

# Global EPOS and Self-Checkout



# The EPOS & Self-Checkout Market Is Transforming - Gain Strategic Advantage or Risk Market Share


## Market Visibility Challenges for Vendors

- Retail technology investment patterns are shifting as stores adapt to changing consumer expectations and competitive pressures
- Without comprehensive market data, vendors face uncertainty in product development priorities and sales targeting across diverse country markets
- Competitors with access to detailed market intelligence can identify and capitalize on emerging opportunities more effectively

## Strategic Intelligence Drives Success


- Comprehensive deployment data reveals market trends and untapped opportunities specific to your EPOS and self-checkout solutions
- Detailed competitive benchmarking across retail segments and geographies helps optimize your product positioning and marketing approach
- Authoritative market intelligence validates your position to prospects and strengthens sales proposals when competing for high-value retail contracts

# Unmatched Methodology: Data You Can't Find Anywhere Else



**QUANTITATIVE BASELINE**

- Draw on our established history of retail technology research
- Unparalleled model of shipment and installed base figures across 50+ countries



**TRIANGULATION & VALIDATION**

- Accuracy of data verified using two decades of historical market data and external sources
- Data analysed by country, vendor and segment




**PRIMARY RESEARCH**

- Key quantitative information solicited from industry suppliers
- Insights on latest rollouts obtained from qualitative calls with country experts
- Analysis of market presence of >100 vendors



**SECONDARY RESEARCH**

- Primary data complemented by extensive secondary research
- Analysis of annual reports and financial filings
- Press releases plus specialist and mainstream media leveraged for insights on major projects

# Comprehensive View of Global EPOS and Self-Checkout Operations: From Recent Developments to Future Forecasts

## Global EPOS and Self-Checkout Dataset

Product	Metric	Dates	Countries	Segments
EPOS	Market Size - Shipments	2022-2031	<p>53 across 6 regions:</p> <p><b>Asia Pacific:</b> Australia, China, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, South Korea, Taiwan, Thailand, Vietnam, Others</p> <p><b>North America:</b> Canada, USA</p> <p><b>Latin America:</b> Argentina, Brazil, Chile, Colombia, Mexico, Peru, Others</p> <p><b>Western Europe:</b> Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, UK, Others</p> <p><b>Central &amp; Eastern Europe:</b> Czechia, Hungary, Poland, Russia, Slovakia, Ukraine, Others</p> <p><b>Middle East &amp; Africa:</b> Israel, Morocco, Saudi Arabia, South Africa, UAE, Others</p>	Grocery+, General Merchandise, Hospitality+
	Market Size - Installed Base	2022-2031		
	Market Size - Expenditure (Hardware; Services; Total)	2022-2031		
	Vendor Data - Shipments	2022-2025		
	Vendor Data - Installed Base	2022-2025		
Self-Checkout	Market Size - Shipments	2022-2031		
	Market Size - Installed Base	2022-2031		
	Market Size - Expenditure (Hardware; Services; Total)	2022-2031		
	Vendor Data - Shipments	2022-2025		
	Vendor Data - Installed Base	2022-2025		
	Market Size - Shipments (Cash-accepting; Cashless)	2024, 2025		

Vendors	40+ including Diebold Nixdorf, Elo, HiStone, HP, NCR Voyix, Oracle, Partner Tech, Posiflex, Sunmi, Toshiba and Wintec
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# Unrestricted Team Access: Maximizing Value Across Your Company



## 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

- Charting tool facilitates production of bespoke outputs
- Comprehensive data easily extracted for further analysis



## Video Conference

- Live session to present findings to your organisation and discuss implications



## Expert Support

- Subject matter experts to aid understanding of data and underlying assumptions

# Deep Market Intelligence and Expert-driven Analysis

We help retail technology industry stakeholders benchmark their market position, identify untapped opportunities, validate strategic investments, and make confident decisions about market expansion.

