

Carting commerce into AI territory

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Calcutta: From tracking prices and surfacing deals to alerting users when an out-of-stock item returns to inventory, agentic AI-led e-commerce is rapidly gathering momentum, with Google making a major push into the space.

At its flagship I/O event earlier this month, the tech giant unveiled Universal Cart — an intelligent shopping cart that allows consumers to add products to a single cart while browsing Search, interacting with Gemini, watching YouTube or even reading Gmail.

Once a product is added, the system works in the background to track price drops and deals, provide insights into price history and notify users when an item is back in stock. Powered by Gemini AI models, the platform also allows users to complete purchases through Google Pay.

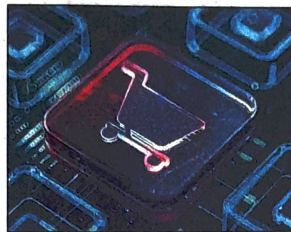
"You can try these select checkout features soon across merchants like Nike, Sephora, Target, Ulta Beauty, Walmart, Wayfair and Shopify merchants such as Fenty and Steve Madden. Universal Cart

is rolling out across Search and the Gemini app in the US this summer, with YouTube and Gmail to follow," Google's VP/GM ads and commerce Vidhya Srinivasan said in a blog post on May 19.

While the service will initially launch in the US, industry observers in India see the move as a signal of Google's broader ambitions in e-commerce, even as questions remain around data privacy, merchant adoption and platform dominance.

"This is essentially Google evolving from a search engine into the operating system for shopping, which is genuinely a fascinating shift," said Akshay Garkel, partner and leader-cyber at Grant Thornton Bharat. "The convenience factor is real and compelling because the entire buying journey becomes seamless across Search, Gmail, YouTube and Gemini."

"At the same time, like any consolidated system, it raises natural questions around privacy and where user data goes. Payment aggregators and checkout platforms will need to rethink their positioning as the transaction moment moves



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closer to Google's ecosystem. For brands, the bigger opportunity is that clean product data, accurate inventory and fast fulfilment may matter more than ever because that is what the algorithm rewards," he added.

Archana Jahagirdar, managing director and CEO of Rukam Capital, said the development validates the growing importance of direct-to-consumer businesses and conversational commerce.

"It is a validation of how far D2C businesses have reached where a giant like Google wants to become a unified platform for these businesses," she said. "Conversational-led shopping will become ubiquitous. India has varied customer profiles and highly aspirational consumers who are constantly on

the move. Voice and conversational interfaces are, therefore, likely to gain strong traction."

She added that while the proposition is promising, several nuances would still need to be refined with functionalities and features having to evolve with consumer experience. "There is potential to reimagine shopping, and it will be interesting to see how this shapes the future of commerce."

Partha Sengupta, co-chairperson of the IT Committee at the Bengal Chamber of Commerce and Industry, described the move as "a significant evolutionary milestone" that could usher e-commerce into an era of agentic commerce.

"For consumers, this introduces a sophisticated AI layer capable of optimising value and buying patterns seamlessly," he said. "For the broader retail ecosystem, however, it establishes a new paradigm where the traditional boundaries of customer relationship management are being fundamentally redrawn."

He cautioned that retailers must continue to retain the ability to cross-sell, upsell and preserve their unique brand

identities instead of having digital storefronts overly simplified within a centralised checkout ecosystem.

"For consumers to fully embrace this frictionless experience, a high degree of trust will be required. Google must meticulously manage and safeguard granular purchasing behaviour and procurement patterns while maintaining rigorous standards of data stewardship and user experience," Sengupta added.

Amitava Sengupta, co-chairperson of the chamber's IT Committee, said the platform may not immediately transform e-commerce because its success would depend on merchant participation, consumer trust and Google's ability to balance convenience with privacy concerns.

"But if it scales, it could make Google a far bigger gatekeeper of buying decisions, especially for routine purchases. Over time, it could evolve into a fuller shopping agent that not only remembers what users want, but also recommends, bundles and eventually completes purchases with tighter user controls."