

Europe ATM Industry Outlook to 2015

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Abstracts

Executive summary

The report titled “Europe 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 Europe and country-wise ATM market. The report covers a detailed coverage on Europe region encompassing the UK, Germany, Spain, France and Italy.

Europe

Europe is also a matured market for the ATM industry offering less scope for the growth of ATM usage in the region. Recently, numerous financial institutions are migrating to the EMV smart chip technology. ATM deployers are also installing additional security measures and modern technology to stop ATM cash frauds and physical attacks in the region.

ATM linked fraud incidents have been increasing over the years and showed a ~% increase in Europe from 2010. The considerable increase in the number of fraud incidents in Europe can be attributed to the rise in cash trapping incidents which accounted for ~% of the total ATM fraud incidents in the region. There were ~ cash trapping incidents in 2011 which grew by a remarkable ~% from mere ~incidents in

2010

Europe ATM industry has exhibited marginal growth over the period regarding the number of ATMs installed. The total count of ATMs installed in Europe grew from ~ thousand in 2006 to ~ thousand in 2011. The number of ATMs installed in 2010 showcased a marginal decrease of ~% from ~ thousand ATMs installed in 2009. The number of ATM cards issued in Europe presented a growth at a 5 year CAGR of ~% to record ~ billion issued cards in 2011.

The UK

The total ATM cash withdrawal transactions in the UK grew consistently till 2009 and then declined by ~% in 2010 to record ~ billion transactions that year and by ~% in 2011 to further decline to ~ billion transactions. The total cash withdrawn over the years showed growth in 2007 and 2010. The total cash withdrawn in the UK declined in 2008 and 2009 due to the economic crisis which resulted in conservative approach to spending.

Germany

UniCredit holds ~% market share in Germany in terms of the total number of ATMs installed in the country. This bank accounts for around ~ATMs around the country. UniCredit is a major European financial institution based in Italy. This banking institution operates in around ~ countries. Deutsche Bank accounts for around ~ ATMs installed in Germany commanding ~% share of the total market. This bank operates in over 70 countries.

Spain

There are two payments system in Spain, Banco de Espana Settlement Service (Servicio de Liquidacion del Banco de Espana; SLBE) for the processing of large-value payments, and the National Electronic Clearing System (Sistema Nacional de Compensacion Electronica; SNCE) for retail payments. The SLBE introduced and managed by the Banco de Espana, began its operation in 1996 and now performs various functions such as settling international transfers, and domestic transfers and payments arising from market activities and multilateral net systems.

France

The total number of ATM terminals installed and ATM cards issued in France have showcased positive growth over the period. The total ATM terminals installed in France showcased growth at a 5 year CAGR of ~% to records ~ thousand ATM terminals in 2011. The total number of ATM cards issued in the country increased from ~ million in 2006 to ~ million in 2011 at a CAGR of ~%.

Italy

The total number of credit cards issued in Italy grew from ~ million in 2006 to ~ million in 2010 while the total number of debit cards grew in the country at a 4 year CAGR of ~% from ~ million cards in 2006 to ~ million cards in 2010.

Key Topics Covered in the Report:

Europe 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 the UK, Germany, Spain, France and Italy

Total POS terminals in Europe

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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