

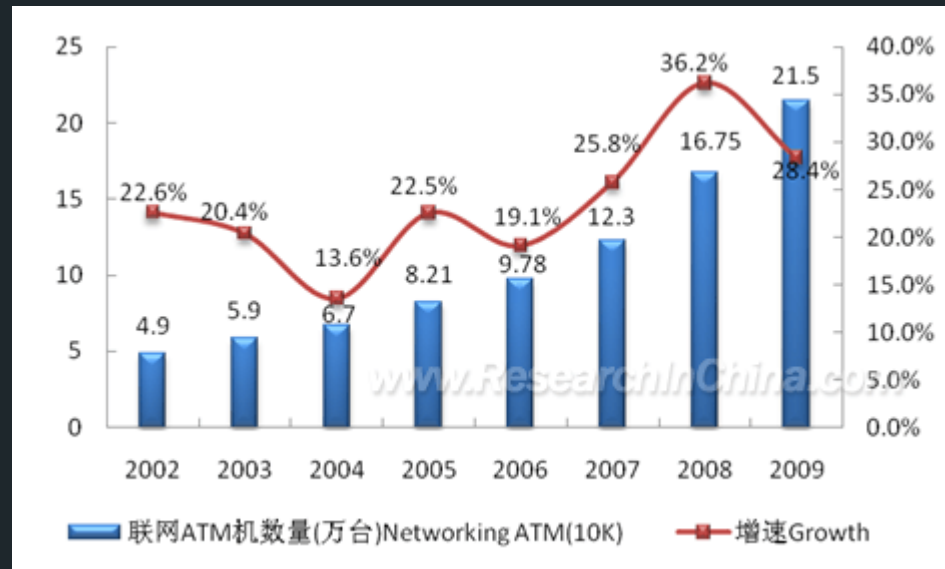
China ATM (Automatic Teller Machine) Industry Report, 2009-2010



At the end of 2009, ATM population in Chinese market rose to 244,700 sets from 192,000 sets in 2008, of which there were 214,900 sets of networking ATM incorporated in China UnionPay.

In China, Banks are the major ATM terminal clients. In 2009, the procurement and placement of ATMs made by such banks as ICBC, ABC, Bank of China, CCB and Bank of Communications and PSBC took the majority of Chinese market shares. In particular, CCB and ABC witnessed the largest number of ATMs in service, 36,000 sets and 41,044 sets respectively with the share of 16.75% and 19.1%.

Networking ATM Population and Growth Rate in China, 2002-2009



Source: People's Bank of China; ResearchInChina

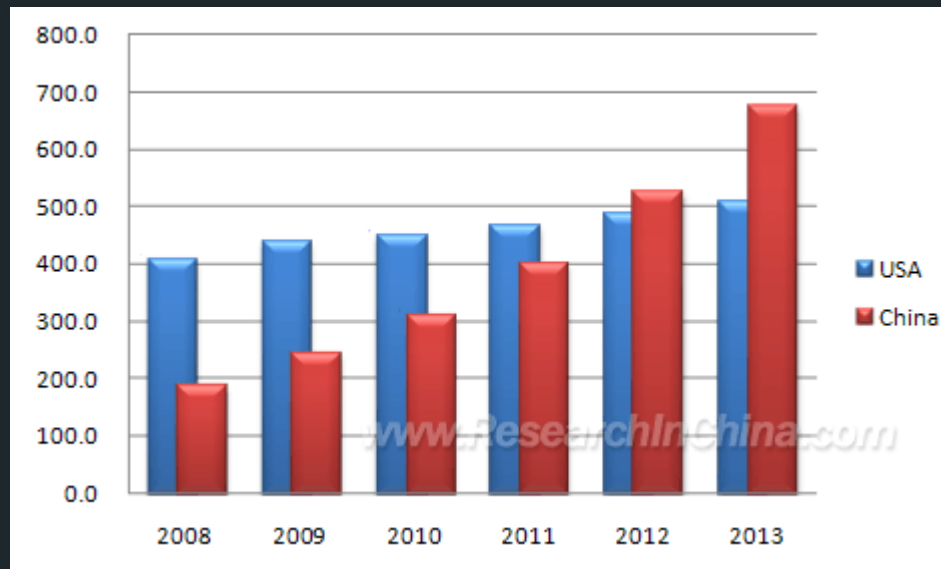
Before 2003, the global ATM market was monopolized by the three giants, namely, NCR, Diebold and Wincor Nixdorf. After 2003, Chinese ATM manufacturers sprung up and found its voice in the competition. In terms of the sales volume in real sense, the top 6 ATM manufacturers in 2009 were as follows: GRGBanking, NCR, Hitachi, Diebold, Yihua, Wincor-Nixdorf.

