

ATM Services Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

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Report description:

The global ATM services market size attained a value of USD 27.34 Billion in 2024 . ATMs offer services including deposits, fund transfers, and bill payment in addition to cash withdrawals. The industry is expected to grow at a CAGR of 6.10% during the forecast period of 2025-2034 to attain a value of USD 49.43 Billion by 2034 .

ATM Services Market Overview

ATM services market offers 24/7 access to cash and banking, enhancing convenience and accessibility. Available in numerous locations, they save time compared to traditional banking. ATMs offer services including deposits, fund transfers, and bill payment in addition to cash withdrawals. To protect financial information, modern ATMs come equipped with security measures like PIN protection. They also promote financial inclusion by reaching underserved areas and are cost-effective for banks, reducing the need for staff. Additionally, ATM transactions are processed instantly, ensuring immediate access to funds. Overall, ATMs significantly improve the banking experience through convenience, efficiency, and security enhancing the ATM services industry revenue.

The growing reliance on modern ATMs for fast cash access, convenience, and security highlights the necessity of regular maintenance to maintain optimal functionality and meet customers' immediate cash demands. The ATM Industry Association (ATMIA) projects that approximately 520,000 to 540,000 ATMs were functioning in 2022 in the United States.

ATM Services Market Growth

The ATM services market has seen significant growth driven by several factors. Increased cash transactions, despite the rise of digital payments, continue to boost the demand for ATM services. ATM installations have expanded in underserved rural areas because of efforts to promote financial inclusion. A growing number of people are using innovations such as smart ATMs that

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provide biometric authentication and cash recycling. The need for convenient banking services is also being increased by urbanisation and the growth of the retail industry. Additionally, partnerships between banks and third-party providers facilitate ATM deployment, while regulatory support promotes financial services. Overall, the ATM services market opportunities are in a position for continued growth to address changing consumer demands.

The Federal Reserve of St. Louis reported that Canada had 67,727 Automated Teller Machines (ATMs) across the country in 2022, contributing to the growth of the ATM services market. The rise in retail locations featuring ATMs has created more opportunities for consumers to withdraw cash.

Key Trends and Developments

Transition towards contactless transactions, incorporation of advanced technologies like AI and ML, and growing demand for financial inclusion are increasing the ATM services market value.

September 2024

Sohar International, Oman's leading bank, enhanced its technological innovation by launching the 'Tap & Go' service across its ATMs and CDMs. This strategic move highlighted the bank's commitment to improving customer experience through contactless functionality, enabling faster and easier transactions for Sohar International and Sohar Islamic cardholders.

June 2024

NCR Atleos Corporation announced the deployment of its first multi-bank deposit ATMs in the UK, enhancing self-service financial access for consumers and retailers. These deposit-taking ATMs, crucial for cash-reliant users, were initially connected to the LINK ATM network in major retail locations.

April 2024

In India, Hitachi Payment Services has launched the first ATM that can be upgraded to a Cash Recycling Machine (CRM) whenever necessary. Manufactured as part of the 'Make in India' campaign, these automated teller machines (ATMs) provide banks enhanced adaptability and efficacy, allowing them to suit market demands while safeguarding their capital.

April 2022

Coinme Inc. expanded its footprint to 49 states by introducing 23 bitcoin ATMs in Vermont grocery shops through a partnership with Coinstar LLC. Coinme offers an alternative to online transactions, particularly for remittance senders, by enabling users to purchase up to \$2,900 worth of Bitcoin with cash at about 21,000 Coinstar kiosks across the country.

Increased Adoption of Contactless Transactions

The ATM services market is experiencing a transition towards contactless transactions, spurred by consumer preferences for convenience and hygiene. Many ATMs now feature NFC (Near Field Communication) technology, enabling users to withdraw cash simply by tapping their mobile devices. This development not only accelerates transactions but also improves safety. As mobile banking and digital wallets gain popularity, ATMs with contactless capabilities are expected to see increased usage, encouraging banks to upgrade their machines to accommodate these evolving preferences further bolstering the ATM services demand growth. In December 2023, consumers in Korea started withdrawing and depositing cash at ATMs by scanning QR codes with their Apple or Android smartphones, eliminating the need for physical bank cards. This service, initiated by the Bank of Korea, was made

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available through 17 banks, including Shinhan Bank, KB Kookmin Bank, Hana Bank, Woori Bank, and NH Nonghyup Bank, allowing users to manage cash transactions via a bank account linked to a virtual card in the mobile cash card app.

