



# China Automatic Teller Machine (ATM) Industry Report, 2019-2025

May 2019

## **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

Since 1985 when the first ATM was deployed in China, ATM installation has been on the rise. By the end of 2018, the ownership of bank self-service equipment had reached 1,110,800 units in China, presenting a year-on-year upsurge of 15.6%, with 7.99 units per 10,000 people, up 15.03% over the previous year. As estimated, the ownership will exceed 2.1 million units in 2025.

In 2018, the statistical standards for bank self-service equipment ownership changed, with intelligent teller machines added, which helped explain the 12 percentage points higher in the ownership growth than in 2017. Noticeably, the self-service equipment ownership suffered a decline for the first time in 2018: in the fourth quarter, ATM ownership stood at 1,110,800 units, a reduction of 17,700 units from the third quarter of the year, from which it can be seen that banks need more intelligent machines in the wave of FinTech.



As online and mobile payments take ground, cash payment is being shocked. In 2016, China's ATM ownership growth plummeted to 6.6% along with the first negative growth in cash withdrawal with bank cards, before a nose dive to a mere 3.9% in 2017. In 2018, ATM ownership went down for the first time. Banks urgently need to address the rising costs such as outlet rental and staff wages as well as the challenges posed by internet banking, and intelligent equipment & information system serve as a solution to lower cost and higher efficiency. By the end of 2018, there had been 228,600 banking outlets in China, first less than in the previous quarter; a record of 88.67% transactions on average had not been handled on bank counter. Against the backdrop, new types of self-service equipment, typically virtual teller machine (VTM) and smart teller machine (STM) open up a new market.

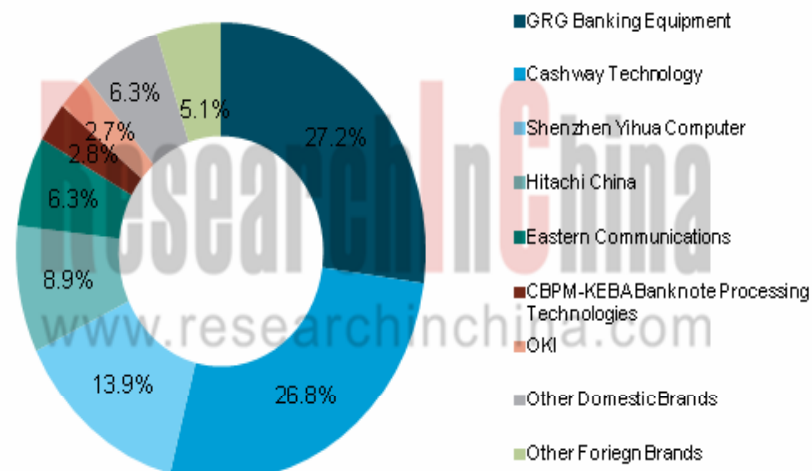
In 2019, VTM and STM are becoming the mainstream ATM, both providing comprehensive services like public-to-private transfer, domestic and foreign transactions, domestic and foreign currencies and financial management. Versatile functions and high cost-performance ratio will ensure the leading role of VTM and STM in future self-service financial service market. Currently, major banks in China have begun to deploy such equipment, such as China Construction Bank having launched a total of virtually 50,000 VTMs/STMs as of 2018.

In China, bank self-service terminals will be more deployed outside banks to form a network and offer more functions to meet the needs of rural urbanization as they pack more emerging technologies. The way of expansion in the form of network outside banks will hold the trend and help to solve the problem of uneven distribution of machines between regions, between urban and rural areas or between different places in the same area. More self-service terminals will be needed accordingly.

**Competitive pattern:**

NCR, Diebod and WincorNixdorf are the top three players in the world, with a combined 80% share of the global market. Among dozens of ATM manufacturers in China, domestic brands include GRG Banking Equipment Co., Ltd., Shenzhen Yihua Computer Co., Ltd., Eastern Communications Co., Ltd. (Eastcom), Guangzhou KingTeller Technology Co., Ltd. and Cashway Technology Co., Ltd.; European and American brands include NCR, Diebod and WincorNixdorf; Japanese and Korean brands cover Hitachi, OKI and Hyosung.

**Market Shares of Bank Cash Self-service Equipment Manufacturers in China, 2018**



Source: China Automatic Teller Machine (ATM) Industry Report, 2019-2025

GRG Banking Equipment Co., Ltd. started with production of ATMs, and had topped the list of ATM sales in China for ten consecutive years from 2008 to 2017, with a market share of nearly 30%. In 2018, the company registered RMB5,459 million in revenue, soaring 24.53% from a year earlier, which was credited to more earnings from its intelligent security and intelligent finance operations.

Guangzhou KingTeller Technology Co., Ltd. is engaged in sales and operation of ATM products. In 2018, its revenue and net income attributable to the shareholders of the listed company plunged by 32.77% and 798.93% to RMB383 million and negatively RMB96.22 million versus 2017, respectively. The worse performance resulted from less demand.

The report highlights the following:

- ATM industry (definition, classification, industry chain, market characteristics, business model, industry policy, technology trend, etc.);
- Global ATM market (size, competitive pattern, structure, prospect, etc.);
- China ATM market (size, competitive pattern, import & export, structure, prospect, etc.);
- China ATM market segments (CRS, VTM, ATM, STM, etc.);
- Bank card market (quantity of cards issued, IC card development, etc.);
- 11 ATM manufacturers (NCR, Diebold, Wincor Nixdorf, Hitachi, OKI, GRG Banking, KingTeller, Eastcom, DCITS and Shenzhen Yihua Computer) (profile, operation, revenue structure, R&D costs, ATM business, development strategy, etc.).

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