

Global Shelf Intelligence Software Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Shelf Intelligence Software market size was valued at US\$ 1288 million in 2025 and is forecast to a readjusted size of US\$ 2359 million by 2032 with a CAGR of 8.7% during review period.

Shelf Intelligence Software refers to a type of software system designed for offline retail stores. It uses computer vision, data analysis, and retail business rule engines to automatically identify, monitor, analyze, and optimize the display and execution of goods on shelves. Its core objective is to achieve visualized shelves, controllable displays, detectable stockouts, and quantifiable execution.

Gross Margin Levels

From a product structure perspective, smart shelf software remains a high-margin software sector, but different sub-models vary significantly. Pure planning/space optimization/SaaS products typically have higher gross margins, roughly 70%-85% according to industry standards. Integrated platforms combining image recognition, store execution, and mobile data collection, due to the costs of model training, cloud inference, project implementation, customer success, and some data collection, generally have a gross margin closer to 60%-78%. Platform vendors integrating ESL, IoT, robots, and multimodal hardware, when viewed as overall solutions, often have gross margins further down to 50%-70%. This assessment is not based on publicly disclosed 'smart shelf software' margins from a single listed company, but rather on research estimates based on clear software subscription models like Salesforce, GoPlanogram, and PlanoHero, and 'software + equipment/sensors/in-store infrastructure' models like Vusion, Hanshow, and Simbe.

Industry Drivers

The growth of this industry is primarily driven by five forces. First, the digitalization of offline stores is upgrading from 'having a system' to 'seeing the real state of the shelves,' which directly drives the widespread adoption of image recognition, Shelf Intelligence, and closed-loop execution. Second, losses from stockouts, mispricing, and non-compliant displays are becoming increasingly quantifiable, and brands and retailers are turning 'real-time shelf execution' into a management metric. Third, the maturity of AI and computer vision has significantly improved the return on investment for mobile phone photography, fixed cameras, robot inspections, and multimodal data collection. Fourth, category management and space optimization are being linked to sales, replenishment, and promotions; shelves are no longer just a display issue, but a matter of GMROI, turnover, and growth. Fifth, collaboration across multiple stores, regions, and teams increasingly requires headquarters to use a unified platform to distribute plans, verify execution, generate rectification tasks, and accumulate data assets. Public market reports and major vendor pages list AI automation, store execution, space optimization, and greater visibility as key growth drivers.

This report is a detailed and comprehensive analysis for global Shelf Intelligence Software market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Shelf Intelligence Software market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Shelf Intelligence Software market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Shelf Intelligence Software market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Shelf Intelligence Software market shares of main players, in revenue (\$ Million),

2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Shelf Intelligence Software

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Shelf Intelligence Software market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Fujitsu (Japan), NEC (Japan), Panasonic (Japan), Toshiba Tech (Japan), Hitachi (Japan), Dmall (China), Chaomeng Data (China), Hikvision (China), Dahua Technology (China), SenseTime (China), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market segmentation

Shelf Intelligence Software market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Computer Vision-Based Smart Shelving Software

Rfid-Based Smart Shelving Software

Others

Market segment by Deployment Type

Cloud-based

On-premise

Market segment by Data Acquisition Method

Mobile Phone Photo Recognition Type

Fixed Camera

Others

Market segment by Application

Large-Scale Integrated Supermarkets

Chain Convenience Stores

Department Stores

Others

Market segment by players, this report covers

Fujitsu (Japan)

NEC (Japan)

Panasonic (Japan)

Toshiba Tech (Japan)

Hitachi (Japan)

Dmall (China)

Chaomeng Data (China)

Hikvision (China)

Dahua Technology (China)

SenseTime (China)

EDION (Japan)

AEON Digital (Japan)

Lawson Digital (Japan)

Megvii Technology (China)

FLUX (China)

LogisWise (China)

Quantum (China)

Zhonghuicang (China)

SDS (Korea)

RELEX Solutions (USA)

Pensa Systems (USA)

Shinsegae I&C (Korea)

Lotte Digital (Korea)

SAS Institute (USA)

Blue Yonder (USA)

LG CNS (Korea)

NielsenIQ (USA)

Trax Retail (USA)

Oracle (USA)

Symphony RetailAI (USA)

Scandit (Switzerland)

Centric Software (France)

ShelfWise (Poland)

shelfy.io (Israel)

Keonn Technologies (Spain)

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Shelf Intelligence Software product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Shelf Intelligence Software, with revenue, gross margin, and global market share of Shelf Intelligence Software from 2021 to 2026.

Chapter 3, the Shelf Intelligence Software competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Shelf Intelligence Software market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Shelf Intelligence Software.

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