



NEWS RELEASE

# Instacart Acquires Arpalus to Advance Real-Time Shelf Intelligence Across Grocery Retail

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Acquisition strengthens Instacart's AI capabilities and purpose-built partner technology to improve inventory accuracy for ecommerce fulfillment and in-store operations across its network

SAN FRANCISCO, July 16, 2026 /PRNewswire/ -- **Instacart** (NASDAQ: CART), the leading grocery technology company in North America, today announced its acquisition of Arpalus, a computer vision company that has developed shelf intelligence technology purpose-built for grocery retail. The accuracy of online orders is only as good as the underlying inventory data – undetected out-of-stocks and catalog gaps are among the most persistent sources of customer dissatisfaction in online grocery, driving substitutions, cancellations, and eroded trust. The acquisition enhances Instacart's ability to serve consumers, shoppers, retailers, and brands with a more complete picture of on-shelf inventory and product availability — a foundational input that increases **fulfillment accuracy**, creates more relevant **AI-powered consumer shopping experiences**, and delivers additional **in-store capabilities**.

Arpalus' technology turns a quick video scan of a store shelf into an accurate, real-time picture of what is actually there. Using computer vision models built specifically for the complexity of real grocery store environments, including low or unreliable Wi-Fi, inconsistent lighting, and thousands of visually similar products packed tightly together, Arpalus can identify individual items on shelves with more than 95% accuracy, on average. The technology runs on any smartphone or camera-equipped device, which means Instacart's network of 600,000 shoppers can generate real-time shelf intelligence at scale using the app they already use on every order. Arpalus models can also guide shoppers in the moment, prompting them to adjust camera angle or distance to ensure every item on the shelf is captured accurately and efficiently.

Instacart has spent more than a decade building the most comprehensive grocery-specific intelligence in the industry — built on more than 1.6 billion lifetime orders, real-time inventory views from nearly 100,000 stores

across North America, and proprietary ML models purpose-built for grocery. At the center of that system is a community of 600,000 Instacart shoppers who visit large-format stores more than 15 times a day on average, generating over 10 million unique daily data points. Every order placed, item picked, and substitution made feeds directly back into Instacart's models, creating a continuously improving picture of real-world store conditions that takes years and significant scale to build. This results in an industry-leading found rate — and with Arpalus' shelf intelligence now part of this system, Instacart can drive that rate even higher, moving closer to a future where every item a customer orders is seamlessly delivered to their door.

Arpalus' computer vision technology extends to **Caper Carts** equipped with external cameras as they move through store aisles, updating in-store on-shelf inventory insights in real-time. Combined, Instacart and Arpalus are expected to drive even more fulfillment efficiencies that create a better customer experience and new earning opportunities for shoppers, while improving inventory accuracy for retailers and brands. Data will be used in accordance with all applicable laws, including privacy laws, and contractual requirements.

"We believe the future of grocery retail is a unified experience powered by Instacart intelligence, where what happens in store connects seamlessly to ecommerce in real time," said David McIntosh, Chief Connected Stores Officer at Instacart. "The Arpalus team has spent years building exceptional shelf intelligence technology, solving the problem of understanding what's actually on store shelves, at any given moment. With our leadership in Physical AI for grocery retail and by activating our network of shoppers, we can feed even more accurate shelf information back into our models, delivering better outcomes for customers, shoppers, and our retail and brand partners."

"Arpalus was founded to solve one of retail's most fundamental challenges: bridging the gap between what happens in-store and the decisions driving business performance," said Ofir Zilberberg, Founder and CEO of Arpalus. "We built an AI platform that gives retailers real-time visibility into inventory and store execution, enabling faster and smarter decisions at scale. Joining Instacart is a transformative milestone. By combining Arpalus' AI innovation with Instacart's scale and retail reach, we are accelerating the future of intelligent retail and redefining how stores operate."

Richer shelf data strengthens Instacart's platform across both online and in-store environments. For consumers shopping on the **Instacart Marketplace**, or on their preferred retailer's owned-and-operated website powered by **Storefront Pro**, more accurate inventory data means a more reliable shopping experience. For retailers, it directly enhances Store View — Instacart's real-time computer vision solution, part of the company's **AI Solutions**, being piloted by retailers including McKeevers and Sprouts, among others — improving shelf availability and accuracy at the store level. It also enriches the sensor data generated by **Caper Carts**, which have scaled to more than 100 cities around the globe. Together, these capabilities advance Instacart's **Physical AI** strategy and its broader

investment in connecting online and in-store grocery experiences through a unified intelligence layer.

## Forward-Looking Statements

This press release contains forward-looking statements within the meaning of Section 27A of the Securities Act of 1933, as amended, and Section 21E of the Securities Exchange Act of 1934, as amended. All statements other than statements of historical fact could be deemed forward-looking, including without limitation statements regarding anticipated benefits and outcomes of the acquisition of Arpalus. These forward-looking statements are subject to known and unknown risks, uncertainties, assumptions, and other factors that may cause actual results or outcomes to be materially different from any future results or outcomes expressed or implied by the forward-looking statements. These risks, uncertainties, assumptions, and other factors include the risks described from time to time in Instacart's filings with the Securities and Exchange Commission (SEC), including in Instacart's Quarterly Report on Form 10-Q for the quarter ended March 31, 2026 filed with the SEC on May 7, 2026. You should not rely on forward-looking statements as predictions of future events. Instacart has based these forward-looking statements on information available to it as of the date of this press release and undertakes no obligation to update these forward-looking statements, except as required by law.

## About Instacart

Instacart is a leading grocery technology company that partners with more than 2,200 retail banners – representing nearly 100,000 stores – to transform how people shop for the groceries they need from the retailers they trust, while creating flexible earning opportunities for shoppers. Through the Instacart Marketplace, Instacart Enterprise platform, and Instacart Ads ecosystem, the company powers ecommerce, fulfillment, in-store technology, AI offerings, and advertising for partners. For more information, visit [www.instacart.com/company](https://www.instacart.com/company). Maplebear Inc. is the registered corporate name of Instacart.

## About Arpalus

Arpalus is an AI-powered retail intelligence company that helps retailers and CPG brands improve product availability, inventory accuracy, and store execution through real-time computer vision. Founded in 2019, the company serves leading retailers and consumer brands, and its proprietary technology is protected by patents in the United States and Europe.

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