Integration of Advanced Technologies

The ATM services market is being reshaped by the incorporation of advanced technologies like AI and machine learning, which are driving demand growth. These technologies facilitate predictive maintenance, allowing banks to maximize ATM uptime and minimize operational costs. Furthermore, AI-driven analytics offer insights into user behaviour, enabling banks to customise services and promotions based on individual preferences. Smart ATMs, featuring cash recycling and biometric authentication, improve security and enhance user experience. As banks increasingly embrace these technologies, the efficiency and functionality of ATM services are set to advance, attracting more users, and promoting ATM services industry growth. In December 2023, GoldPe introduced the APM (Automated Pawn Machine) in India. This innovative AI-driven gold loan ATM utilized advanced technology to provide instant gold loans, analysing not only gold but also platinum and silver for the international market, thus making loans more accessible, efficient, and secure for customers at any time.

Growing Demand for Financial Inclusion

In the ATM services market, financial inclusion is a crucial trend, particularly in emerging economies. As governments and organizations strive to provide banking access to underserved communities, there is an increase in ATM installations in rural and remote locations. These ATMs enable cash withdrawals and offer additional services such as deposits and bill payments, improving banking accessibility. This emphasis on financial inclusion is prompting banks and financial institutions to invest in expanding their ATM networks, generating opportunities for service providers, and contributing to overall ATM services market growth. In May 2024, PocketATM, a fintech startup that enabled cash withdrawals from local grocery stores, expanded its customer base beyond senior citizens and individuals with mobility challenges. After raising \$400,000 in February, it aimed to reach tier 2 and tier 3 cities by allowing merchants to exchange cash for customers through UPI transactions. The app included advanced features like geolocation, a multi-language interface, and offline functionality.

Increasing Cash Usage

Despite the growth of digital payments, cash usage remains robust, particularly in emerging economies. According to the Reserve Bank of India, cash continues to account for around 80% of all transactions in the country as of 2023. In the United States, the Federal Reserve reported in 2022 that cash is still widely used for everyday transactions, with over 30% of Americans preferring cash for purchases under USD 25. The continued reliance on cash for small transactions and in rural areas is driving the expansion of ATM networks to meet growing demand, ensuring accessibility and convenience. In countries like Brazil and Mexico, over 70% of transactions are still made in cash. This enduring demand for cash is pushing the need for expanded ATM networks, requiring more ATMs in both urban and rural areas.

ATM Services Market Trends

Rapid urbanization is driving the need for more ATM installations in both metropolitan and suburban areas. According to the United Nations, more than 55% of the global population lives in urban areas, with this number expected to reach 68% by 2050. As urban populations grow, there is an increased demand for accessible cash, resulting in the expansion of ATM networks to cater to the growing urban population's banking needs.

The push to improve the overall user experience is driving ATM service growth. Banks are focusing on offering more convenient and user-friendly ATMs with features such as touchscreen interfaces, multilingual options, and 24/7 availability. The British Bankers' Association reported that the adoption of self-service ATMs in the UK increased by 20% in 2023, as customers seek

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faster, more efficient banking options. These enhancements in ATM features are making them more attractive to consumers, further boosting the market.

ATM Services Market Dynamics

The ATM services market is shaped by several dynamic factors, including technological advancements like contactless transactions and enhanced security measures. Consumer behaviour drives demand for 24/7 access, while regulatory compliance impacts operations. Competition from banks and fintechs affects pricing strategies, and geographic variations highlight accessibility issues. Partnerships with retailers and technology providers improve service delivery. Additionally, trends towards digital transformation and sustainability are emerging. In September 2022, Utkarsh Small Finance Bank Limited introduced a groundbreaking service designed to enhance cash withdrawal experiences in India. Focusing on process-oriented, technology-driven, and customer-centric services, the bank launched the Interoperable Cardless Cash Withdrawal (ICCW) service via UPI on its ATM network, improving security and accessibility for customers.

