

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 The total cash withdrawn over the years showed growth in 2007 and 2010.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.

Contents

1. GLOBAL ATM MARKET INTRODUCTION AND MARKET SIZE, 2006-2011

2. EUROPE ATM MARKET INTRODUCTION

3. EUROPE ATM MARKET SIZE, 2006-2011

4. EUROPE POS TERMINALS, 2006-2011

5. EUROPE ATM MARKET SEGMENTATION, 2006-2011

5.1. The UK

5.1.1. The UK ATM Market Introduction

5.1.2. ATM Terminals Installed and ATM Cards Issued in The UK, 2006-2011

5.1.3. ATM Cash Withdrawals, 2006-2011

5.1.4. Total Number of Credit and Debit Cards Issued in the UK, 2006-2010

5.1.5. Competitive Landscape of MAjor Banks in the UK, 2010

5.1.6. The UK ATM Market Future Projections, 2012-2015

5.2. Germany

5.2.1. Germany ATM Market Introduction

Interbank Networks

5.2.2. ATM Terminals Installed and ATM Cards Issued in Germany, 2006-2011

5.2.3. ATM Cash Withdrawals, 2006-2011

5.2.4. Total Number of Credit and Debit Cards Issued in Germany, 2006-2010

5.2.5. Competitive Landscape of Major Banks in Germany, 2010

5.2.6. Germany ATM Market Future Projections, 2012-2015

5.3. Spain

5.3.1. Spain ATM Market Introduction

5.3.2. ATM Terminals Installed and ATM Cards Issued in Spain, 2006-2011

5.3.3. ATM Cash Withdrawals, 2006-2011

5.3.4. Spain ATM Market Future Projections, 2012-2015

5.4. France

5.4.1. France ATM Market Introduction

5.4.2. ATM Terminals Installed and ATM Cards Issued in France, 2006-2011

5.4.3. ATM Cash Withdrawals, 2006-2011

5.4.4. Total Number of Credit and Debit Cards Issued in France, 2006-2010

5.4.5. Competitive Landscape of Major Banks in France, 2010

5.4.6. France ATM Market Future Projections, 2012-2015

5.5. Italy

5.5.1. Italy ATM Market Introduction

5.5.2. ATM Terminals Installed and ATM Cards Issued in Italy, 2006-2011

5.5.3. ATM Cash Withdrawals, 2006-2011

5.5.4. Total Number of Credit and Debit Cards Issued in Italy, 2006-2010

5.5.5. Italy ATM Market Future Projections, 2012-2015

6. ATM MARKET NEW TRENDS AND DEVELOPMENTS

Rising Popularity of Video Banking

Multivendor software still a key issue for deployers

New and Improved ATM Applications and Context Aware Tools

The Safety of ATM and Revolution in Branch Network

EMV

Biometric Technology

7. ATM FRAUDS

ATM Linked Fraud Incidents in Europe

8. THREATS TO THE ATM MARKET

9. SWOT ANALYSIS OF THE EUROPE ATM MARKET

10. EUROPE ATM MARKET FUTURE PROJECTIONS, 2012-2015

11. COMPANY PROFILES OF MAJOR ATM PLAYERS

11.1. NCR Corporation

11.1.1. Company overview

11.1.2. Financial Performance

11.2. Wincor Nixdorf

11.2.1. Company overview

11.2.2. Financial Performance

11.3. Diebold

11.3.1. Company Overview

11.3.2. Financial Performance

11.4. KAL

11.4.1. Company overview

12. MACRO ECONOMIC INDICATORS: CURRENT AND PROJECTIONS, 2006-2015

- 12.1. Population
- 12.2. Urban Population
- 12.3. Banknotes and Coins in Circulation Outside Banks
- 12.4. ATM Cards Issued
- 12.5. Number of Banks
- 12.6. Number of bank Branches

13. APPENDIX

- 13.1. Market Definitions
- 13.2. Abbreviations
- 13.3. Research Methodology
 - Data Collection Methods
 - Approach
 - Variables (Dependent and Independent)
 - Multi Factor Based Sensitivity Model
 - Final Conclusion
- 13.4. Disclaimer

List Of Figures

LIST OF FIGURES

Figure 1: Total number of ATM Terminals Installed in the World and Europe, in Thousands, 2006 – 2011

Figure 2: ATM Terminals Installed and ATM Cards Issued in Europe, in Thousands and Million respectively, 2006 – 2011

Figure 3: Europe ATM Market Segmentation by Country on the Basis of ATMs installed, in Percentage, 2006 – 2011

Figure 4: ATM Terminals Installed and ATM Cards Issued in the UK, in Thousands and Million respectively, 2006 – 2011

Figure 5: ATM Cash Withdrawal Transactions inside the UK in Volume and Value from Cards Issued Inside the Country, 2006-2011

Figure 6: Total Number of Credit and Debit Cards Issued in the UK, in Millions, 2006 – 2010

Figure 7: Market Share of ATM Holdings by major Banks in the UK, on the Basis of Number of ATMs Installed in Percentage, 2010

Figure 8: The UK ATM Market Future Projections on the Basis of ATM Terminals Installed and ATM Cards Issued in the UK, in Thousands and Million respectively, 2012 – 2015

Figure 9: ATM Terminals Installed and ATM Cards Issued in Germany, in Thousands and Million respectively, 2006 – 2011

Figure 10: ATM Cash Withdrawal Transactions inside Germany in Volume and Value from Cards Issued Inside Germany, 2006-2011

Figure 11: ATM Cash Withdrawal Transactions outside Germany in Volume and Value from Cards Issued Inside Germany, 2006-2011

