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Europe Neobanking / Digital-Only Banks Market Size, Share, and Analysis, By Component (Solutions, Services), By Deployment Mode (Cloud, On-Premise), By End-User (Banks, Insurance Companies, Fintech Firms, Others) and Forecast 2026–2035

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Abstracts

Europe Neobanking / Digital-Only Banks Market was valued at USD $210 million in 2026 and is projected to reach USD $1.26 billion by 2035, registering a CAGR of 22.0% across the forecast period. The Europe Neobanking / Digital-Only Banks Market continues to expand as supportive regulatory mandates, sustainability-linked procurement policies, and a mature industrial buyer base reshape demand across the value chain.

“Solutions is projected to hold the largest share of the Europe Neobanking / Digital-Only Banks Market through 2035.” This segment continues to gain traction owing to strong existing adoption, favorable total cost of ownership, and vendors bundling advisory and integration services around it to lengthen customer relationships within the Europe Neobanking / Digital-Only Banks Market.

“Banks is likely to remain the leading end-user segment of the Europe Neobanking / Digital-Only Banks Market.” Budget cycles among these buyers are lengthening as procurement teams weigh total cost of ownership more heavily than upfront price, reshaping how vendors package and price europe neobanking / digital-only banks offerings for 2026-2035.

“Europe continues to lead adoption within the europe neobanking / digital-only banks market.” Europe benefits from supportive regulatory mandates, sustainability-linked procurement policies, and a mature industrial buyer base, reinforcing its position

as a priority market for vendors through 2035.

Market Segmentation:

By Component: Solutions, Services

By Deployment Mode: Cloud, On-Premise

By End-User: Banks, Insurance Companies, Fintech Firms, Others

This report on the Europe Neobanking / Digital-Only Banks Market combines primary and secondary research, triangulated using a bottom-up and top-down approach. Secondary research (~55% of data inputs) drew on paid industry databases, company filings, regulatory data, and trade association statistics. Primary research (~45%) consisted of structured expert interviews with senior executives, product managers, and channel partners across the value chain, used to validate assumptions and surface trends not visible in published data.

Primary interviews substantiate the findings: By Company Type – Tier 1 42%, Tier 2 27%, Tier 3 31%; By Designation – C-level 37%, Directors 30%, Others 33%; By Region – Europe 100% (single-market study; sub-segment splits detailed in Section 11).

Key Players active in the Europe Neobanking / Digital-Only Banks Market:

JPMorgan Chase & Co.

Visa Inc.

Mastercard Incorporated

PayPal Holdings

Stripe Inc.

Fiserv Inc.

FIS (Fidelity National Information Services)

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Strategies observed across these players span product innovation, capacity expansion, and partnerships with channel and technology allies to defend share as new entrants emerge.

Research Coverage: The study defines, segments, and forecasts the Europe Neobanking / Digital-Only Banks Market by component, deployment mode, end-user, with qualitative insight into regulatory context, supply-chain dynamics, pricing trends, and competitive positioning.

Key Benefits of Buying the Report: (1) Identify growth pockets aligned with 2026-2035 demand signals across the Europe Neobanking / Digital-Only Banks Market; (2) Understand the drivers and restraints shaping adoption through the forecast period; (3) Size opportunities in underpenetrated segments and geographies; (4) Anticipate execution risks tied to regulatory shifts and procurement-cycle timing.

Market Developments: The period 2026-2035 is characterized by consolidation among established players, rising investment from new entrants targeting adjacent price tiers, and growing buyer preference for vendors offering integrated, service-attached europe neobanking / digital-only banks solutions.

Fatpos Global – Why You Should Purchase This Europe Neobanking / Digital-Only Banks Market Report: Access decision-grade analytics built on triangulated primary and secondary research; benchmark competitors with comparative scorecards; and translate insights into sales narratives and partnership plays that improve win rates.

Contents

1. EXECUTIVE SUMMARY

1.1. Market Share Overview
1.2. Business Trends
1.3. Europe Neobanking / Digital-Only Banks Market: Post-Pandemic & Macroeconomic Outlook
1.4. Key Trends
1.5. Segmentation Snapshot

2. RESEARCH METHODOLOGY

2.1. Research Objective
2.2. Research Approach
2.3. Data Sourcing and Methodology
2.4. Primary Research
2.5. Secondary Research
  2.5.1. Paid Sources
  2.5.2. Public Sources
2.6. Market Size Estimation and Data Triangulation

3. MARKET CHARACTERISTICS

3.1. Market Definition
3.2. Europe Neobanking / Digital-Only Banks Market: Regulatory & Policy Impact
3.3. Key Segmentations
3.4. Key Developments
3.5. Allied Industry Data

