

Brazil POS Terminal - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 106 pages | Mordor Intelligence

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Report description:

Brazil POS Terminal Market Analysis

The Brazil POS Terminal Market was valued at USD 6.45 billion in 2025 and estimated to grow from USD 6.84 billion in 2026 to reach USD 9.16 billion by 2031, at a CAGR of 6.03% during the forecast period (2026-2031). Accelerated digital-payment uptake, anchored by Pix instant transfers, mandatory EMV compliance, and the Central Bank's open-finance roadmap, continues to transform acceptance infrastructure and position Brazil as Latin America's most sophisticated real-time payments hub. Contactless card and Pix-by-proximity rails now operate side-by-side, prompting merchants to replace legacy hardware with hybrid devices that process NFC taps, QR codes, and tokenized wallets in one flow. Competitive pressure persists as zero-fee Pix volumes squeeze interchange revenues, steering acquirers toward bundled banking, credit, and SaaS services that defend margins and deepen merchant relationships. Terminal vendors that enable cloud management, AI-based risk scoring, and multi-rail orchestration have captured the fastest upgrade cycles in metropolitan retail clusters and among small merchants in interior regions.

Brazil POS Terminal Market Trends and Insights

Surge in Contactless/NFC Adoption

Proximity payments captured 67.2% of in-person card volume by December 2024 after the Central Bank cleared Pix-by-proximity for commercial rollout in February 2025. Rede-enabled terminals cut average checkout time from 36 seconds to 6 seconds, giving

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merchants a clear operational incentive to upgrade hardware. With tokenized wallets already in use by 22% of cardholders, the dual-rail model lets acquirers offer real-time settlement discounts without abandoning card acceptance. Terminal makers now preload NFC stacks that toggle seamlessly between domestic instant rails and global schemes, cementing contactless as the new default at the point of sale.

Rapid Expansion of mPOS Among SMEs

Roughly 41.91% of Brazil's 15 million microentrepreneurs still lacked a POS device in 2024; those onboarding favored mobile-first providers such as PagSeguro and Mercado Pago because of lower upfront pricing and bundled banking tools. The government's Cartao MEI program, which waives annual fees for licensed microbusinesses, further broadens the Brazil POS terminal market by reducing entry barriers. Multi-connectivity (3G, Wi-Fi, Ethernet) ensures transactions clear even in low-bandwidth towns, helping mPOS units reach interior municipalities that traditional acquirers once overlooked.

Rising Security and Cyber-Fraud Incidents

Terminal-swapping and skimming schemes collectively known as the "golpe da maquininha" remain widespread despite an 18% decline in fraudulent card volume in 2024. The Central Bank activated the Mecanismo Especial de Devolucoes in October 2025, letting consumers reclaim Pix funds directly through their banking apps, a move that raises liability costs for acquirers. Vendors now add fingerprint readers, trusted-platform modules, and live telemetry that shuts down devices on anomalous behavior, yet each extra safeguard layers costs onto the bill of materials.

Other drivers and restraints analyzed in the detailed report include:

Regulatory Mandates for EMV and PCI Compliance
Pix-by-Proximity Integration Driving Hybrid Terminals
High Up-front Hardware Costs for Micro-Merchants

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The contactless segment generated 66.23% of the Brazil POS terminal market share in 2025 and is poised to expand at an 7.95% CAGR to 2031, reflecting widespread NFC adoption across both card and Pix rails. Merchants favor hybrid terminals capable of routing low-ticket sales to instant Pix while preserving interchange-funded loyalty on higher-value card taps. This flexibility propels ongoing hardware refreshes among grocery, fuel, and quick-service chains.

Digital-wallet tokenization, already reaching 22% of active cards, underpins biometric authentication flows that shorten queues and mitigate fraud. Planned Pix parcelado, due September 2025, will further anchor proximity payments in installment-heavy consumer behavior, reinforcing demand for multi-rail NFC modules. Industry discussions proposing Pix rails directly on plastic cards could elevate contactless penetration in demographics with low smartphone usage, sustaining segment momentum through the forecast horizon.

