

China Automatic Teller Machine (ATM) Industry Report, 2016-2020

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Abstracts

Since 1985, when the first ATM was unveiled in China, the total ATM installations have showed a double-digit growth every year. As of the end of September 2015, the number of network-connected ATMs reached 840,800 units, up 44.1% year-on-year, with a CAGR of 27.2% during 2007-2015. It is projected that the figure would exceed 900,000 units by the end of 2015 and 1.5 million units by 2020.

Seen from market development, China's ATM industry in 2015 was characterized by the following:

(1) A big gap with developed countries

Although the number of network-connected ATMs in China has increased rapidly in recent years, the ATM ownership per million people was only 626 units as of the end of 2015, hence a huge gap compared with 1,409 units (2014's data for North America) in developed countries. The number of bank cards supported by each ATM was 6,246, far exceeding the international standard configuration of 4,000 bank cards by each ATM. In this sense, China's ATM industry still has large market potential. This is particularly true of rural areas and urban communities, where financial outlets are so scarce that there would be a huge demand for ATMs.

(2) Cash recycling system (CRS) has become mainstream models

Cash recycling system (CRS) could maximize the use of ATM and thus has become the mainstream models when banks purchase machines. In 2014, major banks bought 70,655 units of CRS, accounting for 72.17% of the year's added ATMs, almost doubling that in 2007.

(3) VTM has become market highlights

VTM equipment can deliver all-round financial services including public and private business, domestic and international business, domestic and foreign currency business, and wealth management. Its greatly expanded functions and higher cost-effectiveness ratio would make it a highlight in future self-service financial services market. Currently, major banks in China have begun to deploy this kind of equipment, with Bank of Communications, for example, having deployed 489 VTMs as of the end of June 2015.

From the perspective of competitive landscape:

At present, there are scores of ATM manufacturers in China, including homegrown brands like GRG Banking, Shenzhen Yihua Computer, Eastcom, KingTeller, and Cashway, European and American brands such as NCR, Diebold, and Wincor Nixdorf, and Japanese and South Korean brands like Hitachi, OKI, and Hyosung.

As the Chinese government attaches increasing importance to financial information security and poses more and more stringent requirements on independent control of information technology, some Chinese ATM brands with core technologies and intellectual property rights have sprung up, such as GRG Banking, KingTeller, etc. As a result, foreign ATM brands have been greatly restricted, and they have successively established joint ventures with second-line brands. For instance, Diebold, along with Inspur Software, and OKI, together with DCITS, have set up joint ventures. These partners such as Hiaward and OKI, Cashway and Hyosung, and Hitachi and CLP are conducting close contact. For some time to come, the industry tends to be reshuffled.

The report highlights the followings:

Overview of ATM industry, including definition, classification, industrial chain, market characteristics, operation mode, industry policy, and technology trends, etc.;

Overview of global ATM market, including market size, competitive landscape, market structure, and development prospects, etc.;

Overview of Chinese ATM market, including market size, competitive landscape, import and export, market structure, and development prospects, etc.;

China's ATM market segments, including CRS, VTM, ATM operation markets, etc.;

Bank card market, including quantity of cards issued, IC card development, etc.;

Profile, operation, revenue structure, R&D costs, ATM business, and development strategy of 11 ATM manufacturers, including NCR, Diebold, Wincor Nixdorf, Hitachi, OKI, GRG Banking, KingTeller, Eastcom, DCITS, and Shenzhen Yihua Computer.

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