

London, 17<sup>th</sup> August 2017

## **Resilient EPOS market grows for seventh consecutive year**

*Tenth edition of RBR's pre-eminent annual study shows increasing demand for advanced point-of-sale hardware despite tough market conditions*

### **System upgrades in developed economies maintain global market momentum**

Nearly two million programmable EPOS units were shipped globally in 2016, according to *Global EPOS and Self-Checkout 2017*, a new study by strategic research and consulting firm RBR. This represents a 1% increase on the figure for 2015 and the seventh successive year of growth.

Large-scale hardware refreshes by retailers in developed economies boosted shipment numbers. Leading grocery players embarked on replacement projects, including discount supermarket Lidl, French co-operative group Système U and convenience store chain 7 Eleven in Japan.

Similarly, in Australia, where EPOS deliveries grew by 23%, several major supermarket chains, including Coles, chose to upgrade their EPOS estates with new equipment.

### **Store network expansion in emerging markets spurs increased shipment activity**

RBR's research also highlights the contribution of emerging markets to EPOS shipments. Deliveries to Turkey, for example, jumped 18%, setting a new record in the process, while the expanded presence of international retailers boosted the Colombian market.

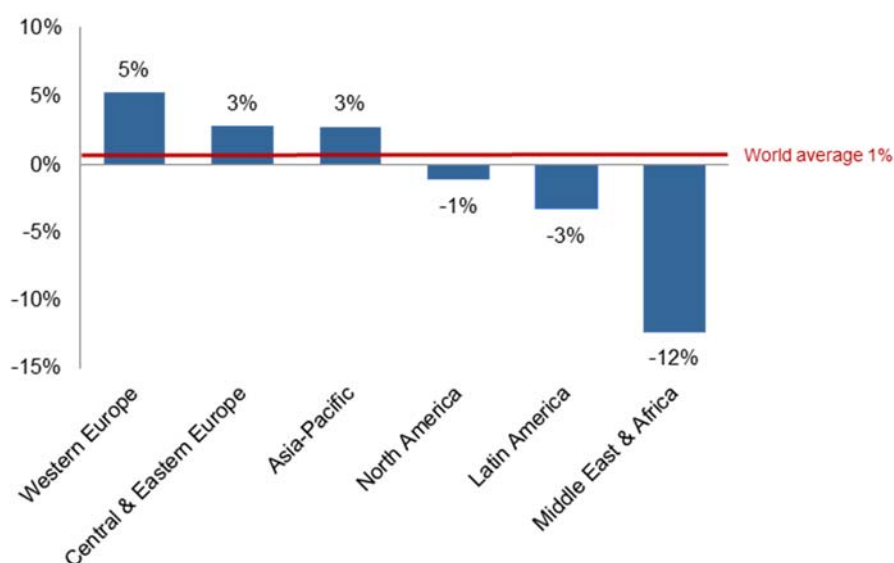
In Asia, the development of the Thai retail sector continues apace, with EPOS deliveries up 49%, while store expansion from both local and international players buoyed the market in Indonesia.

### **US retailers face challenges in tough market conditions**

US shipments dipped by 1% as retailers re-evaluated the number and format of their stores with a knock-on effect on their investment in fixed EPOS. Several major chains, including JCPenney, consolidated their store networks in 2016, while the penetration of both mobile EPOS and self-checkout increased.

RBR reports a slowdown in China, where the economy continued to weaken, while retailers in Latin America cut EPOS investments due to unstable political and economic conditions. In the Middle East, shipment activity also suffered, as oil prices continued to drop.

**Growth in Programmable EPOS Shipments by Region, 2015-2016**



Source: *Global EPOS and Self-Checkout 2017* (RBR)

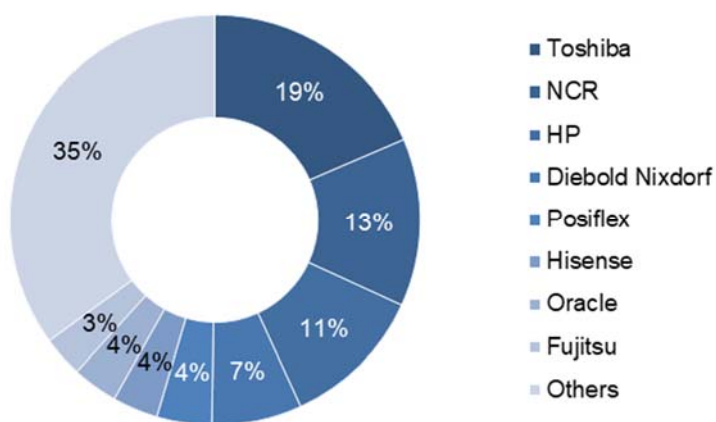
**Toshiba remains the world’s largest EPOS supplier**

RBR’s study shows that Toshiba is the world’s largest EPOS vendor with a 19% share, and it retained its leading position in Asia-Pacific and Latin America. NCR grew its global share to 13%, and increased its lead in North America. HP is the third largest supplier, both worldwide, and in its home region of North America.

Diebold Nixdorf – formed by the acquisition of Germany’s Wincor Nixdorf by US ATM manufacturer Diebold – ranked fourth, and became the largest supplier in Europe.

Taiwanese vendor Posiflex remained the largest supplier in the Middle East and Africa for a second year in a row, and is fifth globally. Almost all Hisense units went to its home market of China, while the majority of US tech giant Oracle’s shipments were also domestic. More than 80% of Fujitsu’s deliveries went to retailers in Asia-Pacific and Europe.

**Suppliers’ Shares of Programmable EPOS Shipments Worldwide, 2016**



Source: *Global EPOS and Self-Checkout 2017* (RBR)

**Fixed EPOS market set to grow despite pressure from alternative solutions**

Global EPOS shipments will continue to grow, despite pressure from mobile devices and self-service solutions such as self-checkout and kiosks. In North America – and to a lesser extent in Europe – greater penetration in hospitality and lower retail tiers will be tempered by store closures, as brick-and-mortar retailing faces intense competition from online giants like Amazon.

RBR forecasts that the number of fixed EPOS installations will reach 15.3 million by 2022, up 13% from 2016. Much of the growth will come from populous developing economies in Asia such as China, India and Indonesia, as the modern retail sector expands in these countries.

**Notes to editors**

These figures and insights are based on *Global EPOS and Self-Checkout 2017* report, the tenth edition of RBR’s annual study. 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](mailto: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.

**The information and data within this press release are the copyright of RBR, and may only be quoted with appropriate attribution to RBR. The information is provided free of charge and may not be resold.**