Payments landscape

54 providers and product groups across six payments categories

54
PROVIDER GROUPS

Merchant acquiring & processing

10

$0 raised · 10 M&A deals · 0% headcount

- Fiserv — Public
- Global Payments — Includes Worldpay
- PayPal — Public
- Stripe — Includes Bridge
- Square — Block
- Toast — Public
- Shift4 — Public
- Adyen — Public
- Checkout.com — Checkout.com
- Nuvei — Advent

Embedded payments & orchestration

10

$629M raised · 3 M&A deals · +8% headcount

- Paysafe — Public
- Payroc — Payroc
- Priority — Public
- Rapyd — Rapyd
- Repay — Public
- Stax — Stax
- Spreedly — Spreedly
- Finix — Finix
- Rainforest — Rainforest
- Primer — Primer

Networks & card issuing

9

$265M+ raised · 3 M&A deals · +10% headcount

- Capital One — Includes Discover
- American Express — Public
- Mastercard — Public
- Visa — Public
- i2c — i2c
- Marqeta — Public
- Highnote — Highnote
- Paymentology — Paymentology
- Episode Six — Episode Six

B2B & cross-border business payments

10

$1.1B raised · 8 M&A deals · +6% headcount

- Corpay — Public
- Payoneer — Public
- Airwallex — Public
- Convera — Public
- Flywire — Public
- Paymentus — Public
- dLocal — Public
- EBANX — Public
- Thunes — Thunes
- Nium — Public

Remittance & account-to-account

9

$40M raised · 4 M&A deals · +10% headcount

- Western Union — Public
- Wise — Public
- Remitly — Public
- Intermex — Public
- Dwolla — Part of NMI
- MoneyGram — MoneyGram
- Trustly — Trustly
- Aeropay — Aeropay
- Moov — Moov

Buy now, pay later

$0 RAISED · 0 M&A DEALS · -17% HEADCOUNT · LAST 24 MONTHS

6

Point-of-sale installment financing and checkout credit

- Klarna — Public
- Affirm — Public
- Zip — Public
- Sezzle — Public
- Splitit — Splitit
- Sunbit — Sunbit

HOW TO READ Grouped by primary offering. Categories overlap; acquired brands are shown under their current owner where they no longer trade separately.

LEGEND Capital raised, last 24 months: lower to higher · Most M&A activity · Raised capital or changed hands, last 12 months

U.S. market focus with global players. Sublabels show owner or status where verified. Research as of November 12, 2026.

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