

Global ATM Market Outlook to 2015 - Rising Challenges by Evolving Alternative Payment Methods

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Abstracts

Executive summary

The report titled “Global ATM Market Outlook to 2015 – Rising Challenges by Evolving Alternative Payment Methods” 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 global 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 regions.

The future projections included in the report provide an insight on the prospects in the Global, regional and country-wise ATM market. The report covers a detailed coverage on Europe, Asia-Pacific, North America, Middle East and Africa and Latin American region encompassing the US, Canada, the UK, Germany, Spain, France, Italy, China, India, Australia, Japan, Singapore, Saudi Arabia, Israel, UAE, Turkey, South Africa, Brazil and Mexico.

Global

Global ATM market is dominated by the Asia Pacific region which contributed around ~ thousand ATMs in 2011 to command ~% of the market. Their market share has grown considerably from ~% in 2006. The rapid growth in this region has been fuelled by the economic and social developments in the emerging countries such as China and India. The Asia Pacific region is estimated to continue its domination in the long run due to low

penetration, economic development and increasing population.

North America is the second largest region contributing ~% to the total global ATM market. This region is led majorly by the US which alone contributed over ~% to the total North America ATM market. North America was the leading region with regard to the ATM market until 2009 after which it was toppled by Asia Pacific. The decreasing market share of North America can be attributed to the maturity of this market.

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 favorable in terms of ATM numbers, 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 ~%.

North America

The US and Canada constitute the North American region. The US holds the major market share in terms of the total number of ATM machines installed in North America accounting for ~% of the total ATMs installed in that region. This region is a relatively matured market for the ATM industry.

The total number of ATM terminals installed in North America was recorded as ~ thousand in 2011 which has grown from 2006 at a 5 year CAGR of ~%. The total number of ATMs installed displayed gradual growth over the period except for a small decline of ~% in 2008. The total number of ATM cards issued in the North America witnessed a decline over the years except for a small growth of ~% in 2007.

Europe

There were ~ million POS terminals in Europe in 2011 which has grown from 2006 at a CAGR of ~%. Italy held the largest share of POS terminals installed in Europe

accounting for ~% share. Italy witnessed growth of POS terminals at a CAGR of ~% to record ~ million POS terminals in the country. France followed close behind with ~ million POS terminals in the country in 2011 which has grown from ~ million in 2006. Spain and the UK followed behind with ~ million and ~ million respectively in 2011.

Middle East and Africa

Turkey and South Africa are the largest ATM markets in the Middle East and Africa region respectively. Both of these countries accounted for a combined market share of ~% in 2011. Both of the countries have exhibited considerable growth potential over the period and are also expected to dominate this region over the period despite the fact that the market share of South Africa is decreasing. Saudi Arabia is the third largest country in this region in terms of the total number of ATM terminals installed. The market share of Saudi Arabia increased from ~% in 2006 to ~% in 2011. The ATM share of Israel decreased by ~% from 2006 to 2010 while the ATM share of UAE increased by ~% during the same timeframe.

Latin America

Brazil is the largest country in Latin America region in terms of the total number of ATM's Installed. With ~ thousand ATMs in 2010, Brazil accounted for ~% of the total ATMs in the region. Mexico possessed share of ~% with ~ thousand ATM terminals in 2010.

Chile's under-banked population is decreasing over the period. Chile is witnessing significant growth in total number of ATM terminals installed in the country.

The total number of ATM terminals installed in the Middle East and Africa region grew from ~ thousand terminals in 2006 to ~ thousand terminals in 2011. The total count of ATM cards issued in the region grew at a 5 year CAGR ~% from ~ million in 2006 to ~ million in 2011.

Key Topics Covered in the Report:

Global, regional 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 regions such as Europe, Asia, Latin America, Middle east and Africa and North America

Total POS terminals in North America, Europe, Asia Pacific and Latin America

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 Global 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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