Based on the authoritative statistics from People's Bank of China, China Banking Association and China UnionPay, this report studies the status quo of ATM industry in China as well as the operation of leading ATM manufacturers around the world. Also, it analyzes the ATM procurement and placement of every bank, and predicts the investment opportunities and risks in ATM industry in the future.

ATM has surged in number for per million people in recent 5 years, soaring to 183 sets in 2009 from 73 sets in 2005. Nevertheless, it does not mean that the ATM market has already been saturated in China. In reality, China has not yet reached the world's average level and even less halved that of the developed countries in terms of ATM ownership for per million people. The ATM market of China is experiencing steady growth.

At present, China is the runner-up, only next to the USA as far as ATM population is concerned, and it is expected that China will surpass the US to top the list by 2012.

ATM Population in China and USA, 2008-2013 E (Unit: 1,000 sets)



Source: ResearchInChina

Table of Contents

- **1. Development of ATM Industry in China**
- 1.1 Definition and Classification of ATM
- 1.2 History of ATM Industry
- 1.2.1 ATM Industry Worldwide
- 1.2.2 ATM Industry In China
- 1.3 Status Quo of ATM Industry in China
- 1.3.1 Features of ATM Industry in China
- 1.3.2 Driving Factors for the Development of ATM Industry
- 1.3.3 Restrictive Factors to the Development of ATM Industry
- 1.4 ATM Upstream and Downstream Industries
- 1.4.1 Upstream Industry
- 1.4.2 Downstream Industry
- 1.5 Technical Characteristics and Development Tendency of ATM Industry
- 1.5.1 Technical Characteristics
- 1.5.2 Development Tendency
- 1.6 Policies Regarding China ATM Industry
- **2. Development of Global ATM Market**
- 2.1 Overview
- 2.2 Operation Model Analysis of Overseas ATM Market and References
- **3. ATM Market in China**
- 3.1 Market Scale
- 3.2 Competition Pattern
- 3.3 Operation
- 3.4 Development Trend
- **4. Investment of Banking Institutions, 2009-2010**
- 4.1 Bank Card Issuing and ATM Quantity, 2009
- 4.2 ATM Procurement and Placement of Banks, 2009-2010
- 4.2.1 ATM Procurement
- 4.2.2 ATM Placement
- 4.3 ATM Construction of Banks, 2009-2010
- 4.3.1 Industrial and Commercial Bank of China (ICBC)

- 4.3.2 China Construction Bank (CCB)
- 4.3.3 Agricultural Bank of China (ABC)
- 4.3.4 Bank of China (BOC)
- 4.3.5 Bank of Communications
- 4.3.6 Postal Savings Bank of China (PSBC)
- 4.3.7 China Merchants Bank (CMB)
- 4.3.8 China Everbright Bank
- 4.3.9 China CITIC Bank

- **5. Operating Situation of China's ATM Manufacturers**
 - 5.1 NCR
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Development
 - 5.2 DIEBOLD
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Development
 - 5.3 WINCOR NIXDORF
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Development

- 5.4 GRGBanking
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Development
- 5.5 Guangzhou KingTeller Technology Co.,Ltd.
- 5.6 Mercuries System Equipment (Nanjing) Ltd
- 5.7 Hitachi Financial Equipment System (Shenzhen) Co., Ltd.
- 5.8 FUJITSU
- 5.9 Beijing Hyosung Computer Tech Corp.
- 5.10 Automated Touchstone Machines Limited
 - 5.10.1 Profile
 - 5.10.2 Operation
- 5.11 Shenzhen YIHUA Computer Ltd.
- 5.12 Beijing LEAD Cash Solution Co., Ltd

- **6. Investment Opportunity of China's ATM Market**
 - 6.1 Risks
 - 6.2 Opportunities
 - 6.3 Investment Strategy

