

# Asia Pacific ATM Industry Outlook to 2015

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## Abstracts

### Executive summary

The report titled “Asia Pacific ATM Market Outlook to 2015” provides a comprehensive analysis on the total number of ATM terminals installed, total number of ATM cards issued, total number of ATM cash withdrawal transactions, total ATM cash withdrawals, top banks in respective countries in terms of total ATM holdings in that country. The report also discusses major trends and developments in the ATM market, company profile of top hardware and software players, government regulations in respective countries and several alternative payment methods (credit cards, debit cards and POS terminals) across various countries.

The future projections included in the report provide an insight on the prospects in the Asia Pacific and country-wise ATM market. The report covers a detailed coverage on Asia Pacific region encompassing China, India, Australia, Japan and Singapore.

### Asia Pacific

Asia Pacific has been the fastest growing region among the other regions in terms of the total number of ATM terminals installed and total ATM cards issued. Despite the rapid growth in the installations of ATMs in Asia–Pacific, the ATM density per capita is still relatively low in several regions, projecting a great scope for further development of the market in the region. The prospects of the ATM market in Asia Pacific are not only bright in terms of ATM numbers, but also the services offered and technology used.

The total number of ATM terminals installed in Asia Pacific has grown over the period at a 5 year CAGR of ~% from ~ thousand ATMS in 2006 to ~ thousand ATMs in 2011. The total number of ATM cards issued in Asia Pacific has increased from ~ million in 2006 to ~ million in 2010 at a CAGR of ~%.

China is the largest country in Asia Pacific in terms of the total number of ATM terminals installed in the region. The market share of China has considerably increased from ~% in 2006 to ~% in 2011. India is the fastest growing ATM market in the Asia Pacific region with total number of ATM terminals installed increasing from 2006 to 2010 at a CAGR of ~%. Australia showcased a decline in market share from ~% in 2006 to ~% in 2011. Japan portrayed significant decline in the market share from ~% in 2006 to ~% in 2011. The market share of Japan is expected to decrease further due to the rapid growth of India and China's market.

## **China**

The ATM market in China is continuously expanding but has not reached the saturation level as yet. The market is expected to witness persistent growth in the coming years. The ATM network is more concentrated in the major cities and urbanized areas as compared to the smaller towns.

The statistic highlights the huge demand and usage of ATM in China. In terms of market share, foreign companies including NCR, Hitachi, Diebold and Wincor Nixdorf still dominate the ATM market of China, with the combined market share exceeding ~%. However, the market occupancy of home grown brands represented by GRG Banking Equipment, Guangzhou KingTeller Technology and Shenzhen YIHUA has increased rapidly since 2006, and reached around ~% in 2010.

## **India**

The State Bank of India is the largest bank in India in terms of revenue, assets, market capitalization and also in terms of the total number of ATMs installed in the country. The bank held ATM market share of ~% from over ~ ATMs installed throughout the country.

Axis bank is the second largest bank in India in terms of the total number of ATM terminals installed in this country with a market share of ~% from over ~ ATMs deployed in the country. As of March 31, 2012, the bank had a network of over ~ branches all over the country.

ICICI bank is the third largest bank in terms of the total number of ATMs installed in India. This bank had a network of ~ branches and ~ ATMs in 2011.

## **Australia**

The Australian finance system is comprised of three broad groups of institutions namely, The Australian Payments Clearing Association (APCA), EFTPOS Payments Australia Limited (EPAL). The APCA is responsible for the development and maintenance of industry rules and procedures for clearing and settlement in the major payments clearing systems.

Debit cards are used in Australia in various ATM's and EFTPOS terminals. They are being used to deposit cash in customers' accounts.

The total number of credit cards in Australia grew gradually over the period from ~ million in 2006 to ~ million in 2010. The country witnessed growth in the number of debit cards from ~ million in 2006 to ~ million in 2010 at a 4 year CAGR of ~%.

## **Japan**

The total number of ATM terminals installed in Japan showcased growth at a CAGR of ~% from ~ thousand in 2006 to ~ thousand in 2011. The total ATM cards issues in Japan decreased from ~ million in 2006 to ~ million in 2011. This decrease can be attributed to the credit crunch in 2009 resulting in people spending more conservatively and banks maintaining a cash reserve with them rather than spending on installation of new ATMs

## **Singapore**

In Singapore, ATMs are another means of allowing bank customer to perform basic transactions without the need of visiting a bank branch. Other than cash withdrawals and deposits, ATMs can also be used by customers to ATMs to apply for initial public offerings (IPOs), transfer funds to third parties, pay bills and reload their MPSVFs (multipurpose stored value facility). NETS OCBCUOB network, the DBS-POSB network and the ATM 5 network are the three key ATM networks in Singapore.

## **Key Topics Covered in the Report:**

Asia Pacific region and country-wise market size by total ATM terminals installed, total ATM cash withdrawal transactions and total ATM cash withdrawn

Market segmentation on the basis of ATM terminals in countries such as China, India, Australia, Japan and Singapore

Total POS terminals in Asia Pacific

Total credit cards and debit cards issued in respective countries

Top banks in respective countries on the basis of total ATM holdings in that country.

Trends and Development of the ATM Industry.

ATM frauds

Threats to the ATM market from some alternative payment methods

Company profile of the top ATM hardware and software manufacturers

Future outlook and projections of total ATM terminals installed and total ATM cards issued.

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