4. EUROPE NEOBANKING / DIGITAL-ONLY BANKS MARKET – INDUSTRY INSIGHTS

4.1. Industry Segmentation
4.2. Supply Chain / Value Chain Analysis
4.3. Industry Ecosystem & Channel Analysis
4.4. Innovation & Sustainability

5. MACROECONOMIC INDICATORS

6. RECENT DEVELOPMENTS

7. MARKET DYNAMICS

7.1. Introduction
7.2. Growth Drivers
7.3. Market Opportunities
7.4. Market Restraints
7.5. Market Trends

8. RISK ANALYSIS

9. MARKET ANALYSIS

9.1. Porter's Five Forces
9.2. PEST Analysis
  9.2.1. Political
  9.2.2. Economic
  9.2.3. Social
  9.2.4. Technological

10. EUROPE NEOBANKING / DIGITAL-ONLY BANKS MARKET

10.1. Overview
10.2. Historical Analysis (2021-2025)
  10.2.1. Market Size, Y-o-Y Growth (%) and Market Forecast

11. EUROPE NEOBANKING / DIGITAL-ONLY BANKS MARKET SIZE & FORECAST 2026A-2035F

11.1. Overview
11.2. Key Findings
11.3. Market Segmentation
  11.3.1. By Component
    11.3.1.1. Solutions
      11.3.1.1.1. By Value (USD Million) 2026-2035F
      11.3.1.1.2. Market Share (%) 2026-2035F
      11.3.1.1.3. Y-o-Y Growth (%) 2026-2035F

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11.3.1.2. Services
11.3.1.2.1. By Value (USD Million) 2026-2035F
11.3.1.2.2. Market Share (%) 2026-2035F
11.3.1.2.3. Y-o-Y Growth (%) 2026-2035F
11.3.2. By Deployment Mode
11.3.2.1. Cloud
11.3.2.1.1. By Value (USD Million) 2026-2035F
11.3.2.1.2. Market Share (%) 2026-2035F
11.3.2.1.3. Y-o-Y Growth (%) 2026-2035F
11.3.2.2. On-Premise
11.3.2.2.1. By Value (USD Million) 2026-2035F
11.3.2.2.2. Market Share (%) 2026-2035F
11.3.2.2.3. Y-o-Y Growth (%) 2026-2035F
11.3.3. By End-User
11.3.3.1. Banks
11.3.3.1.1. By Value (USD Million) 2026-2035F
11.3.3.1.2. Market Share (%) 2026-2035F
11.3.3.1.3. Y-o-Y Growth (%) 2026-2035F
11.3.3.2. Insurance Companies
11.3.3.2.1. By Value (USD Million) 2026-2035F
11.3.3.2.2. Market Share (%) 2026-2035F
11.3.3.2.3. Y-o-Y Growth (%) 2026-2035F
11.3.3.3. Fintech Firms
11.3.3.3.1. By Value (USD Million) 2026-2035F
11.3.3.3.2. Market Share (%) 2026-2035F
11.3.3.3.3. Y-o-Y Growth (%) 2026-2035F
11.3.3.4. Others
11.3.3.4.1. By Value (USD Million) 2026-2035F
11.3.3.4.2. Market Share (%) 2026-2035F
11.3.3.4.3. Y-o-Y Growth (%) 2026-2035F

12. EUROPE EUROPE NEOBANKING / DIGITAL-ONLY BANKS MARKET SIZE & FORECAST 2026A-2035F

12.1. Overview
12.2. Key Findings
12.3. Market Segmentation
12.3.1. By Component
12.3.2. By Deployment Mode

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12.3.3. By End-User
12.4. Country
12.4.1. Germany
12.4.2. United Kingdom
12.4.3. France
12.4.4. Italy
12.4.5. Spain
12.4.6. Rest of Europe

13. COMPETITIVE LANDSCAPE

13.1. Company Market Share, 2025
13.2. Key Player Overview
13.3. Key Stakeholders

14. COMPANY PROFILES

14.1. JPMorgan Chase & Co.
14.1.1. Company Overview
14.1.2. Financial Overview
14.1.3. Key Product / Service Analysis
14.1.4. Company Assessment
14.1.4.1. Product Portfolio
14.1.4.2. Key Clients
14.1.4.3. Market Share
14.1.4.4. Recent News & Development (Last 3 Yrs.)
14.1.4.5. Executive Team
14.2. Visa Inc.
14.3. Mastercard Incorporated
14.4. PayPal Holdings
14.5. Stripe Inc.
14.6. Fiserv Inc.
14.7. FIS (Fidelity National Information Services)
14.8. Ant Group
14.9. Block Inc.
14.10. Adyen N.V.
14.11. Other Prominent Players

15. APPENDIX

16. CONSULTANT RECOMMENDATION

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