China Financial POS Terminal Industry Report, 2016-2020

Description: With the development of electronic information technology and Internet technology, emerging payments like online payment, mobile payment and fixed-line phone payment have produced certain shunting effect on e-payment in the traditional consumption areas as well as exerted an influence on POS terminal-based e-payments.

However, POS terminal manufacturers have taken the initiative to adapt to the market environment by constantly launching the products with Bluetooth, USB, NFC, QR code and other payment functions, so as to keep the sustained and steady development of the industry. By the end of 2015, 22.82 million units of POS terminals joined the UnionPay network in China, up 43.2% YoY.

After years of development, China's POS acquiring environment has been further improved. In 2015, each POS terminal corresponded to 240 bankcards; POS terminal ownership per 1,000 people rose to 16.66 units. But compared with major developed countries, the number of bank cards corresponding to a POS terminal in China is still high.

In the next few years, as emerging technologies are introduced, POS payments will be safer and more convenient, and the POS terminal market potential will be gradually released. By 2020, there will be 58.85 million POS terminals joining the UnionPay network in China, registering a CAGR of 20.9% during 2015-2020.

In terms of competition, due to strict certification system, POS terminal industry has high barriers to entry and thus a relatively high market concentration. Leading POS terminal brands in the Chinese market include LANDI Commercial Equipment, PAX Global, Xinguodu, New POS Technology, VeriFone, Newland and Justtide. In 2015, Fujian LANDI Commercial Equipment Co., Ltd sold roughly 3.2 million units, still ahead of its counterparts, followed by PAX Global Technology Limited with 2.05 million units and Shenzhen Xinguodu Technology Co., Ltd with 1.724 million units.

Fujian LANDI Commercial Equipment Co., Ltd is a wholly-owned subsidiary of the France-based Ingenico (100% shareholding in 2012). Relying on the latter's technical support, Fujian LANDI Commercial Equipment have shaped a complete product line covering financial payment terminals, mobile payment terminals as well as smart payment terminals. As of March 2016, the company sold a total of 10 million units of POS terminals. In May 2016, it launched a new generation of financial security POS terminal product named E8 Family.

The Hong Kong Stock Exchange-listed PAX Global Technology Limited mainly develops and sells EFT-POS products as well as provides related services, with a rich product line. The company has shipped more than 14 million units since its inception, ranking third worldwide in 2015. With respect to market development, it has been adhering to the business at home and abroad, boasting remarkable achievements in the United States, EMEA, Brazil, APAC, etc., which accounts for 55% of total revenue.

As a listed company in China's A share market, Shenzhen Xinguodu Technology Co., Ltd specializes in the R&D, production and sales of payment terminal products; featured products include desktop POS, wireless handheld POS, telephone POS, multimedia POS, etc. In 2015, as its new production line went into production, about 2.42 million units of POS terminals were produced each year.

In addition, the company has developed the "terminal + Internet + finance + big data" strategy, according to which, Internet payment technology will be used in the cloud computing and cloud storage technology based transaction data processing and storage capacity building, so as to provide customers and merchants with the one-stop integrated payment service solutions containing smart payment terminals, online and offline payment technology operation services.

The report provides the following:

- Overview of Chinese financial POS terminal market, embracing definition & classification, category of technology, industrial chain, policies and trends;

- Analysis on global payment industry, including card issuance, consumption, POS terminal shipments,
competition pattern, etc.;

- Analysis on Chinese POS terminal industry, including market size, competition, import & export;

- Analysis on Chinese payment industry, involving non-cash payment, bank card payment, third-party payment, etc.;

- Analysis on Chinese acquiring industry, such as general situation, policies, market size, competition pattern, etc.;

- Analysis on five overseas companies (Ingenico, Verifone, Cybernet, Bitel, First Data) and eight Chinese peers (Fujian LANDI Commercial Equipment, PAX Global Technology, Shenzhen Xinguodu Technology, Fujian Newland Computer, SZZT Electronics Shenzhen, New POS Technology, Castles Technology, and Sunyard System Engineering), including their profile, financial conditions, featured products, R&D status, distribution of production bases, technical features, etc.

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