

London, 6<sup>th</sup> September 2019

## Asia takes global EPOS market to new heights

*Latest research shows the global market for programmable EPOS terminals grew by 1% in 2018, the ninth consecutive year of expansion*

### Shift to Android stimulates Chinese market

2.2 million programmable EPOS units were shipped worldwide in 2018, according to *Global EPOS and Self-Checkout 2019*, a new study by strategic research and consulting firm RBR. The market expanded by 1%, following a year of record activity in 2017.

China, the world's second largest EPOS market, continued to grow strongly, fuelled by the increasing adoption of Android-based systems. The Chinese point-of-sale market is evolving, with terminals commonly supplied to medium-sized retailers by major payment providers Alipay and WeChat Pay, owned by Alibaba and Tencent respectively.

### Large-scale replacement projects boost Japan shipments

Two of Japan's five largest retail groups, Aeon and Family Mart, refreshed their EPOS estates. These projects, as well as increased replacement activity as a result of tax law changes and the forthcoming 2020 Olympics in Tokyo, pushed shipments past the 200,000 unit mark.

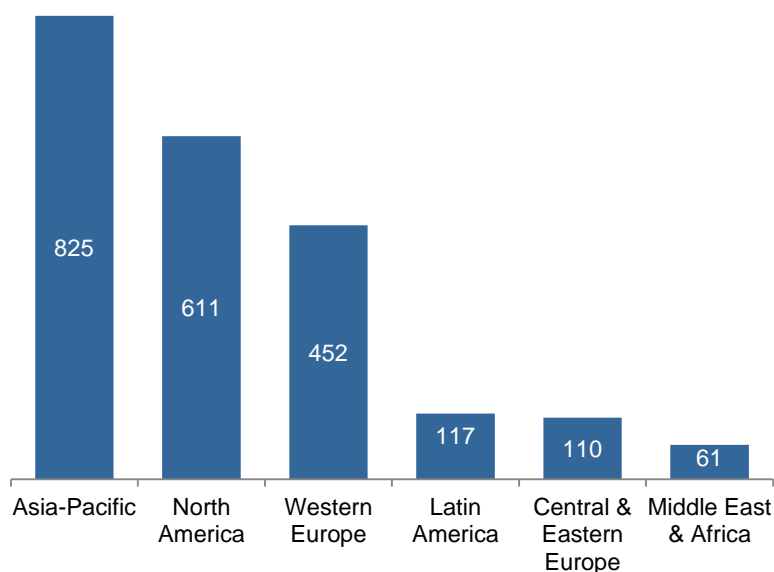
Outside of Asia, other major markets to experience growth included Mexico, where some of the country's leading retailers changed hardware supplier, and South Africa, which has seen low-cost terminals from China and Taiwan becoming more common.

### Investment in store technology remains key in mature economies

The European EPOS market remained robust, according to RBR's research, with varying levels of investment across the continent, primarily involving replacement activity. Major refresh projects boosted deliveries in countries including the Netherlands, Finland and Hungary.

Store transformation projects also continued in North America, although retailers in Canada focused more on self-service technology than EPOS upgrades last year.

### Programmable EPOS Shipments 2018, by Region (thousands)



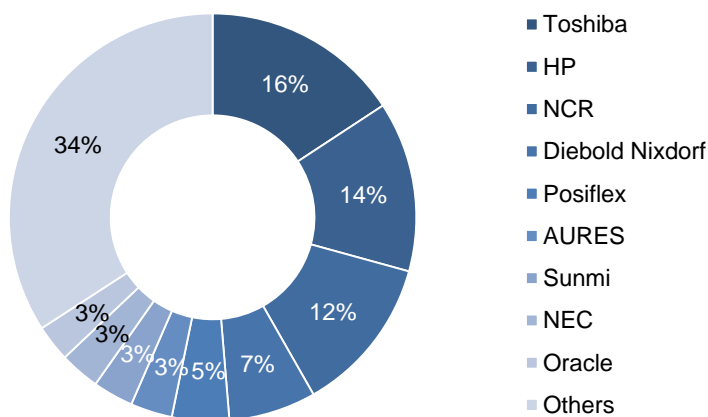
Source: *Global EPOS and Self-Checkout 2019* (RBR)

**Toshiba is the world’s largest EPOS supplier; HP moves into second place**

Toshiba remains the largest EPOS supplier in the world, with 16% of shipments. The Japanese vendor leads in Asia-Pacific. HP increased its share by one percentage point in 2018, moving into second place for the first time. NCR has the largest share in the Americas, and is the third largest supplier globally.

Diebold Nixdorf is the largest vendor in Europe, where more than 80% of its shipments are delivered. Posiflex, the world’s fifth largest supplier, increased its global share, and leads in the Middle East and Africa. No other vendor has more than a 5% share in this extremely fragmented market; various firms have a presence, from international suppliers including AURES and Oracle, to Chinese manufacturers such as Sunmi and Hisense, which mainly compete in their home territory.

**Suppliers’ Shares of Programmable EPOS Shipments Worldwide, 2018**



Source: Global EPOS and Self-Checkout 2019 (RBR)

**EPOS market set to expand, fuelled by emerging economies**

Shipment growth is expected to continue, with retailers in developed economies increasing investment in store touchpoints, including upgrading their EPOS estates. At the same time, the development of emerging retail markets, especially in the Far East, and further penetration of the hospitality sector, will also fuel expansion in the number of EPOS installations.

According to RBR, the number of programmable EPOS shipments is expected to grow by 14% to reach nearly 2.5 million by 2024. Alan Burt, who led the research, commented: “Store technology continues to evolve, with EPOS hardware still playing an important role for retailers in running their businesses efficiently and giving customers a positive checkout experience”.

**Notes to editors**

These figures and insights are based on RBR’s *Global EPOS and Self-Checkout 2019* report. 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.

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