IC Card Smart Card Industry Market Research (China)

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The report analyzes and forecasts the situation and development of China's IC card market, and researches six key IC card chip suppliers in the world, as well as nearly 50 IC card chip, COS, card packaging manufacturers and IC card relevant equipment manufacturers in China.

According to the forecast of Eurosmart in Nov, 2007, the SIM card shipment would reach 3.04 billion pieces in the world in 2007, up 20% compared to the same period of 2006. This figure was beyond estimation made early this year, because the demand from mobile operators in the developing countries exceeded expectation. The orders held by the global largest network operator, China Mobile, added to more than 280 million pieces in the first three quarters in 2007, rising 60% year-on-year.

From the above chart, along with the growth of total shipment of IC card in the world, the proportion of CPU card also increases; while the shipment of memory card slips gradually. Shipment of memory card increased from 2006 to 2007, mainly because statistics and forecast from Eurosmart include the 2nd ID card and oyster card project.

According to Smart Cards Special Committee of China Information Industry Chamber of Commerce, the shipment of China's IC card market was about 1.08 billion pieces in 2005, up 91.8% year-on-year; while the shipment revenue increased 11.1% only to RMB 5.607 billion. In 2006, the shipment was about 1.676 billion pieces, rising 55.2% year-on-year; the shipment revenue ascended 32.4% only to RMB 7.426 billion. This was caused by increasingly intensive competition in China IC market and the dropping prices of SIM card particularly.

With the historic statistics from Committee of Smart Cards of China Information Industry Chamber of Commerce, ResearchInChina evaluates and forecasts the IC card shipment and shipment value from 2007 to 2008 by using time series method. During this course the following factors are considered: Gold Card Project of Ministry of Information Industry, issuance of the 2nd generation of ID card, plan of bank card EMV transference, and 2008 Olympic Games. In 2006, IC card shipment volume and value reached 1.676 billion pieces and RMB 7.426 billion. While in 2008, the volume will increase to 4.183 billion pieces, 1.5 times more than 2006; and the value will hit RMB 14.656 billion, almost doubled that in 2006.

The important IC card market has been dominated by the six international semiconductor giants, like Infineon. Frost & Sullivan's investigation shows that, in 2006, Infineon took up 29.1% market share in global IC chip market valued with USD 1.9 billion, leaving its competitors far behind. Then Samsung, NXP, Atmel, Renesas and STMicroelectronics ranked the next. The six accounted for 91.3% in total. Currently, most of chip markets in China rely much on the international market, so does IC card market, and the market share of domestic IC design companies is not high as well.

The years of 2006 and 2007 witnessed the active period of reform in China IC card industry. Through reorganization, merger and acquisition, new companies established. The increasingly strong companies via the 2nd generation ID card and telecommunication market accelerated to expand the other markets. Meanwhile, entering the international market has become the key work for these companies as well. However, the product similarity still existed, which led to continuous low price. However such situation can not be improved fundamentally. Therefore, the competition in the future will focus on low costs.

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Table of Content

1 IC CARD AND RELEVANT KNOWLEDGE

1.1 Definition
1.2 Classification
1.3 RFID
1.4 Safety System
1.5 International Standard
  1.5.1 Contact IC Card Standard ISO 7816
  1.5.2 Non-Contact IC Card Standard
1.6 Gold Card Project
1.7 IC Card Quality Supervision and Inspection Organizations
1.8 Global IC Card Associations
  1.8.1 APSCA
  1.8.2 EuroSmart
  1.8.3 Radicchio
  1.8.4 SCA

2 DEVELOPMENT OF EMV MAGCARD CHANGED TO SMART CARD

2.1 EMV Standard
2.2 Background and Status Quo of International EMV Transference
  2.2.1 Background
  2.2.2 Transference Methods
  2.2.3 Status Quo
    2.2.3.1 Europe
    2.2.3.2 Asia-Pacific
    2.2.3.3 the USA and Others
2.3 Background, Standard and Plan of EMV Transference in China
Preliminary Plan of EMV Transference of Bank Card in China
2.4 Status Quo of EMV Transference of Bank Card in China
  2.4.1 China has established EMV International Authorized Testing Lab
  2.4.2 Unipay has Started EMV Transference overall
  2.4.3 R&D and EMV Transference of Industrial and Commercial Bank of China
  2.4.4 Agricultural Bank of China Improved System for EMV Transference
  2.4.5 EMV Transference Strategy of Bank of China
  2.4.6 IC Issuance and EMV Transference Thought of Construction Bank of China
  2.4.7 First EMV Transference Trial City in China-Shanghai
  2.4.8 EMV Transference Trail in Beijing has started

