Global POS Software

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Global POS Software Landscape Evolving Rapidly - Are You Positioned For Growth?

Unified Commerce Integration Creates Complex Competitive Landscape

- The shift to unified commerce is fundamentally transforming POS requirements, with flexible, forward-looking solutions essential for retail and hospitality operators to deliver seamless customer experiences
- Without comprehensive global market intelligence, vendors struggle to understand where growth opportunities exist in this rapidly evolving competitive landscape
- Vendors with superior market insight are strategically positioning their solutions for omnichannel success while others operate with incomplete market visibility

Detailed Global Analysis Drives Market Success

- Comprehensive analysis across nearly 50 countries reveals market trends and competitive positioning essential for strategic planning in the evolving omnichannel retail environment
- Accurate performance benchmarking by geography and customer segments enables precise identification of growth opportunities and optimal resource allocation for maximum market impact
- Authoritative market intelligence supports both regular strategic planning and critical ad-hoc decisions, while providing credible validation of your market position to prospects and stakeholders

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Unmatched Methodology: Data You Can't Find Anywhere Else

QUANTITATIVE BASELINE

- Draw on our established history of retail technology research
- Unparalleled POS software market database with c.6k records of major retail and hospitality chains

TRIANGULATION & VALIDATION

- Accuracy of data verified using two decades of historical market data on POS hardware
- Data analysed by country, vendor and eight customer subsegments across grocery/general merchandise/hospitality

PRIMARY RESEARCH

- Key quantitative information solicited from industry suppliers
- Insights on latest projects obtained from qualitative calls with country experts
- Analysis of market presence of >120 vendors

SECONDARY RESEARCH

- Primary data complemented by extensive secondary research
- Analysis of annual reports and financial filings
- Press releases plus specialist and mainstream media leveraged for insights on major projects

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Global Point-of-Sale Software Market: Track Trends Across Eight Subsegments in Retail and Hospitality

Global POS Software Dataset

Metric	Dates	Segments and Subsegments	Countries
Market Size – Total POS installations	June 2025 / June 2024	**Grocery+:** Grocery, Drugstores Convenience with fuel **General Merchandise:** Speciality hardgoods Speciality softgoods Mixed general merchandise **Hospitality+:** Restaurants Hotels	**48 across 6 regions:** **Asia Pacific:** Australia, China, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, South Korea, Taiwan, Thailand, Others **North America:** Canada, USA **Latin America:** Brazil, Chile, Colombia, Mexico, Others **Western Europe:** Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, UK, Others **Central & Eastern Europe:** Czechia, Hungary, Poland, Russia, Slovakia, Others **Middle East & Africa:** Israel, Saudi Arabia, South Africa, UAE, Others
Market Size – New POS installations	June 2024-2025 / June 2023-2024		
Vendor Data – Total POS installations	June 2025 / June 2024		
Vendor Data – New POS installations	June 2024-2025 / June 2023-2024		
Market Size – Forecasts	2025-2030* ** Regional- and global-level only*		

Vendors	140+ including Aptos, ChapsRetail, Diebold Nixdorf, Enactor, Extenda Retail, Flooid, Fujitsu, GEBIT, GK Software, Heading, Linx, LS Retail, NCR Voyix, NEC, Oracle, PAR, Shiji Group, TCS, Toshiba and Veras
Customers	Projects with 1,000+ point-of-sale installations globally *(irrespective of technical/commercial model e.g. licence, SaaS, cloud)*

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Unrestricted Team Access: Maximizing Value Across Your Company

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

- Charting tool facilitates production of bespoke outputs
- Comprehensive data easily extracted for further analysis

Video Conference

- Live session to present findings to your organisation and discuss implications

Expert Support

- Subject matter experts to aid understanding of data and underlying assumptions

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Deep Market Intelligence and Expert-driven Analysis

We help retail technology stakeholders benchmark their market position, identify untapped opportunities, validate strategic investments, and make confident decisions about market.

