

STUDY OVERVIEW

# Global EPOS and Self-Checkout 2021

Executive Report and Market Database

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[www.rbrlondon.com/retail](http://www.rbrlondon.com/retail)

## *Global EPOS and Self-Checkout 2021* provides suppliers with data, insights and understanding that are not available from any other source

### Who should purchase?

- ▶ Suppliers of EPOS and self-checkout (SCO) terminals, and related products/services

### Why should they purchase?

- ▶ *Global EPOS and Self-Checkout 2021* is the industry's highest-quality research, used by leading suppliers because it provides:
  - Profiles of the EPOS and SCO markets in 53 countries across six regions, with commentary on key developments
  - Reliable vendor shares in each market
  - Data for three retail/hospitality verticals, with forecasts to 2026

### How will they benefit?

- ▶ *Global EPOS and Self-Checkout 2021* lets suppliers:
  - Identify growth markets and segments, and set sales targets
  - Benchmark performance versus competitors
  - Evaluate and refine strategy to grow revenues, margins and market share

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

**Objective: Describe current and future market for advanced hardware at point of sale/service**

<b>Scope</b>	<ul style="list-style-type: none"> <li>▶ <b>Products:</b> Programmable EPOS and self-checkout (SCO) hardware</li> <li>▶ <b>Geographies:</b> Global coverage with data for 53 country markets across 6 regions</li> <li>▶ <b>Segments:</b> Data provided for Grocery+, General Merchandise and Hospitality+</li> <li>▶ <b>Measures:</b> Units (shipments / installed base) and value (expenditure on hardware / maintenance)</li> <li>▶ <b>Vendors:</b> Country-level shipment figures (including data per segment) and installed base, for 40+ vendors</li> </ul>
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<b>Methodology</b>	<ul style="list-style-type: none"> <li>▶ RBR has developed a model of the market, segmenting by product, geography and customer</li> <li>▶ Primary and secondary research builds on RBR's in-house data, market understanding and industry expertise</li> </ul>	
	<b>Primary Research</b>	<b>Secondary Research</b>
	<ul style="list-style-type: none"> <li>▶ Speak with vendors face-to-face and via email/telephone                             <ul style="list-style-type: none"> <li>– Own position: shipments, installed base etc.</li> <li>– Competitors' positions</li> <li>– Hardware and services pricing, plus future trends</li> <li>– Trends e.g. growth prospects, replacement cycles</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▶ Vendors: press releases, annual reports etc.</li> <li>▶ Industry sources: websites, journals, associations etc.</li> <li>▶ Stock exchange filings and analysts' stock reports</li> <li>▶ Government: accounting submissions, tax authorities</li> <li>▶ Cross-checks: historical data, penetration (e.g. outlets)</li> </ul>

## In addition to the study report and database, clients receive access to RBR's senior researchers; a presentation of the key findings can also be arranged

