

China IC Card/Smart Card Industry Report, 2009

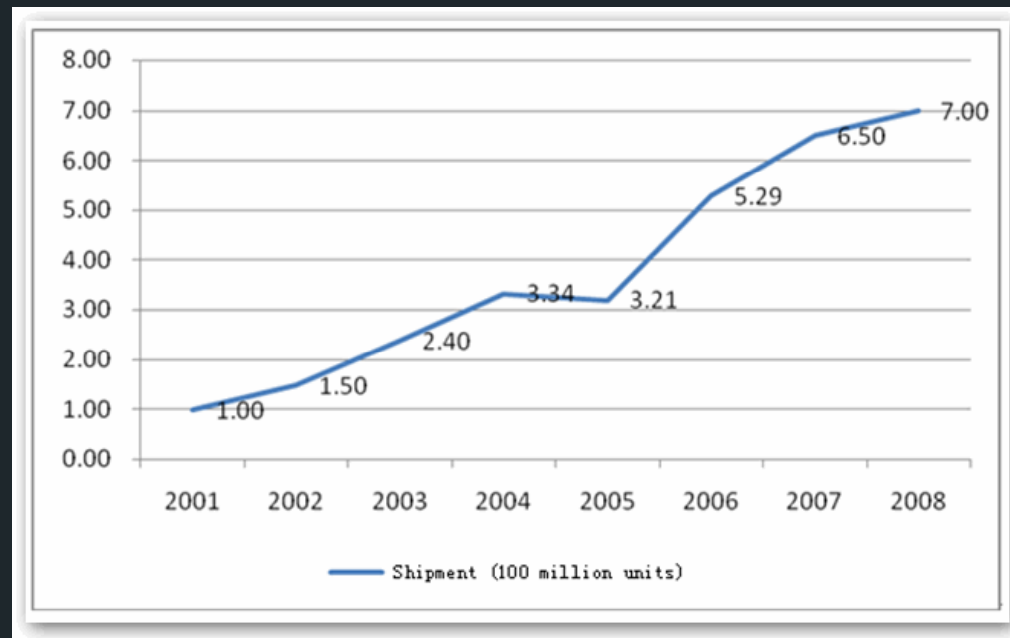


The world's IC card shipment reached 5.085 billion units in 2008, up 18.7% year-on-year, and it is expected that it will amount to around 5.3 billion units in 2009. The card volume per capita in developed countries was 3.5 in 2008, while it was only 1.1 in China, so there was still a larger growth space in China's IC card market.

In 2008, China's smart IC card sales revenue amounted to RMB7.335 billion, and the sales reached 1.946 billion units, down 2% year-on-year; of which, the number of mobile phone card exceeded 700 million units, and the issue of the second generation of ID card had finished in 2008, 918 million units in total. Impacted by global economy downturn, the export had dropped to around over 400 million units in total.

The mobile phone card is one of the mainstream products in IC market. Although the growth in mobile phone subscribers had slowed down in 2008, it is expected that the mobile phone card will still maintain the better sales in the following years taking the trend of more than one card for a person and 3G market development into consideration.

China's Mobile Phone Card Shipment, 2001-2008



Source: Smart Card Committee, China Information Industry Trade Association; ResearchInChina

Renewal of the Second Generation Resident ID Card

By the end of 2008, it had finished its issuance in accordance with unified plan of Ministry of Public Security, which had negative impact on IC card shipment.

Bank Card EMV Transference

China Unipay had implemented bank card EMV transference trials in Bank of China, Industrial and Commercial Bank of China, Agricultural Bank of China and China Construction Bank in Jun, 2009. By the end of 2008, China had issued 1.8 billion bank cards in total, and 94% of which were magnetic cards. In the meantime, the credit card had increased relatively rapidly, up 57.7% year-on-year. With EMV transference expands, it is expected that bank card will greatly promote IC card shipment within the following five years.

Student ID Card & All-in-one-Card in Campus

Currently, Ministry of Education and local governments of all levels are discussing the issue of unifying student ID card and campus all-in-one-card. Once it achieves the uniformed standard, it will issue hundreds of millions of cards.

Urban Transport Card

It will develop towards regional all-in-one-card.

