

STUDY OVERVIEW

# Global EPOS and Self-Checkout 2022

## Executive Report and Market Database

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# ***Global EPOS and Self-Checkout 2022 provides suppliers with data, insights and understanding that are not available from any other source***

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## **Who should purchase?**

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



## **Why should they purchase?**

- ▶ *Global EPOS and Self-Checkout 2022* 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 2022* 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**

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|--------------|---|
| <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> |
|--------------------|--|
|                    | Primary Research   |

- |                    |   |   |
|--------------------|---|---|
| <b>Methodology</b> | Primary Research  | Secondary Research  |
|                    | <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

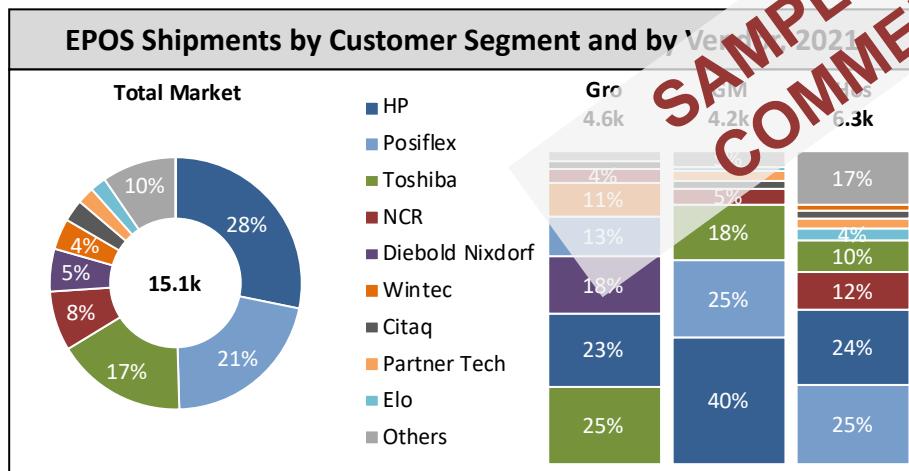
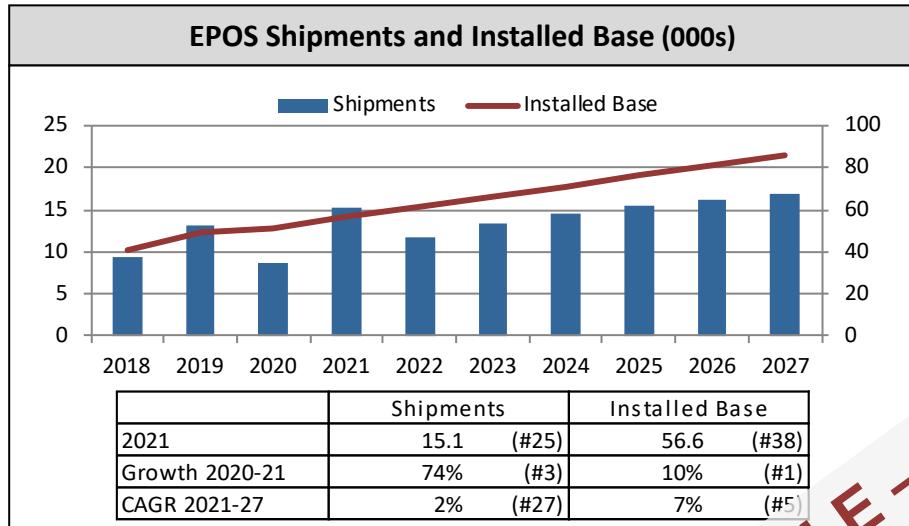
- Timing and Deliverables**
- ▶ Research conducted on an ongoing basis, with report issued annually in early June
  - ▶ Electronic (multi-user licence) copy of research findings
    - Executive report in PowerPoint containing key market statistics, trends and commentary by country and region
    - Comprehensive 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	£55,000	£33,000	£33,000
EMEA	£27,500	£16,500	£16,500
Americas	£16,500	£10,000	£10,000
Asia-Pacific	£22,000	£13,250	£13,250
International Overview <i>[World and regional market coverage]</i>	£20,000	£12,000	£12,000