The Brazil POS Terminal Market Report is Segmented by Mode of Payment Acceptance (Contact-Based, and Contactless), POS Type (Fixed Point-Of-Sale Systems, and Mobile/Portable Point-Of-Sale Systems), End-User Industry (Retail, Hospitality, Healthcare, Transportation and Logistics, and Other End-User Industries). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

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Worldline SA (Ingenico) Verifone Systems LLC PAX Technology Limited Castles Technology Co., Ltd. NCR Voyix Corporation Gertec Brasil Ltda. BBPOS Limited Dspread Technology (Beijing) Inc. New POS Technology Ltd. Centerm Information Co., Ltd. Newland Payment Technology Co., Ltd. Wiseeasy Technology Co., Ltd. Elgin S.A. Bematech Industria e Comercio de Equipamentos Eletronicos S.A. SZZT Electronics Co., Ltd. Fujian Landi Commercial Equipment Co., Ltd. Datecs Ltd. CyberNet Manufacturing Inc. UIC Payworld Inc. Equinox Payments LLC

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Surge in Contactless/NFC Adoption

4.2.2 Rapid Expansion of mPOS Among SMEs

4.2.3 Regulatory Mandates for EMV and PCI Compliance

4.2.4 Pix-by-Proximity Integration Driving Hybrid Terminals

4.2.5 Unified-Commerce Demand for Real-Time Data Loops

4.2.6 Cloud-Managed POS Enabling AI Merchant Scoring

4.3 Market Restraints

4.3.1 Rising Security and Cyber-Fraud Incidents

4.3.2 High Up-front Hardware Costs for Micro-merchants

4.3.3 Margin Squeeze from Zero-Fee Pix

4.3.4 Semiconductor Module Supply Volatility

4.4 Impact of Macroeconomic Factors

4.5 Industry Value Chain Analysis

4.6 Regulatory Landscape

4.7 Technological Outlook

4.8 Porter's Five Forces Analysis

4.8.1 Bargaining Power of Suppliers

4.8.2 Bargaining Power of Buyers/Consumers

4.8.3 Threat of New Entrants

4.8.4 Threat of Substitute Products

4.8.5 Intensity of Competitive Rivalry

4.9 Impact of Macroeconomic Factors

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

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- 5.1 By Mode of Payment Acceptance
 - 5.1.1 Contact-based
 - 5.1.2 Contactless
- 5.2 By POS Type
 - 5.2.1 Fixed Point-of-Sale Systems
 - 5.2.2 Mobile / Portable Point-of-Sale Systems
- 5.3 By End-User Industry
 - 5.3.1 Retail
 - 5.3.2 Hospitality
 - 5.3.3 Healthcare
 - 5.3.4 Transportation and Logistics
 - 5.3.5 Other End-User Industries

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles {(includes Global level Overview, Market level overview, ...)}
 - 6.4.1 Worldline SA (Ingenico)
 - 6.4.2 Verifone Systems LLC
 - 6.4.3 PAX Technology Limited
 - 6.4.4 Castles Technology Co., Ltd.
 - 6.4.5 NCR Voyix Corporation
 - 6.4.6 Gertec Brasil Ltda.
 - 6.4.7 BBPOS Limited
 - 6.4.8 Dspread Technology (Beijing) Inc.
 - 6.4.9 New POS Technology Ltd.
 - 6.4.10 Centerm Information Co., Ltd.
 - 6.4.11 Newland Payment Technology Co., Ltd.
 - 6.4.12 Wiseeasy Technology Co., Ltd.
 - 6.4.13 Elgin S.A.
 - 6.4.14 Bematech Industria e Comercio de Equipamentos Eletronicos S.A.
 - 6.4.15 SZZT Electronics Co., Ltd.
 - 6.4.16 Fujian Landi Commercial Equipment Co., Ltd.
 - 6.4.17 Datecs Ltd.
 - 6.4.18 CyberNet Manufacturing Inc.
 - 6.4.19 UIC Payworld Inc.
 - 6.4.20 Equinox Payments LLC

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

- 7.1 White-space and Unmet-Need Assessment

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