Retail Automation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 100 pages | Mordor Intelligence

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Report description:

Retail Automation Market Analysis

The retail automation market size stands at USD 23.25 billion in 2025 and is forecast to reach USD 42.08 billion by 2030, reflecting a 12.6% CAGR over the period. Rapid adoption is being driven by retailers seeking higher operating efficiency, lower labor exposure, and seamless customer journeys. Front-of-house technologies such as self-checkout and digital kiosks are expanding quickly, while edge-AI chips are opening new locations where limited connectivity once held back upgrades. Hardware continues to account for most current spending, yet cloud software and managed services are expanding faster as retailers favor subscription models that reduce capital outlay. Intensifying competition from e-commerce platforms is also pushing brick-and-mortar operators to automate order picking and last-mile fulfillment, creating fresh demand for micro-fulfillment centers, robotics, and real-time inventory systems.

Global Retail Automation Market Trends and Insights

Rising demand for quality and fast service

Shoppers increasingly value speed and accuracy over ancillary store attributes. Retailers upgrading to AI-driven checkout lanes report around 40% shorter transactions, which improves throughput at peak periods. Smaller chains are turning to modular POS bundles that scale in line with footfall. This modularity lowers barriers to entry, letting independents match service levels offered by national retailers. Higher satisfaction is turning into measurable loyalty gains, making store-wide automation a tactical priority for the next two years. The retail automation market is therefore experiencing sharper adoption cycles whenever customer wait times rise.

Growth and competition among retail and e-commerce players

Traditional stores face aggressive online rivals offering near-instant delivery and personalised promotions. Omnichannel commerce platforms that blend online and in-store inventory are becoming strategic. POS terminals are evolving into unified commerce hubs that process orders originating from websites, apps, or in-aisle QR codes. Retailers launching third-party marketplaces are creating new automation use cases, such as automated seller onboarding and fee reconciliation. Conversely, digital-first brands opening physical showrooms are deploying smart shelving and RFID to maintain the real-time stock accuracy they are accustomed to online. These intersecting models widen the addressable base of the retail automation market.

High hardware failure rates

Retail equipment often runs near-continuously in temperature-fluctuating, dust-heavy settings, leading to component fatigue. Self-checkout scanners exhibit higher downtime than staffed lanes, causing queue abandonment and service desk bottlenecks. Each outage minute can cost a high-volume supermarket thousands in missed revenue and brand erosion. Manufacturers are embedding ruggedised sensors and remote diagnostics, yet the problem remains acute in emerging markets lacking spare-part supply chains. These reliability issues dampen short-term ordering cycles and influence the retail automation market toward service-level-agreement contracts that shift maintenance risk to suppliers.

Other drivers and restraints analyzed in the detailed report include:

Labor shortages and wage inflation accelerating self-checkout adoption / Retail-media monetization driving POS data integration / Rising self-checkout fraud forcing rollout pauses /

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

Segment Analysis

Hardware accounted for 60.0% of 2024 revenue as retailers installed POS devices, kiosks, and RFID gateways. However, software and services are forecast to outgrow hardware at 13.5% CAGR to 2030. The retail automation market size for software subscriptions is expanding as cloud deployment enables continuous feature updates rather than episodic hardware refreshes. Open-API hardware designs now let third-party developers plug in analytics, loyalty engines, and payment wallets, blurring traditional component lines.

Greater focus on data-driven operations is benefiting SaaS providers offering AI-powered forecasting and loss prevention. Managed service contracts bundle uptime guarantees, security patches, and predictive maintenance, shifting spending from capital to operating budgets. As retailers rationalise physical footprints, modular fixtures linked to cloud orchestration supply flexibility. Consequently, solution vendors that pair rugged hardware with scalable platforms are gaining share.

Grocery chains held 48.5% of 2024 revenue owing to high basket churn and thin margins that demand process efficiency. Micro-fulfillment systems, electronic shelf labels, and smart scales are central to this group's automation roadmap. The retail automation market share of grocery is expected to remain significant, yet hospitality operators are posting the fastest gains at 13.6% CAGR. Quick-service restaurants are adding ordering kiosks, kitchen display systems, and robotic food prep to tackle wage pressure and speed expectations.

Hotels are deploying mobile check-in, digital keys, and service robots that deliver linens or room service trays, illustrating cross-sector technology spill-over. While general merchandise and specialty sectors automate inventory visibility, their growth pace is moderate relative to grocery and hospitality. Vendors tailoring solutions to sector-specific workflows will capture incremental opportunities as use cases broaden.

Retail Automation Market Report is Segmented by Component (Hardware and Software and Services), by End-User (Grocery, General Merchandise, and Hospitality), Implementation (In-Store Front-Of-House, Back-Store / Warehouse, and More), Technology (Point of Sale (POS) Systems, Self-Checkout Kiosks, and More), Store Format (Supermarkets, Hypermarkets and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America contributed 35.0% of 2024 revenue. High wages, early adoption culture, and strong vendor ecosystems underpinned leadership. Retailers are piloting computer-vision POS lanes expected to proliferate by 2026. Edge-AI processing inside scanners reduces latency and lessens reliance on data centers. Privacy regulations and shrinkage concerns temper unrestrained rollouts, but innovation pipelines remain healthy.

Asia-Pacific is the fastest-growing region at a 14.0% projected CAGR. China pioneers mobile wallet-only stores and robotic micro-warehouses, while India's e-commerce surge fuels warehouse automation demand. Autonomous mobile robot penetration in regional facilities is forecast to climb from 27% to 92% within five years, underscoring the appetite for labor-saving devices. Rural expansion benefits from edge-AI chips that work in low-bandwidth sites, enlarging the retail automation market reach.

Europe holds a significant share, led by Western economies investing in energy-efficient systems and circular packaging. Eastern markets are catching up as wages rise and cross-border chains modernize. Strict data-protection rules shape computer-vision deployments, pushing vendors to implement on-device anonymization. South America and the Middle East, and Africa, though smaller today, exhibit strong long-term potential. Brazil's reforming tax environment encourages cash-to-digital migration, while Gulf states fund smart-city retail projects that bundle logistics automation and contactless payment infrastructure.

List of Companies Covered in this Report:

Datalogic S.p.A / Diebold Nixdorf Inc. / NCR Corporation / Honeywell International Inc. / Toshiba Tec Corp. / Fujitsu Ltd. / Zebra Technologies Corp. / Posiflex Technology Inc. / RapidPricer B.V. / Fiserv Inc. / Oracle Corp. (Retail Solutions) / SAP SE (Retail Automation) / ECR Software Corp. / Emarsys (SAP subsidiary) / SES-imagotag SA / Pricer AB / Avery Dennison Corp. (RFID) / Checkpoint Systems Inc. / PTC Inc. (Retail AR/IoT) / KUKA AG (Retail Robotics) /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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