

Smart Shopping Cart Market by Cart Type (Fully Integrated Carts, Retrofit Kits), Application Area (Shopping Malls, Supermarkets), Mode of Sale (Direct, Distributor) - Global Forecast to 2030

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Abstracts

The smart shopping cart market is estimated to be USD 326.0 million in 2025 and is expected to reach USD 1,423.1 billion by 2030, growing at a CAGR of 34.3%.

Rapid advancements in AI, computer vision, weight sensors, and edge processing are significantly driving the growth of the smart shopping cart market. These technologies have improved item recognition accuracy, reduced hardware costs, and enhanced the reliability of autonomous checkout systems. Modern carts can identify products, including produce without barcodes, detect mis-scans, and process transactions securely in real time. As the underlying technology becomes more affordable and scalable, retailers gain confidence in large-scale deployment and long-term ROI. The maturing technology ecosystem also supports modular upgrades, improved battery efficiency, and better integration with store systems, making smart carts more practical and commercially attractive than earlier generations.

“The direct segment is expected to have the largest market size.”

Direct sales involve the vendor working closely with retailers to manage installation, integration, and ongoing service. This model ensures tight alignment with store systems, including POS, inventory, loyalty, and real-time analytics platforms. Retailers benefit from higher customization, faster issue resolution, and prioritized feature enhancements. Vendors gain valuable user feedback that accelerates product improvement. Direct sales are common among large supermarket chains or retailers requiring high levels of accuracy, reliability, and long-term partnership commitments.

This model supports advanced deployments where full-stack integration of AI models, edge processing, connectivity, and payment processing is crucial. Recent large-scale deployments by major grocery chains have typically been executed through direct partnerships, ensuring the technology is tailored specifically to the retailer's unique inventory and operational workflows.

“North America is expected to hold the largest market share.”

North America's smart shopping cart market is undergoing a rapid transformation, driven by a relentless focus on enhancing customer experiences and reducing operational costs. The region's retail landscape, characterized by fierce competition, drives major players to innovate aggressively with smart cart technology. Innovations in on-cart edge computing and advanced sensor fusion are enhancing accuracy for loss prevention and enabling dynamic pricing at the point of sale. Companies are also exploring innovative financing models, such as “Robot-as-a-Service”, to accelerate deployment across diverse retail formats. The high disposable income and established digital payment habits of North American consumers make them particularly receptive to in-cart payment and personalized offers. Additionally, the ongoing evolution of supply chain logistics is influencing cart design, integrating more closely with inventory management systems. This concerted effort to redefine the physical shopping experience through technology cements North America's position as a critical growth hub for smart shopping carts.

Breakdown of primaries

The study offers insights from a range of industry experts, including solution vendors and Tier 1 companies. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 62%, Tier 2 – 23%, and Tier 3 – 15%

By Designation: C-level – 38%, D-level – 30%, and Others – 32%

By Region: North America – 40%, Europe – 15%, Asia Pacific – 35%, Middle East & Africa – 5%, Latin America – 5%

The major players in the smart shopping cart market include Amazon (US), Caper (US), Veeva (US), Shopic (Israel), SuperHii (China), Tracxpoint (Israel), Cust2Mate (Israel), Shekel (Israel), Faytech (US), KBST (Germany), MetroClick (US), Retail AI (Japan),

Pentland Firth Software (Germany), VasyERP (India), Smapca (India), SwiftForce (India), Kwikkart (US), ZeroQs (Poland), Shopreme (Austria), and Trollee (Hong Kong). These players have adopted various growth strategies, including partnerships, agreements, collaborations, new product launches, enhancements, and acquisitions, to expand their footprint in the smart shopping cart market.

Research Coverage

The market study covers the smart shopping cart market size and growth potential across different segments, including application areas, modes of sale, cart types, and regions. The application areas studied under the smart shopping cart market include shopping malls, supermarkets, and other application areas. The mode of sale segment includes direct and distributor. The cart type segment comprises fully integrated carts and retrofit carts. The regional analysis of the smart shopping cart market covers North America, Europe, the Asia Pacific, the Middle East & Africa, and Latin America.

Key Benefits of Buying the Report

The report will help market leaders and new entrants with information on the closest approximations of the global smart shopping cart market's revenue numbers and subsegments. It will also help stakeholders understand the competitive landscape, gain valuable insights, and develop effective go-to-market strategies. Moreover, the report will provide stakeholders with insights into the market's pulse, offering them information on key market drivers, restraints, challenges, and opportunities.

The report provides the following insights:

Analysis of key drivers (Growing consumer demand for frictionless, contactless, and personalized shopping, Technological advancements in computer vision, sensors, and edge computing enable reliable, low-latency item recognition), restraints (High upfront hardware and integration costs, Integration complexity with POS, inventory, and loyalty systems), opportunities (Retrofit devices/attachable solutions for existing carts, reducing the deployment cost, In-cart promotions, targeted offers, and ads create recurring revenue streams), and challenges (Robust item recognition across SKUs and packaging changes, Maintaining uptime, battery logistics, and field servicing across thousands of carts complicates scaling) influencing the growth of the smart shopping cart market.

Product Development/Innovation: Detailed insights on upcoming technologies, research

& development activities, and product & service launches in the smart shopping cart market.

Market Development: The report provides comprehensive information about lucrative markets, analyzing the smart shopping cart market across various regions.

Market Diversification: Comprehensive information about new products and services, untapped geographies, recent developments, and investments in the smart shopping cart market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Amazon (US), Caper (US), Veeve (US), Shopic (Israel), SuperHii (China), Tracxpoint (Israel), Cust2Mate (Israel), Shekel (Israel), Faytech (US), KBST (Germany), MetroClick (US), Retail AI (Japan), Pentland Firth Software (Germany), VasyERP (India), Smapca (India), SwiftForce (India), Kwikkart (US), ZeroQs (Poland), Shopreme (Austria), and Trollee (Hong Kong).

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