

Global Banking Industry Analysis 2012-2017: Trend, Profit and Forecast Analysis, February 2012

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Abstracts

Background:

The global banking industry faces short-term uncertainty due to the debt crises that challenge several major economies, but total industry assets are forecast to climb to an estimated US \$163,058 billion in 2017 with a CAGR of 8% over the next five years.

Lucintel, a leading global management consulting and market research firm, has analyzed the global banking industry and presents its findings in “Global Banking Industry Analysis 2012- 2017: Industry Trend, Profit and Forecast Analysis.”

The banking industry is highly fragmented and includes segments such as retail banking, corporate and investment banking, and asset and wealth management. The retail banking segment registered significant growth during 2006–2011 and has excellent potential to grow at an even more rapid pace over the forecast period. Europe dominates the global banking industry with 43% of total market share. The Asia Pacific banking industry, however, grew much faster than both the European and North American regions during 2006–2011. Asia Pacific continues to possess huge opportunity for industry growth. Rising per capita income in the region is expected to drive consumer savings and investment in banking sector. The massive unbanked population in India and China offers immense opportunity for banking companies. The North American banking industry is anticipated to grow modestly in the near term. The Rest of World’s industry growth trajectory offers opportunity for companies to expand their business in those nations.

Europe’s debt crisis and the large government budget deficit in the US are expected to reduce government spending, resulting in sluggish short-term economic growth in

both regions. Rising middle class populations and escalating household incomes in emerging markets provide substantial opportunity for global banks. Rapid technological advances are leading to dramatic shifts in the banking industry as the processing cost per transaction is approaching zero while simultaneously improving efficiency. These advantages are likely to increase trading volumes at the institutional level.

Lucintel's research indicates that despite the combination of margin pressure, sluggish growth in new assets and declines in fee income, retail banking revenue should remain relatively more stable. People will always need basic banking services, and the retail segment is traditionally less volatile than the corporate and investment banking segments.

This study provides a concise overview of the global banking industry. The report tracks three industry segments for four regions; thus, it tracks 12 segments of the global banking industry. This report includes fee income earned by banks from bank assurance, but excludes the premium income from insurance.

This comprehensive guide from Lucintel provides readers with valuable information and the tools needed to successfully drive critical business decisions with a thorough understanding of the market's potential. This report can save Lucintel clients hundreds of hours in personal research time on a global market. It also offers significant benefits in expanding business opportunities throughout the global banking industry. In a fast-paced ever-changing world, business leaders need every advantage available to them in a timely manner to drive change in the market and to stay ahead of their competition. This report provides business leaders with a keen advantage in this regard by making them aware of emerging trends and demand requirements on an annual basis.

Features and Scope of this Report:

To make any investment or strategic decision, adequate and timely information is essential. This market report fulfills this core need. Some of the features of this market report are:

Industry size estimates in US dollar value by segments and by regions

Global banking industry annual trend (2006–2011) and forecast (2012-2017)

Porter's Five Force analysis

New product launch and M&A activity in the industry

Quarterly demand trend (Q1 2010–Q4 2011) and forecast analysis (Q1 2012–Q4 2012) for global banking industry

Gross and net profit trends in the global banking industry

Cost structure trends in the global banking industry as well as by region

Who Can Benefit From This Report?

This study is intended for senior level executives, sales, marketing and business development professionals at various nodes of value chain of this market. This multi-client market study from Lucintel is used by small to multi-national Fortune 500 companies and utilized for a variety of reasons as follows.

Business development

Strategic planning

Business presentation

Determination of market size and trend

Competitive analysis

Resource and Inventory Management

Budgeting

Investment Decision

Research Methodology:

Lucintel has closely tracked and conducted research on hundreds of markets since 1998. This study is a result of years of ongoing research and continuous monitoring of

industry dynamics and trends at various nodes of the value chain from both the supply side and the demand side. Lucintel compiles vast amounts of data from numerous sources, validates the integrity of that data, and performs a comprehensive analysis on it. Lucintel then organizes the data, its findings, and insights into a concise report designed to support the strategic decision-making process

Contents

- 1. EXECUTIVE SUMMARY**
- 2. INDUSTRY DEFINITION AND SCOPE**
- 3. INDUSTRY OVERVIEW**
- 4. GLOBAL MACROECONOMIC OVERVIEW**
- 5. INDUSTRY TRENDS**
- 6. INDUSTRY FORECASTS**
- 7. EMERGING TRENDS**
- 8. CONCLUSIONS**