Cards for Ministry of Labor and Social Security

In Apr, 2009, Ministry of Human Resources and Social Security announced it would implement medical-insurance-card nationwide, and it is expected that medical-insurance IC card will boost up after the year of 2010.

Governmental and Corporate Identity and Access Card

Being the important measure to guarantee system security, such card also can deal with share information and information infrastructure. In the meantime, it can be smart card, as well as USB KEY.

IC Card Develops towards RFID Field

After the 7th National IC Card Application Conference in 2004, State Leading Group Office of Golden Card Project Coordination had officially listed RFID technology and electronic label applications into key works, started trials in some qualified departments and local governments after over-one-year investigation and discussion, and actively and steadily promoted the construction of RFID application demonstration projects, such as industrial production process and safe production management, promoting agricultural products industrialization, anti-fake and dynamic management for important items, supply chain and modern logistics management, digital tourism industry and modern service sector.

In China, the IC card will be applied for more and more fields in the future, such as mobile phone cards (2G & 3G), bank card, STB and digital broadcast card, PBOC 2.0 multi-purpose fees card, and the annual sales will reach more than 2 billion units.

Table of Contents

- **1 IC Card and Relevant Information**
- 1.1 Definition
- 1.2 Classification
- 1.3 RFID
- 1.4 Security System
- 1.5 International Standard
- 1.5.1 Contact IC Card Standard ISO 7816
- 1.5.2 Contactless IC Card Standard
- 1.6 Golden Card Project
- 1.7 IC Card Quality Supervision and Inspection Institution ‘
- 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 Status Quo and Development**
- 2.1 Global IC Card Market
- 2.2 China’s IC Card Market
- 2.2.1 Overview
- 2.2.2 Application Field Outlook
- 2.3 China Telecom IC Card Market
- 2.3.1 Mobile Phone Market
- 2.3.2 Successively Growth of Domestic Companies’ Market Share in China’s Mobile Phone Card Market
- 2.3.3 USIM Card will be the New Spotlight
- 2.3.4 Declining Pay Phone Card Market
- 2.3.5 TD Replaces PHS in 2011
- 2.4 China’s Bank Magnetic Card Switches to IC Card
- 2.4.1 EMV Standard and EMV Transference
- 2.4.2 China’s EMV Transference Background and Status Quo
- 2.4.3 China’s EMV Transference Stimulates IC Card Market Demand
- 2.5 China’s Other IC Card Markets
- 2.5.1 Transport Card

- 2.5.2 Social Security Card
- 2.5.3 Fiscal Card & Fiscal Cash Register
- 2.5.4 the 2nd Generation ID Card
- 2.5.5 IC Card Export

- **3 IC Card Upstream Industry**
- 3.1 Issuance Flow
- 3.2 Industry Chain
- 3.3 Chip Industry
- 3.4 International Manufactures
- 3.4.1 Infineon
- 3.4.2 ATMEL
- 3.4.3 Samsung
- 3.4.4 STM
- 3.4.5 Renesas
- 3.4.6 NXP

- **4 China IC Card Chip Manufacturers**
- 4.1 Datang Microelectronics Technology Co., Ltd
- 4.1.1 Company Profile
- 4.1.2 Business
- 4.1.3 IC Products

- 4.2 Shanghai Fudan Microelectronics Co., Ltd
- 4.2.1 Company Profile
- 4.2.2 Performance
- 4.3 Shanghai Hua Hong (Group) Co., Ltd
- 4.3.1 Company Profile
- 4.3.2 Business
- 4.4 Beijing Tongfang Microelectronics Co., Ltd
- 4.4.1 Company Profile
- 4.4.2 Recent Operation
- 4.5 Shanghai Belling Co., Ltd
- 4.5.1 Company Profile
- 4.5.2 Operation
- 4.6 CEC Huada Electronic Design Co., Ltd
- 4.6.1 Company Profile
- 4.6.2 Smart Card
- 4.6.3 Three-Strategy Deposition

- **5 China's IC Card Manufacturers**
- 5.1 Gemalto
- 5.1.1 Company Profile
- 5.1.2 Revenue

