



ZEBRA

Transformational Benefits at the Intelligent Edge

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PERSPECTIVE





“One of the **most powerful forces** **reshaping markets** will be the **production** and **provision** of **products and services** ever closer to the **point of demand.**”

Robert C. Wolcott, Ph.D.

Executive Director
Kellogg Innovation Network
Managing Partner, Clareo

62% of online customers believe **fast delivery** is the most important aspect of a **positive experience**

Fueling the growth of the on-demand market is e-commerce. By 2026: **Global e-commerce spending will grow 50% to over \$6 Trillion**

In the United States, approximately **43% of all dollars spent in retail e-commerce** transactions will be done via mobile devices in 2024

The market for **on-demand services** is expected to reach a **whopping \$335 Billion by 2025**



ON DEMAND

All While Dealing with a Triple Squeeze...



Cost and Shortage of
LABOR



Optimizing for new
EXPECTATIONS



Diminished
PREDICTABILITY

LABOR

Cost and Shortage of

EXPECTATIONS

Optimizing for new

PREDICTABILITY

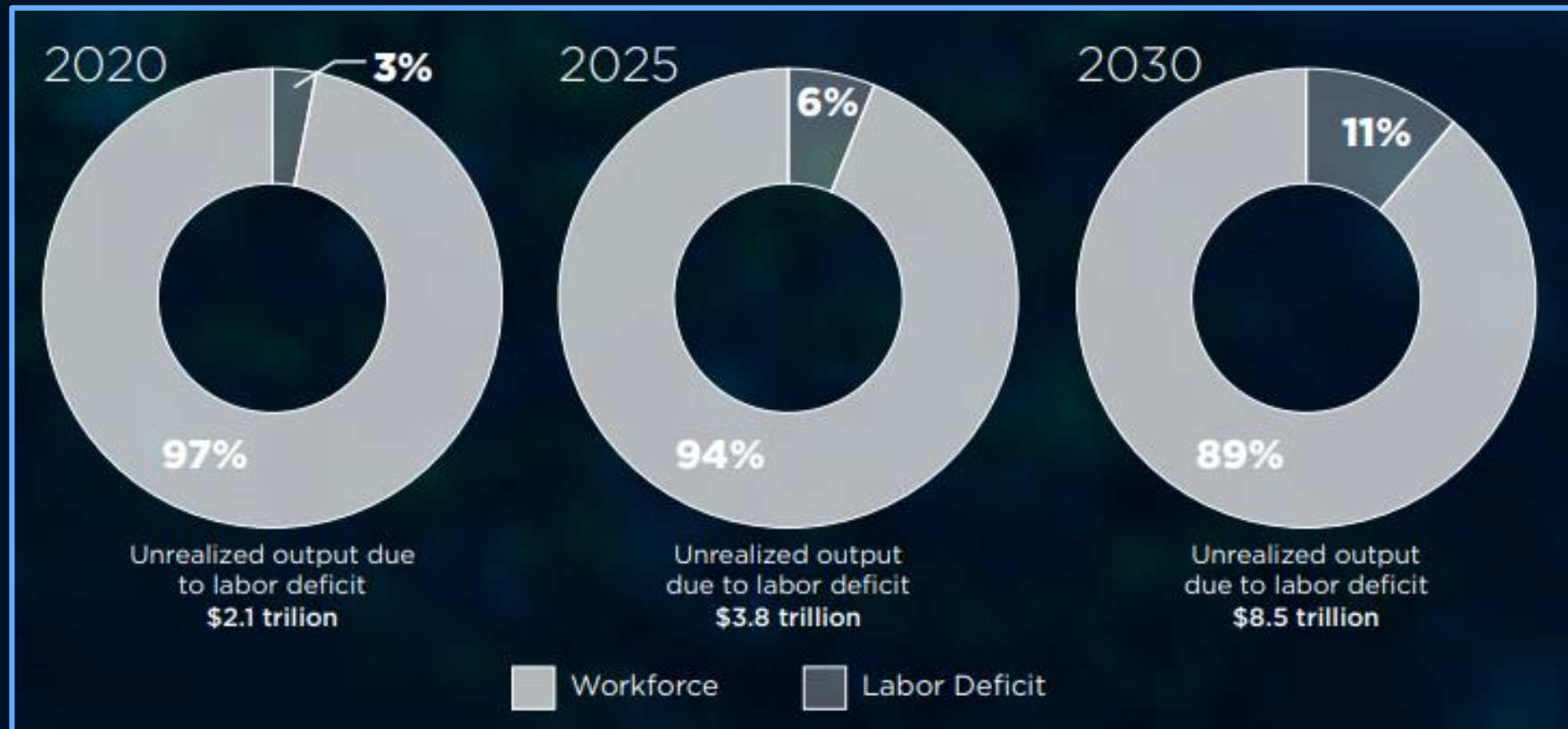
Diminished

Cost and Shortage of **LABOR**

Optimizing for new **EXPECTATIONS**

Diminished **PREDICTABILITY**

Total Global Labor Deficit as a Percentage of Workforce



An aerial photograph of London at sunset. The Shard skyscraper is the central focus, its glass facade reflecting the orange and yellow light of the setting sun. The city's skyline is visible in the background, with other buildings and construction cranes. The foreground shows a dense urban area with various buildings and streets.

85.2
million workers

\$8.5
trillion
unrealized
revenue

Cost and Shortage of **LABOR**

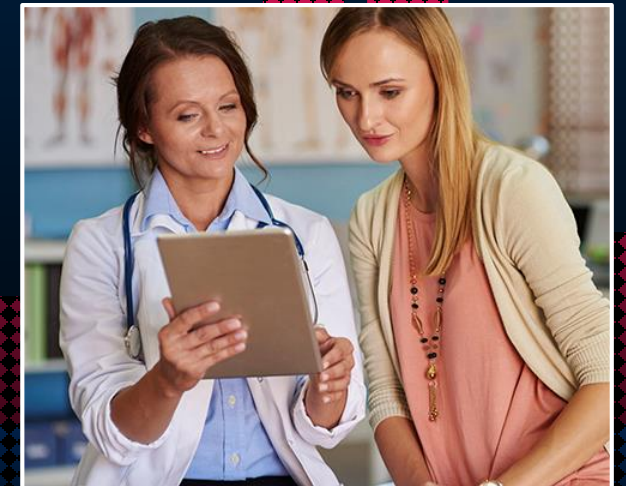
Optimizing for new **EXPECTATIONS**

Diminished **PREDICTABILITY**

WE LIVE IN A WORLD OF LIQUID EXPECTATIONS,
WHERE EACH NEW AND AMAZING EXPERIENCE
BECOMES THE STANDARD TO WHICH ALL
OTHERS ARE COMPARED



**“IF I CAN HAVE A SEAMLESS EXPERIENCE
WHEN I VISIT THE APPLE GENIUS BAR,
WHY ISN'T IT THE SAME WHEN
MAKING A HEALTHCARE VISIT?”**



