

B.O.S. Better Online Solutions Ltd. (BOSC)

Company Overview

BOSC is an automation and defense technology company based in Israel. It sells robotics, RFID tracking systems, and supply chain components to industrial and defense customers. The company serves more than 800 customers and has been growing its profit while expanding in global markets.



Key Highlights

- BOSC is a profitable microcap with rising net income.
- Revenue growth picked up again in 2025 after a slower 2024.
- Over 60% of sales come from defense customers, giving steady demand.
- The company offers robotics, RFID, and parts supply together, which keeps customers loyal.
- Backlog and deferred revenue are increasing, giving better forward visibility.
- The balance sheet is strong with low debt and solid assets.
- Market cap is under \$40M, giving room for upside if growth continues.

Market Opportunity

Automation, tracking, and defense spending are all growing worldwide. Warehouse robotics is expected to grow from about \$7B in 2024 to \$16B by 2033. The global RFID market is around \$16.8B and rising as more companies track inventory digitally. Defense electronics is a \$175–185B market supported by higher defense budgets. BOSC operates inside these large sectors but focuses on niche areas where reliability and automation matter most. As labor costs rise and supply chains become more complex, customers are turning to robotics and RFID to stay competitive.

Competitive Positioning

BOSC stands out by offering robotics, RFID, and supply chain parts as one combined service. This lets customers manage automation and inventory from a single partner. The company has long-term relationships with defense and aerospace customers and benefits from large installed bases. With operations in Israel and sales in the U.S., BOSC serves global clients while staying efficient. Its strong backlog, recurring sales, and defense-heavy customer mix help it compete against larger vendors.

Financial Snapshot & Traction

FY24 Revenue	\$39.9M, down 9.7% due to tough comparisons.
FY24 Gross Margin	23.3%, up from 20.8%.
FY24 EBITDA	\$3.25M, slightly above the prior year.
FY24 Net Income	\$2.3M, up 14.7%.
Backlog FY24	\$27M, up from \$20M.
Q2 2025 Revenue	\$11.5M, up 36%.
Q2 2025 Net Income	\$765K, up 53%.
2025 YTD Sales	\$26.5M; net income \$2.1M.
Guidance	\$45–48M revenue and \$2.6–3.1M net income for 2025.
Cash	\$5.2M with ~\$38M in assets and ~\$14M in liabilities.