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Oracle leads diverse general merchandise POS software market

Major general merchandise retailers, comprising mixed formats as well as speciality hardgoods and softgoods chains, account for 2.6 million POS software installations globally

US firms dominate hardgoods and mixed general merchandise POS software market

Global POS Software 2018, the latest study by strategic research and consulting firm RBR, reveals that North America is by far the largest region for general merchandise POS software, accounting for half the global total. The study, which covers projects of 1,000 or more POS devices, analysed deployments by 1,600 retailers across 46 countries.

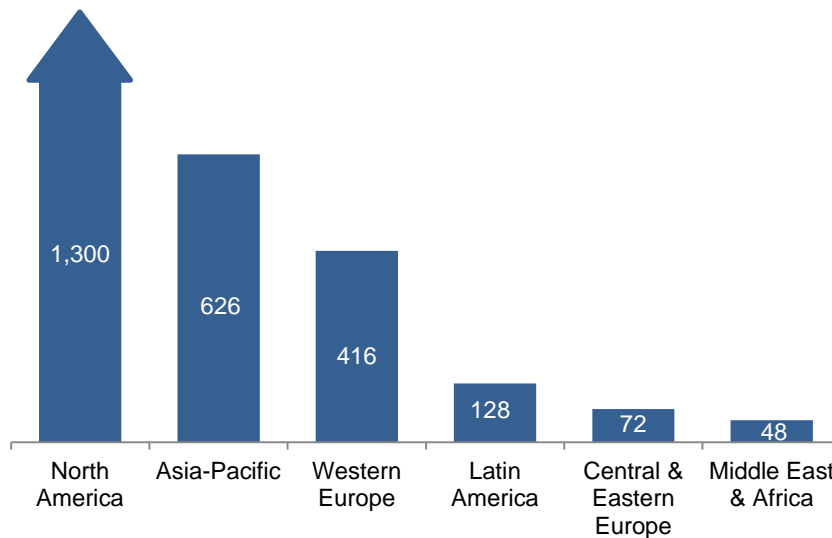
The USA is home to the world’s largest mixed general merchandise and hardgoods retailers, such as Costco and Home Depot. Although these chains have some overseas presence, the bulk of their stores are located in their home market.

European fashion giants expand store networks across the globe

In contrast, the softgoods sector is far more international; the world’s two largest apparel retailers are from Europe, with both Spain’s Inditex and Sweden’s H&M operating extensive store networks across a wide range of countries.

Asia is not only home to a number of huge Chinese and Japanese retail conglomerates operating thousands of stores under various brands, but also international retailers expanding their footprints across the region.

General Merchandise POS Software Installations by Region, June 2018 (thousands)



Source: *Global POS Software 2018 (RBR)*

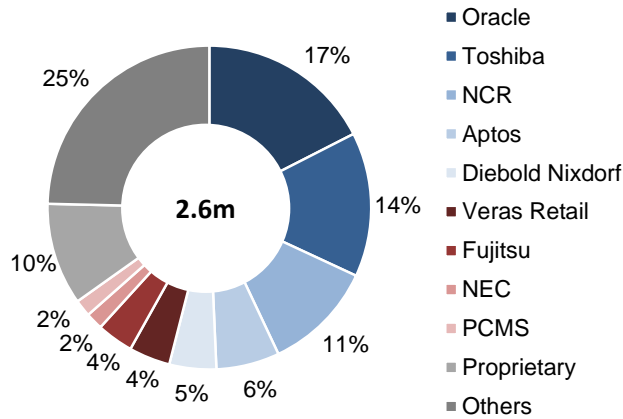
Oracle has the largest share of POS software installations at general merchandise retailers

RBR’s study shows that Oracle is the world’s largest POS software vendor in this segment, accounting for 17% of the market. The vast majority of the company’s installations are in North America. Toshiba, the second largest supplier, and NCR, the third largest, lead in Asia-Pacific and Europe respectively.

Aptos, the specialist software company, has a particularly strong presence in apparel chains in both North America and Europe, as well as in US-based department stores, while Diebold Nixdorf has major customers across all subsegments, with the majority of its installations in Europe and Asia. Veras Retail, which acquired JDA Store Systems in 2016, counts US hardgoods and mixed general merchandise retailers among its largest clients.

Both Fujitsu and NEC have major projects with retailers in their home market of Japan; the former also has hardgoods clients in North America and softgoods customers in several regions. A significant proportion of PCMS' POS software deployments are in Europe, counting both fashion chains and mixed-format retailers as clients.

Vendor Shares of Global POS Software Installations in General Merchandise, June 2018



Source: Global POS Software 2018 (RBR)

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 around 1,600 projects by more than 80 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.

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