

# Middle East and Africa ATM Market Outlook to 2015

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## Abstracts

### Executive summary

The report titled “Middle East and Africa 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 Middle East and Africa and country-wise ATM market. The report covers a detailed coverage on Middle East and Africa region encompassing Saudi Arabia, Turkey, Israel, UAE and South Africa.

### Middle East & Africa

The Middle East market is growing well and is estimated to grow profoundly over the coming years. Iran is a strongly growing market in this region. Its omission from the western financial system aided in being affected less during times of economic crisis. The country is expected to drive the growth of the Middle East region in the coming years. The total number of ATMs installed in the Middle East and Africa region has grown from ~ thousand in 2006 to ~ thousand in 2011 at a 5 year CAGR of ~%. The total number of ATM cards issued in this country clocked ~ million in 2011 by growing at a CAGR of ~% from 2006.

The market in Middle East and Africa has showcased a marginal growth from ~% global

market share in 2006 to ~% market share in 2011. The growth prospects of Middle East and the untapped African market would continue to fuel the ATM market in this region.

## **Saudi Arabia**

Al Rajhi Bank is the world's leading Islamic bank and has a network covering over ~ branches, over 100 dedicated ladies branches, above ~ ATM's, ~ POS terminals installed throughout the kingdom of Saudi Arabia. Their Saudi business model is Sharia-compliant adhering to the Islamic banking principles. This bank is the largest FI in Saudi Arabia.

Riyad Bank is the second largest bank in Saudi Arabia in terms of the total number of ATM terminals installed in that country holding ATM market share of ~% via ~ ATMs. The bank has a network of network of over ~branches with ~ ladies sections and ~ self service electronic branches.

## **Turkey**

Turkey is expected to offer bright prospects for growth in this market which is evident by the ongoing developments and innovations in the ATM market of the country. The total number of ATMs in this country is expected to grow from ~ million in 2011 to ~ million in 2015 at a 4 year CAGR of ~%. The total number of ATM cards issued in Turkey is expected to grow at a CAGR of ~% from 2011 to clock ~ million in 2015.

## **UAE**

The total number of ATM terminals installed in UAE grew from ~ thousand in 2006 to ~ thousand in 2011 at a 5 year CAGR of ~%. The total count of ATM cards issued in UAE grew at a CAGR of ~% from ~ million in 2006 to ~ million in 2011. The ATM market in the country has also been driven by the tourism industry.

## **Israel**

Israel witnessed positive economic development in the year 2011 which led to an increase in consumer expenditure. Additionally, surging living costs in the country resulted in augmented consumer spending in the same period. This led to increase in credit usage and increase in cash withdrawals.

Bank Mizrahi Tefahot, an Israel based FI has chosen NiceVision banking solution to secure and safeguard its branches and ATMs from frauds and physical activities all over the country. NiceVision capture video recordings which can be used for detecting fraud and illegal activities and claim settlement. Additionally, it can also be used as evidence in conformity with regulatory requirements.

## **South Africa**

According to the South African Police Services Crime Report 2010 / 2011, while the number of bank robberies declined, the number of ATM bombings exhibited a growth of ~%. The banks and the police are increasingly striving to reduce these crime activities. In 2010, ~ hand-held skimming devices and ~ ATM skimming devices were retrieved all through the nation. National and provincial committees have been created to be aware of the new ATM frauds and scams and ways to prevent them. These committees also engage in spreading awareness among the public, identifying problem areas and analyzing ATM crime patterns and trends. EMV debit card technology is currently being implemented by banks in an endeavor to put an end to ATM frauds such as skimming and scamming.

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

Middle East and Africa 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 Saudi Arabia, Turkey, Israel, UAE and South Africa

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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