China Cards and Payments Market - Size, Share, Development, Growth and Forecast to 2020

Description: The study is based on extensive secondary and primary research. The various sources studied during the secondary research include websites of payment/banking/industry associations, industry regulatory bodies, banks, and card issuers. The primary research included in-depth interviews with industry experts and key opinion leaders.

China cards and payments market overview.

The card payments market in China grew at a healthy pace during the period 2012-2014, both in terms of volume and value. Some of the factors fueling the growth are payment infrastructure modernization, growing number of cards in circulation and the benefits offered to debit card and credit card holders by the card issuers. In terms of number of transactions, the total card market is expected to grow at a CAGR of 10.5% over the period 2015-2020.

The country's GDP per capita increased during the period 2012-2014, from CNY 39,446.6 in 2012 to CNY 46,507.5 in 2014. The GDP per capita is likely to grow further over the period 2015-2020, to reach CNY 71,440.4 in 2020. This growth is further expected to increase the cards usage over the forecast period. The consumer preference for cashless payments underpins the growth of card payments market in China.

The card issuers in the country have implemented different marketing strategies to encourage consumers to increase card payments rather than paying in cash. Common strategies deployed by banks are product discounts and reward points. The banks target various customer segments to offer card products such as retail and corporate clients and specific customer segments. Within credit card category, the banks target corporate customers and frequent travelers. In debit card category, the banks target public transport users, regular account holders, and frequent shoppers. Whereas in the charge card segment, the banks target high net-worth individuals and corporate customers.

Charge cards segment represents a small portion of the Chinese pay later card market. Average charge card transaction value increased from CNY 3,387.5 in 2012 to CNY 3,536.3 in 2014, at a CAGR of 2.2%. The average transaction value of charge card is anticipated to grow at a CAGR of 1.3% during the forecast period of 2015-2020.

The prepaid cards segment in terms of number of cards, recorded a growth of 20.7% during the period 2012 to 2014 and is anticipated to grow at a CAGR of 11.6% over the forecast period.

Report Coverage


Key players in the China cards and payments market:

Agricultural Bank of China
Industrial and Commercial Bank of China
Bank of China
China Construction bank
Bank of Communication

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