

London, 30<sup>th</sup> September 2021

## Fierce competition in challenging global EPOS market

*COVID-19 caused the global EPOS market to contract last year, but research forecasts recovery*

### Global EPOS market becoming more fragmented

Last year saw 1.7 million programmable EPOS units delivered globally, according to *Global EPOS and Self-Checkout 2021*, the latest study by strategic research and consulting firm RBR. Activity declined as retailers diverted investment to other priorities in light of the COVID-19 pandemic.

The market, however, is becoming more competitive and fragmented, with more than half of shipments supplied by companies outside the largest five vendors.

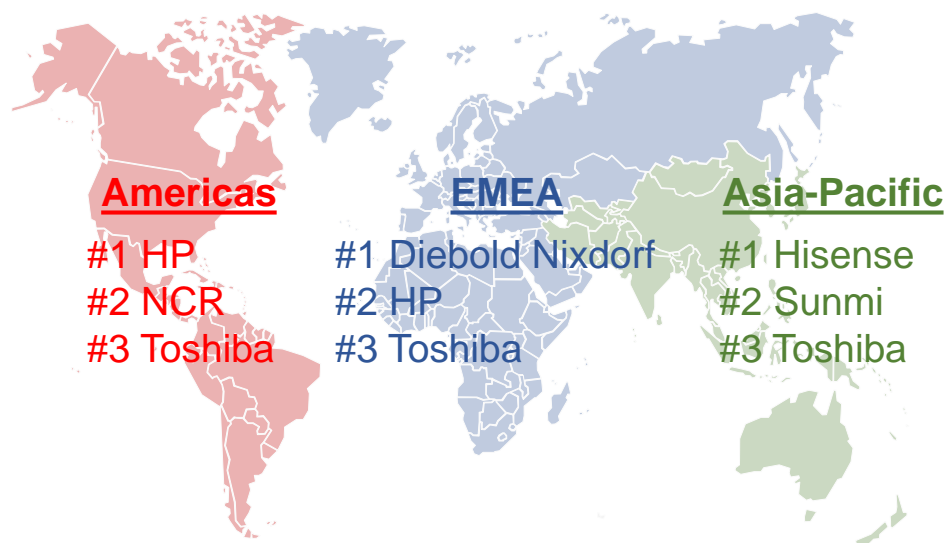
### HP is the world's largest EPOS supplier with just 16% market share

For a second consecutive year, HP is the world's largest EPOS supplier, maintaining its 16% share of global shipments. The majority of its units were delivered to North America, and its customers are mainly general merchandise and hospitality firms.

Toshiba is in second place globally, with its strongest presence in the USA and Japan. The firm counts leading grocery retailers and mass merchandisers as customers.

NCR accounts for 10% of the global market and is the largest vendor in Latin America. As well as supplying major supermarket and convenience brands around the world, its EPOS units are widely installed at leading US and international fast-food operators.

### Top 3 Suppliers of Programmable EPOS Shipments by Region, 2020



Source: *Global EPOS and Self-Checkout 2021 (RBR)*

Diebold Nixdorf is the largest EPOS supplier to EMEA, working with many of the region's leading grocery chains.

Growth of their home market means Chinese vendors Hisense and Sunmi are the largest vendors in Asia-Pacific, and like peer Wintec, they are expanding overseas. Taiwanese vendors, including Posiflex, Firich and Partner Tech, also have substantial overseas business, both under their own brand and often as OEMs.

### After a challenging 2020, EPOS market forecast to recover

Global shipments of EPOS terminals are expected to gradually recover over the next few years. Alan Burt, who led RBR's research, commented: "After a difficult 2020, we expect market recovery to continue in the coming years, with retailers able to choose from a wide variety of EPOS suppliers".



## PRESS RELEASE

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### Notes to editors

These figures and insights are based on RBR's *Global EPOS and Self-Checkout 2021* report. Since its first appearance in 2008, RBR's annual study 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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