



China IC Card/Smart Card Industry Report, 2010

Apr. 2011

This report

- ◆ **Analyzes global and China's IC card market.**
- ◆ **Focuses on the upstream industry of IC card market .**
- ◆ **Highlights the operation of IC Card Chip and IC Card Manufacturers in China.**

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Abstract

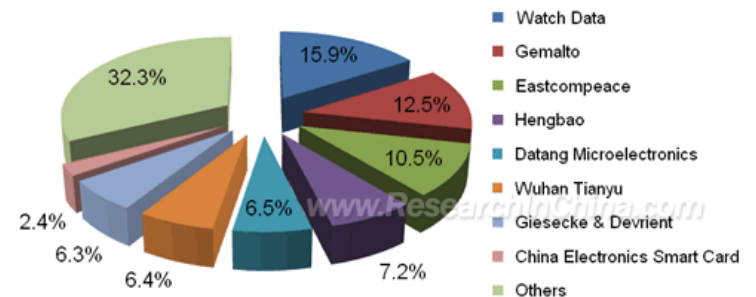
In 2010, in terms of the global IC card market, Asia-Pacific Region accounted for 71.5% of the market share, and China's IC card sales occupied one-third of the total global. Besides, the market share of IC card used in telecom sector exceeded 70%.

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 581million,7.2%).

Market Share of Key IC Card Manufacturers in China, 2010



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.

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