Selected Charts

- Major Manufacturers of Upstream Modules
- ATM Population Worldwide, 2007-2013E
- Regional Distribution of ATM Market Worldwide, 2008
- ATM Population in Top 3 ATM Countries Worldwide, 2010
- Networking ATM Population and Growth Rate of China, 2002-2009
- Overall ATM Population and New Increment of China, 2005-2009
- ATM Population for Per Million People and Growth Rate in China, 2005-2009
- ATM Population for Per Million People Worldwide, 2008
- Sales Share of China's ATM Market 2008-2009
- Profit Model of ATM's Collaborative Operation
- Profit Model of ATM's Financial Leasing Operation
- ATM Operators in China
- China's CRS Population and Growth, 2005-2009
- Proportion of CRS Population in Total ATM Population in China, 2005-2009
- Total Quantities of China's Bank Cards and Growth Rate, 2005-2009
- Transactions and Transacted Value of China's Bank Cards, 2006-2009
- Bank Card Quantity for Each ATM in China, 2001-2009
- Proportion of ATM Terminal Customers, 2008
- ATM Quantity in Service and Proportion of Each Bank, 2009
- ATM Quantity for Each Business Outlet of Each Bank, 2008-2009
- ICBC ATM Placement Quantity and Growth Rate, 2005-2009
- CCB ATM Placement Quantity and Growth Rate, 2006-2009
- ABC ATM Placement Quantity and Growth Rate, 2007-2009
- BOC's ATM Placement Quantity and Growth Rate, 2008-2009

- Bank of Communication's ATM Placement Quantity and Growth Rate, 2006-2007
- PSBC's ATM Placement Quantity and Growth Rate, 2006-2007
- China CITIC Bank's ATM Placement Quantity and Growth Rate, 2005-2009
- Sales Revenue of NCR, 2004-2009
- Sales Share of NCR in China's ATM Market, 2005-2009
- ATM Order Intake of NCR in Mainland China, 2006-2009
- Major ATM Products of NCR
- Sales Revenue and Growth Rate of Diebold Worldwide, 2005-2009
- Gross Profit and Gross Margin of Diebold, 2006-2009
- Sales Share of Diebold in China's ATM Market, 2006-2009
- Major Products of Diebold
- Sales Revenue and Growth Rate of Wincor Nixdorf, 2005-2009
- Gross Profit and Gross Margin of Wincor Nixdorf, 2006-2009
- Revenue Percentage of Wincor Nixdorf by Sector, 2005-2009
- Major ATM Products of Wincor Nixdorf
- Operating Income and Growth Rate of GRGBanking, 2004-2009
- ATM & AFC Gross Margins of GRGBanking, 2004-2009
- Gross Margin of GRGBanking, 2006-2010
- Market Shares of GRGBanking in China, 2006-2009
- ATM Sales Volume and Revenue of GRGBanking, 2005-2009
- Sales and Proportions of GRGBanking's Top 5 Clients, 2009
- Sales and Proportions of GRGBanking's Top 5 Clients, 2008
- Major ATM Products of GRGBanking
- Prime Operating Revenue and Growth Rate of Guangzhou KingTeller Technology, 2004-2009
- Operating Income Structure of Guangzhou KingTeller Technology by Product, 2007-2009

- ATM Operating Margin & Sales Gross Margin of Guangzhou KingTeller Technology, 2006-2009
- Guangzhou KingTeller Technology's Major Partners for Collaborative Operation
- Guangzhou KingTeller Technology's Major Partners for Financial Leasing
- Major Products of Guangzhou KingTeller Technology
- Big Events of Mercuries System Equipment (Nanjing) Ltd
- Operating Income and Operating Profit of Nanjing Mercuries Data Systems Limited, 2004-2008
- Export Delivery Value of Nanjing Mercuries Data Systems Limited, 2006-2008
- Major Products of Nanjing Mercuries Data Systems Limited
- Major Clients of Nanjing Mercuries Data Systems Limited
- Market Shares of Hitachi, 2007-2009
- Major ATM Products of Hitachi
- Technical Indices and Properties of Fujitsu's 8000 Series ATM
- Operating Income and Operating Profit of Beijing Hyosung Computer Tech Corp., 2007-2008
- Major ATM Products of Beijing Hyosung Computer Tech Corp.
- Operating Income and Operating Profit of Automated Touchstone Machines Limited, 2006-2008
- Major ATM Products of Shenzhen Automated Touchstone Machines Limited
- Major ATM Products of Shenzhen YIHUA Computer
- Major ATM Products of Beijing LEAD Cash Solution Co., Ltd
- Adjustment Details of ICBC's Major Charge Items
- ATM Ownership for Per Million People in Different Countries, 2009 (based on Tier-I cities in China)

How to Buy

Product details			How to Order
	USD	File	By email: report@researchinchina.com
Single user	1,800	PDF	By fax: 86-10-82601570
Enterprisewide	2,700	PDF	By online: www.researchinchina.com
Publication date: Aug. 2010			
For more information, call our office in Beijing, China:			
Tel: 86-10-82600828			
Website: www.researchinchina.com			