
Description: 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:

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.

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.

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.

Contents:

1. Overview of ATM
   1.1 Definition and Classification
      1.1.1 Definition
      1.1.2 Classification
   1.2 Industry Chain
   1.3 Operating Mode
      1.3.1 Operation Mode of Foreign ATM Markets
      1.3.2 Operation Mode of Chinese ATM Market
   1.4 Industry Policy
   1.5 Development Trend
      1.5.1 Further-expanded Function of ATM
      1.5.2 Developing toward Safer Direction
      1.5.3 Wider Application of Biological Recognition Technology
      1.5.4 Further Integration of Wireless Network Technology
      1.5.5 Popularization of No-card Withdrawal

2. Global ATM Market
   2.1 Banking IT Market
   2.2 ATM Market
      2.2.1 Quantity of ATM
      2.2.2 ATM Installation Rate
   2.3 Competition Pattern
      2.3.1 Regional Competition
      2.3.2 Corporate Competition
   2.4 Development Outlook

3. Chinese ATM Market
   3.1 Status Quo
   3.2 Industrial Characteristics
      3.2.1 Business Model
      3.2.2 Regionality
      3.2.3 Seasonality
   3.3 Market Size
      3.3.1 Quantity of ATM
      3.3.2 ATM Installation Rate
      3.3.3 ATM Purchase Volume of Banks
   3.4 Competition Pattern
      3.4.1 Manufacturers
      3.4.2 Competition between ATM Buyers
   3.5 Imports & Exports
      3.5.1 Imports
      3.5.2 Exports
   3.6 Key Drivers and Prospect

4. Key Market Segments
   4.1 Overview
   4.2 CRS
      4.2.1 Overview
      4.2.2 Purchase Quantity and Ownership
      4.2.3 Competitive Landscape
      4.2.4 Forecast
   4.3 Video Teller Machine (VTM or ITM)
      4.3.1 Overview
      4.3.2 Technical Proposal
      4.3.3 Market Value
      4.3.4 Competitive Landscape
   4.4 ATM Outsourcing
5. Bank Card Business in China
5.1 Number of Issued Bank Cards
5.2 Withdrawal and Deposit
5.3 Financial IC Cards
5.3.1 Overview
5.3.2 Development Course
5.3.3 Market Size
5.3.4 EVM Deployment

6. Major ATM Clients in China
6.1 Agricultural Bank of China
6.1.1 Profile
6.1.2 Number of Issued Bank Cards
6.1.3 Quantity of ATM
6.2 Industrial and Commercial Bank of China
6.2.1 Profile
6.2.2 Number of Issued Bank Cards
6.2.3 Quantity of ATM
6.3 China Construction Bank
6.3.1 Profile
6.3.2 Number of Issued Bank Cards
6.3.3 Quantity of ATM
6.4 Bank of China
6.4.1 Profile
6.4.2 Number of Issued Bank Cards
6.4.3 Quantity of ATM
6.5 Bank of Communications
6.5.1 Profile
6.5.2 Number of Issued Bank Cards
6.5.3 Quantity of ATM
6.6 Some Joint-stock Commercial Banks
6.6.1 China Merchants Bank
6.6.2 China CITIC Bank
6.6.3 Shanghai Pudong Development Bank

7. Global Major ATM Manufacturers
7.1 NCR
7.1.1 Profile
7.1.2 Operating Performance
7.1.3 Revenue Structure
7.1.4 Gross Margin
7.1.5 R & D Expenditure
7.1.6 ATM Business
7.1.7 ATM Business in China
7.1.8 Omni-channel Technology
7.1.9 Cooperation in iTM between NCR and Vidyo
7.2 Diebold
7.2.1 Profile
7.2.2 Operating Performance
7.2.3 Revenue Structure
7.2.4 Gross Margin
7.2.5 R & D Expenditure
7.2.6 ATM Business
7.2.7 ATM Business in China
7.2.8 Strategic Planning
7.2.9 Merger with Wincor Nixdorf
7.2.10 Forming New Joint Venture with Inspur
7.3 Wincor Nixdorf
7.3.1 Profile
7.3.2 Operating Performance
7.3.3 Revenue Structure
7.3.4 Gross Margin
7.3.5 R & D Expenditure
7.3.6 ATM Business
7.3.7 ATM Business in China
7.4 Hitachi
7.4.1 Profile
7.4.2 Operating Performance
7.4.3 Revenue Structure
7.4.4 R & D Expenditure
7.4.5 ATM Business
7.4.6 Strategic Planning
7.4.7 ATM Business in China
7.5 OKI
7.5.1 Profile
7.5.2 Operating Performance
7.5.3 Revenue Structure
7.5.4 Gross Margin
7.5.5 R & D Expenditure
7.5.6 ATM Business
7.5.7 ATM Business in China
7.5.8 Strategic Planning
7.5.9 Forming Joint Venture with DCITS

