

Contactless Payment Market Report by Technology (Near Field Communication (NFC), Radio Frequency Identification (RFID), Infrared (IR), and Others), Device (Smartphones and Wearables, Point-of-Sales Terminals, Smart Cards), Solution (Payment Terminal Solution, Transaction Management, Security and Fraud Management, Hosted Point-of-Sales, Payment Analytics), Application (BFSI, Retail, Transportation, Healthcare, and Others), and Region 2024-2032

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Abstracts

The global contactless payment market size reached US\$ 15.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 38.1 Billion by 2032, exhibiting a growth rate (CAGR) of 10.4% during 2024-2032. The increasing consumer demand for convenient and hygienic payment methods, widespread adoption of smartphones and wearable devices, and advancements in secure payment technologies such as NFC and tokenization, are some of the key factors, driving the market growth.

Global Contactless Payment Market Analysis:

Major Market Drivers: Rapid digitization of the banking, financial services, and insurance (BFSI) industry across the globe is primarily driving the growth of the market. Additionally, the increasing consumer awareness regarding the convenience offered by contactless payment tools and the rising demand for minimized queue time and faster checkouts at banks are also catalyzing the market growth.

Key Market Trends: Various technological advancements, such as the development of biometric-based contactless smart cards and novel RFID tags, are acting as significant growth-inducing factors, bolstering the market growth.

Competitive Landscape: Some of the leading contactless payment market companies include Giesecke & Devrient GmbH, Heartland Payment Systems (Global Payments Inc.), IDEMIA (Advent International), Ingenico Group (Worldline S.A.), On Track Innovations Ltd., Pax Technology, Setomatic Systems, Thales Group, Valitor, Verifone Systems Inc. (Francisco Partners), and Visa Inc., among others.

Geographical Trends: In North America, the widespread adoption of blockchain and 5G technologies, along with significant improvements in the networking infrastructure, is propelling the market for contactless payments. The Asia Pacific contactless payment market is rapidly expanding due to widespread smartphone adoption, increasing digital wallet usage, and supportive government initiatives. Additionally, Europe's contactless payment market is also well-established, characterized by high penetration of contactless cards and widespread acceptance among merchants.

Challenges and Opportunities: The contactless payment market faces challenges such as security concerns and the need for widespread infrastructure upgrades. However, it presents opportunities for enhanced convenience, faster transactions, and increased adoption driven by consumer demand for hygienic and efficient payment methods.

Contactless Payment Market Trends:

Increased Adoption of Mobile Wallets

The growing use of smartphones and mobile wallet applications, such as Apple Pay, Google Wallet, and Samsung Pay, is primarily driving the adoption of contactless payments. For instance, the volume of mobile wallet transactions was about four billion in the financial year 2021, a significant increase from about 32.7 million transactions in the financial year 2013. Additionally, the mobile wallet transaction volume in India is expected to reach around 71 billion by 2025. Moreover, the mobile rate penetration in India was 15.7% in 2020 and is expected to reach 30% in 2025. Significant growth in the adoption of smartphones is expected to propel the contactless payment market

share in the coming years. Furthermore, the integration of contactless payment technology, such as near-field communication (NFC) technology, into wearable devices like smartwatches and fitness trackers is enhancing convenience and user adoption. Besides this, the growth in contactless debit card and credit card transactions in retail stores and outlets is anticipated to catalyze the market demand for contactless terminals in the retail sector over the forecast period. For example, the most popular payment method in the UK last year was debit cards, which accounted for 45% and 28%, respectively, of all payments made at POS terminals, according to statistics from Worldplay.

Technological Advancements

Continuous advancements in near-field communication (NFC) and radio-frequency identification (RFID) technologies are enhancing the efficiency and reliability of contactless payments. Various key market players are increasingly investing in facilitating smooth contactless payment processes. For instance, in October 2023, Softpay and Dotykacka collaborated to introduce a Tap-to-phone Payment Solution in the Czech Republic and Slovakia, utilizing Nexi as an Acquirer. Tap-to-phone technology provider SoftPay announced a strategic partnership with multifunctional POS system solution provider Dotykacka to meet the growing demand for contactless payment acceptance in the Czech Republic and Slovakia. Additionally, advancements in blockchain technology promise to further secure transactions and streamline processes. These innovations collectively drive the growth and adoption of contactless payment solutions, offering enhanced security, efficiency, and user experience. For instance, in May 2024, VeChain, a leading blockchain platform, announced its plan to revolutionize the integration of blockchain technology with Near Field Communication (NFC) chips to enhance data authenticity and unlock new market opportunities. This strategic move aims to reshape the retail landscape by leveraging blockchain's inherent trust and immutability. Such innovations are anticipated to propel the contactless payment market size in the coming years.

