

Japan QR Code Payments Market Assessment, By Type [Static QR Code, Dynamic QR Code], By Payment Mode [Card-based, Wallet-based, Bank Transfer], By End-user [Retail Consumer, Merchants, Enterprises], By Application [Retail, Transportation, Hospitality, Healthcare, Others], By Region, Opportunities and Forecast, FY2019-FY2033F

Market Report | 2025-07-31 | 125 pages | Market Xcel - Markets and Data

AVAILABLE LICENSES:

- Single User License \$3500.00
- Multi-User/Corporate Licence \$4700.00
- Custom Research License \$7200.00

Report description:

Japan QR code payments market is projected to witness a CAGR of 8.13% during the forecast period FY2026-FY2033, growing from USD 0.67 billion in FY2025 to USD 1.25 billion in FY2033 due to a lot of factors, including government-led cash initiatives such as "Cashless Vision" policy, super app and e-commerce integration, and smartphone penetration and youth adoption. Japan's QR code payments market has evolved significantly from hesitant adoption to widespread utility. Once reliant on cash and cards, Japan now stands at a digital payment inflection point, driven by regulatory nudges, smartphone penetration, and rising consumer preference for fast, touchless checkouts.

The government's "Cashless Vision" strategy initiative gave QR codes a soft push. Today, QR payments are used for a wide range of applications, from dining at restaurants to visiting doctors. The key is simplicity; there is no need for physical cards or specialized terminals - scan, pay, and done.

Domestic players such as PayPay and LINE Pay dominate user mindshare, while Rakuten Pay, Apple Pay, and Google Pay battle for ecosystem lock-in. The QR code, whether static or dynamic, is not just a payment method anymore; it has become a behavior, and it is growing.

For instance, in August 2024, Rakuten Payment Co., Ltd. conducted a campaign for its cashless payment service, Rakuten Pay.

During this campaign, users who used the app's sending function for the first time and transferred 500 yen or more of their Rakuten Cash balance received 200 Rakuten Points as a reward. The initiative targeted first-time users of the sending feature, aiming to encourage more convenient cashless transactions, such as advance payments or bill splitting, through the Rakuten Pay

app.

Surge in Wallet-Based QR Payments Across Urban Japan

QR payments were once an option. In many Japanese cities, they are now accepted. Wallet-based QR code systems, particularly those from PayPay, Rakuten Pay, and LINE Pay, have experienced a surge in adoption due to rewards, ease of use, and cross-platform merchant acceptance. These QR wallets are not niche; they are national. From family-run ramen shops to JR train kiosks, wallets are winning.

In August 2024, PayPay crossed 60 million registered users, covering 4.2 million merchants across Japan. That is nearly every convenience store, izakaya, and mall kiosk in Tokyo and Osaka. The company processed over USD 69 billion (JPY 10 trillion) in transactions in fiscal year 2023 alone, representing a 17% increase from the previous year.

Retail Sector Accelerates QR Integration via Super App Ecosystems

Japan's fragmented retail space is rapidly unifying around QR code payments, thanks to super app ecosystems. From loyalty to logistics, QR codes are now stitched into the retail experience. Speeding QR adoption is being observed with bold incentives and rewards, making contactless payments fun, convenient, and widespread.

For instance, in March 2024, the Tokyo Metropolitan Government launched a 10% rebate campaign via QR wallets (PayPay, auPAY, Rakuten Pay, d-payment), spanning over 350,000 stores, from convenience chains to family restaurants. The campaign led to a significant increase in consumer usage and retailer adoption.

This is not about replacing POS terminals; it is about redefining them. QR codes are now checkout counters, coupons, and loyalty cards, all in one pixelated square.

Dynamic QR Code Systems Revolutionize Enterprise and Healthcare Payments, Aiding Growth

Japan QR code payment sector is witnessing a transformation as dynamic QR technology enables secure, real-time transactions for corporate and medical payments. Enterprises are adopting these systems for B2B invoicing, supply chain payments, and automated reconciliation, while healthcare providers leverage them for insurance claims, telemedicine fees, and contactless patient billing. Unlike static QR codes, dynamic versions generate unique, time-sensitive transactions, reducing fraud risks and enabling rich data integration with ERP/EHR systems. With major banks and fintechs (such as PayPay and LINE Pay) supporting the standard, Japan's QR payments are evolving beyond retail into mission-critical financial infrastructure, driving annual growth in commercial adoption.

For instance, in August 2024, TBCASoft's HIVEX Network Launches Dynamic-QR Across Japan. The HIVEX payment network (by TBCASoft) rolled out dynamic QR codes at hundreds of thousands of merchants, covering taxis, vending machines, retail stores, and public services. Each scan generates a unique, time-sensitive QR for airtight security and rapid transaction verification, pushing QR ubiquity deeper into everyday life.

