
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 USD315 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.

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