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NRF 2025 APAC Conference Summery

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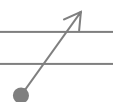
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1. Executive Summery

NRF 2025 APAC – Retail DX & AI-Powered Commerce Insights

NRF2025 APAC, as presented through its official agenda, centers on a clear and unifying concept: **how AI is reshaping the future of retail across Asia and the world**. While technology itself is a core theme, the sessions collectively reveal something deeper—**strategic insight, organizational readiness, and regional adaptation** as the real drivers of impact.

Unlike NRF New York, where global-scale innovation narratives dominate, the APAC conference emphasizes **regional specificity**, showcasing how both Western and Asian retailers are confronting local realities: dense urban environments, labor shortages, cultural expectations, exploding convenience needs, and diverse levels of digital maturity.

The discussions highlight not merely “technology for technology’s sake,” but **how to implement AI and automation in Asia in ways that truly optimize retail and enrich daily life**.

From this broader agenda, this report focuses on **three high-impact sessions deeply related to Retail DX**.

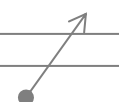
◆ Sam’s Club China — A Case That Embodies the East–West

Contrast in Digital Retail

This session illustrates how Sam’s Club China has developed a model fundamentally different from its U.S. and European counterparts.

Rather than importing Western retail technologies as-is, Sam’s Club China prioritizes:

- **operational foundation and discipline,**
- **listening to local customer needs,**
- **redefining hospitality & convenience,**
- **building infrastructure and talent before innovation, and**
- **using technology not as the goal but as the enabler.**



In a global environment where “retail tech” is often treated as a trend to chase, Sam’s Club China offers a powerful counterpoint:

innovation is meaningful only when built on a rigorous operational and philosophical foundation.

◆ FamilyMart — Japan’s Convenience DNA, Reinterpreted and Scaled Across Asia

FamilyMart’s session reveals an aggressive and culturally grounded expansion strategy across Asia.

Key themes include:

- early adoption of **U.S.-style Retail Media Networks (RMN)**,
- re-exporting Japan’s globally admired convenience-store excellence
- (merchandising precision, cleanliness, hospitality),
- redefining the **role of convenience stores in Asian youth culture**,
- creating new merchandising ecosystems and lifestyle-driven branding,
- building a **new revenue model through RMN monetization**.

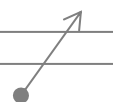
FamilyMart positions itself as **Asia’s next-generation convenience brand**, not by copying Japan’s domestic model but by reinterpreting it for regional lifestyles, demographics, and cultural contexts.

◆ VusionGroup — ESL as the Backbone of Next-Generation Store Infrastructure

While known as the world’s largest electronic shelf label (ESL) manufacturer, VusionGroup’s session made clear that they are now effectively a **core infrastructure provider for next-generation retail operations**.

By digitalizing shelf-edge information and embedding sensors, Vusion enables:

- real-time inventory visibility,



- automation of pick-path and replenishment,
- ultra-low-power ESL devices powered by in-store lighting,
- instantaneous price changes and dynamic promotions,
- on-shelf programmatic advertising (“Edge Media”),
- precise stock allocation for same-day delivery,
- minimal labor operations in stores facing workforce shortages.

This technology is not about replacing paper price tags; it is about **transforming the shelf into an operational brain and an advertising surface.**

The result is a model where revenue increases through:

- RMN monetization inside the store,
- reduced waste and loss,
- more accurate purchasing & replenishment,
- simplified operations with fewer staff,
- higher omnichannel sales through real-time precision.

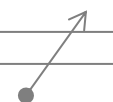
◆ **Additional Themes Beyond These Three Sessions**

Other sessions covered critical AI-enabled domains such as:

- high-precision audience segmentation,
- advanced consumer insight analytics,
- ESG and waste-management optimization,
- AI-driven labor planning and store management,
- predictive inventory allocation,
- personalization engines and loyalty optimization.

These cases collectively outline a future where **AI implementation is not optional—it is the base condition for operational survival and differentiation.**

*For deeper insights, KnC will publish a **full in-depth report** and offer **custom thematic deep-dive studies** tailored to specific markets, technologies, and strategic challenges.*



2. Background --- What is NRF APAC

NRF APAC launched in 2023, making the 2025 event the third edition.

- Organizer: National Retail Federation (NRF)
- Host Region: Singapore (Marina Bay Sands)
- Event Dates: Jun 3-5, 2025
- Positioning:
“The APAC hub covering the future of store experience, digital commerce, payments, logistics, and customer engagement.”

Key Differences between NRF APAC and New York

NRF APAC is for...

- The **regional edition** designed for Asia–Pacific markets
- Focused on **operational innovation, AI-driven efficiency**, mobile-first commerce, payments, and urban retail
- Participation dominated by APAC executives, digital commerce leaders, and regional startups
- Acts as a **bridge between global best practices and APAC-specific realities**

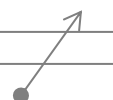
NRF APAC — APAC-Specific Themes

1. AI-driven operational efficiency for small-format stores
2. Unified commerce in mobile-first environments
3. Payments innovation, including QR interoperability and real-time payments
4. Retail Media growth models unique to APAC, shaped by superapps and marketplace ecosystems
5. Automation designed for compact stores in densely populated urban areas
6. Integration between superapps and e-commerce platforms, creating multi-service retail networks
7. Optimization of local last-mile delivery, tailored to high-density markets

Whereas **NRF APAC** emphasizes the intersection of **physical stores, mobile ecosystems, and AI-driven operations**,

NRF New York focuses more on **global e-commerce scale, enterprise supply chains, and large-format store infrastructure**.

****Why these topics carry greater weight in APAC (KnC Assumption)***



*APAC retailers face structural conditions—**labor shortages, rising store wages, extreme urban density, and mobile-first consumers**—that magnify the need for operational automation, mobile-enabled customer journeys, and flexible last-mile networks.*

As a result, APAC has become a “testbed” where retail innovation must solve practical, high-intensity operational challenges rather than purely strategic ones.