3 IC CARD MARKET

3.1 Status Quo and Prospect in the World
3.2 Status Quo and Prospect in China
  3.2.1 Overall Shipment of IC Card Market
  3.2.2 Issuance and Development of IC Card
3.3 Status Quo and Prospect of IC Card Market of China Telecom
  3.3.1 Mobile Phone Card Market
  3.3.2 Increasingly Growth of Market Shares of Domestic Companies in China's Mobile Phone Card Market
  3.3.3 USIM Card will be the New Bright Spot
  3.3.4 Declining IC Card for Public Phones
  3.3.5 PIM Card Market
3.4 Status Quo and Prospect of Non China Telecom IC Card Market

3.4.1 the 2nd Generation ID Card
3.4.2 Public Transportation Card
3.4.3 Social Insurance Card
3.4.4 IC Card in Education Field
3.4.5 Fiscal Card and Fiscal Processor
3.4.6 Other Fields
3.5 Competition Layout of China's IC Card Industry
3.5.1 Development
3.5.2 Price Trend
3.5.3 Sales Channels
3.5.4 Top Ten Smart Card Companies

4 UPSTREAM INDUSTRY OF IC CARD

4.1 Issuance Flow
4.2 Industry Chain
4.3 Upstream Chip Industry Layout
4.4 International Companies
4.4.1 Infineon
4.4.2 ATMEL
4.4.3 Samsung
4.4.4 STMicroelectronics
4.4.5 Renesas
4.4.6 NXP

5 IC CARD CHIP MANUFACTURERS IN CHINA

5.1 Datang Microelectronics Technology Co., Ltd
5.1.1 Company Profile
5.1.2 Financial Performance
5.1.3 IC Products
5.2 Shanghai Fudan Microelectronics Co., Ltd
5.2.1 Company Profile
5.2.2 Financial Performance
5.3 Shanghai Huahong Group Co., Ltd
5.3.1 Company Profile
5.3.2 Shanghai Huahong Jitong Smart Card System Co., Ltd
5.3.3 Shanghai Huahong Integrated Circuit Co., Ltd
5.4 Beijing Tsinghua Tongfang Microelectronics Co., Ltd
5.4.1 Company Profile
5.4.2 Recent Operation
5.5 Shanghai Belling Co., Ltd
5.5.1 Company Profile
5.5.2 Operation
5.5.3 Clients Group
5.6 CEC Huada Electronic Design Co., Ltd
5.6.1 Company Profile
5.6.2 Recent Financial Statistics
5.6.3 Smart Card Products by Field
5.6.4 Three Strategy Deposition

6 IC CARD MANUFACTURERS IN CHINA

6.1 Gemalto
6.1.1 Company Profile

6.1.2 Operating Revenue
6.1.3 Related China's Joint Ventures
6.2 Watch Data System Co., Ltd
6.2.1 Company Profile
6.2.2 Operating Revenue
6.2.3 Oversea Layout
6.2.4 Strategy of Large Domestic Clients
6.2.5 Projects of Product Application
6.3 Tianjin Jiepu Smart Card Co., Ltd
6.3.1 Company Profile
6.3.2 Products
6.3.3 Customers
6.5 Gemplus Goldpac Group Co., Ltd
6.5.1 Company Profile
6.5.2 Customer Relation
6.5.3 Partners
6.6 Jingking Wader Technology (Shenzhen) Co., Ltd
6.6.1 Company Profile
6.6.2 Partners
6.6.3 Customer Relation
6.7 Beijing Aviation Zhitong Technology Co., Ltd
6.7.1 Company Profile
6.7.2 Products
6.7.3 Partners
6.9 Zhongshan Dahua Intelligent Technology Co., Ltd
6.9.1 Company Profile
6.9.2 Products
6.10 Shenzhen Mingwah Aohan Technology Co., Ltd
6.10.1 Company Profile
6.10.2 Production Scale
6.10.3 Competition Advantages
6.10.4 Financial Performance
6.10.5 Partners
6.11 Shanghai Solaic IC Card Co., Ltd
6.11.1 Company Profile
6.11.2 Production Conditions
6.12 Shanghai Feilo Acoustics Co., Ltd
6.12.1 Company Profile
6.12.2 Changfeng Smart Card Co., Ltd
6.12.3 Shanghai Pujiang Smart Card System Co., Ltd
6.12.4 Products
6.12.5 Financial Performance
6.13 Shanghai China Card Group
6.14 Shenzhen Tsinghua Wumao Information Technology Co., Ltd
6.14.1 Company Profile
6.14.2 Branches
6.14.3 Products
6.15 Zhuhai Eastcom Peace Smart Card Co., Ltd
6.15.1 Company Profile
6.15.2 Products
6.15.3 Oversea Market
6.15.4 Operation
6.16 Aerospace Information Co., Ltd
6.16.1 Company Profile
6.16.2 Undertaking Projects

