

POS (Point of Sales System) Terminal Market in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the domestic POS terminal market with the following conditions:

1. Research period: From October to December, 2016
2. Research targets: POS terminal manufacturers, vendors of POS software/tablet POS, and etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature research

What is the POS (Point of Sales System) Market?

A POS (Point of Sales System) is a sales management system used at the time when the products or services are sold. It tabulates and manages the merchandize sales by each item. The entire POS system is consisted of a server, POS terminals, POS software, and peripheral devices. The market size in this research targets POS terminals and has been calculated based on the shipment at manufacturers. Note that tablet POS is not included.

◆ Key Findings

■ POS Terminal Market for FY2016 Projected to Attain 147,160 Terminals, or 50,699 Million Yen

The domestic POS terminal market size in FY2015, based on the shipment at manufacturers, expanded largely to 148,273 terminals up by 16.1% in volume, or 49,735 million yen, a rise by 24.0% in value. However, the market for FY2016 is projected to level off to attain 147,160 terminals in volume, a decline by 0.8%, or 50,699 million yen in value, a rise by 1.9%. It seems that the user companies are in preparation to take measures for various system amendments scheduled in the coming future, and that the investment plans behind the scenes with 2020 set as one of their goals in progress.

■ POS Industry, Responding to Demands for Self-Service Checkout and Tablets

With lack of personnel in the distribution and retailing industry having been quite serious, such systems as self-service checkout systems, or a.k.a. SACATs (semi-attended customer-activated terminal,) have become rapidly and widely introduced at supermarkets. In the recent new business negotiations, semi-self-service checkout systems at stores becoming the default condition stipulated in the RFP. If such systems are widely accepted in the future, they are considered to be able to prevail in other retail business, too. In addition, adoptions of tablet POS systems have increased to a level where their influence cannot be ignored anymore.

■ With CAGR from FY2015 to FY2019 Becoming 4.0%, Domestic Shipment Volume of POS Terminals Projected to Achieve 173,601

As various system amendments toward 2020 await the distribution and retailing industry, the user companies, which had been reluctant to upgrading their systems, highly probably would

finally take a plunge to make capital investment in order to increase convenience in settlement and to respond to changes in tax systems and inbound tourism demand and etc. CAGR of the domestic POS terminal market based on the shipment volume at manufacturers from FY2015 to FY2019 is likely to be 4.0%, with the market size in FY2019 likely to attain 173,601 terminals. On the other hand, the shipment value is likely to decelerate for the time being, partly because the unit price is on the decline.

◆ **Report format :**

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Price: 190,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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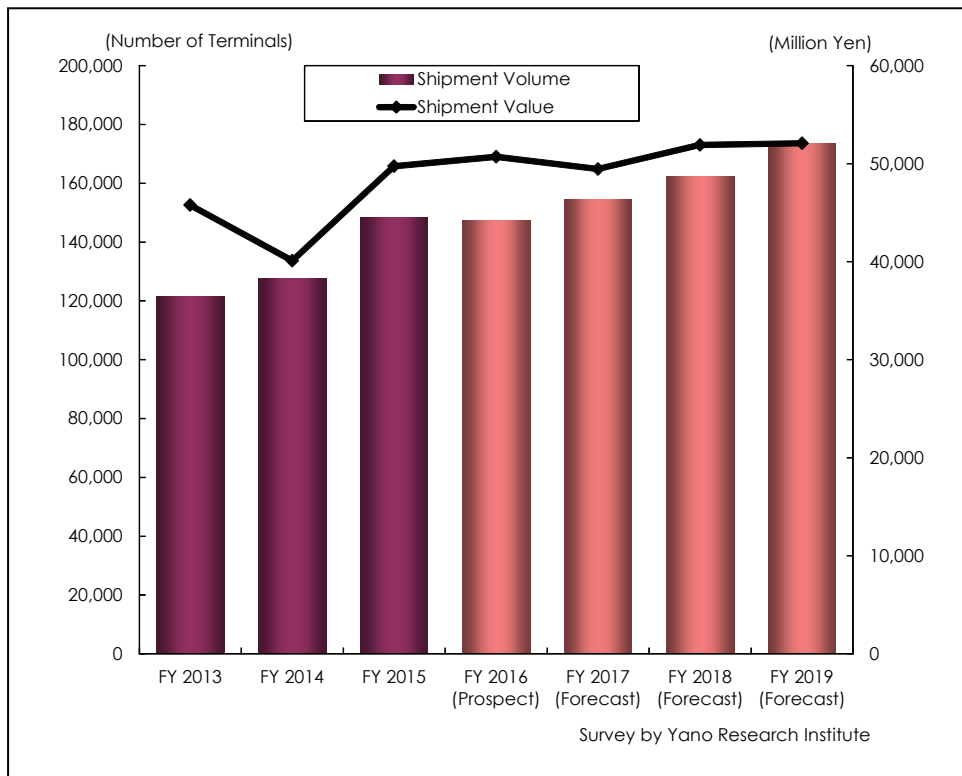
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■ **Table & Figure 1: Transition and Forecast of Domestic POS Terminal Market Size**

(Unit: Number of Terminals, Million Yen)

	FY 2013	FY 2014	FY 2015	FY 2016 (Prospect)	FY 2017 (Forecast)	FY 2018 (Forecast)	FY 2019 (Forecast)
Shipment Volume	121,555	127,704	148,273	147,160	154,518	162,244	173,601
Shipment Value	45,781	40,093	49,735	50,699	49,446	51,918	52,080



Notes:

1. The market size is based on the shipment volume and value at manufacturers.
2. A POS (Point of Sales System) is a sales management system used at the time when the products or services are sold. It tabulates and manages the merchandize sales by each item. The entire POS system is consisted of a server, POS terminals, POS software, and peripheral devices. The market size in this research targets POS terminals and has been calculated based on the shipment volume at manufacturers. Note that tablet POS is not included.