



Industry Playbook

Retail Edition

Market Insights, Best Practices, Player Overview along the Value Chain

March 2025

Retail is adopting IoT, with global coverage requirements

Relevance of retail use cases for the IoT market:



Footprint 1NCE in the retail sector:



Sources: Market data courtesy of Transforma Insights, 1NCE Customer Insights
As of Jan 2025, 1NCE served 23,000 customers of which 1% are active in the retail sector.

Common use cases supported are smart vending machines, electronic shelf labeling, point of sale terminals, ticket machines, collection machines, and ATMs.

1% of our customers are building solutions in Retail, including POS terminals

	Customers %	Typical applications			Selected customers
Utilities	 20%	- Electricity meters - Gas meters	- Water meters - Leak prevention	- Network monitoring - Smart grid	 
Infrastructure	 8%	Remote Maintenance for elevators	- Solar Energy Monitoring - Charging stations	Water and heating metering	  
Logitics	 7%	- Asset tracking - Temperature monitoring	- Telemetry for vehicles - Geo-fencing	Cold-chain monitoring	 
Automotive	 17%	- Usage based insurance - Road-charging	- Fleet management - Car sharing	- Stolen vehicle recovery - Fuel level monitoring	  
Industry	 9%	- Oil monitoring - Industrial automation	- Tank monitoring - Equipment monitoring	Industrial sensors	 
Agriculture	 7%	Remote analysis of bee colonies	- Pest control - Yield monitoring	Geofencing and alerting	  
Smart Cities	 6%	Cost and energy reduction	Water leakage monitoring	Elevator management solutions	 
Healthcare	 2%	- Health monitoring - Refrigeration monitoring	Cleaning monitoring (hotels)	Digital signage	 
Consumer	 7%	Indoor Wellbeing Monitoring	Professional Coffee Machines' Monitoring	Energy consumption monitoring	 
Retail	 1%	Vending Machines Monitoring	Payment Processing		 

Key IoT use cases in Retail

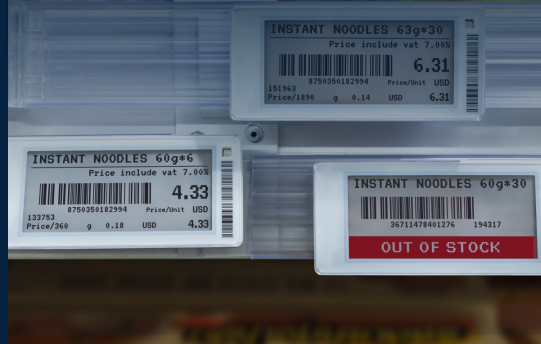
Smart Vending Machines

Smart vending machines use IoT technology to sell goods, such as snacks, beverages, or electronics, in various locations. Equipped with sensors and IoT connectivity, they monitor inventory levels, track sales, and perform predictive maintenance.



Electronic Shelf Labelling

IoT in Electronic Shelf Labeling (ESL) ensures labels are updated in real-time, reflecting price changes or promotions instantly across stores. It supports deployment in large retail environments, providing stable communication for label synchronization.



Point of Sale Terminals

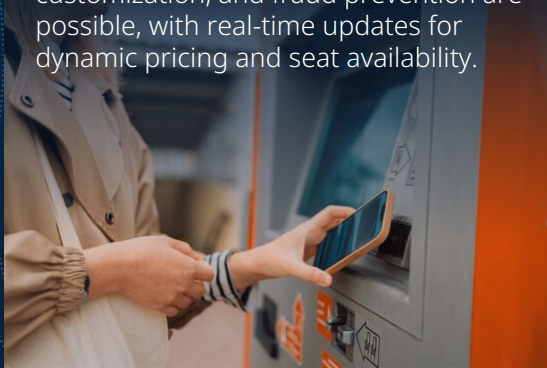
POS terminals adopt IoT to process transactions in retail, hospitality, and service industries more efficiently. They integrate hardware such as card readers, barcode scanners, and receipt printers with software that manages sales, inventory, and payment processing, and connectivity for real-time data synchronization.



