Global EPOS and Self-Checkout

RESEARCH OVERVIEW

datos
INSIGHTS

RBR Data Services research delivers market and competitive intelligence to support regular and ad-hoc strategic planning

RBR Data Services provides clients with independent and reliable data and insights through published research, consulting and bespoke data services. Its global research covers the cards and payments, retail technology and banking automation sectors and is used by leading market participants, analysts and regulators as the authoritative source of industry and competitor benchmark data.

Datos Insights is the advisor of choice to the banking, insurance, securities, and retail technology industries – both the financial institutions and the technology providers who serve them. We help our clients make better technology decisions so they can protect and grow their customers' assets.

For more information, visit www.datos-insights.com

Contact
Datos Insights
393 Richmond Road
London TW1 2EF, UK
rbr@datos-insights.com

Global EPOS and Self-Checkout provides suppliers with data, analysis and insights that are not available from any other source

Point-of-sale technology remains crucial for retailers; vendors need reliable and granular data

- Increasing competition from online players is prompting traditional retailers to re-imagine their store networks in every aspect, from size and scale to design and layout
- The use of technology in stores has never been more important, enabling retailers to offer customers a range of checkout options, including assisted and self-service lanes
- Vendors lack a reliable, detailed view of their market presence and that of their competitors

The study provides technology vendors with intelligence on the market and their competitors
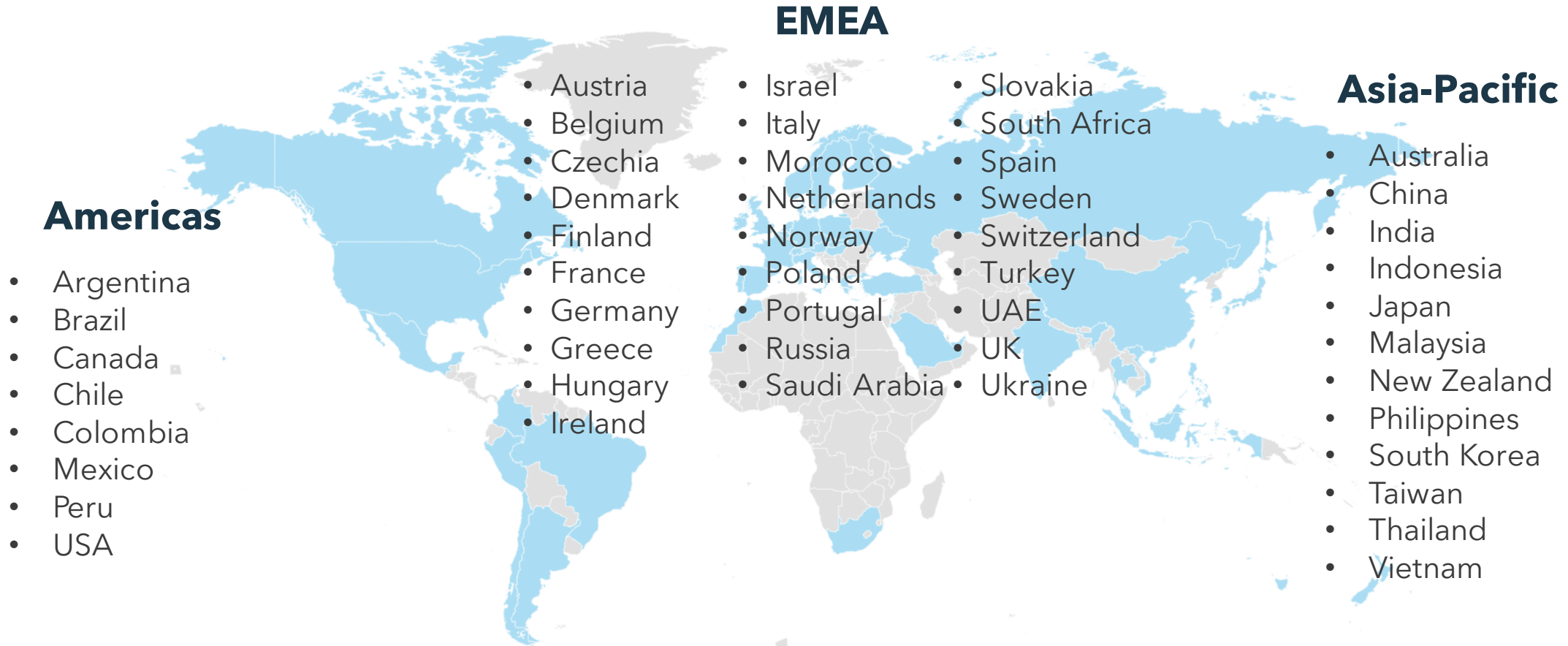
- Understand overall market context, and identify future opportunities
- Benchmark versus competitors, overall as well as by geography and customer segments
- Provide authoritative, independent substantiation of market presence in marketing collateral