## COMPREHENSIVE COVERAGE

Full global coverage, including 53 countries

Robust data for EPOS and self-checkout hardware

Data and insights on major market players

## DEEP MARKET UNDERSTANDING

Multilingual in-house team

Deep industry focus and country expertise

Proprietary research; reliable forecasts

## LONG-TERM COMMITMENT

Covering retail technology for >15 years

Reputation for integrity and independence

The authoritative research provider trusted by the industry's major players

## FIND OUT MORE



Alan Burt  
Director, Market Data and Forecasting

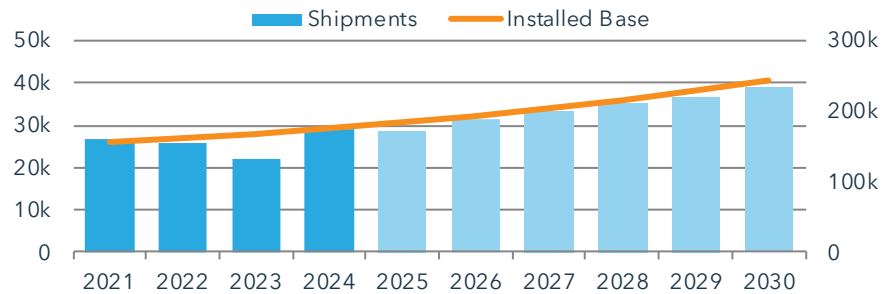
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## DATOS INSIGHTS CLIENTS INCLUDE



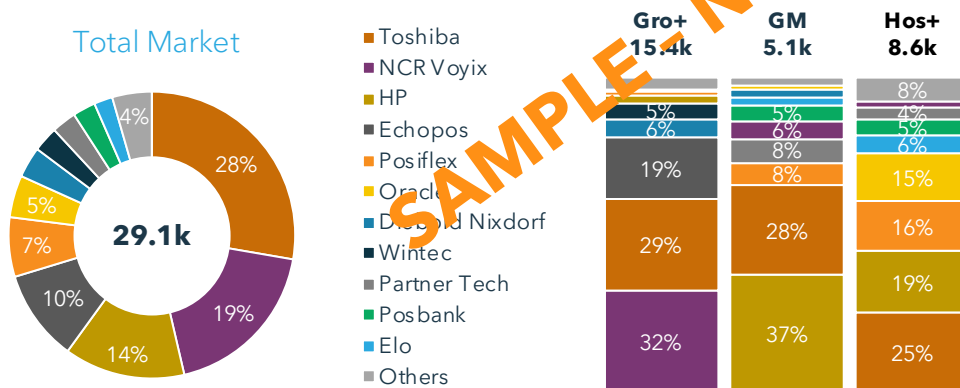
# Toshiba is the largest vendor in the growing Turkish EPOS market

## EPOS Shipments and Installed Base



	Shipments		Installed Base	
2024	29.1k	(#13)	175.6k	(#16)
Growth 2023-24	33%	(#8)	5%	(#2)
CAGR 2024-30	5%	(#22)	6%	(#14)

## EPOS Shipments by Segment and Vendor, 2024



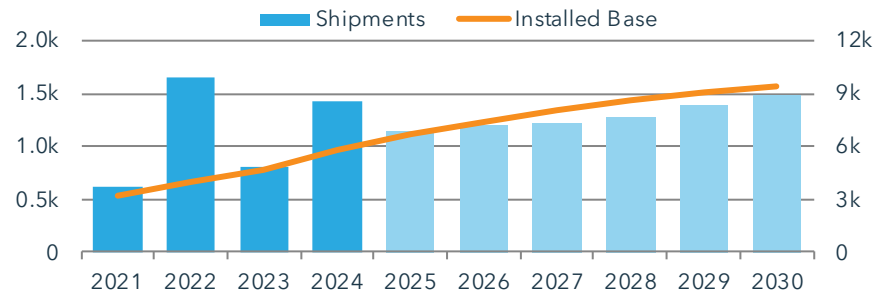
## Key Insights

- EPOS shipments to Turkey grew by nearly a third in 2024, with more than 29,000 units delivered
- Toshiba is the largest supplier to the market, with a 28% share of shipments and a strong foothold in all segments
  - Among its customers is a major global supermarket chain
- NCR Voyix is the second largest, accounting for 19% of units shipped in 2024
  - The vendor has the largest share of the grocery segment, and works with local distributors such as Encore
- HP accounts for 14% of EPOS shipments to the market
  - The manufacturer works with domestic partner Denker, mainly supplying the general merchandise sector
- Local firm Echopos counts grocery firm ŞOK among its clients
- Diebold Nixdorf delivered more than 1,000 units in 2024 with customers including local supermarket chain A101
- Turkish vendor Robotpos delivers to its home hospitality sector
  - Clients include coffee chain Kahve Dünyası and restaurant firm Tavuk Dünyası which each have more than 300 locations
- Other vendors present in the market include Vectron, which supplies the Turkish hospitality segment through reseller Omni
- Turkey's EPOS market has strong growth potential, with the total installed base forecast to exceed 240,000 by 2030