COMPREHENSIVE COVERAGE

Full global coverage, including 48 countries

Robust data for POS applications

Data and insights on major market players

DEEP MARKET UNDERSTANDING

Multilingual in-house team

Deep industry focus and country expertise

Proprietary research; reliable forecasts

LONG-TERM COMMITMENT

Covering retail technology for >15 years

Reputation for integrity and independence

The authoritative research provider trusted by the industry's major players

FIND OUT MORE

Alan Burt
Director, Market Data and Forecasting

Contact Us

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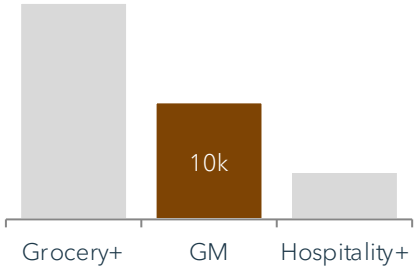
NCR Voyix is the largest supplier to Chile's general merchandise sector

Market Context

Population (mn)	20
GDP (USD bn)	247

Segment Split



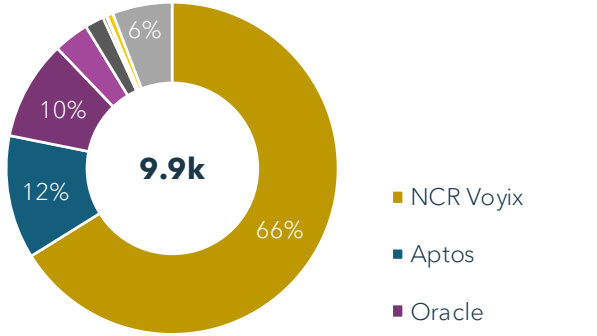
Subsegments

	Total POS, June 2024 (k)	New POS, 2023-2024 (k)
Softgoods	1.3	neg.
Hardgoods	1.5	0.1
Mixed GM	7.2	0.1
GM	9.9 (#34)	0.3 (#35)

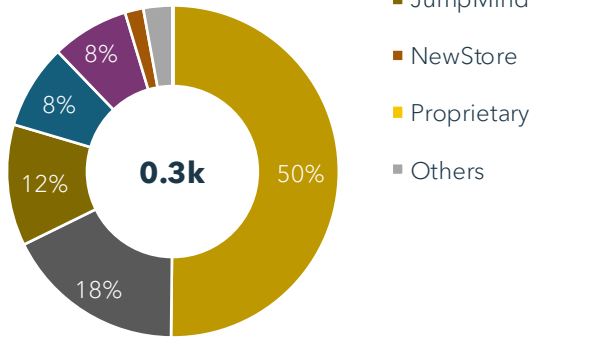
Total POS subsegments

Market Shares, June 2024

Total POS



New POS



Key Insights

- Chile is home to a small general merchandise sector, dominated by domestic retail groups Falabella and Cencosud
- NCR Voyix accounts for two-thirds of the market, supplying several Walmart banners and a local department store chain
- Aptos' clients include variety store chain MINISO and La Polar department stores
- Oracle supplies POS software to Bata, which has more than 170 shoe stores in Chile
- Other vendors present in the market include Diebold Nixdorf and LS Retail; the former supplies a global clothing chain, while the latter's clients include Adidas

