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Global Merchant Acquiring Market: Analysis By Volume, By Transaction, By Payment Method (Visa, Mastercard, American Express, Discover, JCB, Local Card Networks, and Alternative Payment Model), By Company Type (Scaled Incumbent Acquirers, and Modern Acquirers), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2026

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Abstracts

In terms of volume, the global merchant acquiring market stood at US$27.80 trillion in 2021 and is estimated to reach US$41.75 trillion by 2026. In terms of transaction flow, the global merchant acquiring market reached 421.03 billion in 2021 and is expected to reach 987.95 billion by 2026. Merchant acquisition is an essential component of card payment transaction processing. Merchant acquirers enable merchants to accept card payments by acting as a bridge between merchants, issuers, and payment networks, offering merchants authorization, clearing and settlement, dispute management, and information services.

Over the past few years, merchant acquiring market growth has been driven by its adaptability to the rapidly changing payment ecosystem. The merchant acquirer multiples have grown owing to the rapid digitalization wave across industries which has increased the usage of non-cash payments, globally. In addition, key growth drivers for merchant acquiring include eCommerce and mobile digital transactions, as well as the adoption of integrated payments and value-added services. The global merchant acquiring volume market is projected to grow at a CAGR of 8.3% during the forecast period of 2022-2026.

Market Segmentation Analysis:

By Payment Method: The market report has segmented the global merchant acquiring market into seven segments on the basis of payment method: (Visa, Mastercard, American Express, Discover, JCB, Local Card Networks, and Alternative Payment Models). The Visa card network segment held more than 41.9% of the share in the merchant acquiring market in 2021, as the Visa card network has been the largest card network holder during the historical period of 2017-2021.

By Company Type: The report splits the global merchant acquiring market into two different segments: scaled incumbent acquirers, and modern acquirers. The modern merchant acquiring segment is the fastest growing segment with a CAGR of around 35.2% during the forecast period, as the market will be driven by growing demand for a cashless society in many countries, and additional demand for digital transactions globally.

By Region: According to this report, the global volume market can be divided into five major regions: Asia Pacific (China, Japan, India, and the Rest of Asia Pacific), North America (The US, Canada, and Mexico), Europe (UK, Germany, France, Italy and Rest of Europe), Latin America, and the Middle East and Africa. The Asia Pacific enjoyed the major share of 41.2% of the global market in 2021, primarily driven by the region's rising banked population, improving payment infrastructure, growing consumer preference for electronic payments, and rising merchant acceptance. Asia-Pacific is noted for being the first geography to show digital wallets as the primary eCommerce payment modality, which continues with digital wallets representing 68.5% of eCommerce transaction value in 2021. This is particularly true in China, where digital wallets accounted for almost 80% of eCommerce transaction value.

Global Merchant Acquiring Market Dynamics:

Growth Drivers: The rise in online payments in the e-commerce industry, as well as the increased usage of smartphones and the availability of various payment methods, are driving market expansion. Further, the market is expected to increase due to digital banking services, growth of disruption across payments & banking, acceleration of SME digitization, etc. in recent years.

Challenges: Merchant attrition is an old and major issue in the merchant acquiring industry. Merchant attrition occurs when a client or consumer terminates their engagement with a corporation, in this case, a merchant acquirer. As a highly concentrated business, the merchant acquiring industry has always experienced strong rivalry, with each acquirer aiming on gaining a larger market share than their peers. Additionally, other factors like increasing card fraud in ‘card-not-present’ situations, etc. are some challenges to the market.

Trends: Payments and commerce are evolving at a rapid rate. Integrated payment software suppliers must adapt and enable all touch-free payment options in their point-of-sale environments. 'Integrated payments' refers to the integration of payment processing procedures with other critical software-based business solutions. Therefore, since penetration rates in the US market and globally remain low, and the benefits to merchants are evident, integrated payments will continue to play an important role in the merchant acquiring market in the coming years. More trends in the market are believed to grow the merchant acquiring market during the forecasted period, which may include smart payment routing merchant acquiring services, rising adoption of frictionless payments, rising adoption of cloud payment migration, AI-based merchant acquiring services, etc.

Impact Analysis of COVID-19 and Way Forward:

The global merchant acquiring market was impacted in many ways by the COVID-19 pandemic. COVID-19 brought in many changes in the world, digital transformation of economic activities was seen taking place rapidly, in addition to this, the world witnessed a decline in global payment revenue, increased wiliness towards adopting cashless transactions, a decline in consumer spending, increased cyber card frauds, and growth in e-commerce shopping via digital payments. The changes brought in by COVID-19, such as guaranteed same-day settlement, instant digital payments, etc., are looked to have a long-term impact in the post-COVID era.

Competitive Landscape and Recent Developments:

The global merchant acquiring industry is moderately fragmented market, with the top ten acquirers in the world handling nearly 50% of the global card transaction volume in 2021. However, the market shares held by these top 10 market players range between ~ 10%-2%, in the year 2021. The merchant acquiring industry has been witnessing consolidation since 2001, resulting in the dominance of a few large players in the industry. The global trend of the dominance of large players in the industry is also reflected in the US, as the top ten acquirers in the market handled around 80% of the cards transaction, in 2021.

Further, key players in the merchant acquiring market are:

JPMorgan Chase & Co. (Chase Paymetech Solutions LLC)

Fidelity National Information Services, Inc. (Wordplay Inc.)

Fiserv, Inc. (First Data)

Global Payments Inc.

U.S. Bancorp (Elavon, Inc.)

Citigroup Inc. (Citi Merchant Services)

Bank of America (Bank of America Merchant Services)

Barclays PLC (Barclaycard)

Cielo S.A.

Wells Fargo & Company (Wells Fargo Merchant Services LLC)

Stripe, Inc.

China UnionPay Merchant Services Co., Ltd.

Today's merchant acquiring competitive landscape is more dynamic than ever before, owing to a surge in innovation, an active community of new entrants, and a proliferation of innovative payment experiences. In recent years, tech-savvy firms have joined the market, reinvented the merchant journey and streamlined price structures and merchant experiences across the lifecycle. FinTech such as Adyen, Stripe, and Square, as well as merchant acquirers, software providers, gateways, payment facilitators, value-added resellers, service organizations, and point-of-sale vendors, are competing with acquirers and with one another to offer additional value for merchants and their consumers. Furthermore, the business has experienced a surge in mergers, acquisitions, and investments during the last five years. In the acquiring industry, there were more than 30 mergers and acquisitions in 2019. Fiserv and First Data, FIS and Worldpay, and Global Payments and TSYS were among the most famous mega-mergers. First Data Corp, Global Payments, TSYS, and Worldpay spent an estimated US$10 billion on acquisitions in the five years leading up to these mega-mergers. ?

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