The market is highly competitive, with companies constantly innovating to differentiate their offerings. In July 2022, NCR Corporation established a strategic partnership with the Bank of New Zealand (BNZ) to aid in the bank's digital transformation. Through its NCR ATM as a Service solution, NCR will oversee BNZ's ATM fleet, which includes off-site cash dispensing machines and on-site NCR SelfServ[®] ATMs, providing customers with 24/7 access to transactional services boosting the growth of the ATM services industry.

Market Restraints

The ATM services market encounters several restraints that hinder growth and operations. Key challenges include high operational costs from maintenance and transaction fees, security concerns like fraud and cybersecurity risks, and complex regulatory compliance. Market saturation in urban areas and competition from fintechs further limit expansion.

Additionally, a consumer shift to digital payments reduces ATM services demand, while technological integration issues and economic pressures like inflation add to the difficulties. Geographic limitations, particularly in rural areas, also pose challenges. Addressing these restraints requires strategic planning and innovation to remain competitive in the evolving landscape.

ATM Services Industry Segmentation

The EMR's report titled "ATM Services Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by ATM Type

- Onsite ATMs
- Offsite ATMs
- Worksite ATMs
- Mobile ATMs

Market Breakup by Application

- Withdrawals
- Transfers
- Deposits

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□ Others

Market Breakup by Region

□ North America

□ Europe

□ Asia Pacific

□ Latin America

□ Middle East and Africa

ATM Services Market Share

Market Analysis by ATM Type

Onsite ATMs, located within bank branches, provide customers with convenient access to transactions without the need to enter the bank. This arrangement not only enhances customer experience but also increases foot traffic, creating several ATM services market opportunities for cross-selling services. Additionally, the security measures in place at bank premises reduce the risk of theft or vandalism. Onsite ATMs reinforce the bank's brand visibility in the community, fostering customer loyalty while generally offering lower transaction fees compared to offsite ATMs, leading to cost savings for both banks and customers.

Offsite ATMs extend banking services to areas lacking physical branches, improving accessibility for underserved populations. Strategically placed in high-traffic locations like malls and airports, these ATMs capture a larger volume of transactions. They offer flexibility in placement based on customer demand and changing demographics. Furthermore, banks can generate additional revenue through transaction fees from users of other banks. Offsite ATMs can also provide enhanced service offerings, such as cardless withdrawals and mobile banking integration, appealing to tech-savvy customers and broadening their user base.

Market Analysis by Application

Withdrawals via ATMs offer significant convenience, providing 24/7 access to cash without needing to visit a bank during business hours, boosting the ATM services demand. Customers can obtain cash instantly, which is essential for immediate expenses or emergencies. ATMs also reduce wait times compared to traditional branches, facilitating quicker transactions. They are widely accessible, including in remote areas, catering to underserved populations. Furthermore, ATMs allow customers to withdraw funds from multiple linked accounts, enhancing flexibility in managing their finances and meeting various cash needs.

ATM services demand growth facilitate quick fund transfers between accounts, allowing customers to manage their finances efficiently. With 24/7 availability, users can perform transfers at any time, enhancing overall convenience. Transferring funds through ATMs often incurs lower fees than online or branch methods, helping customers save money. Additionally, ATM transfers utilise advanced security measures to protect financial information, ensuring safe transactions. Most ATMs feature user-friendly interfaces, making it easy for individuals to complete transfers without requiring extensive banking knowledge or assistance.

ATM Services Market Regional Insights

Europe ATM Services Market Analysis

Europe currently holds the largest demand for ATM services, with Germany, Italy, and France being key players in the sector. In February 2024, Ventus, a Digi company, introduced its Managed Network-as-a-Service ATM solution in the EU, initially launching in Germany. The offering includes the Ventus LC300 router, along with processing, check imaging, and cloud services. Ventus will

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design, build, host, and maintain ATM networks across the EU, featuring a PCI DSS 3.2.1 compliant, encrypted private network that connects to top payment gateway processors. Additionally, in February 2023, Worldline partnered with AVEM to upgrade Groupe Les Mousquetaires' ATM fleet, enhancing operational flexibility and profitability in France.

