

London, 7th December 2017

Global POS software market surpasses seven million installations

RBR's second annual study into POS software at major retail and hospitality chains reveals a fragmented and competitive sector

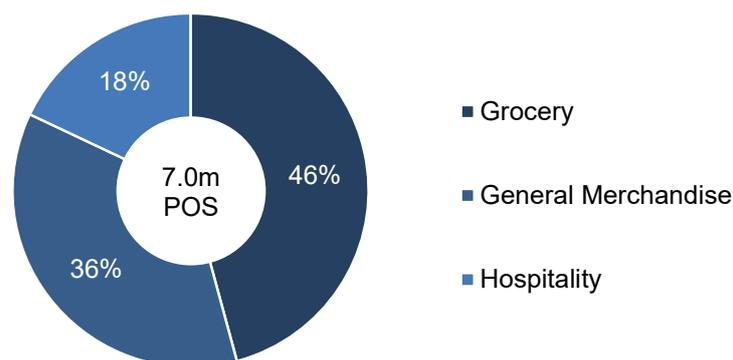
Huge grocery segment characterised by diverse range of store formats

Global POS Software 2017, the latest study by strategic research and consulting firm RBR, shows that the grocery segment accounts for 46% of POS software deployments. This makes it comfortably the largest segment globally, owing to a wide range of grocery retailers, including major chains focusing on large format stores in Europe, and Asian players operating networks of small stores.

The report, the only in-depth international study of this market, also reveals that 36% of POS software installations are in the general merchandise segment, comprising mixed retailers including department store chains such as JC Penney, and speciality firms like fashion brand Gap.

The ongoing expansion of large quick-service restaurant chains globally, in particular in emerging markets, contributes to a burgeoning hospitality sector, which accounts for 18% of POS software installations.

POS Software by Segment, June 2017



Source: Global POS Software 2017 (RBR)

The scale of North America's retail sector is unparalleled

Global POS Software 2017 confirmed North America as by far the largest region for POS software installations, representing 39% of the world total, owing to the chained nature of its general merchandise and hospitality sectors. Asia-Pacific ranks second by this measure, buoyed by China, where both domestic and international players are expanding their business activities.

Western Europe is the other major region for POS software, with its concentrated grocery segment accounting for the majority of installations. In the remaining regions, there are fewer local retailers which have sizeable store networks.

NCR remains the largest POS software vendor, followed by Toshiba and Oracle

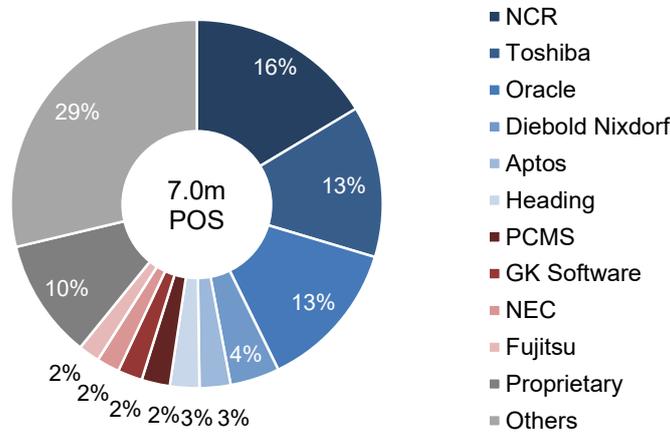
Vendors from the USA, Europe and Asia compete to supply the largest retailers and hospitality firms, many of which have international operations.

NCR is the largest POS software supplier in the world, accounting for 16% of the market, and leading in three of the six regions covered by RBR's study.

The second largest vendor globally, Toshiba, has a strong footing in the Americas, as well as in its home region of Asia-Pacific. Oracle has 13% of the global market, with the largest share in North America; it also leads in both general merchandise and hospitality segments globally.

Diebold Nixdorf is the second largest vendor in Europe and has a strong presence in Asia. Other major suppliers with an international presence include US firm Aptos, the UK's PCMS and GK Software from Germany.

Vendor Shares of Global POS Software Installations, June 2017



Source: Global POS Software 2017 (RBR)

New customer rollouts and store expansion boost new POS software count

RBR's study also found that in the year to June 2017, POS software rolled out by new customers, and by existing clients in additional stores accounted for 291,000 installations globally. These included large-scale projects by Australian, German and Japanese grocery chains as well as the expansion of discount brands in both the USA and Europe, and department stores in Asia.

Alan Burt, who led the research for RBR commented: *"These new deployments underline the increasing importance of POS software to retailers aiming for a frictionless shopping experience for customers"*.

Notes to editors

These figures and insights are based on RBR's study *Global POS Software 2017*. This in-depth international study of this dynamic market analyses nearly 1,400 projects by more than 70 vendors. 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.

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