6.16.3 Production Bases
6.16.4 Operation
6.17 China Electronics Smart Card Co., Ltd
6.17.1 Company Profile
6.17.2 Products
6.18 Wuhan Tianyu Industry Co., Ltd
6.19 Shenzhen Hongcard Technical Co., Ltd
6.19.1Company Profile
6.19.2 Customers
6.19.3 Partners

7 IC CARD SYSTEM SOLUTIONS AND RELEVANT SOFTWARE MANUFACTURERS IN CHINA

7.1 Beijing Feitian Technology Co., Ltd
7.1.1 Company Profile
7.1.2 Oversea Market
7.2 China Smartech Development Co., Ltd
7.2.1 Company Profile
7.2.2 Product Quality
7.3 Fujian Newland Computer Co., Ltd
7.3.1 Company Profile
7.3.2 Operation
7.4 Guangdong Tecsun Technology Co., Ltd
7.4.1 Company Profile
7.4.2 Production Scale
7.4.3 Operation by Application Product
7.4.4 Products
7.4.5 Partners
7.5 Beijing Orient Card Digital Information Technology Co., Ltd
7.5.1 Company Profile
7.5.2 Main Customers
7.6 Beijing Shuoliang Information Technology Co., Ltd
7.6.1 Company Profile
7.6.2 Partners
7.7 Dalian Hengji Electronics Technical Co., Ltd
7.7.1 Company Profile
7.7.2 Products
7.8 Jiangsu Hengbao Co., Ltd
7.8.1 Company Profile
7.8.2 Production Equipment
7.8.3 Main Business
7.8.4 Main Customers
7.9 Hainan Pacific Intellectual Technology Co., Ltd
7.10 Beijing Jiuding Antong Technology Development Co., Ltd

8 IC CARD READ-WRITE EQUIPMENT MANUFACTURES IN CHINA

8.1 Beijing Furong Electronics Co., Ltd
8.1.1 Company Profile
8.1.2 Products
8.2 Beijing Changmao Technology Co., Ltd
8.2.1 Company Profile
8.2.3 Products
8.4 Fujian Landi Commercial Equipment Co., Ltd
8.5 China -Vision Intelligent Card Reader Co., Ltd

9 IC CARD MATERIALS, PRINTING MANUFACTURERS IN CHINA

9.1 Jiangsu Huaxin Plastic Industry Developing Co., Ltd
9.2 Shaanxi Zhongcai Technology Group Co., Ltd
9.3 Eternal Group
  9.3.1 Shanghai Eternal Information Technology Co., Ltd
  9.3.2 Shanghai Eternal Printing Co., Ltd
9.4 Zhenzhou Wanguang Smart Card Technology Co., Ltd
  9.4.1 Company Profile
  9.4.2 Factory