Source: Datos Insights

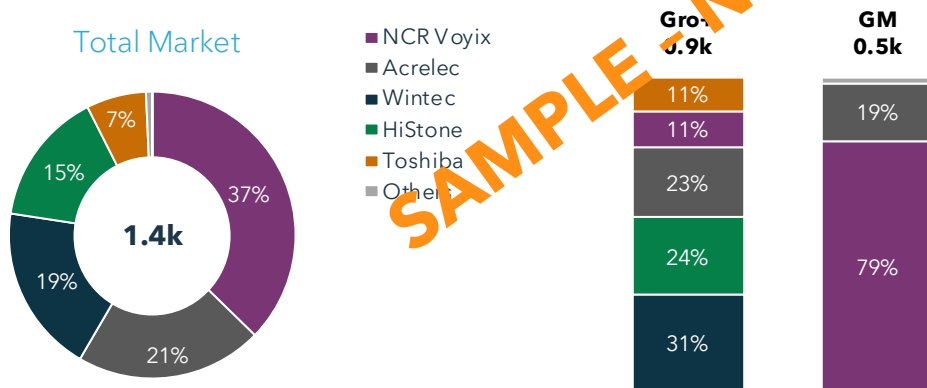
# Chile's self-checkout market sees strong growth in 2024, with major grocery chains investing heavily in the technology

## SCO Shipments and Installed Base



	Shipments		Installed Base	
2024	1.4k	(#21)	5.8k	(#20)
Growth 2023-24	77%	(#16)	25%	(#25)
CAGR 2024-30	1%	(#36)	8%	(#32)

## SCO Shipments by Segment and Vendor 2024



## Key Insights

- More than 1,400 self-checkout terminals were delivered to Chile in 2024, up from around 800 shipments in 2023
- The largest supplier to the market is NCR Voyix, which shipped 530 units in 2024
  - Customer Walmart has deployed self-checkouts at its Líder, Líder Express and SuperBodega aCuenta brands
  - Acrelec accounts for more than a fifth of total shipments, with customers including Falabella Group's Tottus supermarkets
- Chinese manufacturers Wintec and HiStone have market shares of 19% and 15% respectively, both supplying the grocery sector
  - The latter works with domestic reseller GIRBOY, with clients including SMU-owned supermarket chain Unimarc
- Toshiba represents 7% of total self-checkout shipments
  - The manufacturer works with local partner RHISCOM, with customers including grocery chains Supermercados Cugat and Supermercados El Trébol
- Proprietary self-checkout solutions have been implemented by fashion retailers Zara and H&M; both use RFID technology
  - H&M has installed such checkouts at its flagship store, while Zara has rolled out its solution to multiple locations
- Self-checkout installations in Chile are forecast to total nearly 10,000 by 2030

# Access Our Market Database Through an Interactive Online Platform With Custom Filtering and Charting Tools



SAMPLE - NOT FOR COMMERCIAL USE

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

Products		Customer Segments	
<b>EPOS</b>	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	<b>Grocery+</b>	<ul style="list-style-type: none"> <li>• Supermarkets</li> <li>• Hypermarkets</li> <li>• Discounters</li> <li>• Convenience stores</li> <li>• Drugstores/pharmacies</li> </ul>
<b>Programmable EPOS</b>	<p>A “programmable EPOS” unit is, in addition:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• fully user-programmable, running an open operating system and dedicated POS application</li> <li>• purpose-built for transaction processing</li> <li>• designed to be stationary (because of peripherals, cabling, weight etc.)</li> </ul>	<b>General Merchandise</b>	<ul style="list-style-type: none"> <li>• Mass merchandisers</li> <li>• Cash and carry/warehouse club</li> <li>• Department/variety stores</li> <li>• Speciality retail - soft goods</li> <li>• Speciality retail - hard goods</li> </ul>
<b>Self-Checkout</b>	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	<b>Hospitality+</b>	<ul style="list-style-type: none"> <li>• Hotels</li> <li>• Restaurants</li> <li>• Leisure</li> <li>• Other service industry</li> </ul>

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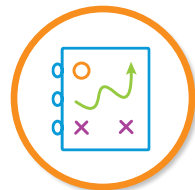
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