Regulatory Initiatives and Framework

The government authorities of various nations are taking initiatives to establish security standards and safeguard against fraud, thereby building trust in the contactless payment market. Regulatory frameworks, such as the General Data Protection Regulation (GDPR) in Europe, enforce stringent data protection measures. Guidelines from bodies like the Payment Card Industry Data Security Standard (PCI DSS), set standards for secure transactions. Government authorities are also supporting the

adoption of contactless payments through initiatives that encourage digital transactions and reduce reliance on cash. For instance, in February 2024, the Reserve Bank of India (RBI) released a major policy statement outlining several developmental and regulatory initiatives covering financial markets, regulations pertaining to lending institutions, and payment systems, including digital currency and fintech. On the financial markets front, RBI announced that it would comprehensively review the existing regulatory guidelines for Electronic Trading Platforms (ETPs) that enable transactions in financial instruments regulated by RBI, such as foreign exchange and government securities. Such initiatives by the government authorities of various nations are anticipated to catalyze the growth in the contactless payment industry over the forecasted period.

Global Contactless Payment Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global contactless payment market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on technology, device, solution, and application.

Breakup by Technology:

Near Field Communication (NFC)

Radio Frequency Identification (RFID)

Infrared (IR)

Others

The contactless payment market report has provided a detailed breakup and analysis of the market based on the technology. This includes near field communication (NFC), radio frequency identification (RFID), infrared (IR), and others.

Near Field Communication (NFC) is a short-range wireless technology that enables communication between devices within a few centimeters. It is widely used in contactless payments, allowing secure transactions by simply tapping a smartphone or contactless card near an NFC-enabled terminal. NFC enables fast transaction speeds, enhanced security through encryption, and convenience, as it eliminates the need for physical contact or swiping.

Radio Frequency Identification (RFID) uses electromagnetic fields to automatically identify and track tags attached to objects. In the contactless payment market, RFID tags are embedded in cards and devices, enabling quick and easy transactions by waving the card near an RFID reader. Benefits include the ability to process multiple transactions simultaneously, increased durability of RFID cards, and improved transaction efficiency and convenience.

Breakup by Device:

Smartphones and Wearables

Point-of-Sales Terminals

Smart Cards

The report has provided a detailed breakup and analysis of the market based on the device. This includes smartphones and wearables, point-of-sales terminals, and smart cards.

Contactless payments are gaining significant traction due to their convenience and preference. As a result, various wearable device manufacturers are incorporating near-field communication (NFC) technology as a standard into most smart devices, like smartphones and wearables, to provide greater convenience by removing the need to fumble with a wallet, purse, or phone. Furthermore, the increasing penetration of smartphones and wearables is also offering lucrative growth opportunities to the contactless payment market. For instance, in India, in 2018, around 36% of households had a smartphone, which increased to 74.8% in 2022. Similarly, from 2016 to 2019, connected wearable devices increased by 325 million to 722 million respectively. 30% of middle-income households used fitness trackers in the U.S. in 2020. Such a significant rise in smartphones and wearables is positively impacting the contactless payment market outlook.

Breakup by Solution:

Payment Terminal Solution

Transaction Management

Security and Fraud Management

Hosted Point-of-Sales

Payment Analytics

The report has provided a detailed breakup and analysis of the market based on the solution. This includes payment terminal solution, transaction management, security and fraud management, hosted point-of-sales, and payment analytics.

