mobile payment and cross-border payment;
5. Analysis of 6 group-operated third-party payment companies in China, covering their development history, operation, business layout, partners, development strategy, etc.;
6. Analysis of 9 independently-operated third-party payment companies in China, including their development course, operation, business layout, partners, development strategy, etc.;
7. Analysis of 3 third-party payment companies owned by telecom operators in China, involving their development history, operation, business layout, partners, development strategy, etc.

Contents: Preface

1. Environment for Development of Third-Party Payment Market
   1.1 Definition
   1.2 Policy Environment
      1.2.1 Relevant Policies
      1.2.2 License Issuance
   1.3 Economic Environment
   1.4 Technical Environment
1.5.1 NetizenScale
1.5.2 Mobile NetizenScale
1.5.3 Online-shopping Market Scale

2. Analysis of Third-Party Payment Industry Users
2.1 Internet Payment
2.1.1 User Attribute
2.1.2 User Behaviors
2.2 Mobile Payment
2.2.1 User Attribute
2.2.2 User Behaviors
2.2.3 AlipayUsers vs. WeChat Payment Users

3. Market Analysis of Third-Party Payment Industry
3.1 Development History
3.2 Market Scale
3.3 Competition Pattern
3.3.1 Number and Business Type of Enterprises
3.3.2 Market Shares
3.3.3 Deepening of Internet Finance Industry Layout
3.3.4 More Industries Setting Foot in Third-party Payment

4. Analysis of Third-Party Payment Market Segments
4.1 Offline Acquiring
4.1.1 Development Background
4.1.2 Market Scale
4.1.3 Trends
4.2 Internet Payment
4.2.1 Market Scale
4.2.2 Market Structure
4.2.3 Competition Pattern
4.3 Mobile Payment
4.3.1 Definitions
4.3.2 Industrial Chain
4.3.3 Development Environment
4.3.4 Market Scale
4.3.5 Market Structure
4.3.6 Competition Pattern
4.3.7 Trends
4.4 Cross-border Payment
4.4.1 Definitions
4.4.2 Policies
4.4.3 Market Development

5. Analysis of Group-operated Companies
5.1 Overview
5.2 Alipay
5.2.1 Profile
5.2.2 Development History
5.2.3 Operation
5.2.4 Mobile Payment
5.2.5 Partners
5.2.6 Establishment of Ant Financial
5.3 China UMS
5.3.1 Profile
5.3.2 Partners
5.3.3 Mobile Payment
5.3.4 Marching into Internet Personal Finance
5.4 ChinaPay
5.5 China TV Pay
5.6 Tenpay
5.6.1 Profile
5.6.2 Development History
8.2 Trends
8.3 Overall Forecast
8.4 Market Segment Forecast
8.4.1 Offline Acquiring
8.4.2 Internet Payment
8.4.3 Mobile Payment

Selected Charts

- Interpretation of Third-party Payment Regulatory Policy
- Policies on Third-Party Payment Industry in China, 2010-2015
- List of Companies with Payment Business License (as of Apr. 10, 2015)
- List of 17 Companies with Cross-border Payment Business License
- China's GDP YoY, 1999-2014
- China's CPI YoY, 1990-2015
- China's Netizen Scale and Internet Penetration, 2008-2014
- China's Mobile Netizen Scale and % of Total Netizens, 2007-2014
- Transaction Scale of China's Online-shopping Market, 2008-2014
- Regional Structure of Internet Payment Users in China, 2013
- Age Structure of Internet Payment Users in China, 2013
- Education Structure of Internet Payment Users in China, 2013
- Payment Types of Internet Payment Users in China, 2013
- Expected Payment Types of Internet Payment Users in China, 2014
- Gender and Age Structure of Mobile Payment Users in China, 2013
- Regional Structure of Mobile Payment Users in China, 2013
- Usage Scenario of Mobile Payment Users in China, 2013
- Expected Payment Types of Mobile Payment Users in China, 2013
- Gender and Age Structure of Users of WeChat Payment and Alipay Wallet in China, 2013
- Regional Structure of Users of WeChat Payment and Alipay Wallet in China, 2013
- Chinese Netizen's Safety Evaluation for Wechat Payment, 2013
- Chinese Netizen's Safety Evaluation for Alipay Wallet, 2013
- Development History of Third-party Payment Industry in China
- Transaction Scale of China's Third-party Payment Industry, 2009-2014
- Proportions of Internet Payment, Mobile Payment and Offline Acquiring by Transaction, 2009-2014
- Business Types Contrast of Third-party Payment in China
- Regional Structure of Third-party Payment Companies in China (as of April 10, 2015)
- Market Share of Third-party Payment Companies in China (by Transaction), 2013
- Layout of Third-party Payment Companies in China Internet Finance Industries Setting Foot in Third-party Payment
- YoY Change of Issuing Quantity of Bank Card and Credit Card in China, 2007-2014
- Issuing Quantity of Bank Card and Credit Card in China, 2006-2014
- Transaction Volume of Third-party Offline Acquiring in China, 2009-2014
- Transaction Volume Structure of Third-party Offline Acquiring in China, 2009-2014
- Transaction Volume of China's Third-party Internet Payment, 2009-2014
- Transaction Volume Structure of Third-party Internet Payment in China, 2013-2014
- Market Share of Third-party Internet Payment in China (by Transaction Volume), 2014
- Definition of Mobile Payment
- Industrial Chain of Mobile Payment
- Development History of Mobile Internet Technology in China
- Ownership Volume and Penetration Rate of Smartphone in China, 2010-2017E
- Transaction Volume of China's Third-party Mobile Payment, 2009-2014 (Unit: RMB billion)
- Transaction Volume Structure of China's Third-party Mobile Payment (by Business Types), 2013-2014
- Market Share of Third-party Mobile Payment in China (by Transaction Volume), 2014
- Quarterly Growth of Users Quantity of WeChat Payment and QQ Wallet, 2014
- Definition of Cross-border Payment
- Policies on China Cross-border Payment Industry
- Layout of Third-party Payment Companies in China Cross-border Payment
- Payment Subsidiaries of China UnionPay
- Payment System of China UnionPay
- Basic Information of Alipay's Business License
- Alipay's Shareholders before and after Equity Transfer
- Development History of Alipay
- Transaction Volume of Alipay on November 11, 2009-2014
Partners of EPAY
SWOT of Telecom Operator's Companies
Main Operational Data of China Third-Party Payment Industry, 2014
Transaction Scale of China Third-party Payment Market, 2015-2017E
Transaction Scale Structure of China Third-party Payment Market, 2015-2017E
Transaction Scale of China Third-party Offline Acquiring Market, 2015-2017E
Transaction Scale of China Third-party Internet Payment Market, 2015-2017E
Transaction Scale of China Third-party Mobile Payment Market, 2015-2017E

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