

London, 23<sup>rd</sup> July 2020

## HP takes over as the world's largest EPOS supplier

*HP has been steadily growing its presence in the global EPOS market – new research finds that it shipped more units than anybody else last year.*

### Global EPOS activity down for the first time in a decade

The global programmable EPOS market contracted in 2019, with shipments down 2%, according to *Global EPOS and Self-Checkout 2020*, a new study by strategic research and consulting firm RBR. This was the first fall in deliveries since 2009, although activity actually increased in the majority of the 53 countries covered by the study.

### Major payments firms work with local suppliers in China

The continuing adoption of Android-based solutions in China, the world's second largest market, helped deliveries there grow 8%. The country has undergone a mobile payments revolution in recent years, with Alipay and WeChat Pay working with leading local hardware suppliers to distribute EPOS devices to retailers.

### Store openings boost activity in developing markets

Developing markets saw an increase in activity, owing to expanding store networks in countries such as Indonesia and the UAE, as well as major hardware upgrades in countries including Colombia and Thailand.

Retailers in more mature EPOS markets also chose to invest in refreshing their estates, including leading supermarket chains in Germany and the UK, while shipments in Canada grew by 30% owing to large-scale replacement projects in the fast food and discounter sectors.

### Competing investment priorities for retailers in the USA and Europe

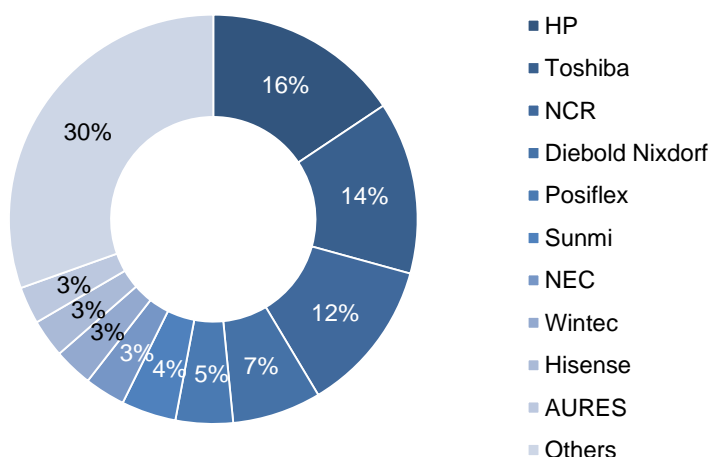
According to RBR's research, activity fell in the USA and much of Europe, with some retailers focusing investment on other technologies, including self-service, as part of wider store transformation projects. Online competition continued to create a challenging environment for brick-and-mortar retailers, making for a more cautious investment climate for EPOS solutions.

Elsewhere, such as in Japan and Mexico, the completion of hardware refreshes at major retailers resulted in a decline in deliveries in 2019.

### HP increases its share to become the world's largest EPOS vendor

HP became the world's largest EPOS supplier in 2019, increasing its share by two percentage points to 16% of shipments. It leads in North America as well as the Middle East and Africa.

**Suppliers' Shares of Programmable EPOS Shipments Worldwide, 2019**



*Source: Global EPOS and Self-Checkout 2020 (RBR)*

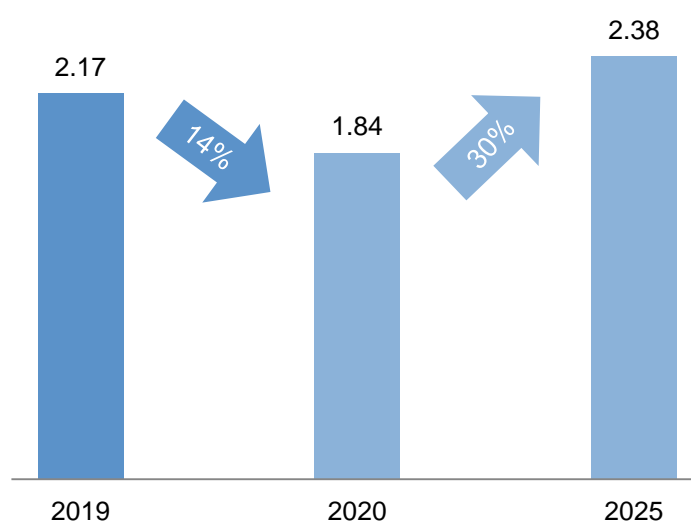
Toshiba is in second place, and has the largest share in Asia-Pacific, to where more than 40% of its units were delivered. NCR is third globally and leads in Latin America.

Diebold Nixdorf is the largest supplier to Europe, while Posiflex rounds out the top five global vendors. No other supplier accounts for more than 4% of shipments, with a wide range of firms present including China's Sunmi and Hisense, and international suppliers such as Japan's NEC, China's Wintec and AURES from France.

### Robust medium-term demand for EPOS technology expected

The retail shutdown during the COVID-19 crisis is expected to suppress short-term investment in EPOS solutions, with the hospitality sector, where outlets have been closed for longer periods of time, likely to be hardest hit.

### Global Programmable EPOS Shipments 2019-2025 (millions)



Source: *Global EPOS and Self-Checkout 2020* (RBR)

According to RBR, the number of programmable EPOS shipments is forecast to bounce back in 2021 however, with activity expected to be back to pre-COVID levels by 2022. By 2025, nearly 2.4 million units are predicted to be delivered globally. Alan Burt, who led the research, commented: *“Despite the devastating impact of the global pandemic, the desire of retailers and hospitality operators alike to improve in-store customer journeys will mean medium-term demand for advanced point-of-sale hardware will be healthy”*.

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### Notes to editors

These figures and insights are based on RBR's *Global EPOS and Self-Checkout 2020* 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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