Key IoT use cases in Retail

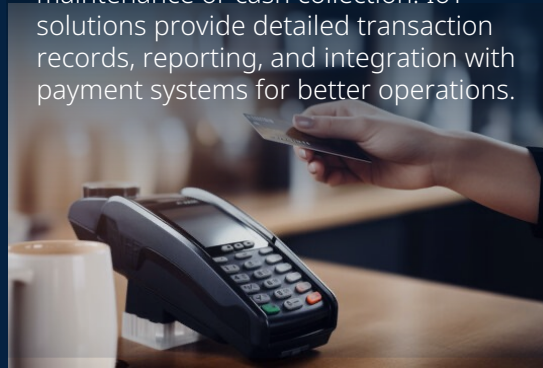
Ticket Machines

Using IoT connectivity and software ensures these machines stay online for real-time ticketing, payment processing, and integration with central systems. They can operate in diverse locations, from urban transit hubs to remote event venues. Payment validation, ticket customization, and fraud prevention are possible, with real-time updates for dynamic pricing and seat availability.



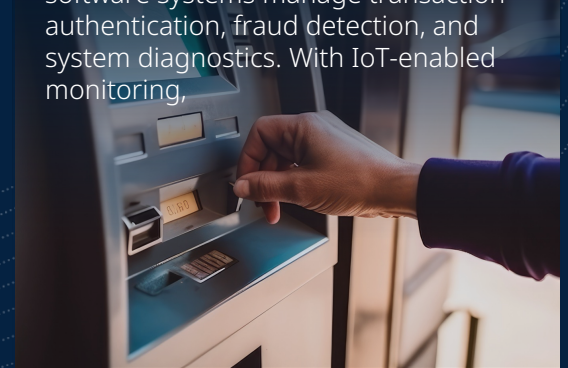
Collection Machines

Collection machines, often used for payments, donations, or recycling refunds, send transaction data instantly to central servers for processing and reporting with IoT technology. Equipped with sensors, they enable user interaction and notifications for maintenance or cash collection. IoT solutions provide detailed transaction records, reporting, and integration with payment systems for better operations.



ATMs

Automated Teller Machines (ATMs) use IoT technology to provide secure, real-time financial transactions, such as cash withdrawals, deposits, and account inquiries. They stay online for data synchronization with banking servers, even in remote areas. Specialized software systems manage transaction authentication, fraud detection, and system diagnostics. With IoT-enabled monitoring,



Overview of players with traction in the market

Key players in POS Terminal Vendors

Player	Logo	Location	Description	Website
BBPOS		Hong Kong	Mobile & portable payment solutions, mPOS devices & contactless readers	Link
Fiserv		USA	Financial services & payment processing solutions	Link
ID TECh		USA	Payment solutions, including card readers & POS peripherals for secure transactions	Link
Ingenico		France	Secure payment solutions & POS terminals	Link
Itron Electronics		China	Manufactures electronic payment terminals & solutions	Link
PAX Technology		China	Traditional countertop terminals, mobile POS, & unattended payment solutions	Link
Sunmi		China	Hardware solutions, Android-based POS terminals	Link
Verifone		USA	Payment & commerce solutions, POS systems & payment services	Link

 Find more at the **1NCE Knowledge Base**

Overview of players with traction in the market

Specialized players in **Vending Machine Manufacturers**

Player	Logo	Location	Description	Website
Crane Payment Innovations		USA	Vending solutions with integrated cash & cashless payments, telemetry & enterprise software integration	Link
EVOCA Group		Italy	Coffee machines & vending solutions	Link
FAS International		Italy	Energy-efficient vending machines, real-time monitoring	Link
Jofemar		Spain	Modular vending machines with telemetry, contactless payments & mobile integration	Link
Fuji Electric		Japan	Beverage vending machines with advanced cooling	Link
Magex		Italy	Smart vending machines with inventory trackin	Link
Royal Vendors		USA	High-capacity beverage vending machines with energy-efficient cooling	Link
TCN Group		China	Vending machines, remote management & cashless payment options	Link

