

China IC Card/Smart Card Industry Report, 2010

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Abstracts

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In 2010, in terms of the global IC card market, Asia-Pacific Region accounted for 71.5% of the market share, and China's IC card sales occupied one-third of the total global. Besides, the market share of IC card used in telecom sector exceeded 70%.

China's sales volume and revenue of IC card reached 2.135 billion pieces and RMB8.1 billion in 2010, up 8.4% and 13% year-on-year respectively. In traditional application field, the distribution of 2nd-G ID cards almost completed; in mobile communication market, the sales volume of China Mobile SIM card increased by 3.2% against previous year. The burgeoning applications in fields like unified national social security card and mobile payment card increased substantially. In 2010, the sales volume growth rate of national social security card topped 126.3%, which enabled it to become the next important application of IC card behind 2nd generation ID card.

Chinese local suppliers of smart card chip mainly consist of Datang Microelectronics Technology Co. Ltd, Shanghai Fudan Microelectronics Co. Ltd, Beijing Tongfang Microelectronics Co., Ltd (acquired by Tangshan Jingyuan Yufeng Electronics Co., Ltd in 2011), and Shanghai Huahong Group Co., Ltd.

In 2010, IC card sales and market shares of key enterprises were presented as follows: Watch Data (close to RMB1.3 billion, 15.9%), Gemalto (around RMB1.015 billion, 12.5%), Eastcompeace Smart Card Co., Ltd (RMB 852 million, 10.5%), Hengbao (RMB 581 million, 7.2%).

IC card made by Watch Data possesses important market positions in application fields

such as telecommunication, finance, transportation and government. Watch Data is the fourth largest supplier of telecom card in the Chinese market, whose income from telecom cards took up 50% of its revenue and SIM/USIM card shipments occupied 12% of the total procurement of telecom operators.

In 2010, 45% of SIM card sales of Gemalto, as the largest cardmaker in Asia and with branches in Beijing and Shanghai, were procured by the three major telecom operators in China.

SIM card income occupied over 70% of the revenue of Eastcompeace in 2010. The newly introduced business of high-end smart cards CMMB and EMV will become the highlight in business growth for Eastcompeace in the future, since the proceeds from the two sources registered RMB80 million and RMB54 million respectively in 2010.

Pillar product of Hengbao is magnetic card. In H1 2010, the quantity and unit price of magnetic card both showed a downward trend. Meanwhile, the business growth was fueled by mobile payment IC card (28.4%) and financial IC card (7.2%).

With the completion of 2nd generation ID card distribution and the market shrinkage of IC card for telephone use, the operating income of Datang Microelectronics fell from RMB 923.8 million in 2007 to RMB 529.6 million in 2010. The business of bank IC card and mobile payment card will usher in a bright prospect in 2011; in the meantime, business of social security card will ever grow.

Contents

1. PROFILE OF IC CARD

- 1.1 Definition
- 1.2 Classification
- 1.3 RFID
- 1.4 Security System
- 1.5 International Standards
 - 1.5.1 Contact IC Card Standard ISO7816
 - 1.5.2 Contactless IC Card Standard
- 1.6 Golden Card Project
- 1.7 IC Card Supervision and Inspection Organization
- 1.8 Global IC Card Alliance
 - 1.8.1 APSCA
 - 1.8.2 EuroSmart
 - 1.8.3 Radicchio
 - 1.8.4 SCA

2. IC CARD MARKET ANALYSIS

- 2.1 Global IC Card Market
- 2.2 China IC Card Market
- 2.3 China Telecom IC Card Market
 - 2.3.1 SIM Card Market
 - 2.3.2 Increasing Market Share of SIM Card of Domestic Enterprises
 - 2.3.3 Popularization of USIM Card
 - 2.3.4 Delisting of PAS in 2011 and Giving Way to TD
- 2.4 Status Quo & Prospect of Transformation from Magnetic Card to IC Card for China's Banking
 - 2.4.1 Standards and Migration of EMV
 - 2.4.2 Initiation of China's EMV Migration in 2011
 - 2.4.3 Technologies for Home-made Financial IC Cards Still to be Improved
- 2.5 Status Quo & Prospect of Other IC Card Markets in China
 - 2.5.1 Social Security Card
 - 2.5.2 Public Transport IC Card
 - 2.5.3 Fiscal Card and Fiscal Processor

