



China Automated Teller Machine (ATM) Industry Report, 2010

Apr. 2011

This report

- ◆ **Analyzes the Development of Global and China ATM Market .**
- ◆ **Focuses on ATM Investment of Banking Institutions in 2010.**
- ◆ **Highlights the operation of ATM Manufacturers in China.**

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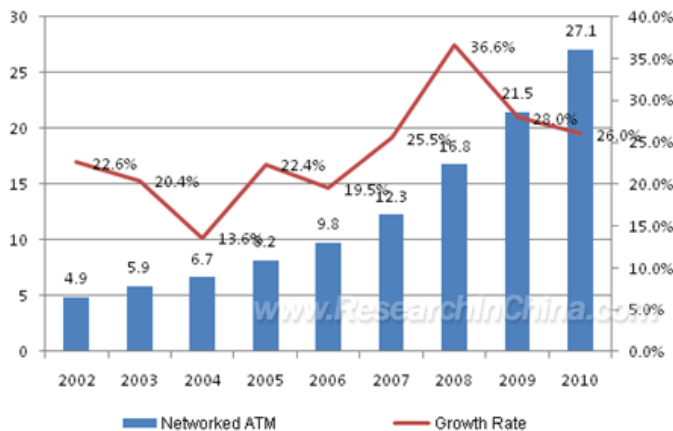
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Abstract

With the accelerated improvement in domestic consumption level, China's banking industry quickens its steps in expansion and innovation by intensifying the placement of self-service monetary equipment such as ATM, in an attempt to boost the development of networked ATM market. By the end of 2010, the networked ATM ownership nationwide increased by 56,100 sets than 2009 to 271,000 sets in 2010, with a 26.11% YOY rise.

China Networked ATM Ownership and Growth Rate, 2002-2010
(10,000 sets)



Source: The People's Bank of China; ResearchInChina

China's sharp increase in ATM ownership does not mean that the ATM market has already been saturated. Instead, the ATM market of China is on its way for sustained and stable development. Presently, in China, the ATM ownership realizes 202 sets per million people, much lower than the international average level and even lower than half of the level of developed countries. Moreover, ATMs are available only in mid-and big-cities and counties or some developed villages and towns across China, and have not spread over every community in cities and every village in rural regions yet.

In addition, an ATM serves 8,900 bankcards on average in China, outnumbering the global standard of 4,000 ones. This indicates robust demand of China's ATM market and prosperous market potential.

In terms of market pattern, foreign companies including NCR, Hitachi, Diebold and Wincor Nixdorf still dominate the ATM market of China, with the combined market share exceeding 52%. However, the market occupancy of homegrown brands represented by GRG Banking Equipment, Guangzhou KingTeller Technology and Shenzhen YIHUA has increased rapidly since 2006, and reached around 40% in 2010.

GRG Banking Equipment ranks the first place among its homegrown equivalents in terms of ATM capacity and sales scale. And its ATM products with independent core intellectual property rights have been gradually recognized by the market.

NCR is a world-renowned ATM and ATM module provider, the products of which have long been occupying considerable market share in China. Impacted by its fast-growing Chinese counterparts, NCR has seen consecutive years of decline in its market share.

Diebold has long been a front-runner in terms of the global ATM market occupancy. Before 2008, it remained the champion in Chinese market, but has seen gradual slump in its market share in recent years. Nevertheless, it develops well in security and ATM service areas.

With nearly three decades of ATM production experience, Hitachi has developed by leaps and bounds in China. In 2010, it became the runner-up in Chinese market.

YIHUA, with the technical support from Japan-based OKI, specializes in the production and sales of cash recycle system (CRS). In 2010, YIHUA jumped to the fourth place in the Chinese market in terms of CRS output and sales volume.

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