The study provides detailed, country-by-country data on the market for programmable EPOS and self-checkout hardware

Scope	
Product	**Programmable EPOS** and **self-checkout** (SCO) **hardware**
Geographies	Global coverage with data for **53 country markets** across **6 regions**
Segments	Data provided for **Grocery+**, **General Merchandise** and **Hospitality+**
Vendors	**40+ vendors** including Diebold Nixdorf, Elo, HiStone, HP, NCR Voyix, Oracle, Partner Tech, Posiflex, Toshiba, Sunmi and Wintec
Metrics	Units (**shipments** / **installed base**) and **value** (expenditure on hardware / maintenance)
Dates	**End-2023**, historical data and **forecasts** to 2029

For full details of product and segment scope, see Appendix

The study will provide global data, including figures for 53 country markets

EMEA

- Austria
- Belgium
- Czechia
- Denmark
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland

- Israel
- Italy
- Morocco
- Netherlands
- Norway
- Poland
- Portugal
- Russia
- Saudi Arabia

- Slovakia
- South Africa
- Spain
- Sweden
- Switzerland
- Turkey
- UAE
- UK
- Ukraine

Americas

- Argentina
- Brazil
- Canada
- Chile
- Colombia
- Mexico
- Peru
- USA

Asia-Pacific

- Australia
- China
- India
- Indonesia
- Japan
- Malaysia
- New Zealand
- Philippines
- South Korea
- Taiwan
- Thailand
- Vietnam

Including 'Other' markets for Latin America, Western Europe, Central and Eastern Europe, Middle East and Africa, and Asia-Pacific

The study methodology builds on our expertise in large-scale, global studies, designed to ensure comparability and reliability

Collect	Validate	Analyse
Data gathered from all major vendors	Accuracy of claims verified using variety of sources	Leveraging RBR expertise in drawing insights from data
• RBR Data Services solicits information from industry suppliers • Primary data complemented with secondary research • Overall 100+ vendors analysed	• RBR's historical market data over two decades • Insights on retailers' store networks • Press releases plus specialist and mainstream media • Annual reports and stock exchange filings	• Data analysed by country, vendor, etc. • Report commentary highlights major customers, and the latest rollouts • Insights on forecasts and future trends

The study leverages RBR Data Services' expertise in syndicated retail research studies, its deep knowledge of the POS market and its ability to draw insights from data

Ease of use, and access to the RBR Data Services team, maximises value across your organisation

Deliverables collectively address clients' core market intelligence needs

Market Report
- Key market statistics, trends and commentary by country
- Regional and global comparative analyses
- Familiar PowerPoint format facilitates re-use of material

Market Database
- Excel format enables use across your organisation
- Charting tool facilitates production of bespoke outputs
- Comprehensive data easily extracted for further analysis

Video Conference
- Live session to present findings and discuss implications

Analyst Access
- Ongoing access to senior RBR Data Services researchers

In addition to the full global report, regional and segmented options are available

Geographic Coverage	Full Report (EPOS and SCO)	EPOS Only	Self-Checkout Only
Global (Full Report)	**£61,000**	**£36,500**	**£36,500**
EMEA	£30,500	£18,250	£18,250
Americas	£18,250	£11,000	£11,000
Asia-Pacific	£24,500	£14,750	£14,750
International Overview (World and regional market coverage)	£22,000	£13,250	£13,250

Contact us with questions, to discuss your requirements or place an order:
+44 20 8831 7300
rbr@datos-insights.com