- 5.1.3 Relevant Joint Ventures in China
- 5.2 Watchdata
 - 5.2.1 Company Profile
 - 5.2.2 Revenue
 - 5.2.3 Oversea Business
 - 5.2.4 Key Clients
 - 5.2.5 Product Application Items
- 5.3 Gemplus Goldpac Group Ltd
 - 5.3.1 Company Profile
 - 5.3.2 Client Relation
 - 5.3.3 Partners
- 5.4 JingKing Technology Holding LTD
 - 5.4.1 Company Profile
 - 5.4.2 Partners
 - 5.4.3 Client Relation
- 5.5 TATWAH SMARTECH Co., Ltd
 - 5.5.1 Company Profile
 - 5.5.2 Products
- 5.6 Shenzhen Mingwah Aohan Technology Co., Ltd
 - 5.6.1 Company Profile
 - 5.6.2 Production Size
 - 5.6.3 Finance & Market Strategy
 - 5.6.4 Partners
- 5.7 Shanghai Feilo Acoustics Co., Ltd
 - 5.7.1 Company Profile
 - 5.7.2 Finance
- 5.8 Shanghai China Card Group
- 5.9 Eastcompeace Smart Card Co., Ltd
 - 5.9.1 Company Profile
 - 5.9.2 Products
 - 5.9.3 Operation
- 5.10 Aisino Corporation
 - 5.10.1 Company Profile
 - 5.10.2 Customer-made Projects
 - 5.10.3 Production Base
 - 5.10.4 Operation
- 5.11 CESC
 - 5.11.1 Company Profile
 - 5.11.2 Products
- 5.12 Wuhan Tianyu Information Industry Co., Ltd
 - 5.12.1 Company Profile
 - 5.12.2 Smart Card Application Fields
- 5.13 Shenzhen Hong Card Technology Co., Ltd
 - 5.13.1 Company Profile
 - 5.13.2 Clients
 - 5.13.3 Partners

- 5.14 Zhenzhou Wanguang Smart Card Technology Co., Ltd
 - 5.14.1 Company Profile
 - 5.14.2 Products
 - 5.14.3 Output Capacity
- **6 China IC Card Solutions and Relevant Software Manufacturers**
- 6.1 Beijing Feitian Chengxing Technology Co., Ltd
 - 6.1.1 Company Profile
 - 6.1.2 Domestic Market
 - 6.1.3 Oversea Market
- 6.2 Fujian NewLand Computer Co., Ltd
 - 6.2.1 Company Profile
 - 6.2.2 Operation
- 6.3 Guangdong Tecsun Science & Technology Co., Ltd
 - 6.3.1 Company Profile
 - 6.3.2 Production Size
 - 6.3.3 Operation by Applied Product
 - 6.3.4 Products
 - 6.3.5 Partners
- 6.4 Beijing Oriencard Digital Technology Ltd
 - 6.4.1 Company Profile
 - 6.4.2 Key Clients
- 6.5 Dalian Hengji Electronic Technology Co., Ltd
 - 6.5.1 Company Profile
 - 6.5.2 Products
- 6.6 Jiangsu Hengbao Co., Ltd
 - 6.6.1 Company Profile
 - 6.6.2 Output Capability
 - 6.6.3 Main Business
 - 6.6.4 Key Clients

Selected Charts

- Contact CPU Card Chip Structure
- IC Card Classifications
- Global IC Card Shipment by Type, 1999-2009
- China IC Card Shipment and Sales, 2000-2011
- China IC Card Industry Sales Revenue Structure, 2008
- China Mobile Phone Card Shipment, 2001-2008 (100 million Units)
- China Mobile Smart Card Market Share, 2008
- China Mobile 3G Subscriber Number and Growth Trend, Jan-Aug, 2009
- China Pay Phone Number, 2005-Jul, 2009
- China PHS Subscriber Number, 2005-Jul, 2009
- Bank Card Industry Chain Structure
- China Transport IC Card Issuing Number, 2001-2008
- China Social Security IC Card Issuing Number, 2004-2008
- China's 2nd Generation ID Card Issuing Number, 2004-2008
- Ratio of China IC Card Export Volume and to Total Shipment, 2008
- IC Card Industry Chain
- Infineon Global Business
- Infineon Solution in Communication Field
- Infineon Business Structure, 2008
- Infineon Revenue, 2008Q1-2009Q3
- Infineon IC Card and Security Business Revenue, 2008Q1-2009Q3
- ATMEL Net Income, 2004-2008
- ATMEL Revenue by Product, 2008

