

# China Intelligent Transportation System (ITS) Industry Report, 2012-2015

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## Abstracts

The urban per capita area of paved roads only approximates 10.6 square meters in China, far lagging behind foreign countries which boast 15-20 square meters of paved road per capita. Meantime, the urban vehicle ownership is ballooning at a growth rate of 15%, while the growth rate of road areas only reaches around 3%. Therefore, intelligent transportation system (ITS) has become an important means to improve the efficiency of road use and reduce the imbalance between traffic supply and demand.

In accordance with the planning of Science & Technology Division of the Ministry of Transport of P.R.C., China will realize the sensing and monitoring of expressways, national and provincial arterial highways, important sections, large bridges, vehicle areas and transportation conditions, and the drivers will be able to obtain the required travel plans and real-time travel information at any time and any location in their familiar way by 2015, so as to enhance the attractiveness and sharing power of public transport, and ease urban congestion. Moreover, China will carry out the monitoring of dangerous goods transport vehicles, vessels, coaches, buses, taxis and rail traffic through the whole journey.

The data on the orders of the industry in H1 2012 suggested that the ITS industry was still flourishing. In spite of economic slowdown, the local governments continued to advance project construction in BT mode, showing that the demand for ITS from local governments did not shrink.

In order to stop the economic downward trend, China National Development and Reform Commission announced its approval of 25 urban rail transit planning and projects, 13 highway construction projects, 10 municipal projects and 7 port & waterway projects in September 2012, with total investment of more than RMB 1 trillion. The

investment in these projects will undoubtedly boost the development of ITS industry in China.

**The report resolves around the followings:**

Status quo and planning of Chinese transportation industry and informatization;

Current situation of Chinese ITS industry;

ITS investment in China;

Status quo and objectives of Chinese ITS industry by region;

Profile, financial highlight, revenue structure by segment and by region, prospects and performance prediction, clients and so forth of 17 key ITS enterprises in China;

Market size and forecast of ITS industry and its major four segments in China during 2012-2015.

Along with the expanding investment in ITS industry and the accelerating industry growth, new companies rush into the market.

There are currently three major types of enterprises in market competition. The first type of them is represented by Digital China and ZTE that march into the ITS industry with the concept of smart city. In early July 2012, the Municipal Government of Ningbo and ZTE Corporation signed a cooperation framework agreement to build ITS.

The second type covers security companies like Hikvision and Dahua Technology which tap into the ITS area through the combined tender of urban security and ITS construction. In recent years, as the end-users of security monitoring and urban ITS are public security and traffic police departments, the traffic monitoring and electronic police are also equipped with security administration function, which provides an opportunity for security companies to enter the ITS industry.

The third type includes such system integrators as Enjoyor and E-Hualu. These firms are in a dominant position by possessing strong problem-solving skills in ITS market and complete marketing channels, and maintaining sound partnership with relevant

government departments. An integrator like E-Hualu is extending to the upstream products to lift its gross margin.

According to the development plan, China will make more effort in urban ITS construction. It will promote the construction of traffic information service platform in around 50 major cities to provide traffic information inquiry and traffic guidance service, develop intelligent signal control system in more than 200 cities to shape intelligent traffic command system, and carry forward regional scheduling of public transport and construction of related systems in over 100 large cities to strengthen the construction and application of electronic ticket service.

Additionally, China ITS (Holdings) Co., Ltd. and Anhui Wantong Technology Co., Ltd. that previously engaged in intercity ITS also shift their business focus to urban ITS field, which shows that the urban ITS industry becomes more attractive to enterprises due to its rapid development.

## Contents

### **1. STATUS QUO AND PLANNING OF CHINESE TRANSPORTATION INDUSTRY AND INFORMATIZATION**

- 1.1 Transport Infrastructure
- 1.2 Means of Transportation
- 1.3 Development Plan of China's Transport Construction, 2011-2015
  - 1.3.1 Expressway
  - 1.3.2 Railway (Including Rail Transit)
  - 1.3.3 Urban Transportation
- 1.4 Status Quo and Plan 2011-2015 of Traffic Informatization in China
  - 1.4.1 Current Situation
  - 1.4.2 Plan 2012-2015
- 1.5 ITS Is an Inevitable Choice to Address Road Congestion Issue