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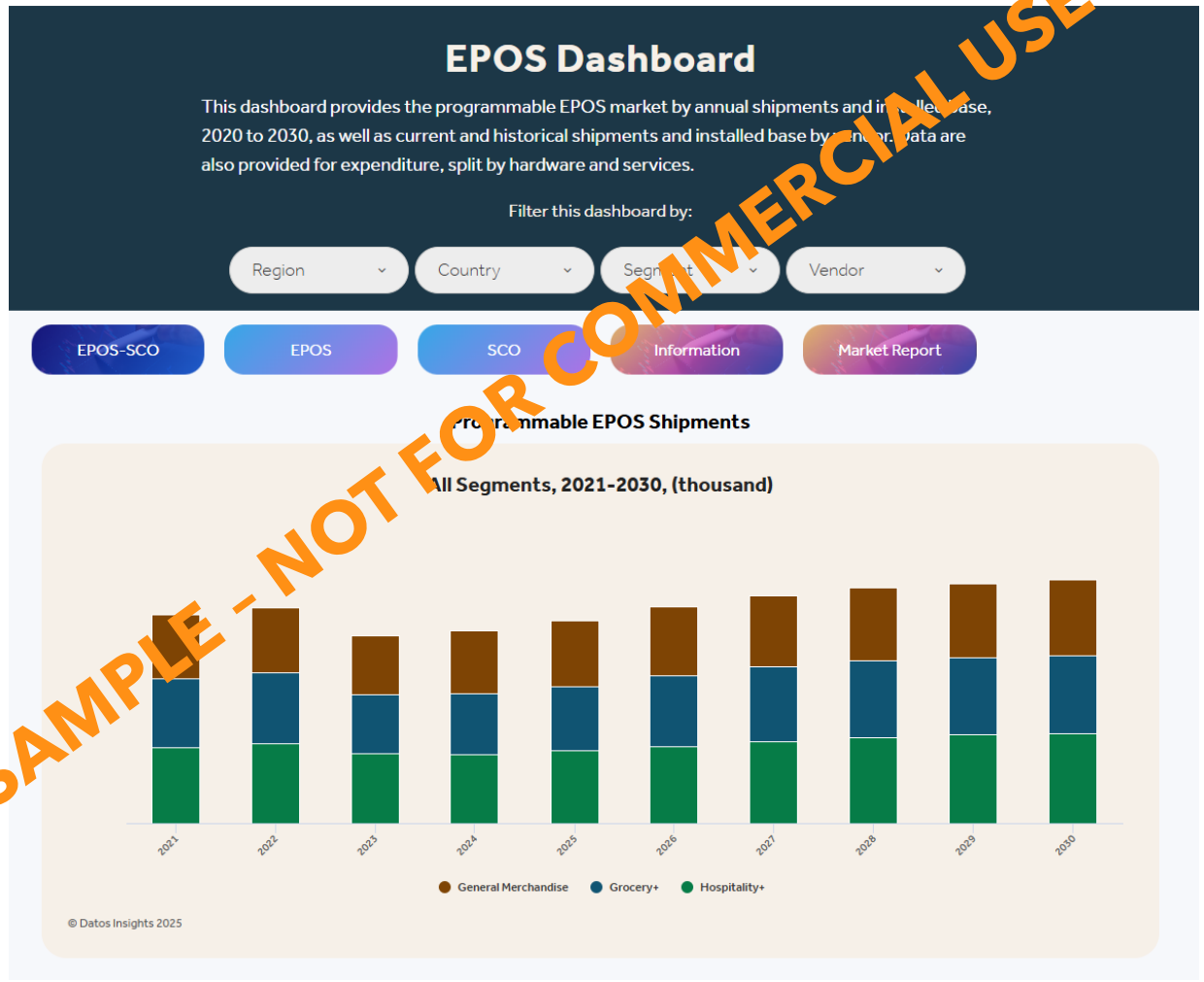
Access Our Market Database Through an Interactive Online Platform With Custom Filtering and Charting Tools



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* *Above screenshot taken from Global EPOS and Self-Checkout – for illustrative purposes only.*

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Datos Insights Powers Retail Technology Transformation

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In an era of rapid change, we empower firms across the financial services ecosystem to make high-stakes decisions with confidence and speed. Our distinctive combination of proprietary data, analytics, and deep practitioner expertise provides actionable insights that enable clients to accelerate critical initiatives, inspire decisive action, and de-risk strategic investments to achieve faster, bolder transformation.

INSIGHTS & ADVISORY

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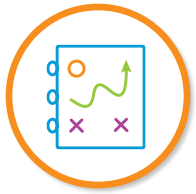
CONSULTING



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