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

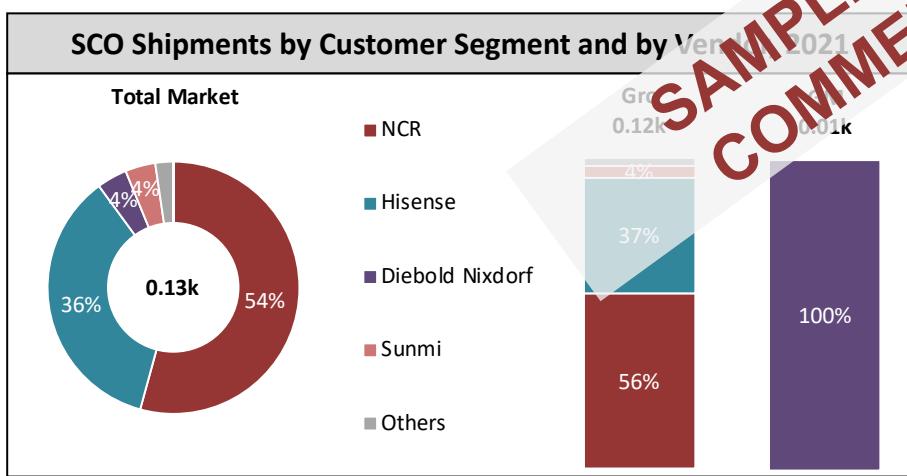
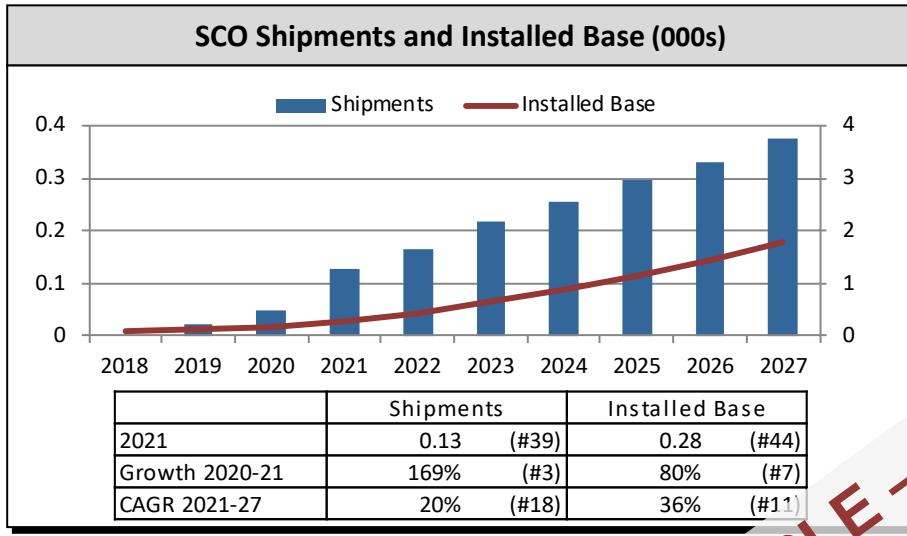
## EPOS shipments bounce back in the UAE, reaching a new high



### Market Commentary

- ▶ There were around 15,000 programmable EPOS shipments to the UAE in 2021, marking a record year
- The retail sector has performed well in recent years, though 2020 saw a decline in shipments owing to the economic crisis of the COVID-19 pandemic
- ▶ HP is the leading supplier of EPOS terminals to the UAE, with a 28% market share
- The vendor works with distributors such as Almoe in Dubai and Alpha Data in Abu Dhabi
  - Major customers include grocery chain Nesto and a retail group which operates major international brands
  - Posiflex represented 21% of the market, delivering around 3,200 units
  - The vendor has a strong presence in both the GM and hospitality sectors; customers include major fashion retailers and Americana Group, which operates global QSR brands
  - The vendor also counts grocery chain Al Othaim among its customers
- ▶ Toshiba is the third largest supplier to the UAE
- A key customer is grocery chain Carrefour, which has more than 70 locations
- ▶ NCR represents 8% of shipments, delivering nearly 1,200 terminals
- The vendor counts Americana Group among its customers
- ▶ Diebold Nixdorf and Wintec have 5% and 4% market shares respectively
- Both supply the grocery sector, with Diebold Nixdorf terminals installed at Lulu hypermarkets
- ▶ While shipments are expected to fall in 2022, growth is expected over the remainder of the forecast period
- The installed based is forecast to grow at a CAGR of 7%