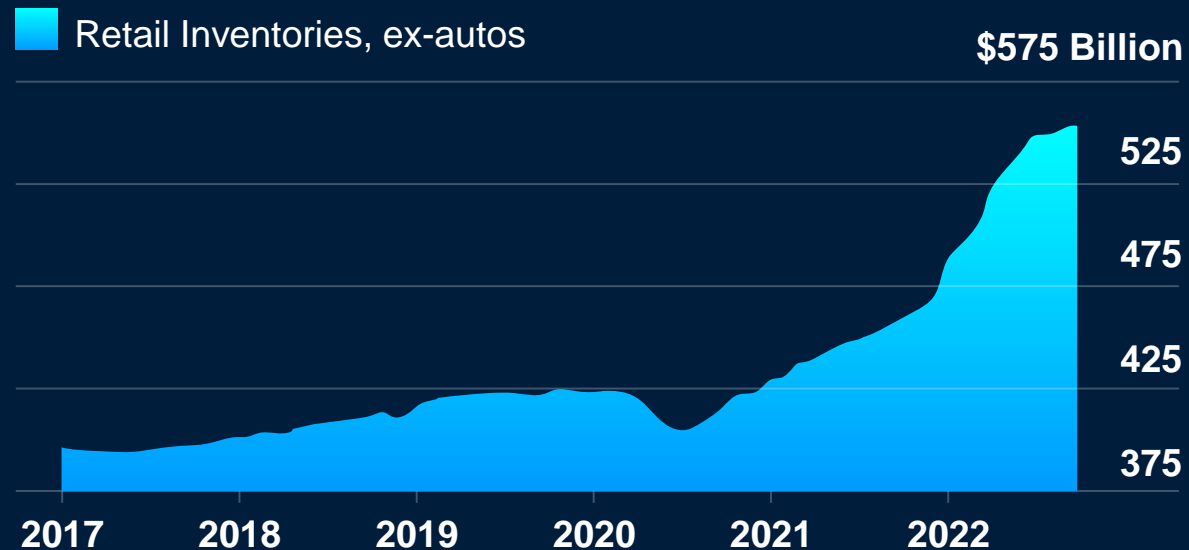
Cost and Shortage of **LABOR**

Optimizing for new **EXPECTATIONS**

Diminished **PREDICTABILITY**

US Retail Inventories Surge

Stockpiles at Retailers Exceed \$550 Billion this Year



2022 Total Inventory Distortion

Cost or Out-of-stock and Overstock (Increase over 2020)

