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Introduction, Background, Objectives

For the last 18 years, IHL has been tracking the Retail POS Market in detail. In this analysis we review the POS Shipments and Installed Base in the EMEA (Europe, Middle East and Africa) Retail market . Specifically, we are analyzing the POS terminals that are being used per retail segment, with a focus on key barriers to entry for hardware and software providers. We discuss key trends and market forces that are affecting the buying decisions of retailers in each of the segments. And finally, we discuss overall trends and forecasts for this market for 2016 and beyond.

This report is designed for those who need to understand the nuances of the POS market in detail, leveraging trends, barriers to entry and key forces in play. It is both quantitative and qualitative in nature. Although there are a lot of charts and figures, we provide the driving issues behind these numbers.

For the purposes of this report we do not count units that are in labs; we only count those in pilot or in rollout.

Retail Segment Definitions

- **Food / Supermarket** – Stores that sell food and grocery items, regardless of store size.

- **Drug Stores** – Stores that sell personal care and medicinal goods.

- **Hypermarkets** – This is a broad segment that varies by country. In many, it includes a full service Food store as well as products typically included at Discounters under one roof. In other countries, stores can range anywhere from a Superstore format (think Walmart Supercenter) to a full-line Department Store (with large appliances) combined with a full-line Grocery store.

- **Department Stores** – Traditionally larger format stores, upscale in products and including hard and soft goods with department style checkout.

- **Mass Merchants** – Like a hypermarket format, but only carrying non-food items or limited food items and using a front-end checkout. Also includes Discounters.

- **Specialty Stores** – Stores that focus on particular product line niches. Includes apparel, news, shoes, and DIY type stores.

- **Convenience Stores** – Includes gas stations and forecourts.

- **Hospitality** – Includes Restaurants, Bars, Pubs and Hotels.

POS Definitions

At IHL we believe it is important that we state clearly the definitions of what we are classifying as a POS device. For the purposes of our analysis, we are defining POS as PC-based workstations, namely PC-class Processor-based and LAN-available terminals. Although others might include Electronic Funds Terminals as POS, we do not include them here. Perhaps the best definitions come from the use of the current model names of the top vendors that we are including:

Toshiba GC: SurePOS 300, 500 and 700 families, TCx700, TCxWave

Hewlett Packard: RP2, RP5, RP7, RP9, MP9 G2 platforms, PCOCD

Wincor-Nixdorf: BEETLE family of terminals

NCR: RealPOS 20, 40, 50, 60, 70 and 80 families

Fujitsu: TeamPOS 3000 and 7000 series

In our research, we also include PC-on-Cash-Drawer devices (PCOCD); however, we do not attempt to distinguish between vendors. We do include Self-Checkout units in our figures but do not break these out in the discussion.

We do not include Electronic Cash Registers (ECR) in our study. Although the lines have blurred as to POS and ECR in terms of processors and connectivity, we believe there is a clear distinction in functionality, expandability, and serviceability between these devices.

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Thank You

contact information

For more info, please contact us at

www.ihlservices.com

lee@ihlservices.com
greg@ihlservices.com
@gregbuzek
+1 615-591-2955