3 IC CARD UPSTREAM INDUSTRY

- 3.1 IC Card Industry Chain
- 3.2 IC Card Chip Industry Layout
- 3.3 Global IC Card Upstream Manufacturers
 - 3.3.1 Infineon
 - 3.3.2 ATMEL
 - 3.3.3 SAMSUNG
 - 3.3.4 STMicroelectronics
 - 3.3.5 Renesas
 - 3.3.6 NXP

4 IC CARD CHIP MANUFACTURERS IN CHINA

- 4.1 Datang Microelectronics Technology Co. Ltd
 - 4.1.1 Profile
 - 4.1.2 Business
- 4.2 Shanghai Fudan Microelectronics Co., Ltd
 - 4.2.1 Profile
 - 4.2.2 Business
- 4.3 Shanghai Huahong Group Co., Ltd
 - 4.3.1 Profile
 - 4.3.2 Business
- 4.4 Beijing Tongfang Microelectronics Co., Ltd
 - 4.4.1 Profile
 - 4.4.2 Operation
- 4.5 CEC Huada Electronic Design Co., Ltd
 - 4.5.1 Profile
 - 4.5.2 IC Card Business
 - 4.5.3 Three Strategic Deployments

5 IC CARD MANUFACTURERS IN CHINA

- 5.1 Gemalto
 - 5.1.1 Profile
 - 5.1.2 Financials
 - 5.1.3 Gemalto in China
- 5.2 Giesecke & Devrient
- 5.3 Watch Data
 - 5.3.1 Profile

- 5.3.2 Financials
- 5.3.3 Overseas Business
- 5.3.4 Dynamics
- 5.4 Hengbao
 - 5.4.1 Profile
 - 5.4.2 Production Capability
 - 5.4.3 Main Business
 - 5.4.4 Development Impetus for 2011
- 5.5 Eastcompeace Smart Card Co., Ltd
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Strategies
- 5.6 Wuhan Tianyu Information Industry Co., Ltd
 - 5.6.1 Profile
 - 5.6.2 Business
 - 5.6.3 Development Planning
- 5.7 Goldpac Group Co., Ltd
 - 5.7.1 Profile
 - 5.7.2 Business
- 5.8 JingKing Wader Technology (Shenzhen) Co., Ltd
 - 5.8.1 Profile
 - 5.8.2 Partners & Clients
- 5.9 Tatwah Smartech
 - 5.9.1 Profile
 - 5.9.2 IC Card Business
- 5.10 Shenzhen Mingwah Aohan High Technology Co., Ltd
 - 5.10.1 Profile
 - 5.10.2 Financials
 - 5.10.3 Market Strategies
- 5.11 Aisino Corporation
 - 5.11.1 Profile
 - 5.11.2 Operation
- 5.12 Other IC Card Manufacturers
 - 5.12.1 Shanghai Pujiang Smart Card Systems Co., Ltd
 - 5.12.2 Shanghai Chang Feng Smart Card Co., Ltd
 - 5.12.3 Shanghai China Card Group
 - 5.12.4 China Electronics Smart Card Co., Ltd
 - 5.12.5 Shenzhen Hongcard Technical Co., Ltd
 - 5.12.6 Zhengzhou Wanguang Smart Card Technology Co., Ltd