EPOS shipments to Indonesia bounce back, with strong future growth expected
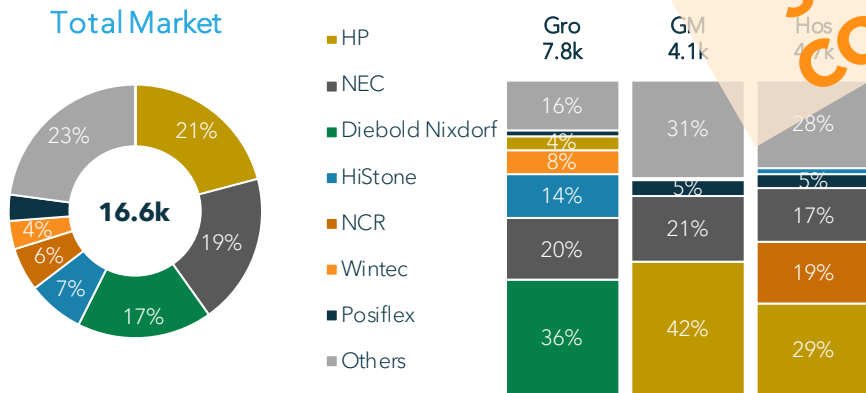
EPOS Shipments and Installed Base (000s)
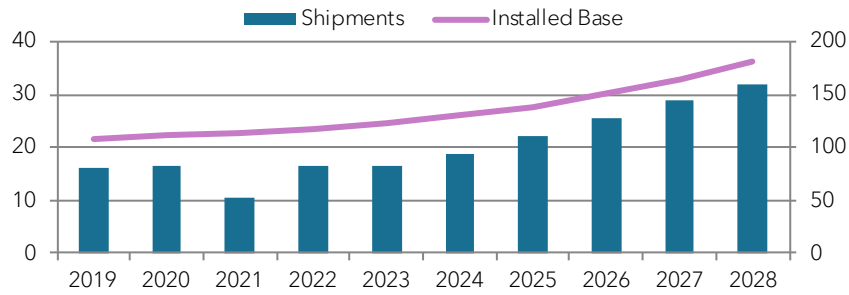
	Shipments		Installed Base	
2022	16.6	(#25)	117.5	(#25)
Growth 2021-22	61%	(#2)	3%	(#9)
CAGR 2022-28	11%	(#8)	8%	(#8)

EPOS Shipments by Segment and Vendor, 2022

Total Market

16.6k

- HP
- NEC
- Diebold Nixdorf
- HiStone
- NCR
- Wintec
- Posiflex
- Others

Market Commentary

- Shipments of programmable EPOS units to Indonesia rose by 61% in 2022, with nearly 17,000 units delivered
  - 2022 saw several major retailers, including an international fast-food chain, undertake hardware refreshes
  - Leading convenience store chains Alfamart and Indomaret continue to expand, each opening around 1,000 new locations in 2022
  - HP represented 21% of total shipments to the market in 2022, with a strong presence in both GM and hospitality sectors
  - Customers include department store chain Matahari, which has nearly 150 outlets
  - International QSR chains franchised by MAP, such as Burger King and Starbucks, also use HP EPOS hardware
- NEC is the second largest supplier to the market, accounting for nearly a fifth of shipments; customers include AEON
- Diebold Nixdorf accounts for 17% of the market, working with local partner Kahar Duta Sarana
  - The vendor delivers to Dairy Farm International, which operates Giant and Hero grocery stores
- Other vendors present in the market include Chinese suppliers HiStone and Wintec, as well as NCR
- The expanding retail sector in Indonesia offers strong growth potential; EPOS installations will surpass 180,000 units in 2028
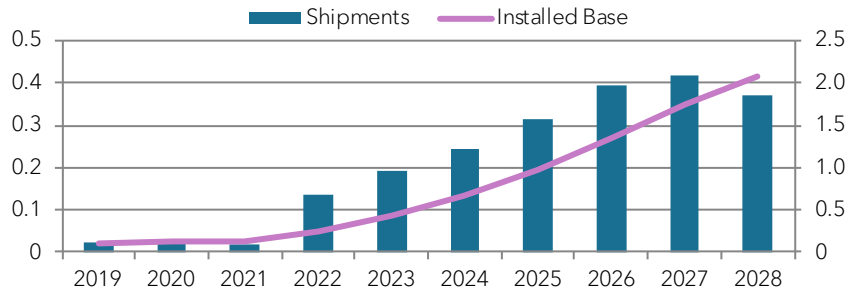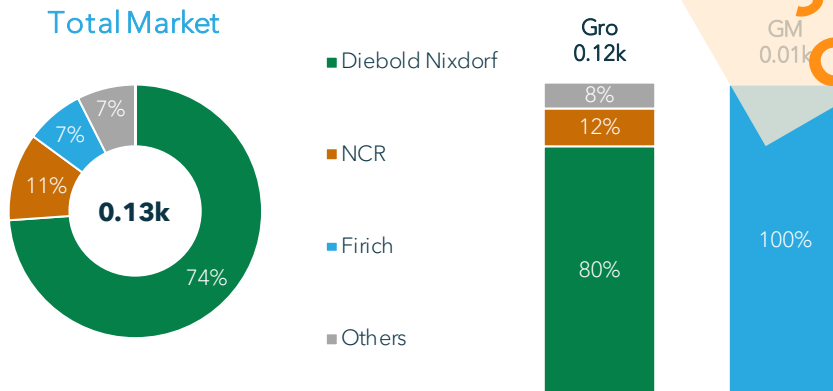
Record number of self-checkout shipments to Saudi Arabia in 2022