### **2. CURRENT SITUATION OF CHINESE ITS INDUSTRY**

- 2.1 Definition
- 2.2 ITS Classification
- 2.3 Policy
- 2.4 Competitive Landscape of ITS Market

### **3. ITS INVESTMENT IN CHINA**

- 3.1 ITS Investment in 2011
- 3.2 ITS Investment in 2012
- 3.3 Major ITS Investment Projects in China
- 3.4 Investment and M & A

### **4. CURRENT SITUATION AND OBJECTIVES OF CHINESE ITS INDUSTRY BY REGION**

- 4.1 Beijing
- 4.2 Shanghai
- 4.3 Zhejiang
- 4.4 Status Quo and Planning of Traffic Informatization in Jiangsu
- 4.5 Status Quo and Planning of Traffic Informatization in Anhui
- 4.6 Traffic Informatization Planning in Heilongjiang

- 4.7 Status Quo and Planning of Traffic Informatization in Shandong
- 4.8 Traffic Informatization Planning in Shanxi
- 4.9 Status Quo and Planning of Traffic Informatization in Guangdong
- 4.10 Status Quo and Planning of Traffic Informatization in Liaoning
- 4.11 Traffic Informatization Planning in Chongqing

## **5. KEY ITS ENTERPRISES IN CHINA**

### **5.1 Wisisoft Co., Ltd.**

- 5.1.1 Profile
- 5.1.2 Financial Data
- 5.1.3 Revenue Structure
- 5.1.4 Shareholding Company
- 5.1.5 Prospects and Performance Prediction in 2012-2014

### **5.2 Enjoyor Co., Ltd.**

- 5.2.1 Profile
- 5.2.2 Operation
- 5.2.3 Revenue Structure
- 5.2.4 Clients
- 5.2.5 Prospects and Performance Prediction in 2012-2014

### **5.3 E-Hualu Information Technology Co., Ltd.**

- 5.3.1 Profile
- 5.3.2 Financial Data
- 5.3.3 Revenue Structure
- 5.3.4 Shareholding companies
- 5.3.5 Prospects and Performance Prediction in 2012-2014

### **5.4 Nanjing LES Information Technology**

- 5.4.1 Profile
- 5.4.2 Financial Data
- 5.4.3 Revenue Structure
- 5.4.4 Clients and Suppliers

### **5.5 Shanghai Baosight Software Co., Ltd.**

- 5.5.1 Profile
- 5.5.2 Operation
- 5.5.3 Revenue Structure
- 5.5.4 Prospects and Performance Prediction in 2012-2014

### **5.6 Shenzhen Sunwin Intelligent Co., Ltd.**

- 5.6.1 Profile
- 5.6.2 Operations

- 5.6.3 Revenue Structure
- 5.6.4 Clients
- 5.6.5 Prospects and Performance Prediction in 2012-2014
- 5.7 CSNT
  - 5.7.1 Profile
  - 5.7.2 Operations
  - 5.7.3 Revenue Structure
  - 5.7.4 Shareholding company
  - 5.7.5 Prospects and Performance Prediction in 2012-2014
- 5.8 Anhui Wantong Technology Co., Ltd.
  - 5.8.1 Profile
  - 5.8.2 Financial Summary
  - 5.8.3 Revenue Structure
  - 5.8.4 Abundant Backlogs
  - 5.8.5 Prospects and Performance Prediction in 2012-2014
- 5.9 Bright Oceans Inter-Telecom
  - 5.9.1 Profile
  - 5.9.2 Financial Summary
  - 5.9.3 ITS Business
  - 5.9.4 Revenue Structure
  - 5.9.5 Clients
- 5.10 Jiangsu Tianze Infoindustry Co., Ltd.
  - 5.10.1 Profile
  - 5.10.2 Operations
  - 5.10.3 Revenue Structure
  - 5.10.5 Prospects and Performance Prediction in 2012-2014
- 5.11 China ITS (Holdings)
  - 5.11.1 Profile
  - 5.11.2 Financial Highlights
  - 5.11.3 Revenue Structure
  - 5.11.4 Acquisition of Beijing Stone ITS Integration Co., Ltd.
- 5.12 China TransInfo
  - 5.12.1 Profile
  - 5.12.2 Financial Highlights
  - 5.12.3 Revenue Structure
  - 5.12.4 Business Outlook
- 5.13 Shenzhen Keybridge Communications Co., Ltd
  - 5.13.1 Profile
  - 5.13.2 Financial Highlights