3. 2025 Key Trends in NRF APAC 2025

1. AI-Native Retail Operating Models

The strongest and most consistent message throughout the conference—very much aligned with NRF 2025 in New York—was the acceleration of AI-native retail operations.

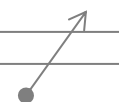
Across sessions, several AI applications emerged as the central pillars of future retail:

- **AI workforce orchestration**, enabling dynamic task allocation and labor optimization
- **AI-driven last-mile logistics**, enhancing routing, demand prediction, and delivery efficiency
- **Generative AI for merchandising and product content**, powering richer storytelling and faster SKU-level execution
- **Digital shelf intelligence**, improving real-time availability, pricing accuracy, and shelf compliance

In the APAC region, these themes resonate even more strongly due to three structural challenges that are **more acute than in Europe or North America**:

- **A chronic shortage of retail labor**
- **Rapidly rising wages for store associates**
- **Extreme population concentration in urban areas**, driving high-density retail formats

These factors make APAC one of the most demanding environments for retail operations — and simultaneously, one of the most fertile grounds for AI-driven innovation.



2. Retail Media as a Core Profit Engine

Retail Media Networks continued to be a central theme at NRF APAC.

*While Japan and South Korea remain in the **early stages** of RMN development, Southeast Asia—driven by platforms such as **Grab, Lazada, and Shopee**—is experiencing **hyper-growth**.*

Major APAC retailers including **Aeon, Lotte, Reliance Retail, and Woolworths** are also accelerating their investments in retail media infrastructure.

In 2025, discussions focused heavily on three priorities:

- **Incrementality measurement**, emphasizing the need to prove true sales lift
- **ROI models for in-store media**, which remain underdeveloped but strategically important
- **CTV integration**, bringing retail media into premium video environments

Together, these themes highlight APAC's shift from “ad products” to **measurable, full-funnel retail media ecosystems**.

3. Unified Commerce & Zero-Friction Customer Journeys

APAC consumers exhibit highly fluid, channel-agnostic shopping behaviors.

Their journeys move seamlessly across **stores, e-commerce, social platforms, click-and-collect, and returns**, forming a single continuous experience.

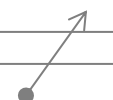
Markets such as Singapore and South Korea are also seeing a rapid rise in **self-checkout adoption**, while **real-time stock visibility** has become a non-negotiable requirement for omnichannel execution.

One session captured this shift perfectly with the statement:

“Unified commerce is becoming the default, not a strategy.”

4. Payments Innovation

Payments innovation emerged as a uniquely APAC-driven theme at the conference.



Across Southeast Asia in particular, consumers have leapfrogged traditional card-based systems, accelerating the adoption of **mobile payments and QR-based interoperability standards**.

Real-time payments are rapidly scaling across markets such as Singapore, Malaysia, Thailand, and Indonesia, reshaping checkout experiences both online and in store.

Two dynamics define APAC's payments landscape:

- **A mobile-first population**, accustomed to frictionless, app-integrated financial services
- **Cross-border QR standardization**, enabling seamless regional commerce

As a result, payments in APAC are no longer just a financial layer—they have become a foundational part of customer experience and retail productivity.

5. Supply Chain & Fulfillment Automation

Automation took on a heightened level of urgency within APAC, driven by dense urban environments, high operating costs, and accelerating e-commerce demand.

Retailers across the region are rapidly experimenting with technologies that compress lead times and reduce dependency on labor-intensive processes.

Key developments highlighted at the conference included:

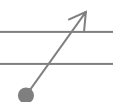
- **Micro-fulfillment centers (MFCs)** embedded within or adjacent to urban stores
- **Robotics and automated picking systems** deployed for fresh and frozen categories
- **AI-driven demand forecasting** integrated with replenishment workflows
- **Autonomous store concepts**, designed for “one-person operations” in markets like Japan and Singapore

These innovations signal a broader shift:

APAC's logistics networks are moving toward hybrid physical-digital systems, where automation is not optional but essential for scalability and cost discipline.

6. Sustainability Through Data

Unlike Europe—where sustainability is anchored in regulation—APAC's approach is increasingly data-driven and operational.



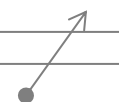
Retailers are prioritizing initiatives that deliver measurable impact on efficiency and waste reduction rather than compliance alone.

Major themes included:

- **Food waste reduction**, supported by AI forecasting and dynamic discounting
- **Supply chain transparency**, particularly for fresh and imported goods
- **Standardization of ESG reporting**, enabling cross-market comparability
- **Energy optimization in stores**, linked with IoT sensors and real-time monitoring

The consensus across sessions was clear:

Data—not policy—is becoming the catalyst for sustainability adoption in APAC.



4. Notable Sessions & Quick Notes

Keynote: “The Story Behind China’s Leading Omnichannel Retailer — Sam’s Club China”

- *Speaker:* Andrew Miles (Global Essence Int’l)
- *Modulator:* Jordan Berke (Tomorrow)
- *Stage:* KPMG Vision Stage, Marina Bay Sands
- *Date:* June 5, 2025, Day3
- *Source:* KnC Quick Report



Andrew Miles
Advisor and Business
Consultant
Global Essence Int’l Ltd.



Interviewed By:
Jordan Berke
Founder & CEO
TOMORROW

TOMORROW

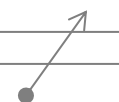


【Session Context】

This keynote featured Andrew Miles, who led Walmart China and Sam’s Club China from 2012 to 2025.

Under his leadership, Sam’s Club grew from six small clubs into China’s leading omnichannel retail model, built upon a distinctive operating philosophy:

- Commit to the core principles of the club model
- Adapt to the specific cultural, economic, and logistical dynamics of Asia



- Build a strong operational foundation before pursuing innovation
- Maintain absolute clarity on who the business serves

This session presented a “*live case study*” of how a global retail giant must localize deeply to succeed in Asia.