Out-of-stock
\$1.235 Trillion
+8.1%



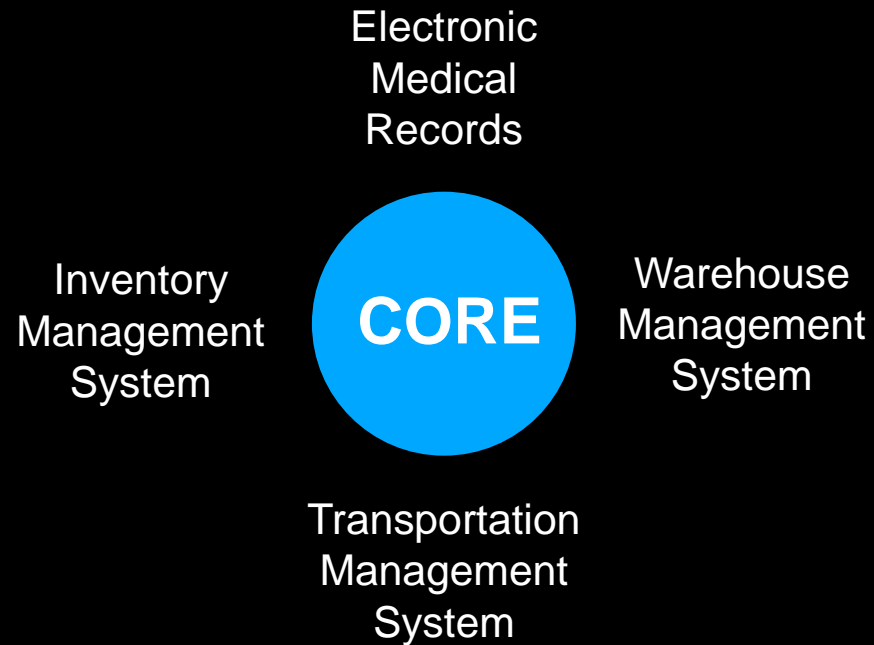
IHL Group

Overstock
\$758.3 Billion
+21.2%

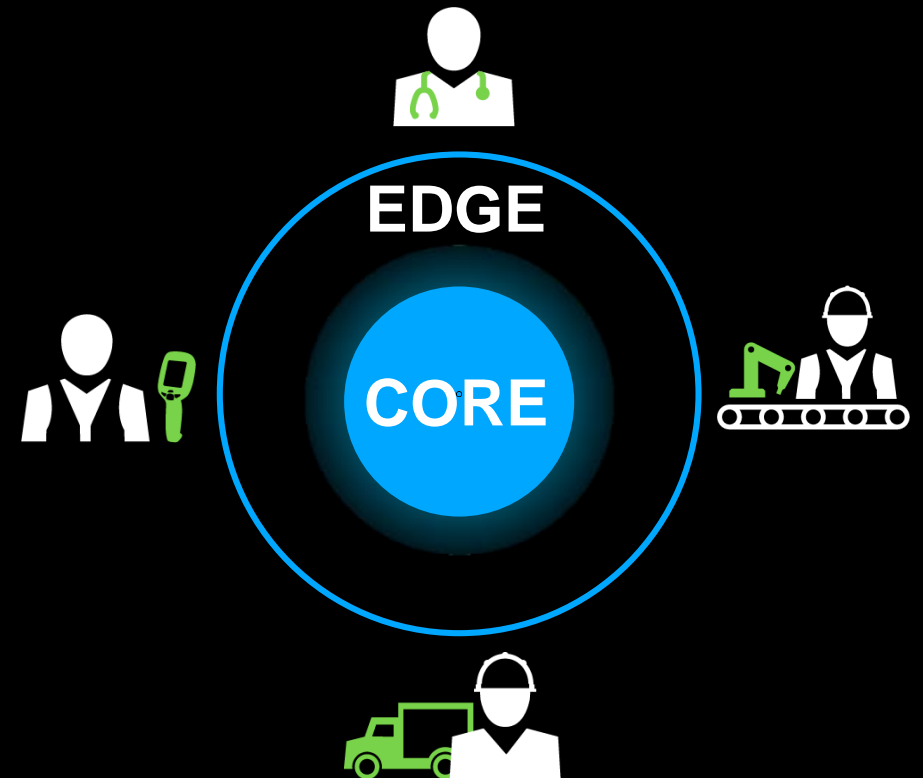
Digital innovation *began* at the core of the enterprise...

...but it *now* lives at the enterprise edge, where work gets done.

Systems of Record



Systems of Reality



A photograph of two women in a clothing store. They are standing in front of a rack of red velvet coats. One woman is pointing at a coat, and the other is smiling. They are holding a large orange shopping bag. The image has a blue overlay on the right side.

ENABLING FLAWLESS FULFILLMENT

CHALLENGE

On average, **only 65%** of inventory reported through inventory management software is correct

Zebra retail intelligence

WHAT IF THESE WALLS COULD TALK?

SOLUTION

SMART SENSOR ENABLED STORE



SHELFSIGHT
In-Store Fixed Camera-
Based Real-Time Image
Recognition System

vispera



REDUCING FOOD WASTE

The background of the slide is a photograph of several tall, stacked wire mesh crates. Each crate is filled with green cabbages. The crates are arranged in a way that shows multiple levels, with some crates in the foreground and others receding into the background. The lighting is somewhat dim, and the overall color palette is dominated by the green of the cabbages and the grey of the wire mesh.

CHALLENGE

One-third of food produced for human consumption is lost or wasted globally. This amounts to about 1.3 billion tons per year.

FARM TO FORK VISIBILITY



SOLUTION

REAL-TIME
ENVIRONMENTAL
SENSING

22°

TEMPERATURE
TOO HIGH!

Highest Temperature		Live read
22°C		Threshold 25°C
Shipments in the vicinity (20)		
20°C	Shipment ID 135635	
22°C	Shipment ID 135632	
20°C	Shipment ID 135629	
21°C	Shipment ID 135627	
21°C	1	



SAVING LIVES

CHALLENGE

Medical Error
is the **Third Leading**
Cause of Death in the
US, responsible for
250,000 deaths per year.

*Johns Hopkins University Medical Center

ELIMINATE ERRORS FROM OCCURRING



- 35% of nurses' time is spent on documentation
- 20% of nurses' time is spent on care coordination

SOLUTION

Identify and locate every patient, caregiver, piece of equipment, and medication in real-time

