

# Global POS Software

RESEARCH OVERVIEW



# About RBR Data Services, a division of Datos Insights

RBR Data Services provides clients with independent and reliable data and insights through published research, consulting and bespoke data services. Its 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.

Datos Insights is the advisor of choice to the banking, insurance, securities, and retail technology industries—both the financial institutions and the technology providers who serve them. We help our clients make better technology decisions so they can protect and grow their customers' assets.

For more information, visit [www.datos-insights.com](http://www.datos-insights.com)

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# ***Global POS Software provides industry suppliers with unparalleled data, analysis and insight***

## **Vendors lack data on global POS software market, despite critical role in omnichannel retailing**

- In an omnichannel world, the in-store experience needs to echo, and enhance, online capabilities
- The POS application needs to be fully integrated into all “unified commerce” initiatives
- Vendors lack a reliable, global view of their market presence and that of their competitors

## **The study provides POS vendors with intelligence on the market and their competitors**

- Understand overall market context, and identify future opportunities
- Benchmark versus competitors, overall as well as by geography and customer segments
- Provide authoritative, independent substantiation of market presence in marketing collateral

# ***Global POS Software* presents the only in-depth view of the market, with extensive geographic and customer segmentation**

Scope <sup>1</sup>	
Product	POS (point-of-sale/ <b>point-of-service</b> ) applications
Geographies	Global coverage with data for <b>48 country markets</b> across <b>6 regions</b>
Segments	Data for <b>8 subsegments</b> across grocery, general merchandise and hospitality industries
Vendors	<b>120+ suppliers</b> including Aptos, Diebold Nixdorf, Extenda Retail, Flooid, Fujitsu, GEBIT, GK Software, Heading, Heartland, LS Retail, NCR, NEC, Oracle, PAR, Shiji Group, TCS, Toshiba and Veras
Customers	Projects with <b>1,000+</b> point-of-sale installations* globally
Metrics	<b>Total POS</b> installations – <b>June 2023</b> / June 2022 <b>New POS</b> installations – 2022-2023, 2021-2022 and forecasts 2023-2028

<sup>1</sup> For full details of scope, see Appendix

\*Irrespective of technical/commercial model e.g. licence, SaaS, cloud

# The study methodology builds on our expertise in large-scale, global studies, designed to ensure comparability and reliability

## Collect

Data gathered from all major vendors

- RBR Data Services solicits information from industry suppliers
- Primary data complemented with secondary research
- Overall 120+ vendors covered

## Validate

Accuracy of claims verified using variety of sources

- RBR's POS software market database with 5.5k records
- Insights on POS hardware
- Press releases plus specialist and mainstream media
- Annual reports and stock exchange filings