### Timing and Deliverables

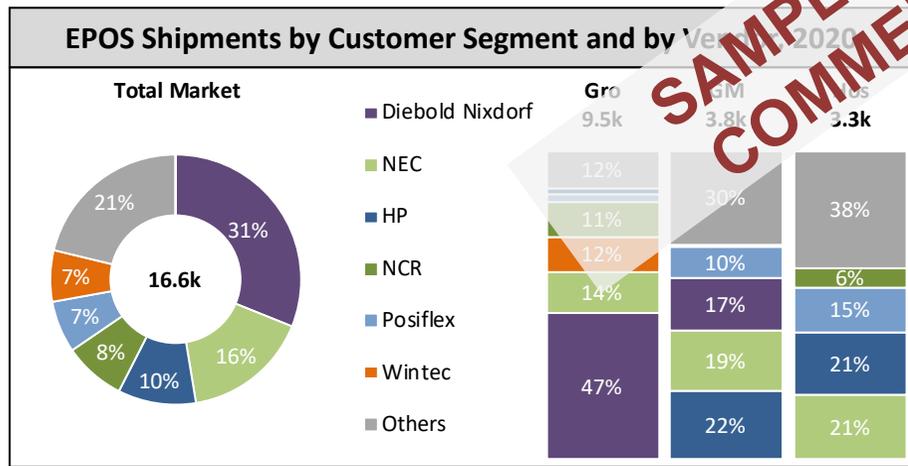
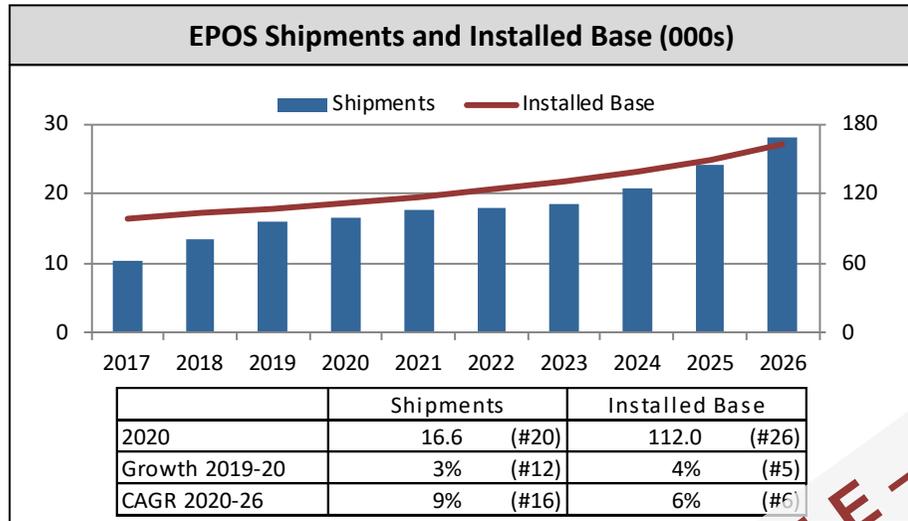
- ▶ Research conducted on an ongoing basis, with report issued annually in early June
- ▶ Printed and electronic (multi-user licence) copies of research findings
  - Executive report in PowerPoint containing key market statistics, trends and commentary by country and region
  - Comprehensive market database provided in Excel
- ▶ A conference call presentation of the study results can be organised if desired
- ▶ Privileged access to RBR's senior research analysts

### Pricing

Options	Full Report (EPOS and SCO)	EPOS Only	Self-Checkout Only
Full Report	£53,000	£31,750	£31,750
EMEA	£26,500	£16,000	£16,000
Americas	£16,000	£9,500	£9,500
Asia-Pacific	£21,250	£12,750	£12,750
International Overview <i>[World and regional market coverage]</i>	£13,250	£8,000	£8,000

**To discuss your requirements or place an order, please contact RBR on +44 20 8831 7300 or [rbr@rbrlondon.com](mailto:rbr@rbrlondon.com)**

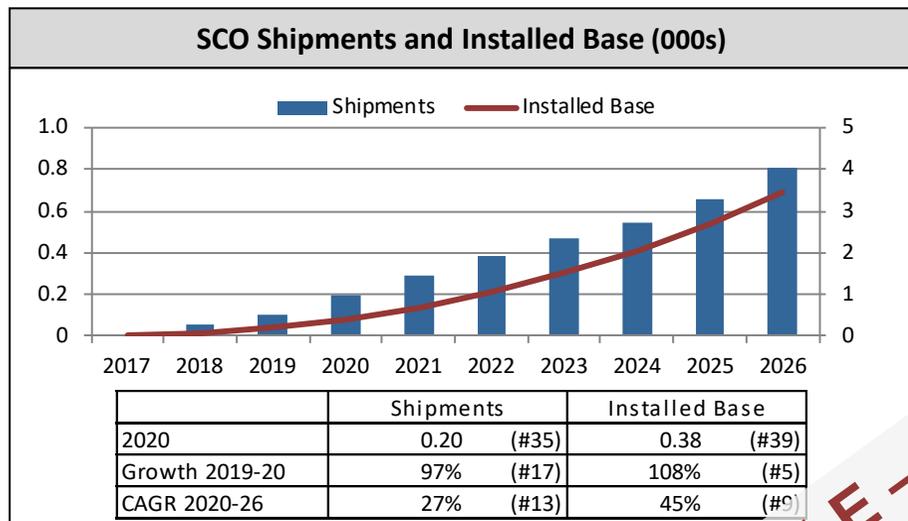
# Major international EPOS vendors work with local partners to supply the largest Indonesian retailers