【Key Insights (from Andrew Miles)】

◆ Returning to the Essence of the Club Model: Fewer SKUs, Clearer Customer

- Despite JD and Alibaba pushing the market toward “infinite choice,” Sam’s Club reduced its assortment from 10,000 to 3,500 SKUs.
- The team defined a sharply focused core customer segment:
35–45-year-old mothers, 1–2 children, owns a car, lives in an apartment, has overseas exposure, seeks quality of life.
Internally named “*BMW members*” for easy cultural alignment.
- Merchandising philosophy: enter the customer’s life, not just provide what she wants.
- Each SKU is judged by: “*Does it make her life easier, happier, or more delightful?*”

Result:

Individual clubs now achieve **USD 500M annual sales with only 3,500 SKUs.**

◆ Foundation First → Innovation Second

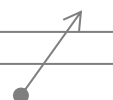
Andrew emphasized a consistent philosophy:

“Without a strong foundation, AI can only drive 2× improvement.

With the right foundation, AI can deliver 10×.”

Foundation includes:

- Cultural clarity
- Decision-making principles
- SKU discipline
- Member-first thinking
- Operational rigor
- A workforce that understands *why* the model works



In APAC's complex environment, implementing technology before establishing the operating model leads to failure.

◆ Dark Store Strategy & the Digital Tsunami

- All memberships were app-based → 100% digital customers.
- Beginning in 2016, Sam's Club developed "Clouds" (Dark Stores):
 - ✓ 1,000 fast-moving SKUs
 - ✓ 1-hour delivery
 - ✓ ~3,000–4,000 m²
 - By 2025:
 - ✓ 500 dark stores across China
 - ✓ Linked to 56 physical clubs
 - ✓ Created a unified ecosystem of:
 - ✓ **Clubs × Dark Stores × International Sourcing × Extended Aisle**

Operational structure:

- ✓ Clubs close at night, but **back-of-house operates 24 hours**
- ✓ Mornings: fresh supply delivered to dark stores
- ✓ Daytime: dark stores manage delivery while clubs operate normally

→Addresses density, speed, and operational pressure unique to China.

→Direct outcome: **higher frequency → higher spend → higher renewal rates.**

◆ Ignore Trends. Avoid Noise. Stay True to the Model.

Andrew's clearest message:

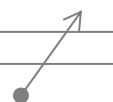
"Do not chase trends.

Quick wins destroy business models.

Know who you serve and what you stand for."

China's extreme speed and volatility make *strategic noise resistance* essential.

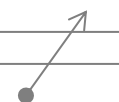
Model consistency—not trend responsiveness—drove Sam's Club's success.



◆ **AI Is Only Powerful When Aligned With People, Product, Profit, and Culture**

- The essence of retail remains:
good products, sustainable profit, motivated employees.
- AI is not a shortcut; it's a multiplier *only when the North Star is shared internally.*
- **Andrew agreed with Lotte's Sam:**
"Go to the stores. Talk to employees. Talk to customers."

This reinforces that **AI does not replace foundational retail judgment.**



【Session Insights from KnC (by Kazu Kanazawa)】

◆ Asia Now Demands Higher Digital Performance Than the West

Asia—especially China, Southeast Asia, and increasingly Japan—has:

- higher digital commerce penetration
- stricter convenience expectations
- denser last-mile environments
- consumers accustomed to 24/7 service
- mobile-first purchasing behavior

Even Walmart, the global retail champion, must adapt deeply to local expectations.

This is not optional—it is survival.

◆ Importing Western DX Blueprints Won't Work in Japan

Japan often assumes:

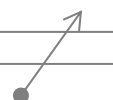
“If we import Western retail tech (AI, automation, assortment expansion), growth will follow.”

But Sam's China proves the opposite:

- **SKU expansion is a mall logic**, not a universal truth.
- For club models or D2C brands, SKU expansion:
 - ✓ worsens working capital
 - ✓ breaks merchandising logic
 - ✓ dilutes brand identity
 - ✓ increases operational complexity

Japan must adopt “market-fit first, technology second” rather than “technology-first implementations.”

◆ Foundation → Innovation is the Only Sustainable Path



KnC insight:

“The first job of digital strategy is to strengthen the value foundation. Innovation is the second step—not the first.”

When businesses skip foundation-building:

- AI becomes a cost-reduction tool only
- It never produces service innovation
- It disconnects teams from the value creation process
- The margin freed through efficiency never transforms into customer value

When foundations are strong:

1. AI yields exponential impact
2. 24-hour operations become manageable
3. Staff culture remains intact
4. Automation augments, not erodes, service quality

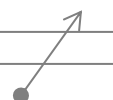
【Implications for APAC & Japan】

- ◆ **Localization is not customization—it is strategic reconstruction.**
- ◆ **SKU discipline + cultural clarity outperform “more choice” logic in Asia.**
- ◆ **AI must be applied only after operational and cultural foundations are built.**
- ◆ **Japan’s retail DX must break from Western models and align with local behaviors.**
- ◆ **Identity clarity (“Who are we?” “Who do we serve?”) is a competitive weapon.**

Next Steps

If you want, We can now:

- ***Produce a fully formatted PDF-ready English analyst note***
- ***Add a one-page executive summary***
- ***Add visual frameworks (without fabrication)***
- ***Integrate additional sessions you attended (same standard)***



Keynote: “The Convenience Store Wars: How FamilyMart is Forging Their Own Path”

- *Speaker:* Shin Odake (Family Mart)
- *Modulator:* Alex Rezvan (Retail Podcast)
- *Stage:* KPMG Vision Stage, Marina Bay Sands
- *Date:* June 5, 2025, Day3
- *Source:* KnC Quick Report



Shin Odake

Director, Senior Managing
Executive Officer, Chief Supply
Chain Officer
FamilyMart



Interviewed By:

Alex Rezvan

Founder
The Retail Podcast

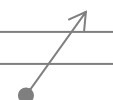


【Session Context】

In this keynote, CEO Shin Odake shared how **FamilyMart has broken out of Japan’s “sea of sameness”** to become one of Asia’s most distinctive, culturally resonant, and fast-growing convenience retailers.