- 5.13.3 Revenue Structure
- 5.13.4 ITS Related Shareholding company
- 5.13.5 Prospects and Performance Prediction in 2012-2014
- 5.14 Shanghai Huahongjt Smart System
  - 5.14.1 Profile
  - 5.14.2 Financial Highlights
  - 5.14.3 Revenue Structure
  - 5.14.4 Clients
  - 5.14.5 Prospects and Performance Prediction in 2012-2014
- 5.15 UNIS
  - 5.15.1 Profile
  - 5.15.2 Financial Highlight
  - 5.15.3 ITS business
- 5.16 ST Electronics–PCI
- 5.17 ZTE ITS

## **6. CHINA'S ITS MARKET SIZE AND FORECAST**

- 6.1 ITS Market Size in 2011-2015E
- 6.2 ITS Market Segments and Forecast
  - 6.2.1 Intelligent Traffic Management Market Size in 2012-2015E
  - 6.2.2 Electronic Toll Collection Market Size in 2012-2015E
  - 6.2.3 Intelligent Public Transport Market Size in 2012-2015E
  - 6.2.4 Traffic Information Service Market Size in 2012-2015E
- 6.3 Development Trends of ITS Industry in China

## Selected Charts

### SELECTED CHARTS

China's Financial Expenditure on Transportation Industry, 2003-2011  
Highway Mileage and Growth Rate in China, 2007-2010  
Accumulated Operating Mileage of Urban Rail Transit in China, 2000-2015E  
China's Expressway Mileage, 2005-2015E  
Number of Operating Vehicles of Chinese Urban Transit, 2002-2010  
Number of Operating Vehicles of Chinese Urban Rail Transit, 2002-2010  
Automobile Ownership in China, 2002-2011  
Highway Mileage per Vehicle in China, 2007-2010  
Economic Costs of Traffic Jam in Major Chinese Cities  
Classification of ITS  
ITS-related Policies in China, 2003-2012  
Investment Cases and Amount of ITS Industry, 2009-2012  
Major ITS Investment Plans in Cities in China, 2012  
Investments and Acquisitions of Urban ITS Industry, 2011  
Employees and R&D Investment of Wisesoft, 2007-2011  
Financial Data of Wisesoft, 2007-2012  
Revenue Structure of Wisesoft by Product, 2007-2012  
Profit & Gross Margin of Wisesoft by Product, 2008-2012  
Revenue Structure of Wisesoft by Region, 2007-2012  
Net Profit of Wisesoft's Shareholding Companies, 2009-2011  
Performance Prediction of Wisesoft, 2012-2014E  
Employees and R&D Investment of Enjoyor, 2007-2011  
Financial Data of Enjoyor, 2007-2012  
Revenue Structure of Enjoyor by Product, 2007-2012  
Profit & Gross Margin of Enjoyor by Product, 2008-2012  
Revenue Structure of Enjoyor by Region, 2007-2012  
Name List and Revenue Contribution of Enjoyor's Top 5 Clients, H1 2012  
Name List and Revenue Contribution of Enjoyor's Top 5 Clients, 2011  
Performance Prediction of Enjoyor, 2012-2014E  
Employees and R&D Investment of E-Hualu, 2008-2011  
Financial Data of E-Hualu, 2008-2012  
Revenue Structure of E-Hualu by Product, 2007-2012  
Profit & Gross Margin of E-Hualu by Product, 2007-2012  
Revenue Structure of E-Hualu by Region, 2007-2012  
Net Profit of E-Hualu's Shareholding Companies, 2010-2011