SCO Shipments and Installed Base (000s)

	Shipments		Installed Base	
2022	0.1	(#39)	0.2	(#46)
Growth 2021-22	570%	(#4)	95%	(#6)
CAGR 2022-28	18%	(#21)	43%	(#)

SCO Shipments by Segment and Vendor, 2022

Total Market

0.13k

- Diebold Nixdorf
- NCR
- Firich
- Others

SAMPLE FROM 2023 STUDY – NOT FOR COMMERCIAL USE

Market Commentary

- There were more than 130 shipments of SCO terminals to the Saudi Arabian market in 2022; prior to 2022, annual shipment levels had not exceeded 30 units

- Diebold Nixdorf delivered nearly 100 terminals to grocery customers in Saudi Arabia, working with two local distributors Alhamrani and Zultec Group

  – Al Othaim continues to roll out Diebold Nixdorf self-checkouts at its supermarkets

  – Riyadh-based supermarket chain Al-Sadhan, also began rolling out the vendor's SCO terminals in 2022

  – Further Diebold Nixdorf customers include SPAR, which opened two new stores in 2022, both equipped with SCO

- NCR shipped 15 terminals to Saudi Arabia; the vendor sells SCO terminals to retailers via local partner Retail Business Solutions

- Major retail chain Bindawood uses NCR SCO units, which are installed at both its own-brand stores and at Danube locations

- Firich shipped a small number of units to Saudi Arabia in 2022; clothing chain Max Fashion has begun piloting card-only SCO terminals from this vendor at one of its mall stores

- Supermarket chain Carrefour has installed proprietary self-checkouts at some of its stores in Saudi Arabia

- SCO shipments will increase over the forecast period with the installed base exceeding 2,000 units by 2028

A comprehensive Market Database is provided in Excel, which includes a Custom Analysis tool

Global EPOS and Self-Checkout 2024

Programmable EPOS Shipments and Installed Base - All Segments, by Region and Country, 2020-2029, (thousand)

Confidential - Internal Use Only

Source: RBR Data Services

Region	Country	Shipments									
		2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Asia-Pacific	Australia										
Asia-Pacific	China										
Asia-Pacific	India										
Asia-Pacific	Indonesia										
Asia-Pacific	Japan										
Asia-Pacific	Malaysia										
Asia-Pacific	New Zealand										
Asia-Pacific	Philippines										
Asia-Pacific	South Korea										
Asia-Pacific	Taiwan										
Asia-Pacific	Thailand										
Asia-Pacific	Vietnam										
Asia-Pacific	Others										
Asia-Pacific	Total										
North America	Canada										
North America	USA										
North America	Total										

Global EPOS and Self-Checkout 2024

Programmable EPOS Shipments - All segments, by Vendor, Region and Country, 2020-2023, (thousand)

