



Paul Schlossberg
President

FROM: Paul Schlossberg
DATE: September 22, 2017
SUBJECT: Update on the automated store business

There has been a surge of new players in this pipeline.

It's been 21 years since my first encounter with Shop 24 at SIAL in Paris. Many companies have entered the ACS business since then. Almost all failed. Most of those failures were self-inflicted – mistakes and problems which should have easily been predicted and thus avoided.

The recent activity made me stop and go back through my files. In just the past 12 months, there have been 11 new and/or revitalized entrants in automated shopping.

CONCEPT	BRAND OR OEM	COMMENTS
Foodles	Unknown OEM	French company
Pharmacy Vending machine	CVS Unknown OEM	In test markets in New England and NYC.
Lego vending	Unknown OEM	From recent article in <i>Fast Company</i>
Bodega	Bodega	Founded by ex-Googlers
Colesseo	Magex	
Uniqlo	Unknown OEM	Clothing
Pickup Towers	Unknown OEM	In test at 15 Walmart stores
Moby store	Wheelys	Mobile c-store prototype testing in Shanghai (HQ in Sweden)
Lisa	Accelerated Retail Technologies	John Murn's group, taking over former AVT concepts
Store of the Future	Coop Italia	Interactive technology and robotics in-store. Not really an ACS, but very innovative.
Feast	Unknown OEM	Toronto-based food sales kiosks

One more thing: Pay very careful attention to Amazon and Whole Foods. You can bet that there will be unattended kiosks selling food. My expectation is that they will use very sophisticated algorithms to plan and manage those deployments. Beyond that, there are very few companies with the ability to match Amazon's smarts. They will likely be exceptionally good at curating product selection, managing pricing and maximizing merchandising.

Please feel free to contact me if you have any questions or need any additional information. If you're aware of any new companies in automated retailing, please let me know.