PRESS RELEASE

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NCR leads booming global self-checkout market

There were more than 120,000 self-checkout shipments last year, with NCR accounting for nearly half the market, according to new research

Dynamic market supplied by diverse base of suppliers

2019 was yet another record year for self-checkout (SCO) shipments, with activity rocketing by 52%, as revealed by *Global EPOS and Self-Checkout 2020*, the latest study by strategic research and consulting firm RBR.

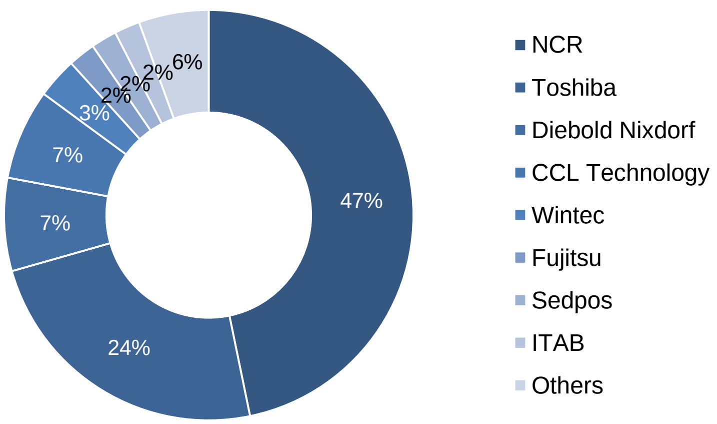
With in-depth coverage of 53 countries, the study paints a picture of where retailers are choosing global technology giants, regional and local players – and in some cases, retailers' own IT divisions – to supply them with self-checkout solutions.

Leading global vendors maintain shares in accelerating market

The three largest international vendors all achieved strong growth in 2019. The research shows that NCR is the largest self-checkout supplier globally, shipping nearly 58,000 units last year, up more than 50% on the year before. The vendor delivered terminals to a strong base of large-scale customers, including international big box giant Walmart, UK grocery chain Sainsbury's and Polish discounter Biedronka.

Toshiba grew its share, with an expanding presence particularly in the USA and Japan. Retailers rolling out the vendor's solution in recent years, many of which are continuing into 2020, include regional US supermarket chains Weis Markets and Albertsons, as well as Walmart Canada. Diebold Nixdorf, the world's third largest vendor, also strongly increased its shipments, supplying more than a quarter of all units delivered to Europe.

Suppliers' Shares of Self-Checkout Shipments Worldwide, 2019



Source: Global EPOS and Self-Checkout 2020 (RBR)

CCL Technology accounted for 7% of the global market, supplying both international and local retailers in its home market of China. Wintec rounds out the top five global suppliers; most of its terminals are installed in China, but it also has a significant presence in Israel.

Other major vendors include Japan's Fujitsu, Sweden's ITAB and Chinese firms Sedpos and Hisense, all of which delivered more than 2,000 SCO units.

New suppliers emerging alongside bespoke solutions

The range of suppliers offering self-checkout terminals is growing larger every year. In some countries, local vendors compete with global players, while a number of prominent retailers have chosen to develop bespoke solutions, including South Korea's E-Mart, and Russian group X5 Retail at its Pyaterochka convenience stores.

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Alan Burt, who led the research, commented: *"With retailers investing more and more in self-service solutions, competition to supply retailers with self-checkout technology is becoming increasingly fierce, with new suppliers and innovative products emerging all the time".*

Notes to editors

These figures and insights are based on RBR's *Global EPOS and Self-Checkout 2020* 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.

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.