Figure 12: Total Number of Credit and Debit Cards Issued in Germany, in Millions, 2006– 2010

Figure 13: ATM Terminals Installed and ATM Cards Issued in Germany, in Thousands and Million respectively, 2012 – 2015

Figure 14: ATM Terminals Installed and ATM Cards Issued in Spain, in Thousands and Million respectively, 2006 – 2011

Figure 15: ATM Cash Withdrawal Transactions inside Spain in Volume and Value from Cards Issued Inside the Country, 2006-2011

Figure 16: ATM Cash Withdrawal Transactions inside Spain in Volume and Value from Cards Issued Outside the Country, 2006-2011

Figure 17: ATM Cash Withdrawal Transactions outside Spain in Volume and Value from Cards Issued Inside the Country, 2006-2011

Figure 18: Spain ATM market Future Projections on the Basis of ATM Terminals Installed in Thousands and ATM Cards Issued in Spain in Million 2012 – 2015

Figure 19: ATM Terminals Installed and ATM Cards Issued in France, in Thousands and Million respectively, 2006 – 2011

Figure 20: ATM Cash Withdrawal Transactions inside France in Volume and Value from Cards Issued Inside the Country, 2006-2011

Figure 21: ATM Cash Withdrawal Transactions inside France in Volume and Value from Cards Issued Outside the Country, 2006-2011

Figure 22: ATM Cash Withdrawal Transactions outside France in Volume and Value from Cards Issued Inside the Country, 2006-2011

Figure 23: Total Number of Credit and Debit Cards Issued in France, in Millions, 2006 – 2010

Figure 24: Market Share of ATM Holdings by major Banks in France, on the Basis of Number of ATMs Installed in Percentage, 2010

Figure 25: ATM Terminals Installed and ATM Cards Issued in France, in Thousands and Million respectively, 2012 – 2015

Figure 26: ATM Terminals Installed and ATM Cards Issued in Italy, in Thousands and Million respectively, 2006 – 2011

Figure 27: ATM Cash Withdrawal Transactions inside Italy in Volume and Value from Cards Issued Inside the Country, 2006-2011

Figure 28: ATM Cash Withdrawal Transactions inside Italy in Volume and Value from Cards Issued Outside the Country, 2009-2011

Figure 29: ATM Cash Withdrawal Transactions outside Italy in Volume and Value from Cards Issued Inside the Country, 2009-2011

Figure 30: Total Number of Credit and Debit Cards Issued in Italy, in Millions, 2006 – 2010

Figure 31: ATM Terminals Installed and ATM Cards Issued in Italy, in Thousands and Million respectively, 2012 – 2015

Figure 32: Number of Non-Cash Transactions Globally, in Billion, 2007 – 2009

Figure 33: Segmentation of Global Non-Cash Transactions by Region, in Percentage, 2009

Figure 34: Segmentation of Non-Cash Transactions by Payment Instrument Mix, in Percentage, 2009

Figure 35: Number of E-Payments and M-Payments Transactions Globally, in Billion, 2009 – 2010

Figure 36: ATM Terminals Installed and ATM Cards Issued in Europe, in Thousands and Million respectively, 2012 – 2015

Figure 37: NCR Corporation Revenue in USD Million, 2009 –2011

Figure 38: NCR Corporation Revenue from Financial Services Segment, USD Million,

2009-2011

Figure 39: NCR Revenue Segmentation by Geographic Area, in Percentage, 2011

Figure 40: Wincor Nixdorf Corporation Revenue in USD Million, FY'2007–FY'2011

Figure 41: Wincor Nixdorf Corporation Revenue Segmentation by Banking and Retail, in Percentage, FY'2011

Figure 42: Diebold Corporation Revenue in USD Million, 2007 –2011

Figure 43: Diebold Revenue Segmentation by Geographic Area, in Percentage, 2011

Figure 44: Population of Europe, in Million, 2006-2015

Figure 45: Urban Population of Europe, in Million, 2006-2015

Figure 46: Banknotes and Coins in Circulation outside Banks, in Europe, in USD Billion, 2006-2015

Figure 47: ATM Cards Issued in Europe, in Million, 2006-2015

Figure 48: Number of Banks in Europe, in Thousand, 2006-2015

Figure 49: Number of Bank Branches in Europe, in Thousand, 2006-2015

List Of Tables

LIST OF TABLES

Table 1: POS Terminals in Europe, in Thousands, 2006 – 2011

Table 2: Market Share of ATM Holdings by major Banks in the UK, on the Basis of Number of ATMs Installed in Units, 2010

Table 3: Market Share of Major Banks in Germany on the Basis of Number of ATMs Installed in Percentage and Units Respectively, 2010

Table 4: Market Share of ATM Holdings by major Banks in France, on the Basis of Number of ATMs Installed in Units, 2010

Table 5: ATM Frauds and Physical attacks in Europe in Terms of Reported Incidents and Losses, in Units and USD Million Respectively, 2007 - 2011

Table 6: NCR Revenue Segmentation by Geographic Area, in USD Million, 2011

Table 7: Wincor Nixdorf Corporation Revenue Segmentation by Banking and Retail, USD Million, FY'2011

Table 8: Wincor Nixdorf Revenue Segmentation by Geographic Region, in USD Million, FY'2007-FY'2011

Table 9: Diebold Revenue Segmentation by Geographic Area, in USD Million, 2011

Table 10: Correlation Matrix of the Europe ATM Market

Table 11: Regression Coefficients Output of the Europe ATM Market

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