



China Automatic Teller Machine Industry Report, 2013-2016

Dec. 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In 2013, Chinese ATM market characterizes the followings:

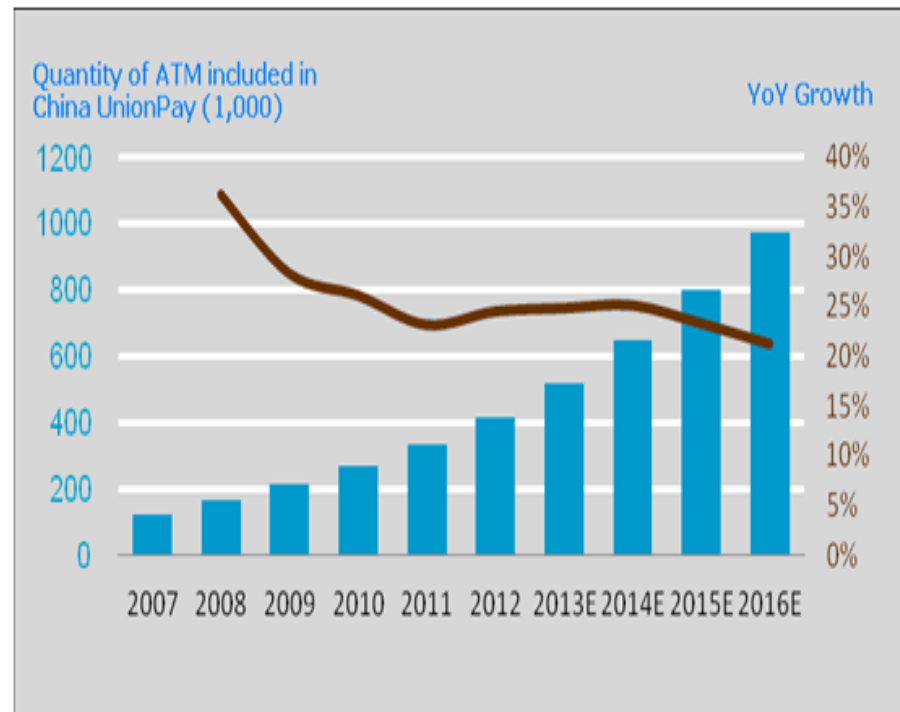
First, China becomes the country with the most quantity of ATM, surpassing the United States.

By H1 2013, 465,600 sets of ATM had been included in China UnionPay, exceeding the United States (445,000 sets) to rank first in the world. However, by quantity of ATM per million of persons, China (307 sets, 2012-year) still lagged behind western Europe (786 sets, 2012) and the United States (1,376 sets, 2012).

Second, the purchase volume of Cash Recycling System (CRS) jumps quickly and a small quantity of Video Teller Machine (VTM) is launched into the market.

In 2007-2012, the purchase volume of Cash Recycling System (CRS) in China rises from 12,000 sets to 61,000 sets at the CAGR of 38.4%, and its share in the ATM purchase volume climbed from 35.5% to 60.6%. Since China Guangfa Bank (CGB) launched the first set of VTM in July 2012, Bank of Communications, Bank of China, China Guangfa Bank, China Minsheng Banking Corp. Ltd., China Everbright Bank and other banks have rolled out VTM in the market in small scale.

Quantity of ATM included in China UnionPay and YoY Growth, 2007-2016



Source: People's Bank of China; ResearchInChina

Third, Industrial and Commercial Bank of China, Agricultural Bank of China, Bank of China, China Construction Bank and Bank of Communications are still major ATM clients.

In 2012, state-owned commercial banks, joint-stock banks, Postal Savings Bank of China, urban commercial banks, agricultural commercial banks and other financial institutions bought 100,700 ATMs cumulatively, up 34.63% from a year earlier. State-owned commercial banks -- Industrial and Commercial Bank of China, Agricultural Bank of China, Bank of China, China Construction Bank and Bank of Communications were still major ATM purchasers and introduced 64,500 of ATMs totally, equivalent to 64.05% of the total annual ATM purchase volume, close to 62.27% in 2011. By virtue of scale advantages, Industrial and Commercial Bank of China, Agricultural Bank of China, Bank of China, China Construction Bank and Bank of Communications still acted as the largest clients in the ATM market.

Fourth, China's ATM CR5 market concentration degree declines.

In 2012, GRG, Hitachi, Yihua, Diebod and NCR ranked the top five in the Chinese market by ATM sales volume, with the total market share of 72.5%, lower than 78.1% in 2010.

The report covers the followings:

- ✘ Overview of ATM (including definition, classification, industry chain and operating modes)
- ✘ Global ATM market (embracing market size, regional competition, corporate competition, and development prospect)
- ✘ Chinese ATM market (covering status quo, market size, competition patterns, export and import, market segments and development prospect)
- ✘ Operation of Chinese bank card business and ATM of banks (number of issued bank cards as well as market share, quantity of ATM as well as market share)
- ✘ Global and Chinese ATM enterprises (NCR, Diebod, Wincor Nixdorf, GRG, etc.) (including revenue, net income, revenue structure, gross margin, R & D expenditure, ATM sales volume, strategic planning)

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