

Electronic Shelf Label Market (ESL Market) - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Electronic Shelf Label Market Report

The electronic shelf label market by revenue is expected to grow at a CAGR of over 26% during the period 2019–2025.

The adoption of electronic shelf labels has been limited; however, the growth has been 3x times in the last five years, which is validating expansion opportunities in the coming years. Germany and Sweden are rapidly approaching the inflection point, which further propels the adoption pattern.

The electronic shelf label market has witnessed several shifts from segmented and mono-chrome variants to multicolored labels. In highly competitive markets, players that offer less sophisticated but cheaper products have a high probability of success. The rise in the proliferation of IoT alongside the growing preference for digitalization is expected to boost the electronic shelf label market shares. The persistent growth in retail formats such as department stores, specialty stores, discounters, and convenience stores has further increased the reliance on technology.

The impact of COVID-19 has drastically affected the sale of ESL in early 2020. In March-April 2020, a majority of developed economies, including the US, the UK, Germany, and China, who are the major end-users of ESL tags, were under the strict lockdown to avoid the spread of the pandemic. This has greatly affected the degree of replacement demand, which is considered to be a major source of income for the leading players in the industry.

The following factors are likely to contribute to the growth of the electronic shelf label market during the forecast period:

Growth in Retail Automation

Demand for E-Paper Technology

Innovations and Development

Demand for Operational Efficiency and Profitability

The study considers the present scenario of the electronic shelf label market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Electronic Shelf Label Market Segmentation

The global electronic shelf label research report includes a detailed segmentation by display, technology, end-users, and geography. The LCD segment accounted for 37% of the total revenue in 2019. LCDs have been the most conventional mode of ESL in the market; they have been adopted in major economies of North America and Europe. Retailers continue to rely on LCD displays as they are considered cost-effective. LCD labels are capable to integrate with the latest technology such as BLE 5.0 and NFC, which help them to remain competitive. However, the segment is likely to witness a decline in revenue share on account of the increasing adoption of e-paper technology.

The RFID technology segment accounted for over 35% of the electronic shelf label market share in terms of revenue in 2019. The presence of a two-way communication feature, affordability, reliability, and security checks is expected to drive the segment. RFID technology is expected to remain competitive during the forecast period by maintaining significant market dominance. RFID connectivity is feasible for large supermarkets and hypermarkets, thereby increasing their adoption.

NFC is the fastest-growing segment as the capability of facilitating contactless payments has driven the growth during the past five years. It has also become an inevitable option among vendors. The rise in smartphone penetration with NFC facilities

has propelled the growth further. The adoption from major vendors further validates the reason behind its dominance as these vendors help in global reach and widespread adoption of NFC based labels in global retail chains.

In 2019, supermarkets and hypermarkets led the revenue contribution by contributing over 51% to the total share. Increasing shopping space, a growing number of SKUs, and intense competition e-commerce platforms are influencing retailers to rely on solutions such as QR code-enabled ESLs. The segment is a major end-user of LCD and e-paper technology. While North America and Europe tend to dominate the segment, the growth in demand for personalized experiences, social commerce, the need for traceability and insights is expected to drive the electronic shelf label market in Africa and Asia.

Department stores were highly limited for the wide-scale adoption owing to the smaller number of SKUs. However, developed markets in Europe and the Americas are having high room for growth in the segment alongside drug stores as vendors are trying to maximize their share in the market. However, the pace of adoption can be slow in growing economies owing to ROI vision and low impact on offering cost advantage. The growth of the segment is estimated to be supported by the penetration of IoT-based devices in stores and the demand for automated solutions. Convenience stores are the next major opportunity for the electronic shelf label market with a high rate of adoption.

The growth in the concept of forecourt retailing, click and collect features, elevating profitability through price fluctuations, penetration of smart shelves, and demand for additional information on certain high-end products are the major factors that are likely to drive the segment during the forecast period. Further, the wide adoption in stores has served as an effective example for upcoming stores that can drive new and additional demands for ESLs.

Segmentation by Display

LCD

E-paper

Segmented E-paper

Fully Graphic E-paper

Segmentation by Technology

RFID

IR

NFC

BLE

Others

Segmentation by End-users

Automotive

Supermarkets & Hypermarkets

Departmental Stores

Convenience Stores

Drug Stores

Others

INSIGHTS BY GEOGRAPHY

Europe has a dominant market with a high presence of ESL systems in retail formats, including apparel and retail stores and electronics retail. The region is expected to remain as the electronic shelf label market leader by 2025 as it grows with regional trends and consumer demands. The concept is more familiar with the region where it has become one of the basic qualities for a store consideration. The future of the competition can be based on sustaining advantage with respect to technical collaborations, new retail partnerships, and deployment of preferable, advanced technologies rather than focusing on penetration. The region is also expected to witness the installation of over 186 million units of ESL by the end of 2025. The region, which is

home to several vendors, is expected to venture into global markets by pursuing strategies such as mergers & acquisitions or joint ventures as the market is expected to be highly fragmented.

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

Japan

South Korea

Australia

Singapore

Latin America

Brazil

Mexico

Middle East & Africa

South Africa

UAE

Saudi Arabia

INSIGHTS BY VENDORS

The Electronic shelf label (ESL) market landscape is considerably fragmented where players such as Pricer, SES-imagotag, and Displaydata are the largest revenue generators in Europe, APAC, and North America. Based on retail trends, the market is expected to witness the growth of domestic vendors in developing economies as future of the retail is based on digitalization and real-time cost-saving solutions in the shopping space. Vendors will try to differentiate their offerings in the Electronic shelf label market through factors such as technology, cloud system, hardware, battery, price, durability, add on features and services. The success and profitability of vendors also depend on the range of SKUs, width and product line of the retail store commodities that depend on the quantity of tags to be installed for optimum utilization.

Prominent Vendors

Pricer

SES-imagotag

Displaydata Limited

Hanshow Technology

Opticon

Other Prominent Vendors

Altierre

DIGI

E Ink

Samsung Electro-Mechanics (SEMCO)

CEST

LG Innotek ESL

NZ Electronic Shelf Labelling

Pervasive Displays Inc.

Dana Industries

ifLabel

Ubiik

Huawei

TroniTAG GmbH

SUNPAI INDUSTRIES

Diebold Nixdorf

M2COMM

Herbert Retail Limited

SoluM

Zkong

Rainus

MariElla

Key Questions Answered

1. What is the global electronic shelf label market size and growth rate during the forecast period?
2. Which technology/end-user/region is generating the largest revenue in the Europe region?
3. What are the factors driving the growth of Electronic shelf label market shares?
4. How is the growth of the automotive segment influencing the growth of the ESL market size?
5. Who are the leading vendors in the Electronic shelf label market, and what are their market shares?
6. What is the impact of the COVID-19 pandemic on the electronic shelf label market?

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million)

Table 264 Electronic Shelf Labels Market in Latin America by End-user 2019?2025
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Table 265 ASP of Electronic Shelf Label in Latin America by End-user 2019?2025
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Table 266 Electronic Shelf Labels Market in MEA by Display 2019?2025 (\$ million)

Table 267 Electronic Shelf Labels Market in MEA by Display 2019?2025 (million units)

Table 268 ASP of Electronic Shelf Label in MEA by Display 2019?2025 (\$/unit)

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Table 270 Electronic Shelf Labels Market in MEA by Technology 2019?2025 (million
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Table 271 ASP of Electronic Shelf Label in MEA by Technology 2019?2025 (\$/unit)

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Table 273 Electronic Shelf Labels Market in MEA by End-user 2019?2025 (million units)

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