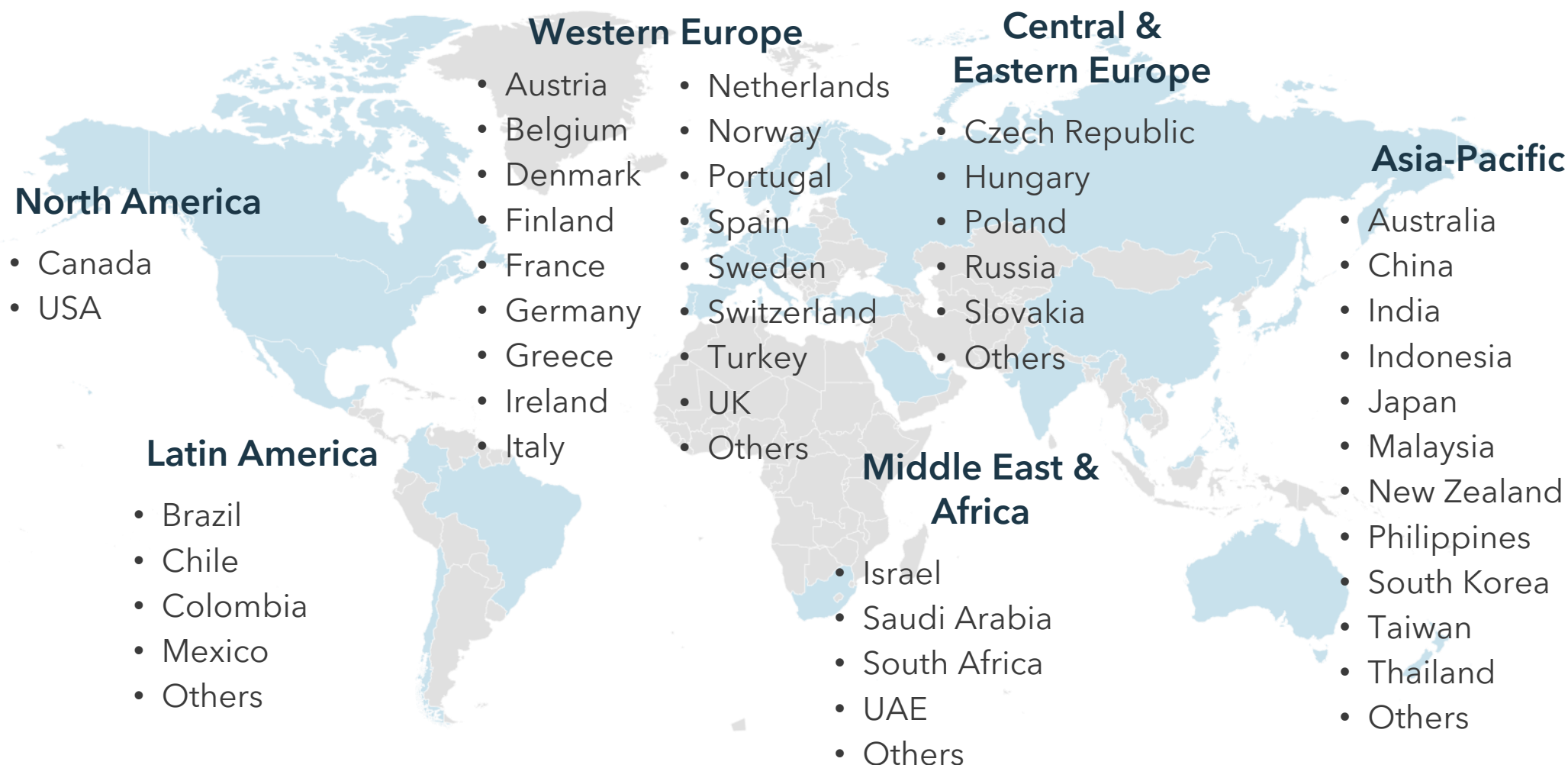
## Analyse

Leveraging RBR expertise in drawing insights from data

- Data analysed by country, vendor, etc.
- Report commentary highlights major customers and new wins by segment
- Insights for grocery, general merchandise and hospitality

The study leverages RBR's expertise in syndicated retail research studies, its deep knowledge of the POS market and its ability to draw insights from data

# The study has global scope, with data provided for six regions and 48 individual country markets



# Ease of use, and access to the RBR team, maximises value across your organisation

**Deliverables collectively address clients' core market intelligence needs**



## Market Report

- Key market statistics, trends and commentary by country
- Regional and global comparative analyses
- Familiar PowerPoint format facilitates re-use of material



## Market Database

- Excel format enables use across your organisation
- Charting tool facilitates production of bespoke outputs
- Comprehensive data easily extracted for further analysis



## Video Conference

- Live session to present findings and discuss implications



## Analyst Access

- Ongoing access to senior RBR Data Services researchers

**In addition to the full global report, regional and segmented options are available**

Geographic coverage	Full Report	Individual Segment [Grocery+/General Merchandise/ Hospitality+]
Global (Full Report)	£39,500	£19,750
EMEA	£19,750	£10,000
Americas	£12,750	£6,500
Asia-Pacific	£15,000	£7,500
International Overview (World and regional market coverage)	£16,750	£8,250

Contact us with questions, to discuss your requirements or place an order:  
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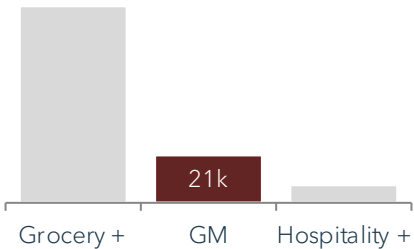


# Diebold Nixdorf accounts for a third of the Polish general merchandise sector

Market Context

Population (mn)	38
GDP (USD bn)	688

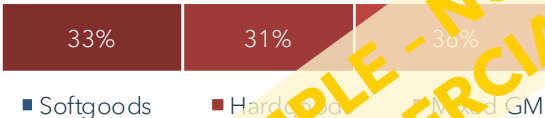
Segment Split



Subsegments

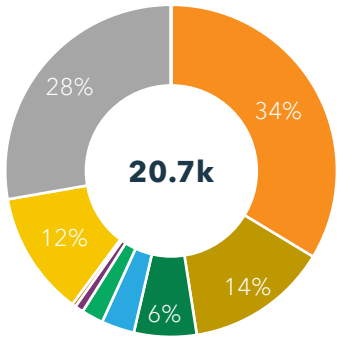
	Total POS, June 2023 (k)	New POS, 2022-2023 (k)
Softgoods	6.7	0.3
Hardgoods	6.4	0.4
Mixed GM	7.5	0.7
GM	20.7 (#20)	1.3 (#1)

