

# **Automated Checkout System Market Forecasts to 2032 – Global Analysis By Component (Hardware, Software, and Services), Type (Fixed Self-Checkout Systems, Mobile Self-Checkout Systems, and Fully Automated Checkout Systems), Technology, End User, and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Automated Checkout System Market is accounted for \$5.7 billion in 2025 and is expected to reach \$15.0 billion by 2032, growing at a CAGR of 14.8% during the forecast period. Automated checkout systems include self-checkout kiosks, scan-and-go options, smart carts, cashierless platforms that use computer vision, payment software, and loss-prevention. It enables faster transactions, lower labor dependence, smoother store operations, and enhanced shopper convenience while supporting omnichannel strategies and data-driven retail formats, driven by increasing demand for frictionless shopping and retailers' focus on operational efficiency and digitized in-store experiences.

### **Market Dynamics:**

Driver:

Rising Labor Costs and Staffing Shortages

The persistent upward trend in labor wages and the chronic difficulty in recruiting and retaining retail staff are powerful drivers for automated checkout adoption. Retailers are increasingly viewing this technology as a strategic solution to manage operational expenses and mitigate the risks associated with understaffing, especially during peak

hours. By deploying these systems, businesses can reallocate human resources to more value-added tasks like customer service and inventory management, thereby improving overall store efficiency and ensuring consistent operation regardless of labor market fluctuations.

Restraint:

### Technical Challenges and Accuracy Concerns

Issues such as misidentifying items, particularly fresh produce without barcodes, or difficulties with age-restricted goods can lead to checkout errors and customer frustration. These accuracy concerns necessitate ongoing human oversight for exception handling, which can undermine the promised efficiency gains. Also, retailers are hesitant to fully commit because the high initial cost of integrating with existing store infrastructure means they want a more reliable and proven return on investment.

Opportunity:

### Expansion into New Retail Formats

While common in groceries, a substantial growth avenue lies in penetrating non-traditional retail sectors. This encompasses warehouse clubs, large-format department stores, and specialty retailers, where the traditional checkout process frequently poses significant challenges. Furthermore, the model is highly applicable to smaller, high-traffic convenience stores and food service locations where speed is paramount. Successfully adapting the technology to these diverse environments would unlock massive, untapped market segments and drive the next wave of industry expansion.

Threat:

### Competition from Established POS Providers

The market faces a considerable threat from well-entrenched point-of-sale (POS) vendors who are rapidly incorporating automated features into their own, already trusted, systems. These competitors leverage their deep existing client relationships and extensive service networks to offer integrated solutions that are often perceived as less risky. This forces pure-play automated checkout startups to compete not just on innovation but also on proving superior reliability and seamless integration against solutions from industry giants with significant market power and brand loyalty.

### Covid-19 Impact:

The pandemic was a major factor in the growth of the automated checkout market. Heightened health concerns over surface contact and close interpersonal interaction at traditional cashier lanes pushed retailers to seek touch-free, low-contact solutions. This sudden shift in consumer preference and operational necessity accelerated pilot programs and deployments of frictionless checkout technologies. Consequently, what was once a forward-looking innovation became an urgent strategic priority for retailers aiming to ensure business continuity and meet new consumer expectations for safety and hygiene.

The hardware segment is expected to be the largest during the forecast period

The hardware segment is expected to account for the largest market share during the forecast period, as it forms the essential physical backbone of any automated checkout system. This segment includes critical and costly investments in cameras, sensors, smart scales, and gating solutions. The significant capital outlay for these components, which are required for the initial setup of every store, directly translates into their dominant revenue contribution. Moreover, the continuous need for hardware upgrades and replacements to maintain system accuracy ensures this segment's sustained financial dominance throughout the forecast period.

The hybrid systems segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the hybrid systems segment is predicted to witness the highest growth rate. Their appeal comes from the fact that they make the switch to automation easier and less disruptive for both stores and customers. Customers appreciate the choice between different checkout methods, which enhances their in-store experience. For retailers, hybrid models are a safer investment that reduces the technical challenges of fully automated systems while still providing significant savings on labor and improving efficiency, making them a desirable and expandable choice.

### Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, attributed to the early and aggressive adoption of retail technology by major chains, high labor costs that incentivize automation, and a strong technological

infrastructure. Furthermore, the presence of leading solution providers and a consumer base that is increasingly comfortable with self-service technologies creates fertile ground for deployment. Significant investments from retail giants in piloting and scaling these systems cement the region's dominant position in the global market.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Rapid modernization of the retail sector in densely populated countries like China and India fuels this explosive growth. The burgeoning middle class and massive investments in smart store initiatives by both local conglomerates and international players are key drivers. Also, the widespread use of smartphones and the general acceptance of mobile payments make it easy to adopt scan-and-go and app-based automated checkout solutions throughout the area.

Key players in the market

Some of the key players in Automated Checkout System Market include NCR Corporation, Diebold Nixdorf, Incorporated, Toshiba Global Commerce Solutions, Inc., Fujitsu Limited, ITAB Group AB, Pan-Oston Corporation, Verifone Inc., PAX Technology Limited, Zebra Technologies Corporation, Honeywell International Inc., Olea Kiosks, Inc., Aila Technologies, Inc., Slabb Holdings, LLC, ShelfX, Inc., Standard Cognition, Inc., Zippin, Inc., Trigo Vision Ltd., Grabango, Inc., Mashgin, Inc., and Sunmi Technology Co., Ltd.

### **Key Developments:**

In October 2025, Honeywell launched the NOTIFIER INSPIRE fire panel in Canada, advancing interoperable fire & life-safety installation and digital monitoring.

In June 2025, Diebold Nixdorf has partnered with LOC Software to enable their ThriVersA software to run natively on Diebold Nixdorf's self-checkout and kiosk systems, simplifying self-checkout implementation for retailers.

In June 2025, Johnson Controls relaunched its Connected Sprinkler service to deliver real-time alerts and predictive maintenance for sprinkler systems.

In June 2024, Halma announced a bolt-on acquisition (G.F.E.) to grow its fire-safety capabilities within the Halma Safety sector.

### Components Covered:

Hardware

Software

Services

### Types Covered:

Fixed Self-Checkout Systems (SCO)

Mobile Self-Checkout Systems (Scan-and-Go)

Fully Automated Checkout Systems (Frictionless Stores)

### Technologies Covered:

Camera-based/Computer Vision Systems

RFID (Radio-Frequency Identification) Systems

NFC and QR Code-based Systems

Hybrid Systems

### End Users Covered:

Retail

Entertainment and Hospitality

Transportation and Travel

Financial Services

Healthcare

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends

- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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