Key context points:

- **16,000 stores worldwide**
- **\$23B in revenue, \$600M operating profit**
- **16 million customers per day**



- **45 consecutive months of YoY sales growth** — the highest in company history

Odake positioned FamilyMart as a **cultural brand**, not just a convenience chain—doing what 7-Eleven traditionally “could not or would not do” in Japan.

◆ Key Insights (from Shin Odake)

Breaking the “Sea of Sameness”

Odake opened with a diagnosis:

“Convenience stores look the same. Sea of sameness.”

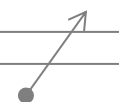
“The era of imitating 7-Eleven is over.”

FamilyMart’s mission is to create **reasons why people specifically choose Famima**, not “a convenience store.”



Key levers:

- Cultural differentiation
- Creative collaboration
- Unique product ecosystems
- Experiences worth “going out of your way” to buy



◆ Aggressive Expansion Across Asia

- **8,000 stores in Asia** outside Japan
- COVID period was domestic-focused, but now:

“The time is right for overseas expansion again.”

FamilyMart aims to export *Japanese convenience culture*—merchandising quality, hygiene, and hospitality—to broader APAC markets.

◆ Fashion × Convenience: A Category Breakthrough

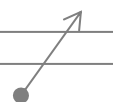
FamilyMart has become **the first global convenience chain to turn apparel into a high-growth business.**

Highlights:

- Since 2019, apparel sales are **up 500%**, reaching **\$115M**, growing another **30% YoY** this year
- **24M pairs of Famima Socks sold**
- “Convenience Wear” developed with **Hiromichi Ochiai + CEKAI**

Expansion into:

- ✧ Imabari towels
- ✧ Shorts
- ✧ Lifestyle basics
- **Fashion show, Fuji Rock partnership**, and collaborations with
 - ✧ NIGO (KENZO, Human Made)
 - ✧ CAHLUMN
 - ✧ Pokémon
 - ✧ Netflix Stranger Things





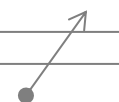
Odake:

“People come to FamilyMart to buy these items.”

This is unprecedented for the global convenience industry.

◆ Reinventing Food: The Onigiri Strategy

- Onigiri = 2,000 years of Japanese food culture
- FamilyMart developed a **new soft-release onigiri machine**
- Partnership with **Onigiri Bongo** (legendary Tokyo shop)
- Collaboration with **Shohei Ohtani** as onigiri ambassador
- Result:
 - ✓ **Highest onigiri sales in company history**
 - ✓ Franchisees feel *pride* in the product again
- **FMCG Icon: Why “Famichiki” Still Dominates**
- 20 years old, still a national hit



- **200 million units per year**, one flavor dominates
- Made from “side cuts” of chicken thigh → **near-zero waste**
- New variants (cheese-filled) are exceptionally successful

◆ **Retail Media: “Famima Vision” as a Cultural Platform**

Famima Vision = nationwide in-store DOOH network

- **10,000 stores**
- **64M weekly reach**
- Recognition: 50%+, with 69% among teens, 66% among 20s
- Reach = “equivalent to TV CM” in Japan
- Not only national broadcasts—also hyperlocal ads (e.g., recruitment near universities)

Famima Vision is:

- **A media platform**
- **A driver of brand loyalty**
- **A tool for footfall and sales**
- **A channel for cultural content (artists, YouTubers)**

70% of advertisers are **non-endemic brands**—a rare case globally.

This shocked global retail media leaders.

◆ **Bold Brand Activism: “We are losing to a market leader.”**

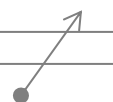
Odake explained the famous Shibuya crossing billboard campaign:

“Let’s replace the No.1.”

“Before eating, 90% say the competitor tastes better.”

“After eating, 50% say FamilyMart tastes better.”

Instead of “we improved taste,” they used **the raw truth** to change consumer perception.



Impact:

- Internal mindset shift:
“It’s okay to challenge the industry leader.”
- Strong external buzz
- Stronger cultural identity

◆ **Future Mission: Redefining “Convenience”**

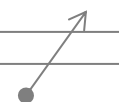


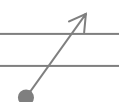
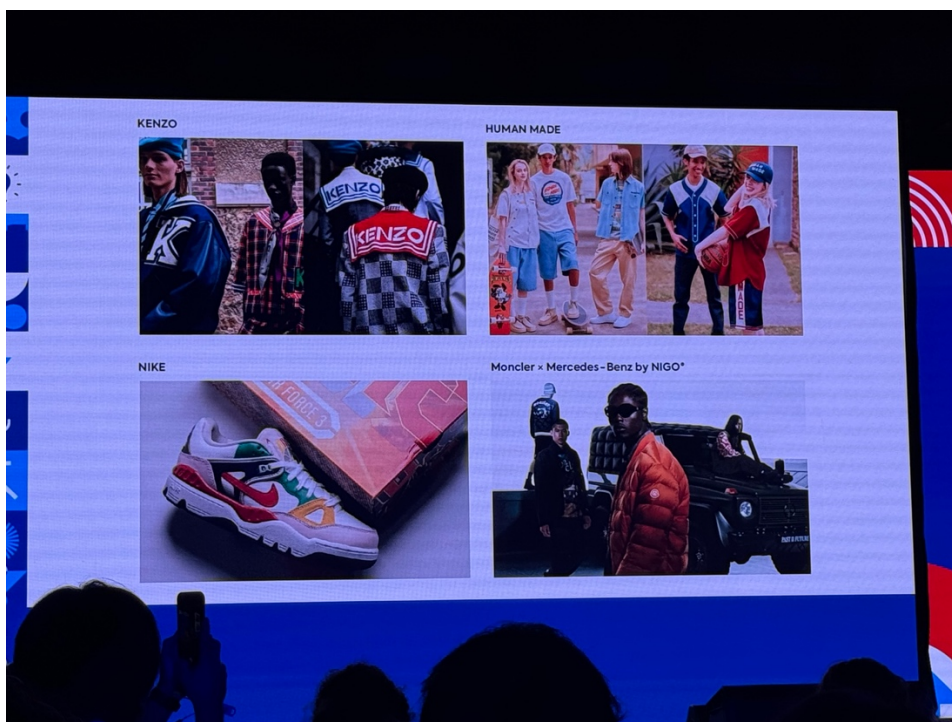
Odake:

*“Convenience exists for one reason: **to be convenient.**”*

What convenience means next:

- 24/7 fashion availability
- Tech-enabled fast shopping
- Omnichannel optimization
- AI-based inventory management
- Embedding top creators into business processes





【Session Insights from KnC (by Kazu Kanazawa)】

◆ Convenience Stores in Asia Are a Cultural Infrastructure

In Asia, convenience stores are not “small retail formats.”

They have become:

- daily life platforms
- social infrastructure
- micro-fulfillment points
- cultural hubs

Japan’s convenience culture—cleanliness, hospitality, quality—became globally recognized during the Tokyo Olympics.

Now, **reverse import** to the U.S. (the birthplace of convenience retail) has begun.

◆ FamilyMart Is APAC’s Most Progressive Convenience Brand

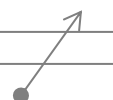
FamilyMart is actively adopting:

- Western-style RMN
- Creative collaborations
- Apparel ecosystem
- Youth culture positioning
- Anti-majority messaging

It feels like **FamilyMart is doing what Japanese 7-Eleven couldn’t import from the U.S.—but taking it even further.**

Meanwhile:

- 7-Eleven Japan = “social infrastructure for the elderly” → stability-oriented



- FamilyMart = “cultural infrastructure for youth” → challenger-oriented

This ideological divergence is becoming an advantage for FamilyMart.

◆ “Convenience” Can Target Everyone or a Core Audience

KnC’s interpretation:

- For multi-generational towns,
 “7-Eleven = for seniors, symbolic reliability”
- For youth:
 “7-Eleven is uncool; Famima is the place to gather at night.”
- This effect may appear *more strongly outside Tokyo*
 because rural youth:
 - are deeply connected to SNS culture
 - seek “coolness extensions” in real life
 - will drive to a Famima or Ministop if needed

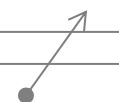
In many rural areas:

- Lawson dominates due to corporate conversions (like Save On → Lawson)
- But Lawson has limited cultural cache
- Youth actively travel to FamilyMart / Ministop
- Car society makes small distances irrelevant

Thus, a pattern emerges:

- **7-Eleven = seniors**
- **FamilyMart = youth**
- **Lawson = neutral / default**
- **Ministop = niche / enthusiast**

This pattern could replicate nationwide.



◆ The First Retail Media Winner in Japan Will Likely Be FamilyMart

Given:

- cultural momentum
- youth penetration
- 64M weekly reach
- brand collaborations
- content creation capability
- 70% non-endemic advertisers

FamilyMart is poised to become Japan's first major RMN powerhouse—ahead of 7-Eleven, Lawson, or supermarkets.

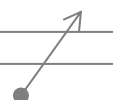
【Implications for APAC & Japan】

- ◆ Convenience retail in Asia is no longer about proximity—it is cultural relevance.
- ◆ Youth culture is becoming the new driver of convenience brand choice.
- ◆ Retail Media in Japan will favor brands with strong cultural identity, not legacy scale.
- ◆ Convenience = universal vs. convenience = youth-specific will create strategic divergence.
- ◆ FamilyMart's model is a blueprint for APAC-style “cultural convenience retail.”

Next Steps

If you want, We can now:

- *Produce a fully formatted PDF-ready English analyst note*
- *Add a one-page executive summary*
- *Add visual frameworks (without fabrication)*
- *Integrate additional sessions you attended (same standard)*



Immersive, Intelligent and Interactive: How 7-Eleven Redefines the Retail Journey with VusionGroup at EXPO 2025

- *Speaker:* *Pauline Monin (Vusion Group)*
- *Modulator:* *Pascal Gerbert-Galillard (Vusion Group)*
- *Guest:* *Giovanni Fili (Exeger)*
- *Stage:* *Expo Stage 2, Marina Bay Sands*
- *Date:* *June 3, 2025, Day1*
- *Source:* *KnC Quick Report*



Pauline Monin
Director of Product Marketing
VusionGroup

VusionGroup



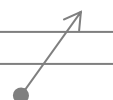
Pascal Gerbert-Gaillard
Executive Vice President APAC
VusionGroup

VusionGroup

【Session Context】

This Big Ideas session showcased how **7-Eleven Japan and VusionGroup** are using **EXPO 2025 Osaka** as a real-world testbed for the next generation of **digitized, sensor-embedded, autonomous stores**.

VusionGroup—formerly SES-imagotag—is:



- the **world's largest ESL (Electronic Shelf Label) manufacturer**
- **33 years** in operation
- Revenue grew from **\$20M (15 years ago)** to **\$1B+ in 2024**
- Deployments: **450M IoT devices worldwide**, with **200M cloud-connected**—making it the **2nd largest category of connected devices after smartphones**



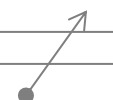
The session highlighted not “digital price tags,” but **the entire digital nervous system of a future store.**

【Key Insights (from the Vusion × 7-Eleven Session)】

◆ **Beyond ESL: A Full Store Digitalization Infrastructure**

Vusion’s latest platform is not “ESL 2.0”—it is **a store-level digital network** enabling:

- central price automation
- real-time inventory sensing
- on-shelf data collection
- guided picking for delivery
- promotional content delivery (Edge Media)



- IoT-based operational analytics

This is the backbone required for:

- **labor-lean operations**
- **instant restocking**
- **rapid pick-pack for same-day delivery**
- **real-time merchandising decisions**
- **in-store retail media monetization**

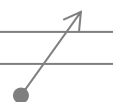
◆ **EXPO 2025 Osaka: 7-Eleven as a Living Laboratory**

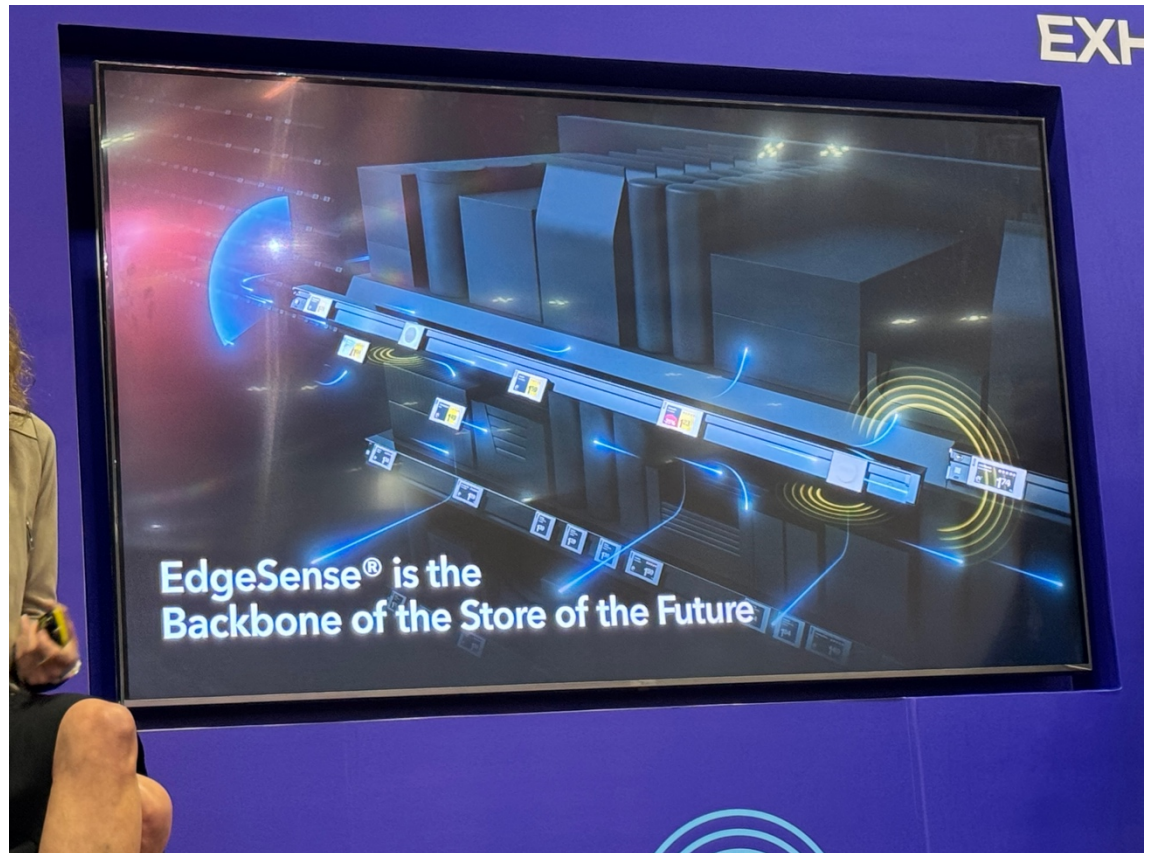
The Osaka Expo store is a **full-scale trial site**, where Vusion's technology stack is deployed in the wild.

Demonstrated elements included:

EdgeSense – the next-gen ESL rail system

- Up to **25 digital displays** on a **1.2m rail**
- Power delivered from the rail
- Can host **price tags, temperature sensors, and other IoT modules**
- Shelf becomes a **data-collecting neural network**





This transforms the shelf into:

- A sensing device
- A real-time inventory window
- A programmatic media surface

Guided Picking Demo

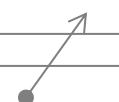
- Store staff simulated delivery picking via a smartphone app
- ESL tags **illuminate** to guide the pick route
- Picking efficiency improves dramatically

1. **8,000 stores in Asia** outside Japan
2. COVID period was domestic-focused, but now:

◆ Radical Energy Efficiency: 48% Less Power + Light-Powered ESL

The session introduced breakthrough innovations:

- New ESL models require **48% less energy**



- Next-gen devices use **tiny batteries + indoor light charging** via Exeger's photovoltaic tech
- Developed in Sweden, partnered with 3M, protected by **300+ patents**
- Used in Adidas headphones, Philips remotes, smart helmets

Giovanni's explanation emphasized:

"No silicon, 100% renewable, nearly edible materials." (quoted from the live discussion)

"Self-powered through store lighting—no recharging, no battery waste."

This makes large-scale, **perpetual ESL deployments** viable and sustainable.

Odake:

"People come to FamilyMart to buy these items."

◆ **Edge Media: Turning the Store into a Retail Media Platform**

Because ESLs are centrally controlled & programmable:

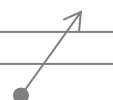
- Price can change instantly
- UI/visuals of tags can be altered
- Time-limited promotions can run dynamically
- On-shelf media becomes **ad inventory**

This creates **new RMN (Retail Media Network) revenue models**, directly from the shelf edge.

Vusion's message was clear:

"This is not labeling."

It is the infrastructure for real-time store intelligence and monetization."



【Session Insights from KnC (by Kazu Kanazawa)】**◆ VusionGroup Is Not an ESL Vendor — It Is Building the Infrastructure for AI-Native Physical Retail**

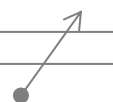
KnC perspective:

- ESL is only the “entry point”
- Competitive advantage =
 - ✓ ultra-low-power hardware
 - ✓ centralized price + data orchestration
 - ✓ shelf-level sensing
 - ✓ real-time inventory accuracy
 - ✓ picking optimization
- This reduces store labor dramatically—critical for Asia’s labor-scarcity markets

Vusion enables:

- **real-time stock visibility**
- **out-of-stock detection**
- **instant digital promos**
- **RMN monetization directly on the shelf**
- **same-day delivery picking accuracy**

This is the **foundation of** AI-powered retail operations.



