

PRESS RELEASE

London, 12th December 2023

Highly competitive landscape for new POS software projects

A wide range of suppliers are providing the world's largest retail and hospitality firms with point-of-sale applications to enhance their operations

Retailers worldwide invest in new POS solutions

Competition between vendors to provide POS software remains fierce, with more than 125 suppliers working with major retail and hospitality chains, according to *Global POS Software 2023*, the latest study from strategic research and consulting firm RBR Data Services, a division of Datos Insights.

There were more than 390,000 new POS software installations in the year to June 2023 as a result of both market expansion, with deployments of POS devices such as assisted, self-service and mobile touchpoints, in existing and newly opened stores, and through a change of software supplier on existing devices.

NCR Voyix and Flooid are the largest suppliers of new installations

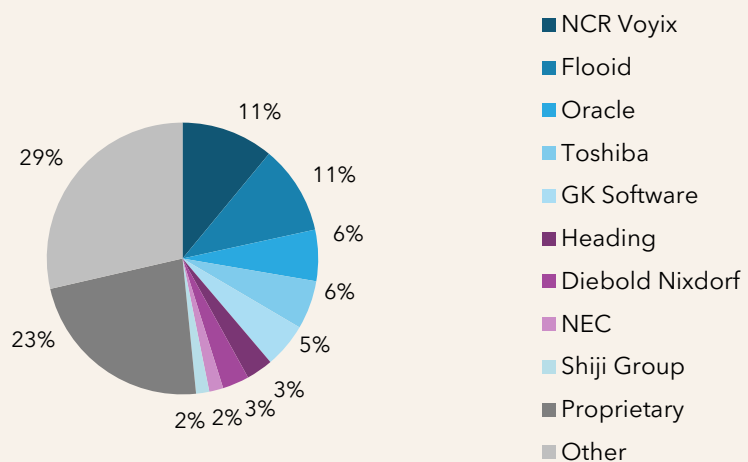
NCR Voyix has the largest share of new POS software deployments globally, accounting for 11%. It leads among grocery and hospitality operators, with customers including large-scale fuel convenience chains in the USA and global fast-food brands.

The study shows Flooid has jumped up the rankings this year, leading among general merchandise retailers, after a major rollout in the US. The firm works with retailers around the world including South Africa's Woolworths.

Oracle is third, providing software to major international hospitality and softgoods firms alike, while Toshiba has a strong presence among grocery retailers, particularly in the Americas and Japan. GK Software rounds out the five largest suppliers of new installations globally, rolling out its solutions to major supermarket chains in Europe and the USA.

Other major suppliers include Diebold Nixdorf, which has customers across all regions, Chinese vendors Heading and Shiji Group, and Japanese firms NEC and Fujitsu.

Vendor Shares of New POS Software Installations, year to June 2023



Source: RBR Data Services, Global POS Software 2023

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Retailers also working with independent suppliers and building own solutions

RBR Data Services' research shows independent software vendors (ISVs) are competing with firms supplying both hardware and software. Among those ISVs working with major chains over the last year are Aptos and subsidiary LS Retail, Enactor, Extenda Retail, GEBIT Solutions and JumpMind.

Alternatively, many leading retailers are implementing proprietary POS software, including global giant Walmart and major restaurant chain Taco Bell in the USA.

More retailers expected to change POS supplier in the future

Two million new POS software deployments are forecast over the next five years, in addition to upgrades from legacy versions. In the year to June 2023, new installations as a result of supplier change increased, and with retailers seeking solutions to enable a wider range of touchpoints and enhance customer experience, such activity is expected to expand in the years ahead.

Notes to editors

About RBR Data Services

RBR Data Services provides clients with independent and reliable data and insights through published research, consulting and bespoke data services. Our 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. For any questions about this release, please contact rbr@datos-insights.com.

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