# Self-checkout shipments to Malaysia hit record levels as new retailers embrace the technology



## Market Commentary

- ▶ 2021 marked a record year in the Malaysia SCO market, with more than 100 units delivered for the first time
- Around 130 units were shipped, up from nearly 50 the year before
- ▶ NCR is the leading supplier to the market, delivering around 70 terminals in 2021
- Customer Tesco was among the first proponents of self-checkout technology in the country, first installing NCR SCO terminals in 2015
  - In 2000, the UK grocery giant's Malaysia entity was purchased by Lotus, part of CP Group
  - Lotus still kept the SCO terminals; they are deployed in 28 stores and an online business
  - NCR delivers to the market through partner E-Tech
  - Chinese vendor Hisense accounted for 36% of total shipments, having entered the market in 2020
  - The vendor works with local partners such as Sektor and its customers include a convenience store chain
- ▶ Diebold Nixdorf delivered its first SCO terminals since 2019, supplying the general merchandise sector
- ▶ Sunmi supplied a small number of units to AEON's Komai-so store which opened in early 2021; customers can either use their smartphones or the self-checkout to scan and pay for items
- ▶ Proprietary SCO terminals using monitors from EC Line have been installed at AEON BiG hypermarkets
- ▶ As more retailers begin SCO pilots, the number of shipments is expected to increase, reaching more than 350 units in 2027
- By the end of the forecast period, the installed base is predicted to near 1,800 units

# A comprehensive market database is provided in Excel

GLOBAL EPOS AND SELF-CHECKOUT 2022												
Programmable EPOS Shipments and Installed Base - All Segments, by Region and Country, 2018-2027												
Confidential - Internal Use Only												
Region	Country	Shipments										
		2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	
Asia-Pacific	Australia											
Asia-Pacific	China											
Asia-Pacific	India											
Asia-Pacific	Indonesia											
Asia-Pacific	Japan											
Asia-Pacific	Malaysia											
Asia-Pacific	New Zealand											
Asia-Pacific	Philippines											
Asia-Pacific	South Korea											
Asia-Pacific	Taiwan											
Asia-Pacific	Thailand											
Asia-Pacific	Vietnam											
Asia-Pacific	Other Asia-Pacific											
Asia-Pacific	Total	Western Europe	Austria									
North America	Canada	Western Europe	Belgium									
North America	USA	Western Europe	Denmark									
North America	Total	Western Europe	Finland									
Latin America	Argentina	Western Europe	France									
Latin America	Brazil	Western Europe	Germany									
Latin America	Chile	Western Europe	Greece									
Latin America	Colombia	Western Europe	Ireland									
Latin America	Mexico	Western Europe	Italy									
Latin America	Peru	Western Europe	Netherlands									
Latin America	Other Latin America	Western Europe	Norway									
Latin America	Total	Western Europe	Portugal									
		Spain	Spain									
		Sweden	Central & Eastern Europe	Czechia								
		Switzerland	Central & Eastern Europe	Hungary								
		Turkey	Central & Eastern Europe	Poland								
		UK	Central & Eastern Europe	Russia								
		Other Western Europe	Central & Eastern Europe	Slovakia								
		Total	Central & Eastern Europe	Ukraine								
			Central & Eastern Europe	Other Central & Eastern Europe								
			Central & Eastern Europe	Total								
			Middle East & Africa	Israel								
			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								
			World	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	Types of Client
<ul style="list-style-type: none"><li>▶ 30 years' experience delivering international market research to diverse blue-chip client base</li><li>▶ Expertise in studies of hardware, software and services</li><li>▶ Carrying out annual study of global market for advanced point-of-sale hardware since 2008</li><li>▶ Strong understanding of general and technology trends in the retail industry</li><li>▶ Reputation for premium, independent syndicated research studies funded by industry suppliers</li></ul>	<p><b>Technology suppliers</b> e.g. Diebold Nixdorf, Fujitsu, GK Software, HP, Microsoft, NCR, Toshiba, Zebra</p> <p><b>Payments firms</b> e.g. American Express, Mastercard, PayPal, Visa</p> <p><b>Consultancies</b> e.g. Bain &amp; Company, Boston Consulting Group</p> <p><b>Retailers</b> e.g. Auchan, X5 Retail</p> <p><b>Investment banks and investors</b> e.g. Advent International, Elliott Management, Goldman Sachs</p>

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

<b>Products</b>		<b>Customer Segments</b>
▶ 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	A “programmable EPOS” unit is, in addition: <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>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>
▶ 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	<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

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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>