

PRESS RELEASE

London, 17th August 2023

Established vendors and new entrants compete in buoyant self-checkout market

Investment in self-checkout technology remains high, with nearly 200,000 units delivered last year

Self-checkout reaches new retail sectors, providing opportunities for vendors

2022 was the second highest year of activity in the global self-checkout market, according to a brand-new report from RBR Data Services, a division of Datos Insights. *Global EPOS and Self-Checkout 2023* shows that with an ever-wider range of retailers embracing the technology, competition in the market remains fierce.

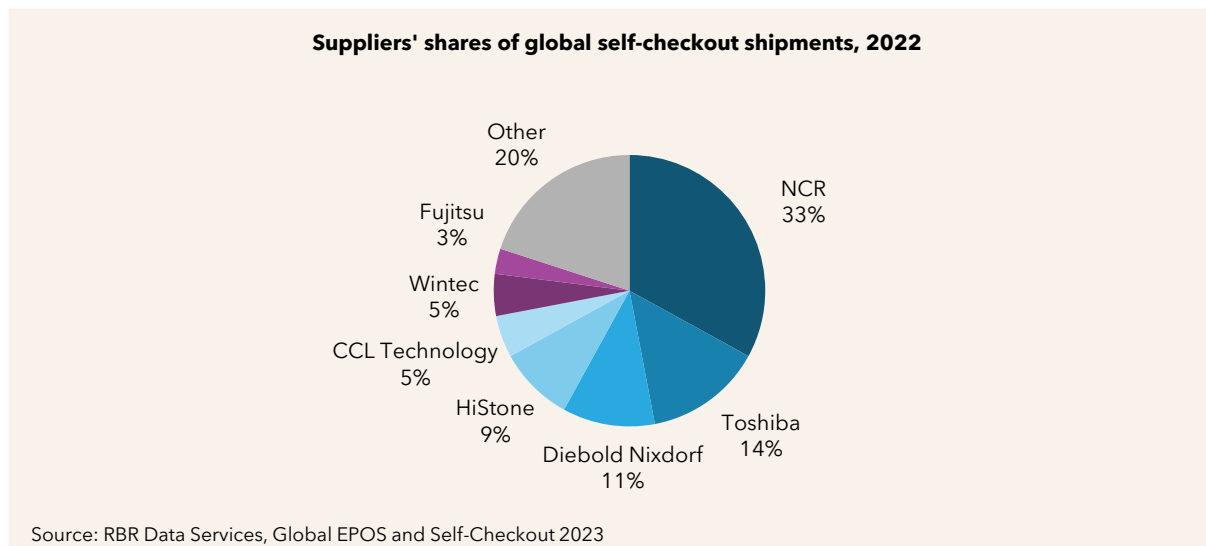
Around 50 vendors are present, from international firms to local players, while some retailers have opted to put together their own solutions.

NCR increases its lead as the largest supplier

NCR remains the largest supplier to the market, accounting for a third of deliveries. Leading in EMEA and the Americas, the vendor supplies major international firms including Walmart as well as large local retailers such as Sainsbury’s in the UK.

Toshiba is second, with a significant presence in Japan and the USA. Major Japanese convenience chains such as Family Mart use Toshiba self-checkout devices, while customers outside Japan include Kroger and Albertsons.

Diebold Nixdorf became the third largest supplier in 2022, growing its market share to 11%. Discount supermarket Lidl continues to roll out the vendor’s solution in multiple countries, while further customers include Carrefour in France.



Vendors continue to expand beyond their home markets

Chinese vendors HiStone, CCL Technology and Wintec together account for nearly a fifth of shipments. HiStone leads in its home market and is increasingly expanding overseas, with projects at local supermarket chains in Latin America.

CCL Technology and Wintec are also expanding their presence outside China. The former has customers in Europe, including French supermarket chain Monoprix, while the latter has a strong foothold in the Middle East.

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The remainder of the market is fragmented; Japanese firms Fujitsu and NEC have major projects in North America and Asia respectively, and Switzerland's 4POS is supplying grocery customers across Europe.

US supplier Mashgin continues to roll out its AI-based terminals to convenience locations, while a growing number of EPOS vendors have expanded their portfolios to add self-service solutions as demand for the technology continues to increase.

Leading chains and smaller retailers build their own solutions

In recent years, some retailers have opted to build their own self-checkout offerings. Major US firms Dollar General and Home Depot have rolled out in-house solutions, putting together units from a range of technology suppliers. Smaller retailers including Prima supermarkets in Hungary and Norfa in Lithuania work with local firms to do likewise.

By 2028, global installations are expected to exceed 1.9 million. Jeni Bloomfield, who led RBR Data Services' *Global EPOS and Self-Checkout 2023* research, commented: "An ever-wider range of retailers are faced with an enormous choice of self-checkout technology. This presents excellent growth opportunities for suppliers, as they work closely with retailers to find the perfect solution which matches business needs and elevates in-store customer experience".

Notes to editors

About RBR Data Services

RBR Data Services provides clients with independent and reliable data and insights through published research, consulting and bespoke data services. Our global research covers the cards and payments, retail technology and banking automation sectors and is used by the leading market participants, analysts and regulators as the authoritative source of industry and competitor benchmark data. For any questions about this release, please contact rbr@datos-insights.com.

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