8. Major Chinese ATM Manufacturers
8.1 GRG Banking
8.1.1 Profile
8.1.2 Operating Performance
8.1.3 Revenue Structure
8.1.4 Gross Margin
8.1.5 R & D Expenditure
8.1.6 Orders
8.1.7 ATM Business
8.1.8 Construction of Financial Outsourcing Service Platform Nationwide
8.1.9 Development Prospect
8.2 Shenzhen Yihua Computer
8.2.1 Profile
8.2.2 Production and Sales
8.2.3 Major Clients
8.2.4 ATM Business
8.2.5 Latest Technological Achievements
8.2.6 Future Technology Trends
8.3 Eastcom
8.3.1 Profile
8.3.2 Operating Performance
8.3.3 Revenue Structure
8.3.4 Gross Margin
8.3.5 R & D Expenditure
8.3.6 ATM Business
8.3.7 Development Prospect
8.4 KingTeller
8.4.1 Profile
8.4.2 Operating Performance
8.4.3 Revenue Structure
8.4.4 Gross Margin
8.4.5 R & D Expenditure
8.4.7 ATM Business
8.4.8 Development Prospect
8.4.9 KingTeller Increases Capital to ATM Production Subsidiaries
8.5 Cashway
8.5.1 Profile
8.5.2 ATM Business
8.5.3 Financial Service Outsourcing Business
8.5.4 Shareholding Reform and Pre-listing Tutoring
8.6 DCITS
8.6.1 Profile
8.6.2 Operating Performance
8.6.3 Revenue Structure
8.6.4 Gross Margin
8.6.5 R & D Expenditure
8.6.6 ATM Main Products and Solutions
8.6.7 GRGBanking Indirectly Controls DCITS
8.6.8 Development Prospect