Selected Charts

SELECTED CHARTS

Structure of Contact CPU Chip

Classification of IC Cards

Market Distribution of Global IC Card Business(by Region), 2009

Market Share of Global IC Card Business (by Application), 2009

Global Shipment of IC Card in All Applications (by type), 2006-2011

Global Shipment of Non-contact IC Card in All Applications, 2010-2011

Global Shipment of IC Card of All Sorts, 2005-2010

China's Shipment and Sales of IC Cards, 2005-2010

Market Share Distribution of IC Card in China, 2010

Shipment of SIM Cards in China, 2001-2010

Number of China Mobile G3 Subscribers, 2010-Jan. 2011

Number of PAS Subscribers in China, 2010-Feb. 2011

Circulation of Social Security IC Cards in China, 2004-2009

IC Card Industry Chains

Market Share of Key Smart IC Card Chip Manufacturers, 2010

Infineon Operating Income of IC Card and Security Services, 2009Q1-2011Q1

Atmel Revenue, 2005-2009

Samsung EEPROM and Flash Technology Roadmap, 2002-2012E

Partners of IC Card Chip of Samsung

Major Business and Clients of NXP

Capacity of IC Card Module of Datang Microelectronics Technology Co. Ltd

Market Position of IC Card Made by Datang Microelectronics Technology Co. Ltd

Operating Income and Net Income of Datang Microelectronics Technology Co. Ltd,
2007-2010

Operating Income and Gross Margin of Shanghai Fudan Microelectronics Co., Ltd,
2008-2010

Revenue of Gemalto (by Business), 2010

Operating Income of Gemalto (by Sector), 2009-2013E

Major Clients of Gemalto

Sales of Watch Data, 2004-2010

Major Clients of Jiangsu Hengbao Co., Ltd.

Operating Income and Net Income of Jiangsu Hengbao Co., Ltd., 2008-2010

Operating Income of Jiangsu Hengbao Co., Ltd. (by Product), 2009-2010

Gross Margin of Jiangsu Hengbao Co., Ltd.(by Product), 2009-2010

Operating Income and Net Income of Eastcompeace Smart Card Co., Ltd, 2008-2010

Product Structure (by Operating Income) of Eastcompeace Smart Card Co., Ltd, 2010
Revenue of Eastcompeace Smart Card Co., Ltd (by Business), 2007-2010
Gross Margin of Businesses of Eastcompeace Smart Card Co., Ltd, 2007-2010
IC Card Capacity of Wuhan Tianyu Information Industry Co., Ltd., 2007-2010
Output, Sales Volume and Revenue of IC Cards of Wuhan Tianyu Information Industry Co., Ltd., 2007-2010
Gross Margin of Wuhan Tianyu Information Industry Co., Ltd, (by Product), 2008-2010
Operating Income of Wuhan Tianyu Information Industry Co., Ltd, (by Region), 2007-2010
Planned Investment Products by Fund-raising of Wuhan Tianyu Information Industry Co., Ltd, 2011
Major Clients of JingKing Wader Technology (Shenzhen) Co., Ltd
Operating Income and Net Income of Tatwah Smartech , 2007-2010
IC Card Sales Volume of Tatwah Smartech, 2007-2010
Unit Price of IC Cards of Tatwah Smartech, 2007-2010
Contactless IC Card Business Income of Tatwah Smartech, 2007-2010
Gross Margin of Contactless IC Card of Tatwah Smartech(by Product), 2007-2010
Operating Income and Net Income of Shenzhen Mingwah Aohan High Technology Co., Ltd, 2007-2010
Operating Income of Aisino Corporation (by Product), 2009-2010
Gross Margin of Aisino Corporation (by Product), 2009-2010
Annual Capacity of Shanghai China Card Group
Profile and Capacity of China Electronics Smart Card Co., Ltd
Major Products of Module Package of China Electronics Smart Card Co., Ltd
Operating Income and Net Income of China Electronics Smart Card Co., Ltd, 2008-2010
Partial Clients of Shenzhen Hongcard Technical Co., Ltd
Products of Zhengzhou Wanguang Smart Card Technology Co., Ltd

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