PRESS RELEASE

London, 25th October 2022

EPOS vendors bounce back as market recovers with 18% increase in shipments

The EPOS market is becoming increasingly competitive and fragmented, with only two suppliers having a market share of more than 10%

EPOS market grows despite ongoing supply chain issues

The global programmable EPOS market returned to growth in 2021, expanding by 18% according to *Global EPOS and Self-Checkout 2022*, the latest study by strategic research and consulting firm RBR.

Despite having to navigate ongoing supply chain issues, including a global chip shortage, vendors delivered more than two million terminals during the year.

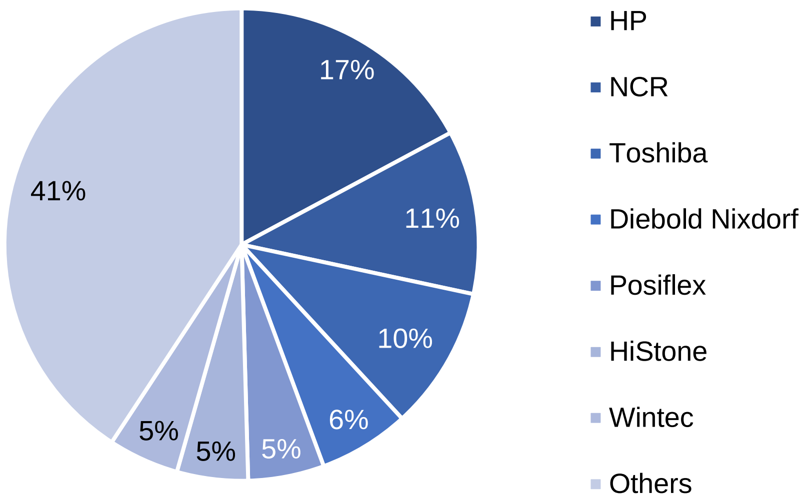
HP strengthens position as largest supplier

HP remains the world's largest EPOS vendor, accounting for 17% of shipments. Although more than half of its units were delivered to the USA, it also leads in western Europe and the Middle East and Africa. HP works mainly with software partners, supplying terminals to speciality retailers and restaurants.

NCR increased its market share, moving into second place globally, delivering more than 230,000 machines. The firm shipped the most terminals to the Grocery+ segment, consisting of grocery, drugstore, and convenience retailers.

One in ten EPOS units delivered globally are from Toshiba. The vendor has many large customers in the USA, western Europe and its home market of Japan, with a particular strength among big box retailers.

Suppliers' Share of Programmable EPOS Shipments Worldwide, 2021



Source: Global EPOS and Self-Checkout 2022 (RBR)

A wide range of suppliers compete in a fragmented market

RBR's study reveals the highly fragmented nature of the remainder of the market. Diebold Nixdorf and Posiflex complete the largest five global EPOS suppliers, with the former leading in Central and Eastern Europe, while the latter's strongest presence is in the Middle East and Africa.

Chinese vendors, including HiStone and Wintec, deliver the vast majority of their EPOS units to their home market, but also have a growing presence abroad. Other major suppliers include Sunmi from China, Taiwan's Firich (FEC) and US technology giant Oracle.

Outside of these, there are hundreds of suppliers of all different types, which often count small chains and restaurant operators as customers. These include those specialising in EPOS hardware only as well as others with an integrated hardware and software offering.

EPOS market open to new entrants

Looking to the future, competition between suppliers is expected to remain fierce as new entrants compete with established players. Alan Burt, who leads RBR's retail technology research, commented: *"Point-of-sale terminals will continue to have an integral place in retailers' in-store technology plans, and with barriers to entry reducing, there is an ever-broader range of suppliers to partner with in every region".*

Notes to editors

These figures and insights are based on RBR's study, *Global EPOS and Self-Checkout 2022.* For more information about this report or to discuss the findings in more detail please email Alan Burt (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 technology, cards and payments. It assists its clients by providing independent advice and intelligence through published reports, consulting and data services, newsletters and events.