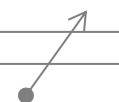


◆ **Japan Begins Full-Scale Pilots — 7-Eleven at EXPO 2025 Is a Turning Point**

The EXPO 2025 deployment represents:

- the first major Japanese real-world trial
- potential national rollout if successful
- a model for 24h convenience retail optimization

Japan has been slow to adopt ESL historically, but the Expo pilot may shift the industry.





◆ Vusion's Energy Technology Is World-Leading

Key KnC interpretation:

- Indoor-light-powered ESL = game-changer
- Enables **nearly perpetual operation**
- Eliminates battery maintenance labor
- Reduces paper & supply waste
- Turns sustainability into a **cost-advantage**, not a burden

This aligns perfectly with Japan's push for:

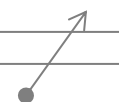
- resource efficiency
- labor reduction
- low-maintenance retail
- zero-downtime operations

This pattern could replicate nationwide.

◆ ESL → Edge Media → RMN Infrastructure

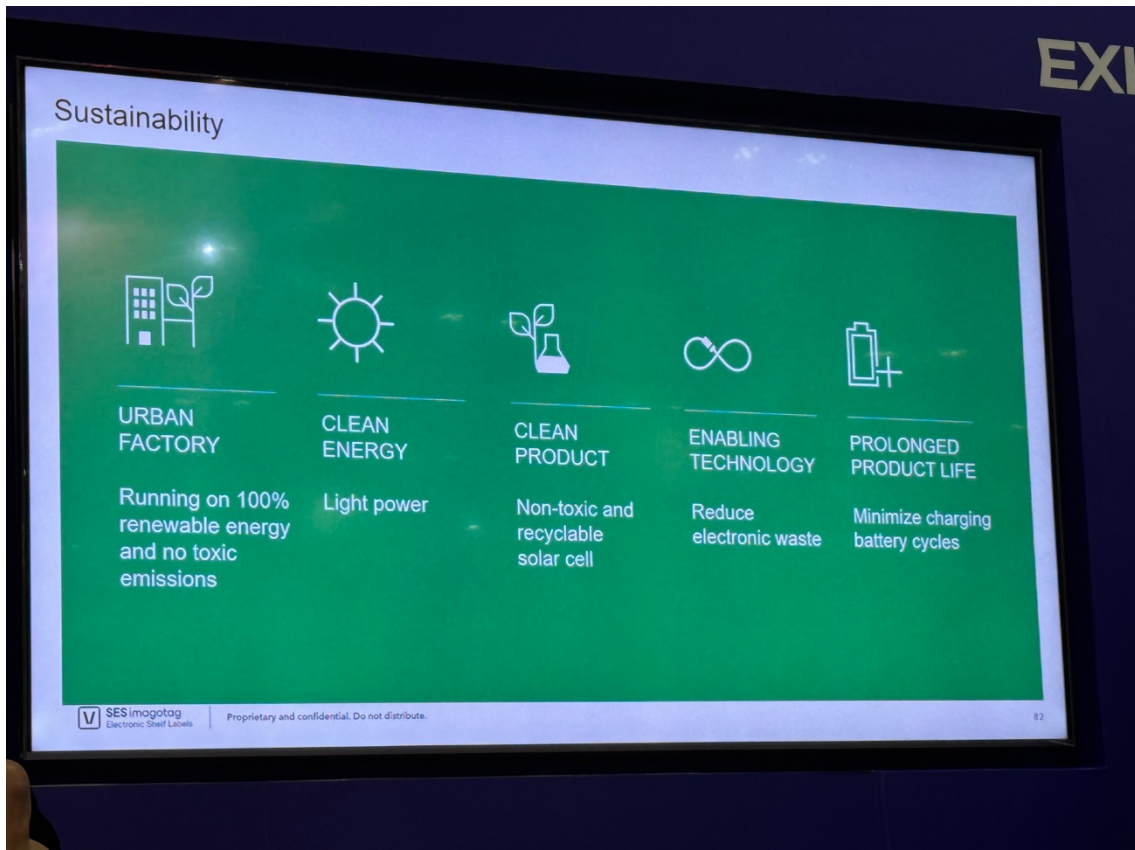
KnC point:

- Once tags become mini-screens with connectivity,
- **the shelf transforms into ad inventory**



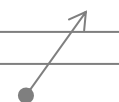
- Dynamic time-sales, targeted promotions, seasonal UI changes
- Centralized control = programmatic media
- This turns every shelf into a “monetizable surface”

This is the **physical retail equivalent of Amazon’s digital ad slots**, but live inside the store.



【Implications for APAC & Japan】

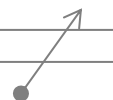
- ◆ Convenience + ESL + RMN will merge into one operational stack
- ◆ Labor shortages make digitized shelves indispensable
- ◆ Japan is entering a phase of ESL mass adoption (led by 7-Eleven trials)
- ◆ Store-edge media will become Japan’s next major RMN channel
- ◆ VusionGroup is positioned as the category-defining infrastructure vendor for Asia’s digitized physical stores



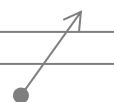
Next Steps

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- ***Produce a fully formatted PDF-ready English analyst note***
- ***Add a one-page executive summary***
- ***Add visual frameworks (without fabrication)***
- ***Integrate additional sessions you attended (same standard)***
- ***Full Research report of Vusion Group and Advanced ESLs***



Appendix



About Author and Company

Authors Profile

Kazuhisa “Kazu” Kanazawa

Founder, CSO & Principal Analyst

✓ Professional Summery

Kazuhisa “Kazu” Kanazawa is a veteran digital strategy and analytics expert with more than 20 years of experience in e-business, retail technology, and data-driven commerce. He has been active in the field since the early days of the internet in 1999, specializing in digital transformation, retail media, and advanced measurement frameworks.

