



China Automated Teller Machine (ATM) Industry Report, 2014-2018

Jan. 2015

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

Global and Chinese ATM markets (2013-2014) present characteristics and trends as follows:

(1) By country, China, India, Indonesia, Pakistan, Nigeria, the Philippines and other countries with low-density ATM installation will be new engines for global ATM growth.

Among them, China as the world's largest ATM market has seen 583,700 ATMs joined China's UnionPay network by the end of the third quarter of 2014, an increase of 63,700 units from the end of 2013 and 99,700 units (up 20.6%) year on year. In the future, the development of rural finance as well as the construction of small outlets such as "community bank" and "financial convenience store" in China will spur the demand for ATM and VTM.

International ATM manufacturers are now accelerating market layout in India and other countries besides maintaining their market share in China. For example, Hitachi acquired Prizm Payment Services Pvt Ltd – an Indian ATM and POS payment solutions provider in March 2014; OKI announced the founding of a sales company in India to manage the local market in April 2014, and prior to that its sales in the Indian market were shouldered by local agents; NCR's second factory in India will come into use in March 2015.

(2) Seen from the ATM function, more and more ATMs will transform into multimedia digital information kiosks and community-based information convenience service stations.

Currently, international manufacturers are continuing to expand ATM function modules, e.g. OKI developed a cash recycling system ATM-Recycler G7 capable of dealing with multi-currencies at the same time and with additional functions of coin payment, non-contact IC card reader/writer, bar code reader, etc. in November 2009; NCR launched a series of new products or solutions in Taiwan in March 2014, mainly involving VTM, cardless withdrawal, ATM parcel service, etc.

(3) In terms of technology application, biometric identification technology (including finger vein recognition, palm vein recognition, face recognition, fingerprint recognition, and iris recognition) will see further integrated application in ATM.

So far, Hitachi, OKI, NCR, Diebold, Wincor Nixdorf, GRG Banking, KingTeller, etc. have introduced ATM with biometric identification, among them, Hitachi boasts strong research and development power in ATM finger vein authentication technology, with commercial production and sales of such ATM in 2005; GRG Banking's H68N ATM with palm vein authentication has been adopted in Turkey.

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ATMs with biometric identification are more used in Japan, Brazil, South Korea, India, Turkey and Vietnam from a global perspective, followed by a quick popularization in other countries within the set timetable.

(4) Cardless withdrawal will become popular as concerns withdrawal method.

Cardless withdrawal is achieved through mobile phone/ATM QR code scanner or ATM NFC sensor. The ATM withdrawal via mobile phone can shorten the time of withdrawal and reduce the hidden trouble of bank card information interception (bootlegging), expected to be popularized in the future. ATM manufacturers with cardless withdrawal business include NCR, Diebold, Wincor Nixdorf, Yihua Computer, and KingTeller.

(5) Domestic and foreign manufacturers are speeding up layout of financial IT services in the perspective of enterprise's new business layout.

Foreign manufacturers have constantly perfected layout of financial IT services by dint of capital advantage. For instance, NCR acquired Alaric Systems in December 2013 for layout of safety payment and then Digital Insight in January 2014 for layout of online banking or mobile banking; Diebold announced its acquisition of A/S (Denmark) in July 2014 for layout of security payments.

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