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## Eurosmart figures on Smart cards global shipments in 2008 and 2009 forecast

The new Eurosmart market vision covers 2008 Smart card shipments and last forecast for 2009. This new issue integrates market knowledge from all of our members, analysis of general economical environment and market trends.

Eurosmart figures are presented in the tables below, with the corresponding comments:

### **2008 Global Shipments**

*(General Assembly, Brussels, 30 April 2009)*

2008	Global shipment in Million of Units (Mu) (As of 30 April 2009)	
	Memory	Microprocessor
Telecoms	380	3 200
Financial services – Retail – Loyalty	30	650
Government – Healthcare	250	140
Transport	160	30
Pay TV	-	100
Others (including corporate ID)	80	65
Total	900	4 185
<b>TOTAL</b>	<b>5 085</b>	

**2008 Secure Contactless market**

(General Assembly, Brussels, 30 April 2009)

<b>2008</b>	<b>Secure Memory Contactless (Mu)</b>	<b>Secure Microprocessor Contactless (Mu)</b>
<b>Financial services</b>	-	<b>100</b>
<b>Government – Healthcare</b>	<b>200</b>	<b>60</b>
<b>Transport</b>	<b>160</b>	<b>30</b>
<b>Others</b>	<b>50</b>	<b>30</b>
<b>TOTAL</b>	<b>410</b>	<b>220</b>

**2009 forecast**

(General Assembly, Brussels, 30 April 2009)

<b>2009</b>	<b>Memory (Mu)</b>		<b>Microprocessor (Mu)</b>	
	<b>In November 2008</b>	<b>Revision 30 April 2009</b>	<b>In November 2008</b>	<b>Revision 30 April 2009</b>
<b>Telecom</b>	<b>300</b>	<b>300</b>	<b>3 600</b>	Eurosmart foresees a range between 3 300 and 3 500 million units
<b>Financial services – Retail – Loyalty</b>	<b>30</b>	<b>30</b>	<b>700</b>	Eurosmart revised this figures upward to 730 million units
<b>Government – Healthcare</b>	<b>170</b>	<b>170</b>	<b>160</b>	<b>160</b>
<b>Transport</b>	<b>160</b>	<b>160</b>	<b>30</b>	<b>30</b>
<b>Pay TV</b>	-	-	<b>100</b>	<b>100</b>
<b>Others (including corporate ID)</b>	<b>80</b>	<b>80</b>	<b>70</b>	<b>70</b>
<b>Total</b>	<b>740</b>		<b>4 660</b>	

## **Comments**

### **Telecom:**

We anticipate a growth in volumes during FY2009 in the range of 3% to 9% compared to FY2008, i.e. between 3 300 Mu and 3 500 Mu.

Emerging markets continue to fuel the growth in volume with, for instance, millions of new subscribers in India and 3G deployments in Brazil and in China. Mature markets experience a new trend around SIM based assets: MNO SIM-only offers for post-paid subscriptions.

### **Financial Services:**

In addition to the EMV migration that continues to spread worldwide, we see a stronger growth than initially anticipated (11/2009) in Contactless payment cards (the 100 Million cards in the field should be achieved in the course of 2009).

Eurosmart members revised the 2009 forecast from 700 Mu to 730 Mu.

### **Government:**

The adoption of Travel Documents (Passports) is getting global (the 100 countries mark will be achieved in the course of 2009). Eurosmart maintains its conservative forecast issued in November 2008 even though this segment is the most likely to deliver upsides in the course of 2009.

## **What is Eurosmart?**

*Eurosmart is an international non-profit association located in Brussels and representing the Smart Security Industry for multi-sector applications. Founded in 1995, the association is committed to expanding the world's Smart Secure Devices market, developing Smart Security standards and continuously improving quality and security applications.*

*Members are manufacturers of smart cards, semiconductors, terminals, equipment for smart cards system integrators, application developers and issuers who work into dedicated working groups (communication, marketing, security, electronic identity, new form factors, and prospect emerging markets).*

*Members are largely involved in political and technical initiatives as well as research and development projects at the European and international levels.*

*Eurosmart is acknowledged as representing "the Voice of the Smart Security Industry".*

*Eurosmart members are: Atmel, Austriacard, FNMT-RCM, Gemalto, GIE Cartes Bancaires, Giesecke & Devrient, Infineon Technologies, Ingenico, Inside Contactless, MasterCard, NedCard, NXP Semiconductors, Oberthur Technologies, Precise Biometrics, Renesas, Sagem Orga, Samsung, Saqqarah International, STMicroelectronics, Toshiba, Zetes.*

*For more information, please visit [www.eurosmart.com](http://www.eurosmart.com)*

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