Performance Prediction of E-Hualu, 2012-2014E  
Employees of Nanjing LES, 2009-2011  
Financial Data of Nanjing LES, 2009-2011  
Revenue Structure of Nanjing LES by Product, 2009-2011  
Profit & Gross Margin of Nanjing LES by Product, 2009-2011  
Revenue Structure of Nanjing LES by Region, 2009-2011  
Name List and Revenue Contribution of Nanjing LES's Top 5 Clients, 2011  
Nanjing LES's Procurement from Top 5 Suppliers and % of Total Procurement, 2011  
Employees and R&D Investment of Baosight Software, 2007-2011  
Financial Summary of Baosight, 2007-2012  
Revenue Structure of Baosight by Product, 2007-2012  
Profit & Gross Margin of Baosight by Product, 2007-2012  
Revenue Structure of Baosight by Region, 2007-2012  
Performance Prediction of Baosight, 2012-2014E  
Employees and R&D Investment of Sunwin Intelligent, 2007-2011  
Financial Summary of Sunwin, 2007-2012  
Revenue Structure of Sunwin by Product, 2007-2012  
Profit & Gross Margin of Sunwin by Product, 2007-2012  
Revenue Structure of Sunwin by Region, 2007-2012  
Name List and Revenue Contribution of Sunwin's Top 5 Clients, H1 2012  
Performance Prediction of Sunwin, 2012-2014E  
Employees and R&D Investment of CSNT, 2007-2011  
Financial Summary of CSNT, 2007-2012  
Revenue Structure of Baosight by Product, 2007-2012  
Profit & Gross Margin of Baosight by Product, 2007-2012  
Revenue Structure of Baosight by Region, 2007-2012  
Performance Prediction of CSNT, 2012-2014E  
Employees and R&D Investment of Wantong Technology, 2007-2011  
Financial Summary of Anhui Wantong Technology, 2007-2012  
Revenue Structure of Wantong Technology by Product, 2007-2012  
Profit & Gross Margin of Wantong Technology by Product, 2007-2012  
Revenue Structure of Wantong Technology by Region, 2007-2012  
Performance Prediction of Wantong Technology, 2012-2014E  
Employees and R&D Investment of Bright Oceans Inter-Telecom, 2007-2011  
Financial Summary of Bright Oceans Inter-Telecom, 2006-2011  
Revenue Structure of Bright Oceans by Product, 2007-2012  
Profit & Gross Margin of Bright Oceans by Product, 2007-2012  
Revenue Structure of Bright Oceans by Region, 2007-2012  
Name List and Revenue Contribution of Bright Oceans's Top 5 Clients, 2011

Employees and R&D Investment of Tianze Infoindustry, 2008-2011  
Financial Summary of Tianze Infoindustry, 2008-2012  
Revenue Structure of Tianze Infoindustry by Product, 2007-2012  
Profit & Gross Margin of Tianze Infoindustry by Product, 2007-2012  
Revenue Structure of Tianze Infoindustry by Region, 2007-2012  
Performance Prediction of Tianze Infoindustry, 2012-2014E  
Employees and R&D Investment of China ITS, 2007-2011  
Financial Summary of China ITS (Holdings), 2009-2011  
Revenue Structure of China ITS by Product, 2007-2012  
Profit & Gross Margin of China ITS by Product, 2007-2012  
Revenue Structure of China ITS by Region, 2007-2012  
Employees and R&D Investment of China TransInfo, 2007-2011  
Financial Summary of China TransInfo, 2011-2012  
Revenue Structure of China TransInfo by Product, 2007-2012  
Profit & Gross Margin of China TransInfo by Product, 2007-2012  
Employees and R&D investment of Keybridge Communications, 2007-2011  
Financial Summary of Keybridge, 2007-2012  
Revenue Structure of Keybridge by Product, 2007-2012  
Profit & Gross Margin of Keybridge by Product, 2007-2012  
Revenue Structure of Keybridge by Region, 2007-2012  
Performance Prediction of Keybridge, 2012-2014E  
Employees and R&D Investment of Huahongjt Smart System, 2009-2011  
Financial Summary of Huahongjt, 2007-2012  
Revenue Structure of Huahongjt by Product, 2007-2012  
Profit & Gross Margin of Huahongjt by Product, 2007-2012  
Revenue Structure of Huahongjt by Region, 2007-2012  
Name List and Revenue Contribution of Huahongjt's Top 5 Clients, H1 2012  
Performance Prediction of Huahongjt, 2012-2014E  
Employees of UNIS, 2007-2011  
Financial Summary of UNIS, 2007-2012  
Market Size of ITS in China, 2011-2015E  
Market Size and Forecast of Urban ITS Industry in China, 2011-2015E  
Intelligent Traffic Management Market Size in China, 2012-2015E  
Electronic Toll Collection Market Size in China, 2012-2015E  
Intelligent Public Transport Market Size in China, 2012-2015E  
Traffic Information Service Market Size in China, 2012-2015E

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