

## **Southeast Asia POS Terminal - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

Southeast Asia POS Terminal Market Analysis

The Southeast Asia POS Terminal Market was valued at USD 4.96 billion in 2025 and estimated to grow from USD 5.73 billion in 2026 to reach USD 11.8 billion by 2031, at a CAGR of 15.55% during the forecast period (2026-2031). Strong consumer migration to mobile wallets, rising ubiquity of QR codes, and government mandates that compel digital payment acceptance are keeping the Southeast Asia POS Terminal market on a steep growth trajectory. Merchants are shifting capital toward software-defined or hybrid devices that consolidate QR, NFC, and card functions, trimming counter clutter while future-proofing acceptance needs. Competitive focus has moved from hardware specifications to software ecosystems, favoring vendors that bundle inventory, CRM, and financing tools into cloud dashboards. Cross-border payment initiatives under the ASEAN Regional Payment Connectivity program promise faster certification cycles, a factor set to unlock incremental demand for the Southeast Asia POS Terminal market through 2030.

Southeast Asia POS Terminal Market Trends and Insights

Rapid Expansion of Digital Payments Across Southeast Asia

Mobile wallets processed more transactions than traditional card networks in Indonesia, Thailand, and the Philippines during 2024, a shift that has amplified replacement cycles for multi-modal devices across the Southeast Asia POS Terminal market. QRIS in Indonesia alone logged more than 16 billion transactions, forcing merchants to ditch single-function card readers in favor of

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scott-international.com](mailto:support@scott-international.com)

[www.scott-international.com](http://www.scott-international.com)

integrated QR/NFC units. Device makers now design terminals with omnichannel APIs, enabling unified reconciliation across storefront and delivery channels. Payment processors, in turn, preload value-added apps loyalty, inventory, BNPL to keep devices sticky over a five-year lifespan. The net effect is sustained double-digit hardware refresh demand, particularly from micro-merchants upgrading from paper or cash registers.

#### Government Cash-less Initiatives and E-payment Regulations

Malaysia's e-Tunai Rakyat, Thailand's PromptPay, and Indonesia's SME subsidy schemes collectively inject thousands of subsidized terminals into the Southeast Asia POS Terminal market every quarter. Compliance clauses require certified NFC and EMV functionality, accelerating orders for mid-range Android models able to pass local security audits. Because subsidies often cover up-front hardware costs, vendors increasingly pivot to SaaS-based licensing that drives recurring revenue even after grants expire. Rural onboarding programs extend demand into second-tier cities, helping distributors expand beyond capital regions much faster than organic merchant acquisition would allow.

#### Cyber-security and Data-privacy Vulnerabilities

Bank Indonesia recorded a 45% jump in POS-linked fraud attempts during 2024, highlighting real-time threats that could stall new deployments if unaddressed. Malware that exploits outdated firmware spreads quickly once a single device is breached, prompting regulators to mandate over-the-air patch cycles. Smaller retailers, lacking IT staff, depend on vendors for security orchestration; when updates lag, risk-averse merchants defer purchases. Consequently, suppliers must bundle managed security services to keep the Southeast Asia POS Terminal market growth momentum intact.

Other drivers and restraints analyzed in the detailed report include:

Rising Adoption of mPOS Among SMEs and Micro-merchants  
Integration of BNPL Capabilities into POS Hardware  
High Total Cost of Ownership for Modern POS Devices

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

#### Segment Analysis

Contactless payments controlled 56.97% revenue share within the Southeast Asia POS Terminal market in 2025, and the segment is forecast to widen at a 17.05% CAGR through 2031. That dominance positions tap-to-pay as the baseline capability for every new device SKU. Vendors now engineer antenna placement and screen prompts to accelerate sub-two-second checkouts, an attribute that merchants equate with higher throughput. QR fallback remains essential for low-value micro-merchant use cases, ensuring no consumer gets blocked by wallet preference.

Terminal makers are stripping mechanical card slots from entry-level units, dropping component costs while promoting SoftPOS for PIN-on-glass transactions. This evolution underlines how the Southeast Asia POS Terminal market size tied to contactless solutions will eclipse card-only hardware retirements by mid-decade. The push also drives telcos to bundle higher LTE data caps with mPOS subscriptions, reflecting traffic spikes from always-connected firmware updates and analytics pings.

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

List of Companies Covered in this Report:

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

Worldline SA (Ingenico) Verifone Systems LLC PAX Technology Ltd. NCR Corporation Toshiba TEC Corporation Newland Payment Technology Co., Ltd. HP Inc. Samsung Electronics Co., Ltd. Fujian Newland Computer Co., Ltd. (Urovo) SUNMI Technology Co., Ltd. SZST Electronics Co., Ltd. Diebold Nixdorf, Incorporated NEC Corporation Fujitsu Limited BBPOS International Limited Centerm Information Co., Ltd. New POS Technology Ltd. Castles Technology Co., Ltd. SUNAR Technology Co., Ltd. Squareup International Ltd.

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 Rapid expansion of digital payments across Southeast Asia

4.2.2 Government cash-less initiatives and e-payment regulations

4.2.3 Rising adoption of mPOS among SMEs and micro-merchants

4.2.4 Integration of BNPL capabilities into POS hardware

4.2.5 Tourism-driven omnichannel retail recovery post-COVID

4.2.6 Migration to Android-based open-OS terminals and app stores

4.3 Market Restraints

4.3.1 Cyber-security and data-privacy vulnerabilities

4.3.2 High total cost of ownership for modern POS devices

4.3.3 Fragmented certification rules across SEA nations

4.3.4 Weak device-servicing networks beyond tier-1 cities

4.4 Industry Value Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Impact of Macroeconomic Factors

4.8 Porter's Five Forces Analysis

4.8.1 Bargaining Power of Suppliers

4.8.2 Bargaining Power of Consumers

4.8.3 Threat of New Entrants

4.8.4 Threat of Substitutes

4.8.5 Intensity of Competitive Rivalry

4.9 Assessment of Macroeconomic Factors on the Market

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

## 5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

### 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

### 5.4 By Country

#### 5.4.1 Singapore

#### 5.4.2 Malaysia

#### 5.4.3 Thailand

#### 5.4.4 Indonesia

#### 5.4.5 Philippines

#### 5.4.6 Vietnam

#### 5.4.7 Rest of Southeast Asia

## 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, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

#### 6.4.1 Worldline SA (Ingenico)

#### 6.4.2 Verifone Systems LLC

#### 6.4.3 PAX Technology Ltd.

#### 6.4.4 NCR Corporation

#### 6.4.5 Toshiba TEC Corporation

#### 6.4.6 Newland Payment Technology Co., Ltd.

#### 6.4.7 HP Inc.

#### 6.4.8 Samsung Electronics Co., Ltd.

#### 6.4.9 Fujian Newland Computer Co., Ltd. (Urovo)

#### 6.4.10 SUNMI Technology Co., Ltd.

#### 6.4.11 SZZT Electronics Co., Ltd.

#### 6.4.12 Diebold Nixdorf, Incorporated

#### 6.4.13 NEC Corporation

#### 6.4.14 Fujitsu Limited

#### 6.4.15 BBPOS International Limited

#### 6.4.16 Centerm Information Co., Ltd.

#### 6.4.17 New POS Technology Ltd.

#### 6.4.18 Castles Technology Co., Ltd.

#### 6.4.19 SUNAR Technology Co., Ltd.

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

6.4.20 Squareup International Ltd.

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

### 7.1 White-space and Unmet-Need Assessment

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

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

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

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

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scott's-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"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

