

Transportation IC Card Market in Japan: Key Research Findings 2017

◆ **Research Outline**

Yano Research Institute has conducted a study on the domestic transportation IC card market with the following conditions:

1. Research period: December, 2016 to November, 2017
2. Research target: Transportation IC Card Issuers, wicket machines providers, Slers, etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature research

<What is the Transportation IC Card Market? >

Transportation IC cards in this research indicate those IC cards that can be used as tickets for public transportation systems such as trains and buses.

◆ **Key Findings**

■ **Transportation IC Card Market Size in FY2016 Grew to 130 Million Pieces in Total**

The market size of transportation IC cards in FY2016, based on the total number of cards issued, has grown to about 130 million pieces. Now that these transportation IC cards are used not only for transportation but also as commercial electronic money which has developed into social infrastructure to support people's daily lives. In addition, 10 major transportation IC cards which had respectively developed at limited parts of the nation at first, have now been mutually available. Such improved convenience of transportation IC cards has increased the number of cards issued, which led to continuous expansion of the market.

■ **Mutual/One-Way Use of 10 Major IC Cards at Local Railways Left Undone, Urgently Needed is Low-Cost Infrastructure to be Built**

Many of local railway enterprises are developing their own services according to what the local users need, not confined to mere use of tickets and commutation passes. However, many of local railway companies decided not to go ahead to make their own IC cards, if any, available to mutually or one-sidedly use 10 major transportation IC cards, but to leave as they are, after taking into consideration of the costs of introduction, maintenance, and management. Nevertheless, when considering that transportation IC cards are supposed to be introduced nationwide in the future, what urgently needed is to construct a system that makes 10 major transportation IC cards to be used mutually and in one-way, at low cost.

■ **Market Forecast: Transportation IC Card Market Size Projected to Attain Total 220 Million Pieces of Cards by FY2021**

The transportation IC card market size, based on the total number of IC cards issued, is projected to attain 220 million pieces by FY2021 because of expansion of the areas used.

Henceforth, the market is projected to expand by the services to be developed for increasing

number of foreign customers visiting Japan, and by some attempts to revitalize local communities through wider acceptance of transportation IC cards aligned with local railways. Although utilization of smartphones in the field of transportation has not been in progress other than East Japan Railway Company, which made mobile Suica cards with Apple Pay installed available to be downloaded into smartphones, it is expected to widen into nationwide level and to grow into social infrastructure.

◆ **Report Format:**

Published Report: “Transportation IC Cards Market 2017”

Issued on: November 30, 2017

Language: Japanese

Format: 215 pages in A4 format

Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

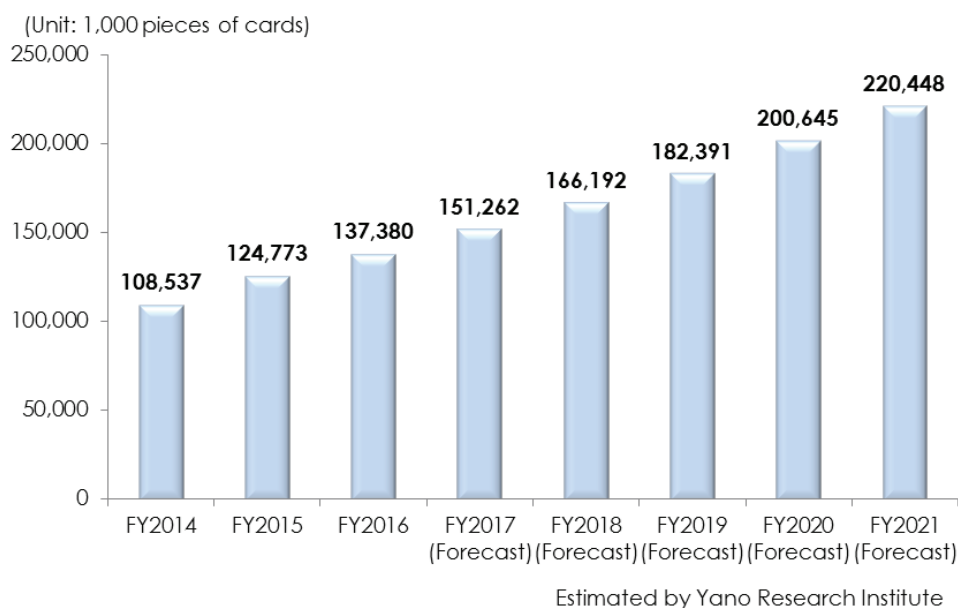
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■ **Figure 1: Forecast of Transportation IC Card Market Size (Total Number of Cards Issued)**



Notes:

1. The market size is based on the total number of transportation IC cards issued.