

China Automatic Fare Collection (AFC) System Industry Report, 2013

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Abstracts

Automatic fare collection (AFC) system is widely used in urban rails and high-speed railways.

By the end of 2013, 19 Chinese cities had put 87 urban rail lines into operation with the operating mileage of 2,539 km, of which 56 lines, 1,788 km (70.42%) and 1,017 operating stations were contributed by top six cities - Beijing, Shanghai, Guangzhou, Shenzhen, Chongqing and Tianjin. In 2014, it is expected that 13 Chinese cities will launch new rail lines, with 403.5 km and 270 stations to be added.

China had opened 37 high-speed railways with the total operating mileage of 11,152 km as of the end of 2013. In 2014-2015, China will fulfill the construction of 12 new high-speed railways with the operating mileage of 8,887 km. The booming high-speed railways will boost the railway passenger transportation capacity and offer market opportunities for AFC system.

Chinese AFC system vendors include: GRG Banking Equipment, Potevio, Shanghai Huahong Jitong Smart System, Shandong New Beiyang Information Technology, China National Software & Service, Founder International, Shanghai Huateng Software Systems and Gaoxin Modern Intelligent System.

The AFC equipment and core modules produced by the Chinese AFC giant GRG Banking Equipment have been applied to more than thirty urban rail transportation and high-speed passenger railway lines in China. In H1 2013, GRG Banking Equipment won the bid for the Project of Banknote Change, Ticket & Card Sale and Recovery Modules in Ningbo and signed a contract about Changsha Metro Line 2 Project; meanwhile, its AFC revenue grew 98.47% year on year to RMB47.20 million.

Huahong Jitong is the only system provider focusing on AFC system in China. Since 2013, the slowdown of some municipal construction projects as well as long construction period have impacted the revenue of the company. From January to September 2013, Huahong Jitong achieved the revenue of RMB148.9 million, down 22.97% year on year; its net income dropped by 22.25% year on year to RMB16.7 million. From 2009 onward, Huahong Jitong has extended its market outside Shanghai, and won the rail transportation projects in Suzhou, Xi'an, Kunming and Harbin through tenders. In H1 2013, the revenue in the regions outside Shanghai accounted for 69.58% of the company's total revenue.

The report mainly includes the following aspects:

Development course, industrial policies, market size and competition patterns of China AFC system industry;

Current construction, future planning and AFC system application in China urban rail transportation industry; rail transportation and corresponding AFC system application in major cities;

Construction, future planning and AFC system application in China high-speed railway industry;

Operation, revenue structure, AFC system business, main AFC system projects and main clients of nine Chinese AFC system providers;

Operation, AFC system business and development in China of six overseas AFC system providers.

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