List Of Figures

LIST OF FIGURES

CHAPTER 3. Industry Overview

Figure 3.1: External forces shaping banking industry

CHAPTER 4. Global Macroeconomic Overview

Figure 4.1: Global GDP growth rate trend

Figure 4.2: Global inflation rate trend

Figure 4.3: Global population growth rate trend

Figure 4.4: Global unemployment rate trend

Figure 4.5: Regional GDP growth rate trend

Figure 4.6: Regional inflation rate trend

Figure 4.7: Regional population growth rate trend

Figure 4.8: Regional unemployment rate trend

CHAPTER 5. Industry Trends

Figure 5.1: Global banking industry total assets annual trend: 2006–2011 (US \$B)

Figure 5.2: Global banking industry total revenue annual trend: 2006–2011(US\$B)

Figure 5.3: Global banking industry regional trend 2006–2011 (US \$B)

Figure 5.4: Global banking industry regional trend 2006–2011(%)

Figure 5.5: Global banking industry regional revenue trend 2006–2011(\$ B)

Figure 5.6: Global banking industry regional revenue Trend 2006–2011(%)

Figure 5.7: Global banking industry segment trend 2006–2011(\$ B)

Figure 5.8: Global banking industry segment trend 2006–2011(%)

Figure 5.9: Quarterly trend global banking industry: 2010-2011(US \$B)

Figure 5.10: Global banking industry profitability trend 2006–2011

Figure 5.11: Global banking industry revenue per employee trend 2006-11

Figure 5.12: Cost structure trend in global banking industry 2006–2011

Figure 5.13: Cost structure in North American industry trend

Figure 5.14: Cost structure trend in European industry

Figure 5.15: Cost structure trend in Asia Pacific industry

Figure 5.16: Top 5 companies vs. global banking industry gross profit & net profit analysis 2011

Figure 5.17: Cash on hand for global banking 2006–2011(\$ B)

Figure 5.18: Cash on hand for global banking industry 2006–2011(%)

Figure 5.19: Debt for global banking industry 2006–2011 (\$ B)

Figure 5.20: Debt for global banking industry 2006–2011 (%)

Figure 5.21: Industry shares of top players in global banking industry in 2006

Figure 5.22: Industry shares of top players in global banking industry in 2011

Figure 5.23: Global banking industry 2006 market share analysis

Figure 5.24: Global banking industry 2011 market share analysis

CHAPTER 6. Industry Forecasts

Figure 6.1: Global banking industry forecast total assets 2012–2017 (\$ B)

Figure 6.2: Global banking industry forecast regional total assets (\$ B)

Figure 6.3: Global banking industry annual forecast 2012-2017 (\$ B)

Figure 6.4: Global banking industry quarterly forecast 2011-2012

Figure 6.5: Global GDP growth rate forecast

Figure 6.6: Global inflation rate forecast

Figure 6.7: Global population growth rate forecast

Figure 6.8: Global unemployment rate forecast

Figure 6.9: Regional GDP growth rate forecast

Figure 6.10: Regional inflation rate forecast

Figure 6.11: Regional population growth rate forecast

Figure 6.12: Regional unemployment rate forecast

Figure 6.13: Global banking industry regional forecast 2012–2017 (\$ B)

Figure 6.14: Global banking industry regional forecast 2012–2017 (%)

Figure 6.15: Global banking industry segment forecast 2012–2017 (\$ B)

Figure 6.16: Global banking industry segment forecast 2012–2017 (%)

CHAPTER 7. Emerging Trends

Figure 7.1: Global banking industry opportunity by region

Figure 7.2: Global banking industry opportunity by segment

List Of Tables

LIST OF TABLES

CHAPTER 3. Industry Overview

Table 3.1: Industry parameters of global banking industry

Table 3.2: Relative market attractiveness by region

CHAPTER 5. Industry Trends

Table 5.1: Regional assets growth rate

Table 5.2: Regional revenue growth rate

Table 5.3: Segment revenue growth rate

Table 5.4: Percentage change in cost structure

Table 5.5: Percentage change in cash on hand

Table 5.6: Percentage change in total debt

Table 5.7: Key companies by revenue growth

Table 5.8: Key companies by revenue decline

CHAPTER 6. Industry Forecasts

Table 6.1: Regional banking forecast growth rate

Table 6.2: Global banking segment forecast growth rate

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