### Market Commentary

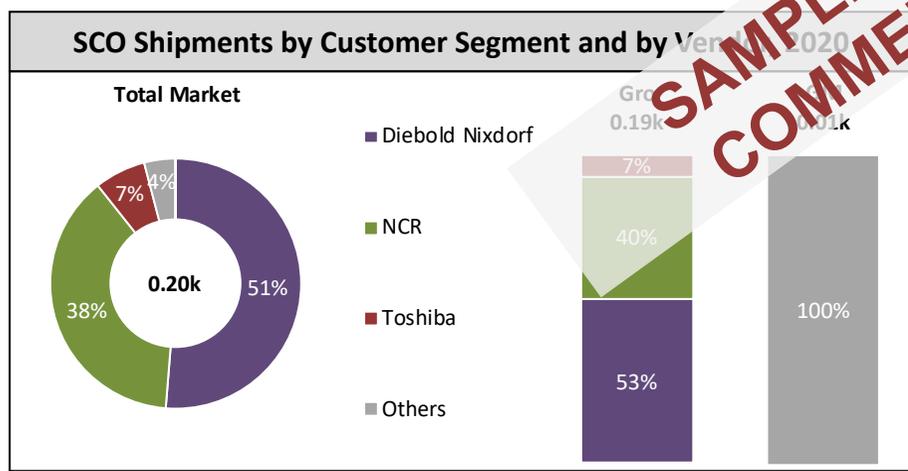
- ▶ More than 16,500 programmable EPOS units were delivered to Indonesia during 2020
  - This represented a modest increase on 2019, mainly owing to a project at a major retailer
  - The COVID-19 pandemic caused two separate lockdowns in Indonesia in 2020, with non-essential retailers shut
- ▶ The grocery segment in Indonesia is dominated by convenience store chains Alfamart and Indomaret, which have nearly 30,000 stores between them
- ▶ Diebold Nixdorf accounted for the largest market share in Indonesia, with 31% of shipments
  - The vendor works with a local partner, Kahar Duta Sarana (KDS)
  - Diebold Nixdorf terminals are installed at a range of retailers, including at stores belonging to Dairy Farm International, and a major local convenience store chain
- ▶ NEC represented 16% of the market in 2020, with its units installed at Alfamart stores
- ▶ HP delivered 1,700 EPOS units to Indonesia, with a strong presence in the hospitality and general merchandise sectors
  - Customers include QSR chains franchised by MAP Group, such as Starbucks and Burger King, as well as Matahari department stores
- ▶ NCR supplied 2,700 terminals in 2020, working via local partners including KDS and Datadigi
- ▶ Despite a slowdown in growth in the Indonesian EPOS market in 2020, there remains great potential in the medium to long-term
- ▶ Shipments are predicted to average more than 21,000 units during the course of the forecast period

