

Japan Mobile Point-of-Sale (mPOS) Market Assessment, By Solution Type [Hardware, Software], By Connectivity Technology [Wi-fi, Bluetooth, Cellular Network], By Operating System [Android, iOS], By Application [Sales and Payment Processing, Inventory Management, Reporting and Analytics, Customer Relationship Management, Others], By End-user Industry [Retail, Hospitality, Healthcare, Transportation and Logistics, Entertainment, Others], By Region, Opportunities and Forecast, FY2019-FY2033F

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Report description:

Japan mobile point-of-sale (mPOS) market is projected to witness a CAGR of 6.62% during the forecast period FY2026-FY2033, growing from USD 2.16 billion in FY2025 to USD 3.60 billion in FY2033 due to technological advancements, shifting consumer behaviors, and evolving retail dynamics. It started with convenience. The mPOS market in Japan has quietly turned into a foundation for modern commerce, especially among small merchants, mobile vendors, cafes, and even service professionals. High smartphone penetration, rising card acceptance, and digital wallet integrations have made these lightweight, portable systems more than just checkout devices, as they are micro-enterprise enablers.

Japan's move toward a cashless economy, accelerated by government incentives and the pandemic, has only amplified adoption. The mPOS solutions are now being designed around connectivity, UX, and cloud compatibility rather than just payment processing. That's where the shift lies, from terminals to ecosystems.

For instance, in March 2024, NETSTARS adopted by Sumitomo Mitsui Card to power QR code payments on the "stera terminal" and mobile devices (stera tap), integrating QR, credit, and e-money in one solution. This initiative aligns with Japan's goal of achieving

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40% cashless transactions by 2025 and fuels the adoption of mPOS across SMEs.

Surge in SME and Micro-Merchant Adoption of Compact mPOS Systems

Small retailers, local cafes, and independent service providers are rapidly becoming the driving force behind Japan's mPOS market. These compact and cost-effective systems enable micro-merchants to bypass the complexities of traditional bank-issued POS terminals, allowing for seamless card acceptance and on-the-go payments. The adoption is not forced; it is a natural process. With minimal setup, low upfront costs, and full mobility, mPOS solutions are perfectly aligned with the needs of Japan's vast SME and micro-enterprise ecosystem. This organic growth reflects a shift in how small businesses approach digital commerce, favoring solutions that prioritize speed, ease of use, and scalability.

For instance, in March 2024, Square, Inc. launched the new Square Terminal in Japan, an Android-based, standalone device combining payments, receipts, and management tools. User feedback noted its popularity at local events and among small merchants due to its all-in-one convenience.

Integration of mPOS Analytics and Cloud Inventory to Fuel Market Growth

The Japanese mPOS (mobile Point-of-Sale) market is poised for significant growth, driven by the integration of advanced functionalities such as loyalty programs, data analytics, and cloud-based inventory management. Retailers and F&B businesses are increasingly adopting mPOS systems that go beyond payment processing to offer customer retention tools (personalized discounts, membership tracking) and real-time sales insights (demand forecasting, stock optimization). Cloud connectivity further enhances operational efficiency by enabling centralized, multi-location inventory control. With Japan's cashless adoption accelerating, these value-added features make mPOS indispensable for SMEs and chains alike, positioning the market for rapid expansion. The mPOS is evolving into a CRM and business insight tool, especially among urban retailers managing omnichannel setups.

For instance, Rakuten's FinTech segment revenue grew +35.8% YoY to JPY 28.6 billion in Q3 2023, fueled partly by mPOS integrations linking payments to inventory and loyalty tools.

mPOS Adoption Driven by Inventory Management Features

For Japan's small and medium-sized retailers, inventory visibility has become mission-critical, especially in the food, fashion, and specialty retail sectors, where margin pressures are high. That's why mPOS systems with integrated inventory tools are now in demand. Devices that offer real-time stock tracking, low-inventory alerts, and automated reorder features are being chosen over basic card readers. For modern Japanese retailers, the value of mPOS is shifting toward systems that reduce out-of-stock losses and streamline store operations. Inventory, not just interface, is the new battleground.

For instance, in October 2023, Digital Garage's Cloud Pay platform partnered with Square Japan, enabling merchants to accept QR codes (including PayPay, Rakuten Pay, d Barai, Alipay+, WeChat Pay, and more) through a single soft terminal using Wi-Fi or Bluetooth. This integration serves established Square users with seamless multi-wallet acceptance, enabling mobile payments without the need for extra hardware.

Key Players Landscape and Outlook

Japan's mPOS market is anchored by a few core players and some nimble disruptors. Rakuten Pay has leveraged its e-commerce, fintech, and loyalty infrastructure to turn mPOS into an innovative retail platform. Square KK (a subsidiary of Block, Inc.) is targeting mid-size and mobile-first merchants with Android-native devices and unified dashboards. With increasing expectations surrounding software, security, and ecosystem interoperability, mPOS in Japan is shifting from a focus on hardware to one of what it connects. STORES, Inc. has become a favorite among sole proprietors, especially in rural Japan, by offering simple, fast-to-onboard card readers with zero upfront cost. Meanwhile, JCB is expanding Smart Code integrations into multi-platform mPOS devices, pushing legacy card infrastructure into the mobile era.

For instance, in March 2024, GMO Payment Gateway, Inc.- Financial Gate teamed up with Soft Space to introduce "stera tap", Japan's first PCI MPoC-certified SoftPOS app, which allows merchants to use just a smartphone or tablet for NFC/contactless payments. It is a significant leap toward terminal-less, scalable mPOS deployment in the field.

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