

PRESS RELEASE

London, 5th October 2023

Diverse range of suppliers compete in growing EPOS market

Half of global POS shipments provided by vendors outside the largest five firms

Retailers' hardware refreshes buoy the market

There were more than two million programmable EPOS units delivered worldwide last year, according to *Global EPOS and Self-Checkout 2023*, a brand-new study from strategic research and consulting firm RBR Data Services, a division of Datos Insights.

This marks annual growth of 3% as retailers across the world continued to invest in hardware upgrades.

HP is the world's largest supplier for the fourth consecutive year

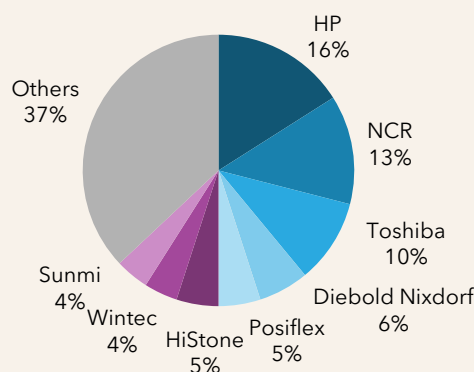
With a 16% share of EPOS deliveries, HP remains the largest global supplier. The majority of its terminals were shipped to North America, where it counts major general merchandise retailers and hospitality operators among its customers. The vendor is also the largest supplier to western Europe.

NCR increased its share by two percentage points to 13%. The firm is the largest supplier to the Grocery+ segment, with many of its major customers in this sector replacing their EPOS terminals in 2022.

Toshiba is the third largest vendor in the world, with a strong presence in the Americas, western Europe and home market Japan. Its customers include some of the world's largest big box retailers.

Diebold Nixdorf and Posiflex together round out the largest five vendors globally, leading in Central and Eastern Europe and the Middle East and Africa respectively.

Suppliers' Share of Programmable EPOS Shipments Worldwide, 2022



Source: : RBR Data Services, Global EPOS and Self-Checkout 2023

Chinese suppliers HiStone, Wintec and Sunmi all primarily deliver to their home market. However, these firms are expanding overseas, particularly in emerging markets in Asia, Latin America and the Middle East and Africa.

Partner network is crucial for vendors' international sales

The remainder of the market is increasingly fragmented, with most vendors using a network of partners to sell their terminals to a wider range of countries. South Korea's Posbank and Taiwan's Firich both supply units internationally, in part via partners, while major US technology firms Oracle and Elo also have a global presence.

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Regional and local suppliers compete alongside international firms in many markets, including Brazilian supplier Elgin in its home country, whilst France's Aures and Switzerland's 4POS have a strong presence across western Europe.

By 2028, the number of EPOS terminals installed worldwide is forecast to reach nearly 16 million. Jeni Bloomfield who led RBR Data Services' *Global EPOS and Self-Checkout 2023* research, commented: "*Competition in the global EPOS market remains fierce as retailers continue to invest in EPOS hardware, with emerging markets offering new areas of growth*".

Notes to editors

About RBR Data Services

RBR Data Services provides clients with independent and reliable data and insights through published research, consulting and bespoke data services. Our global research covers the cards and payments, retail technology and banking automation sectors and is used by the leading market participants, analysts and regulators as the authoritative source of industry and competitor benchmark data. For any questions about this release, please contact rbr@datos-insights.com.

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