

South & Central America Electronic Shelf Label Market Forecast to 2030 - Regional Analysis - by Components (Hardware, Software, and Services), Hardware (Displays, Batteries, Transceivers, Microprocessors, and Others), Product Type (LCD ESL and E-Paper based ESL), Store Type (Hypermarkets, Supermarkets, Non-Food Retail Stores, Specialty Stores, and Others), and Communication Technology (Radio Frequency, Infrared, Near Field Communication, and Others)

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Abstracts

The South & Central America electronic shelf label market is expected to grow from US\$ 50.45 million in 2022 to US\$ 148.94 million by 2030. It is estimated to record a CAGR of 14.5% from 2022 to 2030.

Emergence of Battery-Free Solutions Fuels South & Central America Electronic Shelf Label Market

Wireless data transmission helps ESLs to improve efficiency and speed while also reducing errors caused by changing prices. The application of ESLs can also be extended to factory/warehouse logistics and smart inventory management. Therefore, for ESL applications in several locations, besides its common black & white dual-color ePaper, many companies such as E Ink have created a low-temperature ePaper and triple-color ePaper. The low-temperature ePaper is appropriate for freezers, whereas the triple-color ePaper is designed for promotional or concessional markings. The triple-

color ePaper has a combination of black, white & yellow, and black, white & red. In addition to recent launches, low voltage-driven ESL solutions are also included. In comparison to wireless transmission, which is required in large-scale malls, the new battery-free solution does not require any interior decoration to be modified or any hardware installation, which makes it ideal for small shops. Only a single mobile phone equipped with the NFC feature is required to update label content anytime.

In the current market scenario, demand for better connectivity and battery-free solutions in the logistics and retail sectors is high. Therefore, developers of ESLs aim to continue to invest in more Energy Harvesting technology for ePaper. Such investment would magnify the applications of ESL and fuel its market growth. A few of the battery-free ESL product launches are mentioned as, In June 2023, Ambient Photonics partnered with E Ink to develop next-generation electronic shelf labels (ESLs) that will transform ESLs from programmable price displays into connected battery-free devices with expanded functionality. In January 2020, Ossia Inc. launched the first ever wirelessly powered, battery-free, wire-free electronic shelf label (ESL) system to eliminate the maintenance of battery replacements and the environmental impact of battery disposal. In December 2022, Powercast Corporation and KYOCERA AVX partnered to develop sustainable, battery-free solutions with the ability to harvest power from RFID readers to power ESLs, RFID Sensor Tags, and other battery-free IoT devices.

South & Central America Electronic Shelf Label Market Overview

Brazil, Argentina, and Rest of South & Central America are the major contributors to the overall growth of the South & Central America region. Several countries in South & Central America are substantially adopting various technologies to ease and overcome different challenges faced by the population in respective countries. The fast-growing consumer goods market across the South America is getting more fragmented as the retailers respond to consumer demand for convenience. The shoppers in the region are more willing to try new retail formats in their quest to get most from their grocery budgets. Owing to this, the channel structure in the region is changing rapidly. In the past few years, the number of supermarkets increased in the region and has observed the fastest growth in food demand. Having significantly penetrated in the food retail sector, the supermarkets have triggered an upstream transformation of vegetables and fruits marketing system. On the other hand, the grocery retail sales per capita are considerably lower in the region when compared to the developed markets. This is partly due to lower purchasing power but also due to the occurrence of informal grocery retail, such as street vendors and informal markets. Walmart is the largest grocery retailer in the region. It operates a widespread variety of banners across South America,

comprising hypermarkets, discounters, and supermarkets, in addition to its internet retailing operations and warehouse clubs. While ESL is already broadly used by retail stores in the Europe, US, and China, the ESL solutions with ePaper displays are expected to be progressively introduced in Southeast Asia and South America as well. Thus, the growing number of retail stores year-on-year and advent of advanced solutions are anticipated to increase the implementation of ESL solutions in the coming years. Further, Argentina is concentrating on attracting FDIs by taking several initiatives such as easing import restrictions, signing international bilateral agreements, no restriction on foreign investment and other such initiatives. Such initiatives are expected to help in the development of businesses in the South American region.

South & Central America Electronic Shelf Label Market Revenue and Forecast to 2030 (US\$ Million)

South & Central America Electronic Shelf Label Market Segmentation

The South & Central America electronic shelf label market is segmented into component, product type, store type, communication technology, and country.

Based on component, the South & Central America electronic shelf label market is bifurcated into hardware and software & services. The hardware segment held a larger share of the South & Central America electronic shelf label market in 2022. The hardware segment is further subsegmented into displays, batteries, transceivers, microprocessors, and others.

In terms of product type, the South & Central America electronic shelf label market is bifurcated into E-paper based ESL and LCD ESL. The E-paper segment held a larger share of the South & Central America electronic shelf label market in 2022.

Based on store type, the South & Central America electronic shelf label market is segmented into hypermarkets, supermarkets, specialty stores, non-food retail stores, and others. The hypermarkets segment held the largest share of the South & Central America electronic shelf label market in 2022.

In terms of communication technology, the South & Central America electronic shelf label market is segmented into radio frequency, near field communication, infrared, and others. The radio frequency segment held the largest share of the South & Central America electronic shelf label market in 2022.

Based on country, the South & Central America electronic shelf label market is segmented into Brazil, Argentina, and the Rest of South & Central America. Brazil dominated the South & Central America electronic shelf label market in 2022.

LabelNest; Panasonic Holdings Corp; Opticon Sensors Europe BV; Diebold Nixdorf, Incorporated; and Pricer AB are some of the leading companies operating in the South & Central America electronic shelf label market.

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