

London, 21st December 2018

Expanding grocery retailers drive global POS software market

Latest research reveals 3.4 million POS software installations in the Grocery+ sector worldwide

Grocery+ segment accounts for the largest share of POS software installations

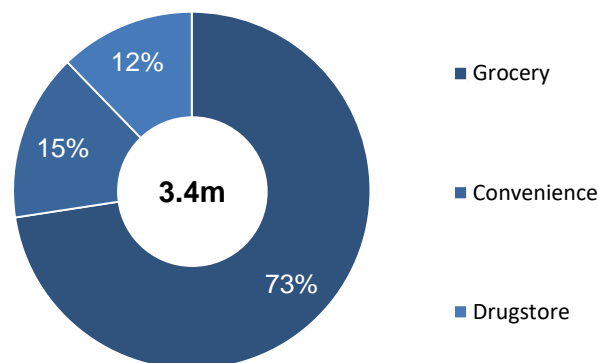
Global POS Software 2018, the new study by strategic research and consulting firm RBR, shows 3.4 million installations at major grocery, convenience and drugstore retailers as of June 2018. This makes the combined Grocery+ segment larger than General Merchandise and Hospitality+. The report, which provides in-depth international analysis of the POS software market, covers projects with 1,000 or more point-of-sale devices.

High adoption of advanced POS systems in grocery sector

Within the Grocery+ segment, the grocery subsegment, comprising both large- and small-format stores, and including discounters, accounts for the largest share of installations. This reflects the size of the grocery market and the high degree of concentration, as well as the near-universal use of advanced POS systems in chain retailers.

Complementing traditional grocery locations are convenience stores in petrol stations. This market is more fragmented, with oil companies increasingly franchising their retail operations. North America is the major drugstore market globally; this sector is much smaller in other regions due to the regulation of the pharmacy business in many countries.

Grocery+ Total POS Software Installations by Subsegment, June 2018



Source: Global POS Software 2018 (RBR)

Strong tradition of convenience retail in Asia

Global POS Software 2018 also reveals that Asia-Pacific is the largest region for Grocery+ POS software installations, with 1.1 million deployments in total. China and Japan together account for nearly two thirds of these, with a strong culture of convenience in both countries.

Western Europe is also home to some of the world's largest supermarket operators, including France's Carrefour, the UK's Tesco, and German discounters Lidl and Aldi which between them have more than 30,000 stores. In contrast, the US grocery market is fragmented; the sheer size of the country helps to explain the presence of regional supermarket groups.

Existing users will upgrade to newer solutions rather than change supplier

RBR forecasts that there will be around 700,000 new POS software installations in the Grocery+ segment between 2018 and 2023. Most will be additional points of sale, driven by discounters and convenience store chains expanding their networks – particularly in Asia.



PRESS RELEASE

Supplier changes will account for a minority of new POS installations: Alan Burt, who led the research for RBR commented: “*With many applications having accumulated customisations over several decades, changing POS is a major undertaking. In the high-volume grocery retail environment, upgrades to newer solutions will be more common than switching vendor*”.

Notes to editors

These figures and insights are based on RBR’s study *Global POS Software 2018*. This in-depth international study of this dynamic market analyses nearly 1,400 projects by more than 75 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.

RBR is a strategic research and consulting firm with three decades of experience in banking and retail automation, cards and payments. It assists its clients by providing independent advice and intelligence through published reports, consulting, newsletters and events.

The information and data within this press release are the copyright of RBR, and may only be quoted with appropriate attribution to RBR. The information is provided free of charge and may not be resold.