

London, 25th June 2018

Store transformation drives global self-checkout market to record high

New research shows unprecedented activity for a second consecutive year, with shipments up 14%

US retailers increase self-checkout adoption amid store revamps

2017 saw another record year for self-checkout (SCO) deliveries, with 63,000 units shipped worldwide, according to *Global EPOS and Self-Checkout 2018*, a new study by strategic research and consulting firm RBR.

The USA accounts for more than half of shipments, with retailers continuing to invest heavily in self-checkout technology as an integral part of revamping their store layouts. Big box players such as Walmart and Kroger have added extra terminals in existing stores and upgraded older hardware.

Pressure on labour boosts deployment in Canada and Japan

Labour pressures drove retailers in Canada and Japan to ramp up SCO deployments. In Canada activity boomed, partly owing to minimum wage increases in several provinces including Ontario and Quebec. A shortage of labour has also prompted Japanese grocery chains to boost investment in self-service technologies.

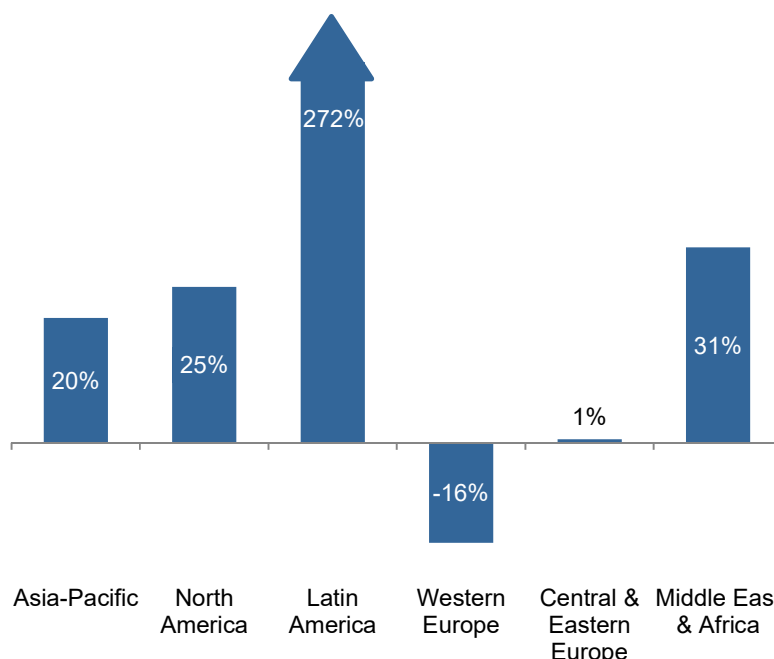
Discounters, both food and non-food alike, are increasingly deploying SCO units in some of the more mature markets. Supermarket discounter Lidl has started piloting the technology in several countries including France, while variety store chains such as Dollarama in Canada and the UK’s Poundland have begun trialling SCO solutions.

Pilots underway in increasingly diverse range of countries

Self-checkout technology is becoming progressively more common in Brazil and China, with shipment numbers more than tripling in both markets in 2017. A number of supermarket chains in these countries have begun pilots, mainly from local suppliers; huge potential remains for these markets and adoption is expected to accelerate over the next few years.

RBR’s research also highlights SCO deployment gathering pace in a diverse range of markets. The technology is gaining momentum in countries such as Argentina, Israel and Poland, while the first units were installed in Colombia during 2017.

Growth in Self-Checkout Shipments by Region, 2016-2017



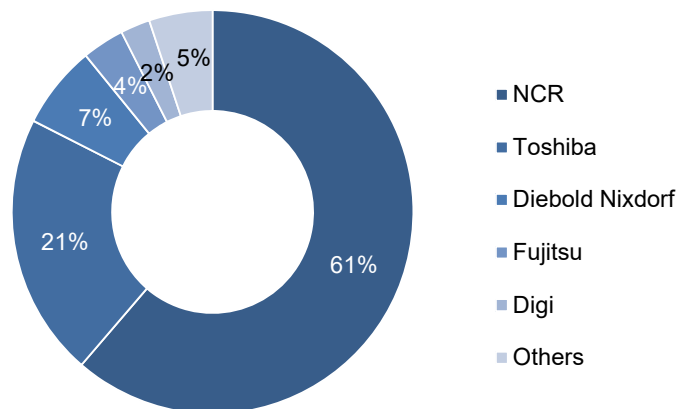
Source: *Global EPOS and Self-Checkout 2018* (RBR)

NCR leads global self-checkout market while Toshiba gains share

NCR remains the largest self-checkout vendor globally, leading in five out of six regions in RBR’s study – its units are deployed by many of the world’s largest retailers. Toshiba is in second place, growing its share via “semi-self-service” deployments in Japan, and hardware refreshes by large US retailers.

Third largest supplier, Diebold Nixdorf, has a particularly strong presence in Europe, where it accounts for 30% of the market. Of the remaining suppliers, the majority of Fujitsu’s units are deployed in the USA and Japan, while most other SCO vendors, such as Japan’s Digi, only have installations in their home markets.

Suppliers’ Shares of Self-Checkout Shipments Worldwide, 2017



Source: Global EPOS and Self-Checkout 2018 (RBR)

Customers have a range of self-service formats available to them

The self-service market continues to evolve, with a proliferation of mobile self-scanning and in-app payment projects in 2017. Major US retailers including Kroger are trialling such technology, although Walmart ended its 100 store “Scan and Go” pilot in 2018.

Self-checkout installations are expected to reach nearly 450,000 by 2023 according to RBR. Alan Burt, who led the research, commented *“The opportunity for further growth of the SCO market is excellent; penetration is increasing in mature markets, while retailers in emerging economies such as Indonesia are now piloting the technology”*.

Notes to editors

These figures and insights are based on RBR’s *Global EPOS and Self-Checkout 2018* 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) or call +44 20 8831 7322.

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