LIST OF TABLES AND FIGURES

Structure of Contact CPU Card Chip
Classification of IC Card
Accumulative Global EMC Card Issuance Amount, at the End of 2004-at the End of 2006
Accumulative Global EMV Terminal Amount, at the End of 2004-at the End of 2006
Global IC Card Shipment by Type, 1999-2008
IC Card Shipment and Shipment Revenue in China, 2000-2008
IC Card Issuance Amount in China, 1996-2008
Accumulative IC Card Issuance Amount in China by Key Field, 2001-2006
Accumulative IC Card Issuance Proportion in China by Key Application Field, 2001-2006
IC Card Shipment in China by Application, 2006
Market Share of Application IC Card by Shipment in China, 2006
Shipment and Issuance Amount of Mobile Phone Card in China, 2001-2006
3G Mobile Phone User Amount in China, 2006-2010
Public Phone Card Issuance Amount in China, 2001-2006
Issuance Amount of the 2nd Generation ID Card in China, 2004-2008
Issuance Amount of Public Transportation IC Card in China, 2001-2006
Issuance Amount of Social Security Card in China by Type, 2001-2006
Issuance Amount of Education in China, 2001-2006
IC Card Industry Chain
Market Share of Global IC Card Chip Manufactures, 2006
Sales of IC Card Microprocessor, 2005-2010
Net Sales Revenue of Infineon, 2003-2007
Operating Revenue and Profit of Atmel, 2000-2006
Operating Revenue of Atmel by Division, 2006
Sales Revenue and Profit of Samsung Semiconductor Division, 2004-2006
IC Card Financial System Product Line of STM
IC Card Electronic System Product Line of STM
IC Card Mobile Communication SoC Product Line of STM
Global MCP Market Share of Renesas by Application Field
Global Smart Card Network of Renesas
Objective of Security MCU Business of Renesas in China
Smart Card Partners of Renesas in China
Mobile Communication Products of Renesas
Financial ID Card Products of Renesas
Global Proportion of Sales of NXP by Region, 2006
Sales Revenue and Net Profit of Datang Microelectronics, 2004-2006
Sales Revenue and Gross Profit of Fudan Microelectronics, 2004-Q3 2007
Main Business Revenue and Total Profit of Shanghai Belling, 2004-2007
IC Card Sales Volume of Shanghai Belling by Application Field, 2006
Revenue and Proportion of Gemalto Products, the First Three Quarters of 2007
Regional Revenue and Proportion of Gemalto Products, the First Three Quarters of 2007

ASP Decrease Margin of SIM Cards of Gemalto, Q3 2006-Q2, 2007
Customers of Gemalto
Operating Revenue of Watch Data
Issuance Volume of IC Cards, 2004-2006
Main Business Revenue of Shanghai Feilo Acoustics Co., Ltd, 2002-2006H1
Content of EMV Level 1 and EMV Level 2
Countermeasure for EMV Attestation
Regional EMV Transference in the World at the end of 2006
Comparison of EMV Transference in Some European Countries at the End of 2006
Global IC Card Issuance Amount by Application Field, 2006-2008
Global Non-contact IC Card Shipment by Application Field, 2007
Global Market Share of Atmel Smart Card Chip by Shipment and Sales, 2001-2006
Quarterly Operating Revenue, Profit and Profit Margin of Electronic LSI of Samsung, 2006-2008
Accumulative Issuance Amount of Smart Cards of Renesas in the World and China
Smart Card Projects for China Provided by Renesas
Company Profile of Datang Microelectronics
Performance of Datang Microelectronics in IC Industry of China
IC Card Development Course of Datang Microelectronics
Output Capacity of IC Card of Datang Microelectronics
Position of Datang Microelectronics in IC Card Industry
IC Card Products and Types of Datang Microelectronics
Main Products of Huahong Jitong Smart Card System Co., Ltd
Main Products of Shanghai Huahong IC Co., Ltd
Product Types of Beijing Huahong
Main Products of Watch Data
Sales and Gross Profit of Shenzhen Mingwah Aohan Technology Co., Ltd by Product, 2005-Q3 2007
Assets Scale and Net Profit of Shanghai Changfeng Smart Card Co., Ltd, 2005-2006
Assets Scale and Net Profit of Shanghai Pujiang Smart Card Co., Ltd, 2005-2006
Annual Output Capacity of Shanghai Pujiang Smart Card Co., Ltd
Some Customers of Shanghai Pujiang Smart Card Co., Ltd
Revenue and Profit Margin of IC Card and Relevant Software Development and System Integration of Feilo Acoustics Co., Ltd, 2005-2007
Products of Shenzhen Tsinghua Wumao Information Technology Co., Ltd
Operating Revenue and Gross Profit Margin of Aviation Information Technology Co., Ltd, H1 2007
Company Profile and Output Capacity of China Electronics Smart Card Co., Ltd
Chip Manufacturers for IC Cards of Tescun
CPU Card Specifications of Tescun
Electronic Products of Dalian Hengji Electronics Technical Co., Ltd
Main Business Revenue and Gross Profit Margin of Jiangsu Hengbao Co., Ltd by Product, 2003-H1 2007

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