North America ATM Services Market Trends

The North American ATM services market value is set for substantial growth, led by prominent brands such as Amorserv LLC, NCR Corporation, Diebold Nixdorf, Hyosung America, Triton Systems, and Genmega. North America's ATM services are evolving with trends like contactless technology, digital banking integration, enhanced security measures, sustainability practices, and the expansion of offsite ATMs, reflecting consumer demands for convenience and improved accessibility. In February 2023, the ATM industry progressed with the OS-agnostic XF4IoT platform, designed to transform operations for vendors, banks, and users. The XFS standard, which controls Windows OS interfaces for ATM devices, powered 90% of ATMs globally and was managed by the open CEN/XFS committee, including major industry players.

Asia Pacific ATM Services Market Insights

In India, companies like CMS Infosystem, Writer Safeguard, SIS Prosegur, Securevalue, Radiant Cash, and Brink's Arya demonstrate the growing ATM services market share in the Asia-Pacific region. The Asia-Pacific ATM services are driven by digital payment integration, enhanced security, offsite ATM expansion, improved user experiences, sustainability initiatives, and a shift toward cashless transactions, reflecting changing consumer preferences and technological advancements. In July 2023, Kakao Pay Corp. launched an overseas withdrawal service at ATMs, partnering with Global Loyalty Network. Available in Japan, Vietnam, and Laos, users can withdraw local currencies using a mobile phone with the KakaoTalk or Kakao Pay app at specific banks' ATMs.

Latin America ATM Services Market Analysis

ATM services industry growth in Latin America is growing due to increased financial inclusion, rising cash demand, technological advancements, fintech partnerships, regulatory support, economic recovery, and sustainability initiatives. Industry reports indicate that Mexico was at the forefront of growth in Latin America, with the number of ATMs using multivendor software increasing by 11,600 from 2020 to 2022. Deployers in the region are increasingly prioritising a unified strategy for managing software updates and appreciating the flexibility that multivendor software provides in utilizing various hardware vendors.

Middle East and Africa ATM Services Market Driving Factors

In the Middle East, ATM services market dynamics and trends are driven by new ATM designs that prioritise user-friendly interfaces and multilingual support. Partnerships with fintech drive innovation, while supportive regulations and economic diversification, focusing on improved customer experiences and reduced wait times. In March 2024, Travelex, a leading travel money brand, opened seven stores and eight ATMs at Zayed International Airport □ Terminal A. With four landside and three airside locations, this expansion brings the total number of Travelex stores in the UAE to 49, enhancing its distribution network across the UAE and the expansive Middle East.

Competitive Landscape

Market players are focusing on providing a diverse array of ATM services, with a focus on payment processing solutions for ATMs and point-of-sale systems. These companies deliver a full range of services, including transaction processing, cash management, and equipment support. Through partnerships with businesses and financial institutions, they aim to offer secure, reliable, and efficient payment solutions, fostering greater cash accessibility and facilitating digital transactions across various markets.

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NCR Corporation

NCR Corporation: Headquartered in Atlanta, Georgia, and established in 1884, NCR Corporation focuses on delivering technology solutions across diverse sectors such as banking, retail, and hospitality. The company offers automated teller machines (ATMs), point-of-sale systems, and various software solutions aimed at improving customer experiences and operational efficiency.

Cardtronics, Inc.

Cardtronics, Inc.: Founded in 2000 and based in Houston, Texas, Cardtronics, Inc. is a prominent provider of ATM services, managing a wide network of ATMs globally. The company is dedicated to improving cash accessibility through innovative strategies and partnerships that serve both consumers and financial institutions.

Euronet Worldwide

Euronet Worldwide: Established in 1994 and located in Leawood, Kansas, is a worldwide leader in electronic payment services. The company specializes in ATM network services, payment processing, and prepaid products, facilitating connections between consumers and financial services through an extensive network of ATMs and point-of-sale solutions across various regions.

Other key players in the global ATM services market report include Diebold Nixdorf, Incorporated, and Payment Alliance International among others.

More Insights On

United States ATM Services Market

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