# Increasing numbers of grocery retailers in the UAE are rolling out self-checkout technology



### Market Commentary

- ▶ The SCO market in the UAE grew for a fourth consecutive year in 2020, with a total of 200 terminals shipped
  - Around 100 units were delivered in 2019
- ▶ Diebold Nixdorf accounted for more than half of total shipments to the UAE in 2020
  - The manufacturer’s main customer is hypermarket chain Lulu Group, which first began trialling SCO technology in 2017
  - Another major grocery retailer in the UAE, which operates various hypermarket, supermarket and convenience store brands, has also begun trialling Diebold Nixdorf SCO terminals
  - NCR represents more than a third of overall shipments
  - The vendor works with local distributor DG Infotech
  - Customers include supermarket chain Spinneys, which operates more than 65 stores in the UAE and uses card-only NCR terminals
  - Further customers include IKEA which has also deployed card-only units and refreshed this hardware in 2020
- ▶ Toshiba also delivered a small number of terminals to the UAE
  - Hypermarket chain Carrefour deploys Toshiba cashless SCO terminals at its stores; customers using the “Scan and Go” service pay at these terminals after scanning their items with a retailer-provided device
- ▶ Other retailers in the UAE which have installed SCO technology include fashion chain Zara
- ▶ With several major retailers in the UAE having widely rolled out SCO terminals, it is expected that the market will continue to grow over the forecast period
- ▶ SCO shipments to the UAE are predicted to continue to rise by a CAGR of 45% over the next six years; by 2026 installations will reach 3,500 units



# A comprehensive market database is provided in Excel

GLOBAL EPOS AND SELF-CHECKOUT 2021																
Programmable EPOS Shipments and Installed Base - All Segments, by Region and Country, 2017-2026																
Confidential - Internal Use Only																
Region	Country	Shipments														
		2017	2018	2019	2020	2021	2022	2023	2024	2025	2026					
North America	Canada											<b>GLOBAL EPOS AND SELF-CHECKOUT 2021</b> Programmable EPOS Shipments - Grocery+, by Vendor, Region and Country, 2017-2026 Confidential - Internal Use Only				
North America	USA															
North America	Total															
Latin America	Argentina											<b>GLOBAL EPOS AND SELF-CHECKOUT 2021</b> Programmable EPOS Shipments - Grocery+, by Vendor, Region and Country, 2017-2026 Confidential - Internal Use Only				
Latin America	Brazil															
Latin America	Chile															
Latin America	Colombia															
Latin America	Mexico															
Latin America	Peru															
Latin America	Other Latin America															
Latin America	Total											<b>GLOBAL EPOS AND SELF-CHECKOUT 2021</b> Self-Checkout Shipments - General Merchandise, by Vendor, Region and Country, 2017-2026 Confidential - Internal Use Only				
Western Europe	Austria															
Western Europe	Belgium															
Western Europe	Denmark															
Western Europe	Finland															
Western Europe	France															
Western Europe	Germany															
Western Europe	Greece															
Western Europe	Ireland															
Western Europe	Italy															
Western Europe	Netherlands															
Western Europe	Norway															
Western Europe	Portugal															
Western Europe	Spain															
Western Europe	Sweden															
Western Europe	Switzerland															
Western Europe	Turkey															
Western Europe	UK															
Western Europe	Other Western Europe															
Western Europe	Total															
Asia-Pacific	Australia											<b>GLOBAL EPOS AND SELF-CHECKOUT 2021</b> Self-Checkout Shipments - General Merchandise, by Vendor, Region and Country, 2017-2026 Confidential - Internal Use Only				
Asia-Pacific	China															
Asia-Pacific	India															
Asia-Pacific	Indonesia															
Asia-Pacific	Japan															
Asia-Pacific	Korea															
Asia-Pacific	Malaysia															
Asia-Pacific	New Zealand															
Asia-Pacific	Philippines															
Asia-Pacific	Singapore															
Asia-Pacific	Taiwan															
Asia-Pacific	Thailand															
Asia-Pacific	Vietnam															
Asia-Pacific	Other Asia-Pacific															
Asia-Pacific	Total															
North America	Canada											<b>GLOBAL EPOS AND SELF-CHECKOUT 2021</b> Self-Checkout Shipments - General Merchandise, by Vendor, Region and Country, 2017-2026 Confidential - Internal Use Only				
North America	USA															
North America	Total															
Central & Eastern Europe	Hungary															
Central & Eastern Europe	Poland															
Central & Eastern Europe	Russia															
Central & Eastern Europe	Slovakia															
Central & Eastern Europe	Ukraine															
Central & Eastern Europe	Other Central & Eastern Europe															
Central & Eastern Europe	Total															
Middle East & Africa	Israel											<b>GLOBAL EPOS AND SELF-CHECKOUT 2021</b> Self-Checkout Shipments - General Merchandise, by Vendor, Region and Country, 2017-2026 Confidential - Internal Use Only				
Middle East & Africa	Morocco															
Middle East & Africa	Saudi Arabia															
Middle East & Africa	South Africa															
Middle East & Africa	UAE															
Middle East & Africa	Other Middle East & Africa															
Middle East & Africa	Total															

