Analysis and Forecast of China AFC (Automatic Fare Collection System) Industry, 2013-2017

(Sample)

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4. Equipment Market of China’s AFC

4.2 Enterprise Competition of China’s AFC Market

AFC becomes the necessary sub-system of the rail transit; because of the complication of the construction, the construction of each rail transit project requires the related system integrators should have the AFC integration experience, so many AFC projects were undertook by the transnational enterprises or joint-ventured enterprises before 2005; since 2006, as the owner enterprises considerate the need of cost controlling, in the meantime, conforming to the domestic related limitation to the localization rate of rail transit equipment, the construction of AFC projects has gradually been undertook by the domestic enterprises.

The competition of AFC market is mainly concentrated in the integration; as the domestic rail transit AFC projects mostly adopt the general contracting to tender, it is required that only the enterprises with the AFC application performance can have the qualification to participate in the bidding, so only a few transnational AFC integrators and several domestic AFC software system integrators have the qualification to participate the competition. Shanghai Huahong Jitong Smart System Co., Ltd., Samsung SDS China and Gaoxin Modern Intelligent System Co., Ltd. totally account for market shares of about 50% of the rail transit AFC projects, composing the main advantageous enterprises of the current AFC market.

Fig.9 Quantity Ratio of Each Company’s Stations Participating in the Rail Transit AFC Projects, 2012
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