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Source: RBR Data Services

Year	Region	Country	Total	4POS								Flytech	Fujitsu	GSAN	HiStone		HP	NCR	NEC
2023	Latin America	Argentina																	
2023	Latin America	Brazil																	
2023	Latin America	Chile																	
2023	Latin America	Colombia																	
2023	Latin America	Mexico																	
2023	Latin America	Peru																	
2023	Latin America	Others																	
2023	Latin America	Total																	
2023	Western Europe	Austria																	
2023	Western Europe	Belgium																	
2023	Western Europe	Denmark																	
2023	Western Europe	Finland																	
2023	Western Europe	France																	
2023	Western Europe	Germany																	
2023	Western Europe	Greece																	
2023	Western Europe	Ireland																	
2023	Western Europe	Italy																	

Global EPOS and Self-Checkout 2024

Self-Checkout Shipments - All segments, by Vendor, Region and Country, 2020-2023, (thousand)

Confidential - Internal Use Only

Year	Region	Country	Total	Fujitsu	HiStone	Hyosung TNS	ITAB	IXR	Laurenti	Mashgin	NCR	NEC	Perto	SED Initta	StrongPoint	Summi	Toshiba
2023	Central & Eastern Europe	Czechia															
2023	Central & Eastern Europe	Hungary															
2023	Central & Eastern Europe	Poland															
2023	Central & Eastern Europe	Russia															
2023	Central & Eastern Europe	Slovakia															
2023	Central & Eastern Europe	Ukraine															
2023	Central & Eastern Europe	Others															
2023	Central & Eastern Europe	Total															
2023	Middle East & Africa	Israel															
2023	Middle East & Africa	Morocco															
2023	Middle East & Africa	Saudi Arabia															
2023	Middle East & Africa	South Africa															
2023	Middle East & Africa	UAE															
2023	Middle East & Africa	Others															
2023	Middle East & Africa	Total															
2023	World	Total															

SAMPLE FROM 2023 STUDY – NOT FOR COMMERCIAL USE

Appendix

RBR Data Services has deep retail and hospitality industry knowledge, researching various store technologies

Key Qualifications

- **35 years' experience** delivering international market research to diverse blue-chip client base

- **Expertise** in hardware, software and services

- **Dedicated EPOS and self-checkout hardware research** since 2008

- **Strong understanding of general and technology trends** in retail and hospitality industries

- **Reputation for premium, independent syndicated research** studies funded by industry suppliers

Types of client

- **Technology suppliers** e.g. Diebold Nixdorf, Epson, Fiserv, Fujitsu, Glory, HP, Microsoft, NCR Voyix, Toshiba, Zebra

- **Retailers** e.g. Auchan, X5 Retail

- **Payment firms** e.g. American Express, Mastercard, Visa

- **Consultancies** e.g. Bain & Company, Boston Consulting Group

- **Investment banks and investors** e.g. Advent International, Elliott Management, Goldman Sachs

The study covers programmable EPOS and self-checkout hardware, and defines three customer segments

Products		Customer Segments	
EPOS	An Electronic Point of Sale ("EPOS") unit is a device which processes transaction data at the point of-sale (or point-of-service) and which has the capability to transmit data to (and receive data from) other computers electronically, in an unrestricted manner	**Grocery+**	• Supermarkets • Hypermarkets • Discounters • Convenience stores • Drugstores/pharmacies
Programmable EPOS	A "programmable EPOS" unit is, in addition: • designed in its entirety with a retail/hospitality (etc.) environment in mind, in terms of lifespan, power consumption, reliability, environmental challenges (dust, grease, heat), connectivity etc. • fully user-programmable, running an open operating system and dedicated POS application • purpose-built for transaction processing • designed to be stationary (because of peripherals, cabling, weight etc.)	**General Merchandise**	• Mass merchandisers • Cash and carry/warehouse club • Department/variety stores • Speciality retail - soft goods • Speciality retail - hard goods
Self-Checkout	A "self-checkout" (SCO) unit has many of the same characteristics as a "programmable EPOS" unit, but allows the customer to handle the "checkout" process of goods already selected, rather than being served by a member of staff	**Hospitality+**	• Hotels • Restaurants • Leisure • Other service industry