List of Charts

- Profit Model of ATM Collaboration Operation in China
- Profit Model of ATM Finance Lease in China
- ATM with the Function of Biological Recognition Released Recently by Some Manufacturers and Institutions
- Global Spending on Financial Industry Informatization, 2014-2018E
- Global ATM Quantity and YoY Growth, 2007-2015
- Global New ATM Quantity and YoY Growth, 2007-2015
- Global ATM Quantity per 1 Million Persons and YoY Growth, 2007-2015
- Global ATM Ownership by Region, 2010-2015
- Market Share of Global ATM Enterprises by Ownership, 2015
- Global ATM Ownership, 2015-2020E
- Quantity of ATM Connected with China UnionPay and YoY Growth, 2007-2015
- ATM Quantity per 1 Million Persons in China, 2007-2015
- Number of Bank Cards that Each Set of ATM Can Deal with in China, 2007-2015
- ATM Purchase Volume and YoY Growth in China, 2007-2014
- Purchase Volume of Cash Recycling System (CRS) and YoY Growth in China, 2007-2014
- Penetration Rate of Cash Recycling System (CRS) in China (by Purchase Volume), 2007-2014
- Sales Volume of Domestic and Foreign Producers in Chinese ATM Market, 2007-2014
- Market Share of ATM Manufacturers in China (by Sales Volume), 2007-2014
- Ranking of Major Banks in China by ATM Purchase Volume Percentage, 2013-2014
- ATM Import Volume and YoY Growth in China, 2010-2015
- ATM Import Value and YoY Growth in China, 2010-2015
- Average Unit Price and YoY Growth of Imported ATMs in China, 2010-2015
- ATM Export Volume and YoY Growth in China, 2010-2015
- ATM Export Value and YoY Growth in China, 2010-2015
- Average Unit Price and YoY Growth of China's ATM Exports, 2010-2015
- Number of Network-connected ATMs in China, 2014-2020E
- CRS Ownership and YoY Growth in China, 2007-2015
- Market Share of CRS Manufacturers in China by Sales Volume, 2010-2015
- CRS Purchase Quantity and YoY Growth in China, 2006-2020E
- CRS Ownership and YoY Growth in China, 2015-2020E
- CRS Market Share in China by Ownership, 2015-2020E
- VTM Industry Chain and Major Competitors
- Schematic Diagram for ATM Outsourcing Service
- Cumulative Volume of Issued Bank Cards and YoY Growth in China, 2007-2015
- Structure of Number of Issued Bank Cards in China, 2007-2015
- Cumulative Volume of Issued Financial IC Cards, YoY Growth and its Penetration in Bank Cards in China, 2010-2015
- Visa's EMV ATM Transformation Plan
- Cumulative Volume of Issued Credit Cards and Debit Cards of Agricultural Bank of China, 2007-2015
- Market Share of Agricultural Bank of China in Debit Cards and Credit Cards (by Cumulative Issued Volume), 2007-2015
- Each Set of ATM Corresponding to Number of Bank Cards of Agricultural Bank of China, 2007-2015
- Cumulative Volume of Issued Debit Cards and Credit Cards of Industrial and Commercial Bank of China, 2007-2015
- Market Share of Industrial and Commercial Bank of China in Debit Cards and Credit Cards (by Cumulative Issued Volume), 2007-2015
- Each Set of ATM Corresponding to Number of Bank Cards of Industrial and Commercial Bank of China, 2007-2015
- Cumulative Volume of Issued Credit Cards and Debit Cards of China Construction Bank, 2007-2015
- Market Share of China Construction Bank in Debit Cards and Credit Cards (by Cumulative Issued Volume), 2007-2015
- Each Set of ATM Corresponding to Number of Bank Cards and YoY Growth of Bank of China, 2007-2015
- Cumulative Volume of Issued Credit Cards and Debit Cards of Bank of China, 2007-2015
- Market Share of Bank of China in Debit Cards and Credit Cards (by Cumulative Issued Volume), 2007-2015
- Each Set of ATM Corresponding to Number of Bank Cards and YoY Growth of Bank of China, 2007-2015
- Cumulative Volume of Issued Credit Cards and Debit Cards of Bank of Communications, 2011-2015
- Market Share of Bank of Communications in Debit Cards and Credit Cards (by Cumulative Issued Volume), 2007-2015
- ATM Quantity and YoY Growth of Bank of Communications, 2007-2015
- Each Set of ATM Corresponding to Number of Bank Cards and YoY Growth of Bank of Communications, 2011-2015
- ATM Quantity and YoY Growth of China Merchants Bank, 2010-2015
- CRS and ATM Installations of China Merchants Bank, 2010-2015
- ATM Quantity and YoY Growth of China CITIC Bank, 2007-2015
- ATM Quantity and YoY Growth of Shanghai Pudong Development Bank, 2009-2015
- Revenue and Net Income of NCR, 2009-2015
- Revenue and Net Income of NCR, 2016-2020E
- NCR's Revenue Structure (by Business), 2010-2015
- NCR's Revenue Structure (by Region), 2010-2015
- Gross Profit and YoY Growth of NCR, 2009-2014
- R & D Expenditure and YoY Growth of NCR, 2009-2015
- Global Production Base Distribution of NCR ATM
- NCR's Major ATM Products
- NCR's ATM Sales Volume and Market Share in China, 2007-2014
- Omni-channel Platform of NCR
- New Revenue Opportunities of NCR
- Revenue and Net Income of Diebold, 2009-2015
- Revenue and Net Income of Diebold, 2016-2020E
- Diebold's Revenue Structure (by Business), 2009-2014
- Diebold's Revenue Structure (by Region), 2009-2015
- Gross Profit and YoY Growth of Diebold, 2009-2015
- R & D Expenditure and YoY Growth of Diebold, 2009-2015
- Diebold's ATM Sales Volume and Market Share in China, 2007-2014
- Diebold's Strategic Planning
- Diebold's Retail Banking Evolution
- Merger Consideration between Diebold and Wincor Nixdorf
- Market Share of Diebold and Wincor Nixdorf (after Merger) by Region
- Joint-venture Architecture of Diebold and Inspur
- Major ATM Operators in China
- Major Policies on ATM in China in Recent Years
- ATM Import Origins as well as Import Volume and Value in China, 2012-2015
- ATM Importing Province as well as Import Volume and Value in China, 2012-2015
- China's Top 10 ATM Export Destinations as well as Export Volume and Value, 2012-2015
- China's ATM Exporting Origins as well as Export Volume and Value, 2012-2015
- Schematic Diagram for Main VTM Functions
- Advantages and Disadvantages of VTM and Other Major Service Modes in Banks
- Operating Cost Structure of VTM and Conventional Banking Outlets
- Main Technology Composition of Typical Self-service Bank
- Major Working Process for Typical VTM
- Calculation Table of China's VTM Market Size
- Diebold ATM Product Series
- Irving & Janus-New Products Released by Diebold in 2015
- Diebold's ATM Fleet in North America
- Wincor Nixdorf ATM Product Series
- OKI's Business Progress in China in Recent Years
- ATM Products of GRG
- Sales Volume, Market Share, Ranking and Average Unit Price of GRG's ATM in China, 2007-2014
- Revenue, Gross Profit and Gross Margin of GRG's ATM and Related Businesses, 2009-2015
- Fund-raising and Proposed Usage of GRG Banking, 2015
- Schematic Diagram for Financial Outsourcing Service Platform of GRG Banking
- Status of Financial Outsourcing Service Platform in GRG Banking's Strategy
- Regional Distribution of GRG Banking's Financial Outsourcing Service
- Major Clients of Shenzhen Yihua Computer
- Eastcom's Revenue Structure (by Region), 2009-2015
- ATM Sales Volume, Market Share, Ranking, Average Unit Price of Eastcom, 2011-2014
- Key ATM Products of KingTeller
- ATM Sales Volume, Market Share, Ranking and Average Unit Price of KingTeller, 2011-2014
- Main ATM Products of Cashway
- ATM Sales Volume, Market Share and Ranking of Cashway, 2012-2014
- ATM Bid Winning of Cashway, Jan.-Dec., 2014

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