

United States 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, Others], 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, 2018-2032F

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Report description:

United States mobile point-of-sale (mPOS) market is projected to witness a CAGR of 7.65% during the forecast period 2025-2032, growing from USD 8.62 billion in 2024 to USD 15.55 billion in 2032, owing to contactless and NFC payment growth, rise of gig economy, demand for omnichannel retail as well as regulatory and security upgrades. The United States mPOS market is no longer niche. It's embedded, in food trucks, boutiques, festivals, clinics, even curbside pickups. Wherever payments need to happen fast, on the move, and with minimal hardware, mPOS is stepping in.

For instance, in September 2024, EMVCo (the global standard body behind tap-to-pay) reported that tap to phone solutions, turning smartphones into NFC terminals, had reached several merchant users globally, with the United States leading regionally. The rise of tap to phone dramatically lowers barriers to entry for mPOS, especially among small mom and pop stores and solo service providers.

Surge in Cloud-Based mPOS Software Adoption Leads to Market Growth

As small and mid-sized businesses digitize, they're choosing SaaS over legacy systems. Cloud-based mPOS reduces hardware

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costs and boosts agility. Updates are real-time, data syncs instantly, and insights are available across devices. For restaurants, salons, and mobile vendors, it's a game changer.

For instance, in Q3 2024, Toast Inc., a leading cloud-based digital platform for restaurants, released its Restaurant Trends Report, revealing key insights into reservation patterns, pricing shifts, and wage trends across approximately 127,000 restaurant locations on its platform. This report underscores the expanding adoption of mobile point-of-sale (mPOS) systems as restaurants increasingly leverage digital tools to optimize operations and enhance customer experience. Toast's continued growth, adding 28,000 net locations in 2024 to reach around 134,000, reflects the rising demand for integrated mPOS solutions in the United States restaurant industry.

Enhanced Mobility Through New mPOS Hardware Bringing Market Expansion

Flexible connectivity options are paramount for mPOS systems. Whether utilizing bluetooth for pop-up events or cellular networks for mobile operations like food delivery, the capacity to process payments irrespective of location significantly expands mPOS adoption. This capability unlocks new market opportunities in areas such as field services, roadside commerce, and rural hospitality, moving beyond conventional retail environments.

For instance, in May 2025, Square (Block, Inc.) launched its new all-in-one mobile device Square handheld POS, which combines the payment acceptance and have built-in inventory tools. It is pocket sized POS which empowers merchant to operate it anywhere and is self-sufficient.

Dominance of Retail Segment in mPOS Deployment

Retail remains the strongest vertical for the United States mPOS market, both in volume and innovation. The retail sector is driving not just usage, but ecosystem growth. From omnichannel syncing to personalized checkouts, retailers are leveraging mPOS to compete with eCommerce in physical settings.

For instance, Shopify's Q4?2023 results revealed that offline revenue (including POS hardware and subscriptions) reached USD 441 million, a five fold increase over four years, signaling strong retail adoption of mPOS systems. This trend is further evidenced by companies like Square and Clover, whose integrated mPOS solutions empower small and medium-sized retailers with robust tools for sales, analytics, and customer engagement, driving operational efficiencies and fostering customer loyalty across diverse retail formats.

Impact of the U.S. Tariff on United States Mobile Point-of-Sale (mPOS) Market

-□The U.S. tariff policies, particularly those targeting Chinese-manufactured electronics and components, have had a notable impact on the country's mobile point-of-sale (mPOS) market. Many mPOS devices rely on imported hardware, including card readers, chips, and batteries, which are subject to increased costs due to tariffs. This has led to higher prices for mPOS solutions, affecting small and medium-sized businesses (SMBs) that depend on affordable, scalable payment systems.

-□Some U.S. providers have shifted supply chains to avoid tariffs, but delays and higher manufacturing costs persist and impacting the market growth. Additionally, the tariffs have accelerated demand for domestic mPOS production and software-driven solutions that minimize hardware dependency.

-□While the long-term effects remain uncertain, the tariffs have forced the industry to adapt, with some fintech firms exploring alternative technologies like smartphone-based SoftPOS to reduce reliance on physical hardware.

Key Players Landscape and Outlook

The United States mPOS market blends fintech dynamism with enterprise-grade tools. Block Inc. and Clover lead in small and medium businesses adoption, thanks to ease-of-use and ecosystem lock-in. Toast dominates food service, offering end-to-end integration. Shopify is pushing hard in retail, especially post-pandemic, as merchants seek hybrid digital-physical platforms. Meanwhile, PayPal's Zettle and Intuit's GoPayment provide accounting tie-ins for freelancers and gig workers. Verifone and Helcim target larger businesses with custom workflows and hardware options. The market isn't just growing, it's segmenting by use case, connectivity, and software depth.

For instance, in January 2025, Verifone Systems, Inc. announced the launch of its new Verifone Victa portfolio of payment devices, designed to deliver seamless and secure payment experiences. The company also introduced Verifone Tap, a new softPOS solution, alongside advanced biometrics capabilities. These innovations aim to equip businesses with enhanced tools for secure, customer-centric transactions and to elevate the payment experience for shoppers through engaging and inclusive touchpoints.

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