Key Players Landscape and Outlook

Japan's QR code payment market is led by PayPay, which dominates through cashback incentives, mass merchant partnerships, and deep integration within SoftBank's ecosystem. LINE Pay, now part of the LY Corporation (comprising Z Holdings and LINE), integrates payments into Japan's largest messaging platform, creating a high-retention super app model. Rakuten Pay leverages its e-commerce, telecom, and banking arms to drive the adoption of closed-loop QR codes among users within the Rakuten ecosystem. NTT Docomo's D payment and KDDI's au PAY offer telco-tied payment experiences, especially among older users.

Meanwhile, Apple Pay and Google Pay are gaining ground among premium and Android users, respectively, often serving as the gateway for QR code adoption via Suica or merchant apps. The real battle is no longer just over who owns the transaction, but who owns the consumer journey from start to finish.

For instance, in November 2024, PayPay Corporation partnered with Alipay+ (an affiliate of Alibaba Group Holding Limited), integrating over 3 million local merchants into a global payment network, thereby bridging inbound tourism and QR-enabled commerce. Together with PayPay, Alipay+ is connecting local SMEs in Japan to the worldwide payment ecosystem, unlocking further growth opportunities for both small businesses and payment partners.

Table of Contents:

1. Project Scope and Definitions

2. Research Methodology

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 3. Executive Summary
- 4. Voice of Customers
- 4.1. Respondent Demographics
- 4.2. Awareness and Usage of QR Code Payments
- 4.3. Key Drivers for Adoption
- 4.4. Payment Preferences by Use Case
- 4.5. Challenges and Concerns Regarding QR Payments
- 5. Japan QR Code Payments Market Outlook, FY2019-FY2033F
 - 5.1. Market Size Analysis & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share Analysis & Forecast
 - 5.2.1. By Type
 - 5.2.1.1. Static QR Code
 - 5.2.1.2. Dynamic QR Code
 - 5.2.2. By Payment Mode
 - 5.2.2.1. Card-based
 - 5.2.2.2. Wallet-based
 - 5.2.2.3. Bank Transfer
 - 5.2.3. By End-user
 - 5.2.3.1. Retail Consumer
 - 5.2.3.2. Merchants
 - 5.2.3.3. Enterprises
 - 5.2.4. By Application
 - 5.2.4.1. Retail
 - 5.2.4.2. Transportation
 - 5.2.4.3. Hospitality
 - 5.2.4.4. Healthcare
 - 5.2.4.5. Others
 - 5.2.5. By Region
 - 5.2.5.1. North
 - 5.2.5.2. South
 - 5.2.5.3. Central
 - 5.2.6. By Company Market Share Analysis (Top 5 Companies and Others - By Value, FY2024)
 - 5.3. Market Map Analysis, FY2024
 - 5.3.1. By Type
 - 5.3.2. By Payment Mode
 - 5.3.3. By End-user
 - 5.3.4. By Application
 - 5.3.5. By Region
 - 6. Demand Supply Analysis
 - 7. Value Chain Analysis
 - 8. Porter's Five Forces Analysis
 - 9. PESTLE Analysis
 - 10. Commission/Subscription Analysis
 - 11. Market Dynamics
 - 11.1. Market Drivers
 - 11.2. Market Challenges

12. Market Trends and Developments

13. Policy and Regulatory Landscape

14. Case Studies

15. Competitive Landscape

15.1. Competition Matrix of Top 5 Market Leaders

15.2. SWOT Analysis for Top 5 Players

15.3. Key Players Landscape for Top 8 Market Players

15.3.1. PayPay Corporation

15.3.1.1. Company Details

15.3.1.2. Key Management Personnel

15.3.1.3. Products and Services

15.3.1.4. Financials (As Reported)

15.3.1.5. Key Market Focus and Geographical Presence

15.3.1.6. Recent Developments/Collaborations/Partnerships/Mergers and Acquisition

15.3.2. LINE Corporation

15.3.3. Rakuten Group, Inc.

15.3.4. Mercari, Inc.

15.3.5. NTT Docomo, Inc.

15.3.6. KDDI Corporation

15.3.7. Apple Inc.

15.3.8. Google LLC

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

16. Strategic Recommendations

17. About Us and Disclaimer

Japan QR Code Payments Market Assessment, By Type [Static QR Code, Dynamic QR Code], By Payment Mode [Card-based, Wallet-based, Bank Transfer], By End-user [Retail Consumer, Merchants, Enterprises], By Application [Retail, Transportation, Hospitality, Healthcare, Others], By Region, Opportunities and Forecast, FY2019-FY2033F

Market Report | 2025-07-31 | 125 pages | Market Xcel - Markets and Data

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$3500.00
	Muti-User/Corporate Licence	\$4700.00
	Custom Research License	\$7200.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>		
	EU Vat / Tax ID / NIP number* <input type="text"/>		

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Address*

Zip Code*

City*

Country*

Date

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com