Payment terminal solutions in the contactless payment market are devices that enable merchants to accept payments without physical contact between the card or device and the terminal. These terminals use Near Field Communication (NFC) technology to communicate with contactless cards, smartphones, and wearables. They provide a fast, secure, and convenient transaction process by simply tapping or waving the payment device near the terminal. Additionally, these terminals often support multiple payment methods, including mobile wallets and traditional chip cards, making them versatile and future-proof in a rapidly evolving payment landscape. Transaction management solutions in the contactless payment market encompass the systems and software that oversee, process, and track financial transactions conducted through contactless methods. These solutions ensure the secure and efficient handling of payments from initiation to completion.

Breakup by Application:

BFSI

Retail

Transportation

Healthcare

Others

The report has provided a detailed breakup and analysis of the market based on the

application. This includes BFSI, retail, transportation, healthcare, and others.

In the Banking, Financial Services, and Insurance (BFSI) sector, contactless payments streamline transactions, enhance security, and improve customer convenience. Banks issue contactless cards and mobile payment solutions, reducing transaction times and fraud risks. This technology also facilitates seamless integration with digital banking services, promoting financial inclusion. In the retail sector, contactless payments offer faster checkout processes, reducing wait times and enhancing customer satisfaction. Retailers provide a contactless payment option to enhance the speed and efficiency of the checkout process, fostering customer loyalty through smoother and quicker transactions. Market players are offering innovative and smart solutions for retailers, which is expected to drive the adoption of contactless payment terminals in the retail segment. For instance, in September 2022, Square, a financial services platform, announced its plan to launch a Tap To Pay service for iPhone in the U.S. This service enabled all sizes of vendors to accept contactless payments directly from their iPhones without any hardware or additional costs.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa.

In North America, various technological advancements, such as the development of biometric-based contactless smart cards and novel RFID tags, are acting as other growth-inducing factors. These technologies are widely adopted by small merchants and service providers to conduct cashless transactions by using their smartphones.

Other factors, including the widespread adoption of blockchain and 5G technologies, along with significant improvements in the networking infrastructure, are anticipated to drive the market further. The Asia Pacific contactless payment market is rapidly expanding due to widespread smartphone adoption, increasing digital wallet usage, and supportive government initiatives. Key markets like China, India, and Japan are driving growth with robust digital payment infrastructure and consumer preference for cashless transactions. For instance, in September 2023, NPCI announced UPI Tap & Pay – an extension of the Indian payment method that allows let users to make payments simply by tapping their devices on NFC-enabled QR codes at merchant locations. Besides this, Europe's contactless payment market is also well-established, characterized by high penetration of contactless cards and widespread acceptance among merchants. The region's regulatory framework, such as PSD2, and consumer trust in digital payments contribute to strong market growth and innovation in contactless solutions.

Competitive Landscape:

The competitive landscape of the industry has also been examined along with the profiles of the following key players:

Giesecke & Devrient GmbH

Heartland Payment Systems (Global Payments Inc.)

IDEMIA (Advent International)

Ingenico Group (Worldline S.A.)

On Track Innovations Ltd.

Pax Technology

Setomatic Systems

Thales Group

Valitor

Verifone Systems Inc. (Francisco Partners)

Visa Inc.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Global Contactless Payment Market News:

May 2024: RuPay, a product of the National Payments Corporation of India (NPCI), announced a collaboration with TATA IPL. The organization unveiled an exclusive wristband and other accessories available for a select few attendees of the TATA IPL 2024 playoffs and final.

March 2024: IndusInd Bank announced the launch of its contactless payments wearable 'Indus PayWear.' It is said to be India's first all-in-one tokenizable wearable for both debit and credit cards.

March 2024: The Federal Bank launched a RuPay smart key chain called 'Flash Pay' for contactless NCMC (National Common Mobility Card) payments at enabled metro stations and PoS terminals. Customers can make payments up to ₹5,000 without a PIN, whereas those over ₹5,000 will require PIN authentication.

Key Questions Answered in This Report:

How has the global contactless payment market performed so far and how will it perform in the coming years?

What has been the impact of COVID-19 on the global contactless payment market?

What are the key regional markets?

What is the breakup of the market based on the technology?

What is the breakup of the market based on the device?

What is the breakup of the market based on the solution?

What is the breakup of the market based on the application?

What are the various stages in the value chain of the industry?

What are the key driving factors and challenges in the industry?

What is the structure of the global contactless payment market and who are the key players?

What is the degree of competition in the industry?

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