 Find more at the **1NCE Knowledge Base**

Overview of players with traction in the market

Specialized players in **ATM Manufactures**

Player	Logo	Location	Description	Website
Diebold Nixdorf		USA	Integrated solutions connecting digital & physical channels	Link
DPL Group		Canada	Communication & remote monitoring systems for ATMs	Link
Hyosung Innovue		South Korea	ATM solutions, cash management systems, & payment technologies	Link
NCR Atleos		USA	ATM solutions, anti-overfill cassettes, contactless card readers, & interactive teller capabilities	Link
Triton Systems		USA	ATMs, user-friendly interfaces, security features	Link

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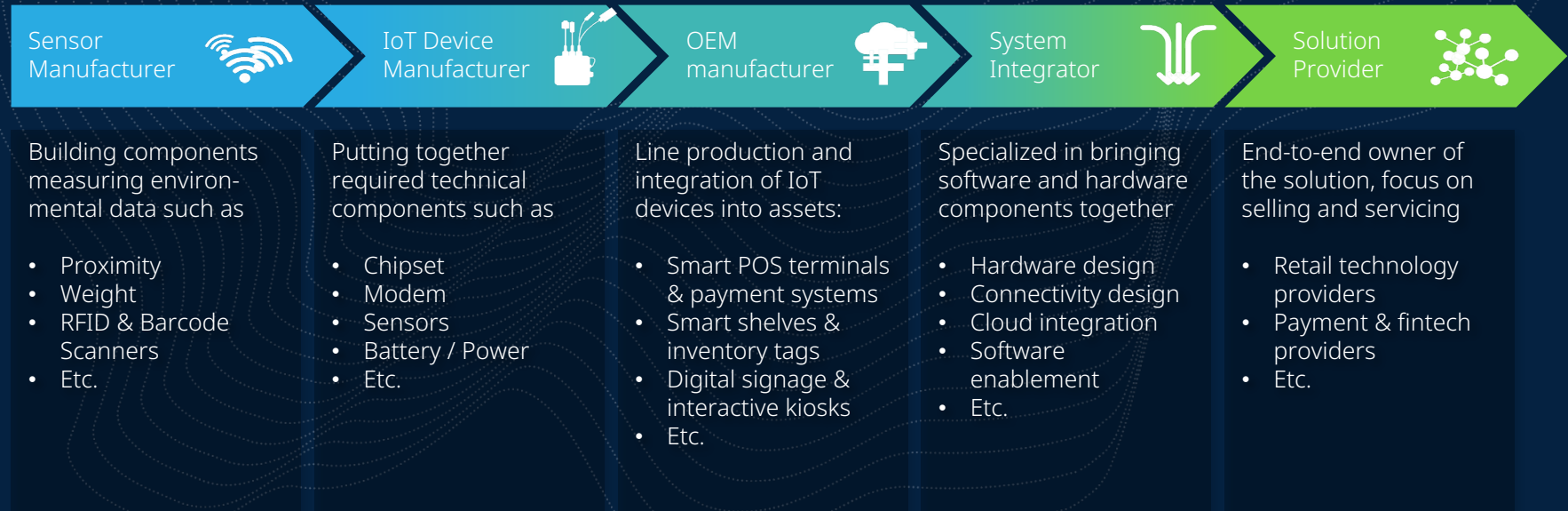
Players 1NCE is supporting in the field

Player		Use Case	More info
VISI/ONE		World's first cloud-based technology for digital price labelling with a special focus on the car dealer market	Link
Jellyfish (ShieldFi)		A crypto debit card featuring ShieldFi's fraud prevention mechanism	Link
August International		E2 Vital Sign Smart Watch, branded as "Audar Watch" for the retail market	Link
Sportstation 2		Sports console with the digital measurement feature	Link
CoffeeCloud		Monitoring the usage of professional coffee/barista machines; real time insights on coffee brewed, cleaning intervals or consumption of coffee beans	Link
BibeCoffee		Remote analysis of consumption data of coffee machines; turning them into smart connected precision terminals	Link
Velocate		Enhanced retail operations with asset protection, supply chain visibility, and theft recovery	Link

 Find more at the **1NCE Knowledge Base**

Understanding the roles of players along the value chain

Creating connected products in the Retail industry means to maneuver through the IoT ecosystem



