

London, 6<sup>th</sup> July 2017

**Breakthrough year for self-checkout as global market booms**

*New RBR research shows sales jumped by 67% globally, with US retailers in particular investing heavily in transforming their stores*

**US big-box retailers expand and refresh their self-checkout fleets**

A record 49,000 self-checkout (SCO) units were delivered to retailers worldwide in 2016, according to *Global EPOS and Self-Checkout 2017*, a new study by strategic research and consulting firm RBR.

Huge investment by several top-10 retailers saw US shipments jump 155%. Big-box chains such as Target have revamped their checkout zones, increasing the number of self-service lanes per store and installing terminals in outlets which did not previously have the technology.

Russia’s leading retailers ramped up self-checkout rollouts, with activity doubling. Magnit and X5 Retail continued to install SCO units in large numbers while others started piloting the solution.

**Breakthroughs in markets with huge potential**

There were major breakthroughs for self-checkout technology in 2016 in several markets which have enormous growth potential. A number of Brazilian supermarket chains began piloting SCO solutions, as did domestic retailers in China, with local vendors supplying the solutions in both cases.

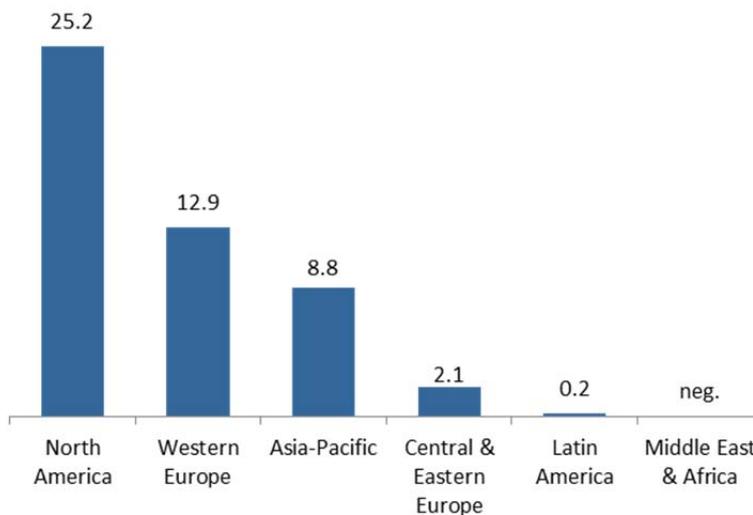
After many years of South African retailers resisting SCO technology due to concerns over shrinkage and pressure from trade unions fearing job losses, supermarket chain Pick ‘n Pay began a pilot.

**Diverse self-service formats increasingly common**

RBR’s study found that diverse forms of self-checkout are taking hold in two of the world’s largest markets, the UK and Japan.

In the UK, compact card-only models are increasingly common in small-format grocery stores. Meanwhile, Japanese retailers have invested in a “semi-self-service” system they deem a more efficient use of limited space: store employees carry out the time-consuming scanning process, leaving customers to handle packing and payment.

**Self-Checkout Shipments by Region, 2016 (thousands)**



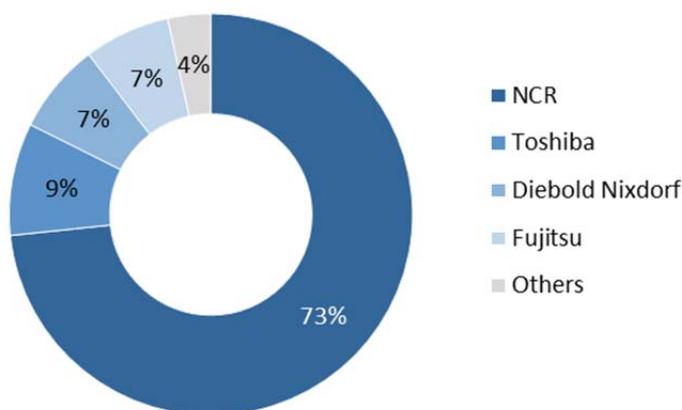
Source: *Global EPOS and Self-Checkout 2017* (RBR)

### NCR triples North America SCO shipments and increases global market share

NCR's share of global self-checkout shipments rose six percentage points in 2016, mainly thanks to rollouts by major US retailers. The company accounted for 73% of the market, and led in all six regions in RBR's study.

Global number two, Toshiba, strengthened its position in Japan, while Diebold Nixdorf moved up one place into third at a global level, and is the second largest supplier in Europe. Japan's Fujitsu is second in North America, and fourth overall. Other vendors include ITAB in Europe, and Digi and NEC in Japan, while domestic manufacturers have emerged in Brazil and China.

#### Suppliers' Shares of Self-Checkout Shipments Worldwide, 2016



Source: Global EPOS and Self-Checkout 2017 (RBR)

### 400,000 self-checkout terminals globally by 2022

A combination of existing SCO proponents rolling out additional units in their stores and new users deploying for the first time will boost global installations by 53% by 2022. Alan Burt, who led the research, commented *"With self-checkout technology being adopted from Turkey to Thailand, RBR forecasts that by 2022 there will be nearly 400,000 SCO machines installed by retailers across more than 60 countries worldwide."*

#### Notes to editors

These figures and insights are based on RBR's *Global EPOS and Self-Checkout 2017* report. Since its first appearance in 2008, RBR's survey has been used for strategic planning across the industry. For more information about this report or to discuss the findings in more detail please email Alan Burt ([alan.burt@rbrlondon.com](mailto:alan.burt@rbrlondon.com)) or call +44 20 8831 7322.

RBR is a strategic research and consulting firm with three decades of experience in banking and retail automation, cards and payments. It assists its clients by providing independent advice and intelligence through published reports, consulting, newsletters and events.

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