

Smart card semiconductors report – 2017

Don Tait, Senior Analyst – July 2017

ACTUALS AND FORECAST

Frequency, time period

- 5-year annual forecast (2017 - 2021)
- Base year (2016)

Measures

- Unit shipments
- Revenues
- ASPs

Regions covered

- Americas
- Asia Pacific
- EMEA

By card type

- Memory
- Microcontroller

By vertical market

- SIM cards
- Payment & Banking
- Non-Mobile Communications
- Conditional Access / Pay TV
- Transportation
- eGovernment & Healthcare
- Retail & Loyalty
- Physical / Virtual Access
- Industrial M2M
- Consumer M2M
- Leisure

Market shares

- Smart card market shares for 2012 to 2016 (memory, microcontroller, unit shipments and revenues)
- 2016 market shares for SIM, eGovernment, transportation and payment

Foundry Analysis

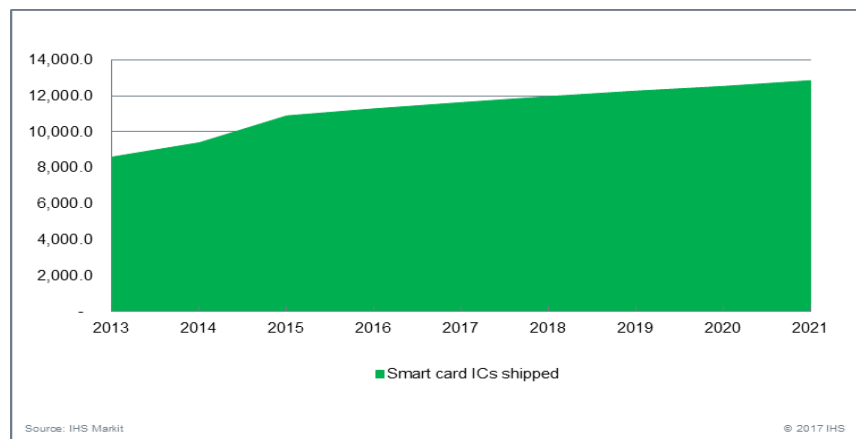
- This section adds some analysis on foundry suppliers. A lot of the foundry suppliers are part of the smart card supply chain and are involved in the manufacture of smart card semiconductors.
- Leading pure play foundry manufacturers and integrated device manufacturer (IDM) foundries are presented.

Which vertical sectors will drive growth in the next five years?

This report, which is the third dedicated report on the market for smart card semiconductors from IHS Markit. It is intended to assist companies active in the smart card semiconductors industry to understand changing market dynamics, and identify opportunities for growth. The intent of this report are to provide an overall summary of the market for smart card semiconductors. The base year is 2016, with initial estimates for 2017 and forecasts are given for each year to 2021.

The report includes detailed coverage by card IC type, vertical market, geographical region, examining the different opportunities and challenges for each. In addition, market shares of leading smart card IC suppliers are also presented from 2012 to 2016.

Figure 1 – Smart card ICs shipped, millions of units



Key Issues Addressed

- The speed with which China, the United States and India will adopt payment and banking smart cards.
- Will the market for SIM card ICs continue to stagnate? When will the eSIM be incorporated into the cellular handset?
- What are the market shares for leading suppliers of ICs in 2016?
- Will India's decision to scrap the 1000 and 500-rupee notes in November 2016 lead to a considerable boost in digital payments from 2017 to 2021?
- Who are the leading foundry suppliers that are involved in the smart card semiconductor production?

Applicable To

- IC Manufacturers
- Smart Card Manufacturers
- Financial Institutions
- Secure Printers
- System Integrators
- Specialists in Card Personalisation
- Manufacturers for Production Equipment for Cards and Readers
- Software Specialists and Application Developers
- MNOs
- foundry manufacturers
- End-users
- Mobile handset manufacturers

LEAD ANALYST

Don Tait – Senior Analyst, Digital Security

Don Tait is an IHS market analyst specializing in digital security area.

Don brings over eighteen years of market research experience to his role as senior analyst within the Digital Security Group. He specialises in the areas of payment and banking cards, fraud protection, SIM/eSIM cards, NFC, smart cards, mPOS and contactless credentials.

Don has presented findings from his reports at many events around the world. He has also written a number of feature articles for leading journals and publications. Don is based in the company's Wellingborough, UK office and may be contacted at don.tait@ihsmarkit.com

ABOUT IHS TECHNOLOGY DIGITAL SECURITY COVERAGE

Our coverage of digital security technology is built on the foundation of IHS Inc.'s deep background in smart technology and security, and the acquisition of IMS Research, who has a 21 year history covering smart credentials.

In addition to the "Smart Card Semiconductors Report – 2017" IHS Markit has also recently published a packaged 3 volume report includes digital security coverage including: SIM/eSIM, near field and proximity payments, fraud protection in payments, mPOS, and payment cards. Taken together, they offer deep insight into suppliers at different points of the supply chain, market data and forecasts, and different technologies within the industry. The digital security coverage comes with in depth access to our analysts and leverages IHS Markit's global capabilities and is complemented by adjacent research areas. Dedicated research teams including (semiconductors, mobile, wearables, access control, M2M, IOT and teardowns).

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