



China Financial POS terminal Industry Report, 2011-2012

Aug. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

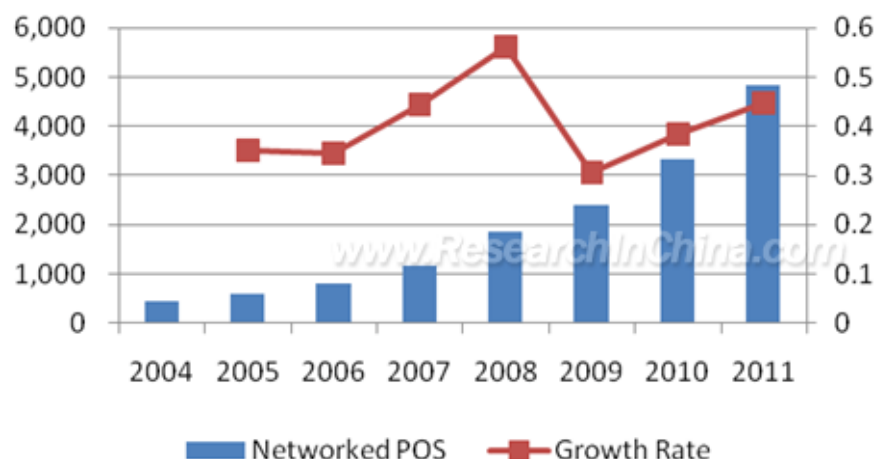
Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS (National Bureau of Statistics of China), China Customs and WIND Database etc.

Abstract

The increasingly robust domestic demand for bank card payment and the mushrooming number of merchants in the POS network boost the demand for financial POS terminals. As of the end of 2011, there had been 3.18 million merchants in the interbank payment network and 4.83 million networked POS terminals in China, up 997,100 merchants and 1.49 million machines over the end of 2010 respectively.



Source: People's Bank of China;

ResearchInChina < China Financial POS terminal Industry Report, 2011-2012>

Despite the fast-growing ownership of networked financial POS terminals, the Chinese financial POS terminal market has not been saturated. By the end of 2011, each POS terminal had corresponded to 672 bank cards, down 7.2% year-on-year and far lagging behind developed countries. In the long run, there is still enormous potential demand for POS terminals in China. In the short term, China's banking industry is accelerating the EMV migration from magnetic stripe card to IC card, making it possible for the demand from financial POS terminal inventory transformation to increase rapidly. Moreover, the EMV transformation is to improve the security of bank card payment, which will fuel the demand for financial POS terminals in the mid-to-long term.

The report resolves around the followings:

※ Status quo of Chinese financial POS terminal, including industry status, market size, operation model, competition characteristics and pattern, and development trends, etc.

※ Operation and development of key financial POS terminal companies in China and beyond, such as LANDI Commercial Equipment Co., Ltd., PAX Global Technology Limited, Shenzhen Xinguodu Technology Co., Ltd. and otherwise.

LANDI Commercial Equipment Co., Ltd., one of the largest financial POS vendors in China, was acquired by Ingenico, a global financial payment provider, in 2008. It sold more than 600,000 financial POS terminals in China in 2011.

PAX Global Technology Limited is a provider of electronic funds transfer at point-of-sale (EFT-POS) terminal solutions, occupying a large market share in Chinese market. In 2010, it was separated from Hi Sun Technology, and went public on the HKEx.

VeriFone is the world's largest provider of financial payment solutions. In 2010, it acquired financial payment businesses of Hypercom and Gemalto to secure its No.1 position in the market share worldwide. However, its market share in China has been shrinking in recent years due to the impact from local rivals.

Shenzhen Xinguodu Technology Co., Ltd. specializes in the R & D, production and sales of financial POS terminals. It has developed rapidly in recent years, with sales volume of financial POS terminals surging from 21,000 units in 2007 to 370,000 units in 2011.

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