Total POS subsegments



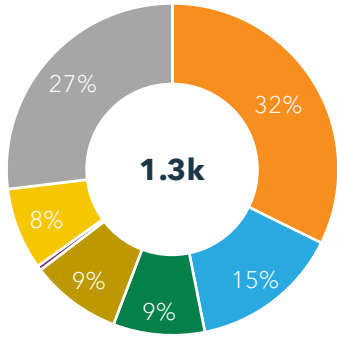
Market Shares, June 2023

Total POS



- Diebold Nixdorf
- NCR
- GK Software
- Aptos
- Fujitsu
- Oracle
- Toshiba
- Proprietary
- Others

New POS



Key Insights

- Diebold Nixdorf is the leading supplier to the Polish general merchandise sector
  - Discount chain PEPCO uses Diebold Nixdorf solutions at its nearly 1,230 stores
- NCR has the second largest share, counting DIY chain Bricomarché among its clients
- GK Software’s clients include Jysk and Maxi Zoo, which have nearly 290 home improvement stores and 70 pet stores respectively
- Aptos supplies clothing chains including Primark, while GEBIT POS software runs at Deichmann shoe stores
- Inditex is among the retailers to use a proprietary solution at its stores

# The comprehensive Market Database provides full details on each vendor's presence, by country and subsegment

Global POS Software 2023					Anycommerce	Aptos	CEGID	Cow Hills	Diebold Nixdorf	Edi Retail	FLA	Fujitsu	GEBIT	GK Software	Heading	Heartland	LS Retail	NCR Voyix	NEC	Oracle	PAR	Shiji Group	Sweda	TCS	Toshiba	Veras Retail
Total and New POS installations, by Vendor, Region and Country - All Segments and subsegments (thousand)																										
Confidential - Client Internal Use Only																										
Source: RBR Data Services																										
Type	Year	Region	Country	Total																						
Total POS	June-23	Asia-Pacific	Australia																							
Total POS	June-23	Asia-Pacific	China																							
Total POS	June-23	Asia-Pacific	India																							
Total POS	June-23	Asia-Pacific	Indonesia																							
Total POS	June-23	Asia-Pacific	Japan																							
Total POS	June-23	Asia-Pacific	Malaysia																							
Total POS	June-23	Asia-Pacific	New Zealand																							
Total POS	June-23	Asia-Pacific	Philippines																							
Total POS	June-23	Asia-Pacific	South Korea																							
Total POS	June-23	Asia-Pacific	Taiwan																							
Total POS	June-23	Asia-Pacific	Thailand																							
Total POS	June-23	Asia-Pacific	AP Others																							
Total POS	June-23	Asia-Pacific	Total																							
Total POS	June-23	North America	Canada																							
Total POS	June-23	North America	USA																							
Total POS	June-23	North America	Total																							
Total POS	June-23	Latin America	Brazil																							
Total POS	June-23	Latin America	Chile																							
Total POS	June-23	Latin America	Colombia																							
Total POS	June-23	Latin America	Mexico																							

# RBR Data Services has deep retail and hospitality industry knowledge, researching various store technologies

## Key Qualifications

- **35 years' experience** delivering international market research to diverse blue-chip client base
- **Expertise** in hardware, software and services
- **Dedicated self-checkout hardware research** since 2008
- **Strong understanding of general and technology trends** in retail and hospitality industries
- **Reputation for premium, independent syndicated research** studies funded by industry suppliers

## Types of client

- **Technology suppliers** e.g. Diebold Nixdorf, Epson, Fiserv, Fujitsu, Glory, HP, Microsoft, NCR, Toshiba, Zebra
- **Retailers** e.g. Auchan, X5 Retail
- **Payment firms** e.g. American Express, Mastercard, Visa
- **Consultancies** e.g. Bain & Company, Boston Consulting Group
- **Investment banks and investors** e.g. Advent International, Elliott Management, Goldman Sachs

# Appendix

# The study provides data for nine subsegments across the retail and hospitality verticals

Customer Segments and Subsegments		Examples
<b>Grocery+</b>	<ul style="list-style-type: none"> <li>Grocery: Supermarkets/hypermarkets, discounters, convenience stores without fuel</li> <li>Convenience stores with fuel</li> <li>Drugstore</li> </ul>	<ul style="list-style-type: none"> <li>Tesco, Lidl, FamilyMart</li> <li>Shell</li> <li>Walgreens Boots</li> </ul>
<b>General Merchandise</b>	<ul style="list-style-type: none"> <li>Speciality hardgoods: electronics, DIY etc.</li> <li>Speciality softgoods: apparel etc.</li> <li>Mixed general merchandise: mass merchandise, department store, warehouse club etc.</li> </ul>	<ul style="list-style-type: none"> <li>Best Buy, Home Depot</li> <li>H&amp;M</li> <li>Walmart, Kohl's, Target</li> </ul>
<b>Hospitality+</b>	<ul style="list-style-type: none"> <li>Hotels (including casinos, resorts, cruise ships etc.)</li> <li>Restaurants (including leisure/entertainment and other service industries)</li> </ul>	<ul style="list-style-type: none"> <li>Hilton</li> <li>McDonald's</li> </ul>



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INSIGHTS