✓ Career Background

Kazu began his career at Netyear Group Corporation, where he founded the company’s digital marketing analytics practice. Over his tenure, he led more than 1,000 projects for over 50 global Japanese enterprises, helping clients build and operate large-scale data analytics infrastructures. His work contributed to Netyear Group’s successful IPO in 2009.

He later served as Chief Marketing Officer at Asia Quest Inc., a system development company specializing in Digital Transformation, where he drove the company’s branding and enterprise client development. Asia Quest completed its IPO in 2022.

Today, Kazu serves as the CSO and Principal Analyst at **Kazu & Company LLC**, supporting the growth of D2C brands and large-scale digital transformation initiatives. He is recognized for his deep expertise in retail technology, commerce analytics, closed-loop measurement, and retail media strategy.

✓ Areas of Expertise

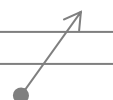
Retail Media Strategy & Measurement

Incrementality Analysis (iROAS, causal modeling)

Closed-Loop Attribution & Audience Architecture

Digital Commerce & D2C Growth

Data Infrastructure for Marketing & CX



Retail Technology & In-Store Digitalization

AI Driven Operation and Marketing

Digital Transformation

✓ **Research Focus**

Walmart Connect & Scintilla, Amazon Advertising (AMC, DSP), Instacart Ads & SKU-level measurement, Kroger Precision Marketing, CTV × Retail Media, and the evolution of shoppable audience ecosystems.

✓ **Publications (2025)**

- Retail Media Networks in 2025: The Rise of Closed-Loop Commerce
- Incrementality Frameworks for Modern Retail Media
- Shoppable Audience Architecture and the Future of Commerce AI

✓ **Books & Major Contributes**

- DX 経営図鑑, *ALC Publishing*, 2021

✓ **Articles & Contributions**

- Contributor, DX Navigator, AsiaQuest, 2020
- Contributor, Web 担当者フォーラム, Impress, 2021
- Contributor, Business+IT, SoftBank Creative, 2021

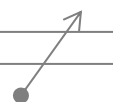
✓ **Selected Speaking Engagements**

- “From High-Risk Innovation to Gain Creation” — Transforming Business Pain Points into New Value, *Circulation Inc.*, 2024
- The Value Experience Created by Mobile Payments and Financial Services, *Seminar Info Co.*, 2019
- AQW DX Series, *Asia Quest Inc.*, 2020–2022
- Global DX Business Design: How Process Transformation Creates New Customer Value, *DXPO*, 2022
- NRF APAC 2025 Review, *IBA Company*, 2025

✓ **Education**

- **M.S., Integrated Marketing**, New York University, School of Professional Studies (2016)
- **MOT (Master of Management of Technology)**, Tokyo Institute of Technology (2008)
- **B.A. in Economics**, Takasaki City University of Economics (1996)

✓ **Professional Authorities / Industry Roles**



- **Jury Member, I-COM Data Creativity Awards (2009-2016)**
- **Member, Japan Omni-channel Association(2024 -)**

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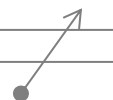
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☆☆☆☆☆☆☆☆☆☆
DXを顧客視点から書き下ろした日本初の一冊

会社の業績向上を目指してDXに手を出す企業が後を絶たない。
しかし、DXが企業変革をもたらすのではない。
DXとは、顧客視点で圧倒的な価値提供プロセス変革を行うための武器なのだ。
このツールをいかに使いこなすべきか？
筆者のメッセージは一つ。
「徹底してお客様のペインを取り除き、お客様にとって新しい価値を提供すること」。
やり方、考え方はここにある。
豊富な事例から自社に最適な手法を見つけ出し、DXを顧客視点で推進してほしい。



[Read sample](#)



Company Profile

- ✓ Company Name: Kazu and Company LLC
- ✓ Established: December 2018
- ✓ Headquarters: Minato-ku, Tokyo, Japan
- ✓ Website: <https://www.kazuandcompany.com/>

- ✓ Company Overview:

Kazu & Company LLC is an independent research and analytics firm specializing in retail media, data-driven commerce, and digital transformation. The firm provides original research, analytics frameworks, and advisory services for global enterprises and D2C brands.

- ✓ Core Services:

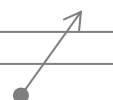
- Retail Media
- Digital Media
- Measurement & Incrementality Analysis
- Data & Analytics Architecture
- Omni-channel, Digital Commerce
- D2C Growth Support
- Digital Transformation (DX)
- User Experiences (UX)
- Customer Experiences (CX)

- ✓ Research Domains:

- Retail Media Networks
- Closed-Loop Measurement
- Audience Architecture
- Commerce Data Management / Analytics
- Instore-Retail Technology
- Fulfillment Technology
- Seamless Experience
- Shopping/Media Journey
- Data Management Platforms
- Insight Discovery

- ✓ Industries Served

- CPG
- D2C / Ecommerce
- System Integrators



- ✓ Notable Achievements
 - Supported 50+ data and digital projects across 10+ retail/D2C clients
 - Published major research on Retail Media Networks and measurement frameworks
 - Managing co-learning seminars across retail and CPG companies in Japan
- ✓ Publications
 - Annual / Quarterly Trends of Retail Media Reports
 - Measurement Frameworks
 - Digital Strategy Whitepapers
 - Books & Industry Contributions
- ✓ Leadership
 - **Kazu Kanazawa:** Founder/CSO, Principal Analyst
 - A veteran analyst with 20+ years of experience in digital marketing, data analytics and retail technology
 - Independent Director of D2C company
 - **Kayo Murakami:** CEO
 - A veteran retail specialist with 20+ years of experience in Ecommerce and Brands
 - Independent Director of Apparel Company