1NCE has a dedicated offering for Smart Agriculture

	Typical customer requirements	Standard offerings	1NCE Offering
Pricing	• Single SKU • Cost transparency • Often only low data use cases	• Multiple suppliers for each region • Monthly fees, overage charges • Data selling focus, high data preferred	✓ All-in-1: 10 €/10 years of service ✓ Transparent: no monthly fees ✓ Lifetime Flat: 500 MB, 250 SMS
Coverage	• Global coverage • Support of LPWA technology • Multiple network and operator switch	• Country group pricing, zoning • No or limited NB-IoT and LTE-M support • Different SIMs for different regions	✓ 173 countries coverage; no zoning ✓ +50 LPWA networks supported ✓ Global SIM with eUICC support
Service	• Device Management • API support • Interoperability	• Device Mgmt not included • API use not available or at high costs • No compatibility with 3rd party software	✓ Included in 1NCE OS ✓ All functions exposable through API ✓ Can be natively used with 1NCE Plugins

We bring your data from the sensor to the cloud

Your Devices



1NCE Platform

Connect

- 500 MB
- 250 SMS
- 173 countries
- VPN / APN
- Data Streamer

OS

- Cloud Integration
- Location Services
- Energy Saver
- APIs
- Device SDKs

10 € for 10 years

Your Data



Business



1.00 €

Industrial



2.00 €

Chip



2.50 €

Sensor Data

Our 1NCE Lifetime Flat is the new standard in IoT

1NCE IoT Lifetime Flat

10 years of service including:

1NCE Connect

- 500 MB
- 250 SMS
- 173 countries coverage
- Open VPN
- API Usage & APN
- Data Streamer
- Monthly data limits
- IMEI Lock
- Freedom to Switch
- 3 months grace period

1NCE OS

- Cloud Integrator
- Device Locator
- Energy Saver
- Device Authenticator
- Device Inspector
- Device SDKs and Blueprints
- LwM2M Service
- Device Controller
- Admin Logs
- Access to Developer Hub (Documentation)

One time fee: 10.00 €

SIM Options



1.00 €



2.00 €



2.50 €

- ✓ Already covers all requirements for most IoT use cases
- ✓ Already sold to 23,000+ customers in 100 countries
- ✓ Widely used across all industries and verticals
- ✓ No minimum order quantities*

Optional Add-Ons and Extensions

Data Top-Up

Additional 500 MB and 250 SMS

+ 10.00 €

Lifetime Extension

Additional 10 years, 500 MB and 250 SMS

+ 10.00 €

High Data Option

High throughput 25Mbit/s

5.00 € / GB

Advanced Device Locator

High-res network location service

Plugins

Integrated 3rd Party Software

Free Trial

High Security Data Routing

IPSec / VPC Peering services

+ 1,800 € / yr

- ✓ Add-Ons trusted by 4,000+ advanced users
- ✓ Co-developed with and for customers

About 1NCE

Fast



23,000+ customers
won in 7 years



400+ team
across Europe,
Asia and US



30 million
managed endpoints



+100% year on year average growth

"1NCE launched its flat rate life-time connectivity offering for connected devices in 2018 and has achieved unparalleled growth in the past two years."

Johan Fagerberg, CEO, Berg Insight

Strong

- Global access under a strong
a family of local network operators

- EU  Deutsche Telekom AG
- USA  T-Mobile US
- Asia  SoftBank
- China  中国电信
- Claro  Claro
- Bell  Bell

Everywhere

Can be used for multiple
IoT applications



Smart
Agriculture



Waste
Management



Industrial
Automation



Fleet
Telematics



Smart City



Tracking



AR / VR



Smart
Buildings



Infrastructure
monitoring



Smart
Metering



Remote
Monitoring



Tracking
Devices

1NCE is a company offering a software platform for connected products that delivers future-proof, hassle-free IoT in 173 countries and regions. The software platform enables customers to easily, securely and reliably collect device data and turn it into actionable intelligence. This accelerates time-to-market for data collection projects by months, increases device lifetime by years, and allows efficient management of sensors from initial deployment to the end of the product lifecycle. More than 23,000 users and 60 Fortune 500 companies trust 1NCE with 30 million connected products worldwide.

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