SAMPLE - NOT FOR COMMERCIAL USE

## RBR is recognised for its analytically rigorous, facts-based approach, global research capabilities and high-quality products

### Key Qualifications

- ▶ 30 years' experience delivering international market research to diverse blue-chip client base
- ▶ Expertise in studies of hardware, software and services
- ▶ Carrying out annual study of global market for advanced point-of-sale hardware since 2008
- ▶ Strong understanding of general and technology trends in the retail industry
- ▶ Reputation for premium, independent syndicated research studies funded by industry suppliers

### Types of Client

**Technology suppliers** e.g. Diebold Nixdorf, Fujitsu, GK Software, HP, Microsoft, NCR, Toshiba, Zebra

**Payments firms** e.g. American Express, Mastercard, PayPal, Visa

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

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

**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	
▶ 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
▶ Programmable EPOS	<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>
▶ 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

Customer Segments	
<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>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>Hospitality+</b>	<ul style="list-style-type: none"> <li>▶ Hotels</li> <li>▶ Restaurants</li> <li>▶ Leisure</li> <li>▶ Other service industry</li> </ul>

## Data are provided for 53 markets across 6 regions

Asia-Pacific	North America	Latin America	Western Europe	Central & Eastern Europe	Middle East & Africa
<ul style="list-style-type: none"> <li>▶ Australia</li> <li>▶ China</li> <li>▶ India</li> <li>▶ Indonesia</li> <li>▶ Japan</li> <li>▶ Malaysia</li> <li>▶ New Zealand</li> <li>▶ Philippines</li> <li>▶ South Korea</li> <li>▶ Taiwan</li> <li>▶ Thailand</li> <li>▶ Vietnam</li> <li>▶ Other</li> </ul>	<ul style="list-style-type: none"> <li>▶ Canada</li> <li>▶ USA</li> </ul>	<ul style="list-style-type: none"> <li>▶ Argentina</li> <li>▶ Brazil</li> <li>▶ Chile</li> <li>▶ Colombia</li> <li>▶ Mexico</li> <li>▶ Peru</li> <li>▶ Other (incl. Caribbean)</li> </ul>	<ul style="list-style-type: none"> <li>▶ Austria</li> <li>▶ Belgium</li> <li>▶ Denmark</li> <li>▶ Finland</li> <li>▶ France</li> <li>▶ Germany</li> <li>▶ Greece</li> <li>▶ Ireland</li> <li>▶ Italy</li> <li>▶ Netherlands</li> <li>▶ Norway</li> <li>▶ Portugal</li> <li>▶ Spain</li> <li>▶ Sweden</li> <li>▶ Switzerland</li> <li>▶ Turkey</li> <li>▶ UK</li> <li>▶ Other</li> </ul>	<ul style="list-style-type: none"> <li>▶ Czechia</li> <li>▶ Hungary</li> <li>▶ Poland</li> <li>▶ Russia</li> <li>▶ Slovakia</li> <li>▶ Ukraine</li> <li>▶ Other</li> </ul>	<ul style="list-style-type: none"> <li>▶ Israel</li> <li>▶ Morocco</li> <li>▶ Saudi Arabia</li> <li>▶ South Africa</li> <li>▶ UAE</li> <li>▶ Other</li> </ul>