- ATMEL Revenue by Region, 2008
- Samsung Semiconductor Sales and Operating Profit, 2008Q1-2009Q2
- Samsung System Chip Sales, 2008Q1-2009Q2
- Renesas MCU Product Structure
- Renesas Global Smart Card Production Network
- Renesas China Security MCU Objectives
- Renesas Smart Card Partners in China
- Renesas Products Provided for China by IC Card Application Market
- Renesas Smart Card Product Technology Plan
- Renesas Mobile Telecom Products
- Renesas Finance ID Card Products
- Renesas Dual-Mode/Contactless Product Plan
- NXP Main Business and Clients
- NXP Global Sales by Region
- Shanghai Fudan Microelectronics Sales Revenue and Gross Profit Margin, 2004-2009
- Shanghai Belling Main Business Revenue and Total Profit, 2004-2009Q3
- Shanghai Belling Main Business and Operation, 2008
- Gemalto Clients
- Watchdata Sales Revenue, 2004-2008
- Watchdata Card Issuing Number, 2004-2008
- Mingwah Aohan Turnover and Gross Profit, 2006-2009
- Shanghai Feilo Acoustics Main Business Revenue and Net Profit, 2004-2009Q3
- Shanghai China Card Group Output Capacity by Product, 2008
- Eastcompeace Certifications Approved
- Eastcompeace Revenue by Product, 2008
- Eastcompeace Operation Sales Growth, 2008Q1-2009Q3

- Eastcompeace Net Profit Growth, 2008Q1-2009Q3
- CESC Investors Relation
- CESC Package IC Card Products
- CESC Main Module Package Products
- Shenzhen Hong Card Some Clients
- Zhenzhou Wanguang Smart Card Technology Products
- Fujian NewLand Computer Main Business Revenue, 2002-2009Q3
- Guangdong Tecsun Social Security Card Plans
- Hengbao Main Products Catalogue
- Hengbao Main Business Revenue and Growth Margin, 2004-2009Q3
- Hengbao Gross Profit Margin Change, 2004-2009Q3
- Hengbao Main Clients

- Global IC Card Shipment by Application Field and Type, 2006-2009
- Global Contactless IC Card Shipment by Application Field, 2008
- EMV Level 1 & EMV Level 2 Certificate Content
- EMV Certificate Measures by Party
- STM Net Income and Operation Profit, 2009
- Datang Microelectronics Overview
- Datang Microelectronics Performance in China's IC Industry
- Datang Microelectronics IC Development Course
- Datang Microelectronics IC Card Module Output Capacity
- Datang Microelectronics IC Card Market Position
- Datang Microelectronics IC Card Products and Types
- Tongfang Microelectronics IC Card Chip Products and Types
- Gemalto Revenue by Business, 2008-2009Q3

- Watchdata Main Products and Application Projects
- JingKing Technology Clients
- Eastcompeace Revenue by Business, 2007-2008
- Eastcompeace Gross Profit Margin by Business, 2007-2008
- Aisino Main Business Revenue and Gross Profit by Product, 2008
- Aisino Product Ratio and Gross Profit Margin Change by Type, 2008
- CESC Overview and Output Capacity
- NewLand Computer Main Business Revenue and Profit Margin by Product, 2009H1
- NewLand Computer Main Business Revenue by Region, 2009H1
- Guangdong Tecsun Social Security Users
- Guangdong Tecsun IC Card Product Chip Providers
- Chip Types for Guangdong Tecsun Contact IC Card Products
- Chip Types for Guangdong Tecsun Induction IC Card Products
- Guangdong Tecsun CPU Card Products Specification
- Oriencard Main Clients and Relevant Products

How to Buy

Product details			How to Order
	USD	File	By email: report@researchinchina.com
Single user	2,300	PDF	By fax: 86-10-82600829
Enterprisewide	3,400	PDF	By online: www.researchinchina.com
Publication date: Nov.2009			
For more information, call our office in Beijing, China: Tel: 86-10-82600828 Website: www.researchinchina.com			