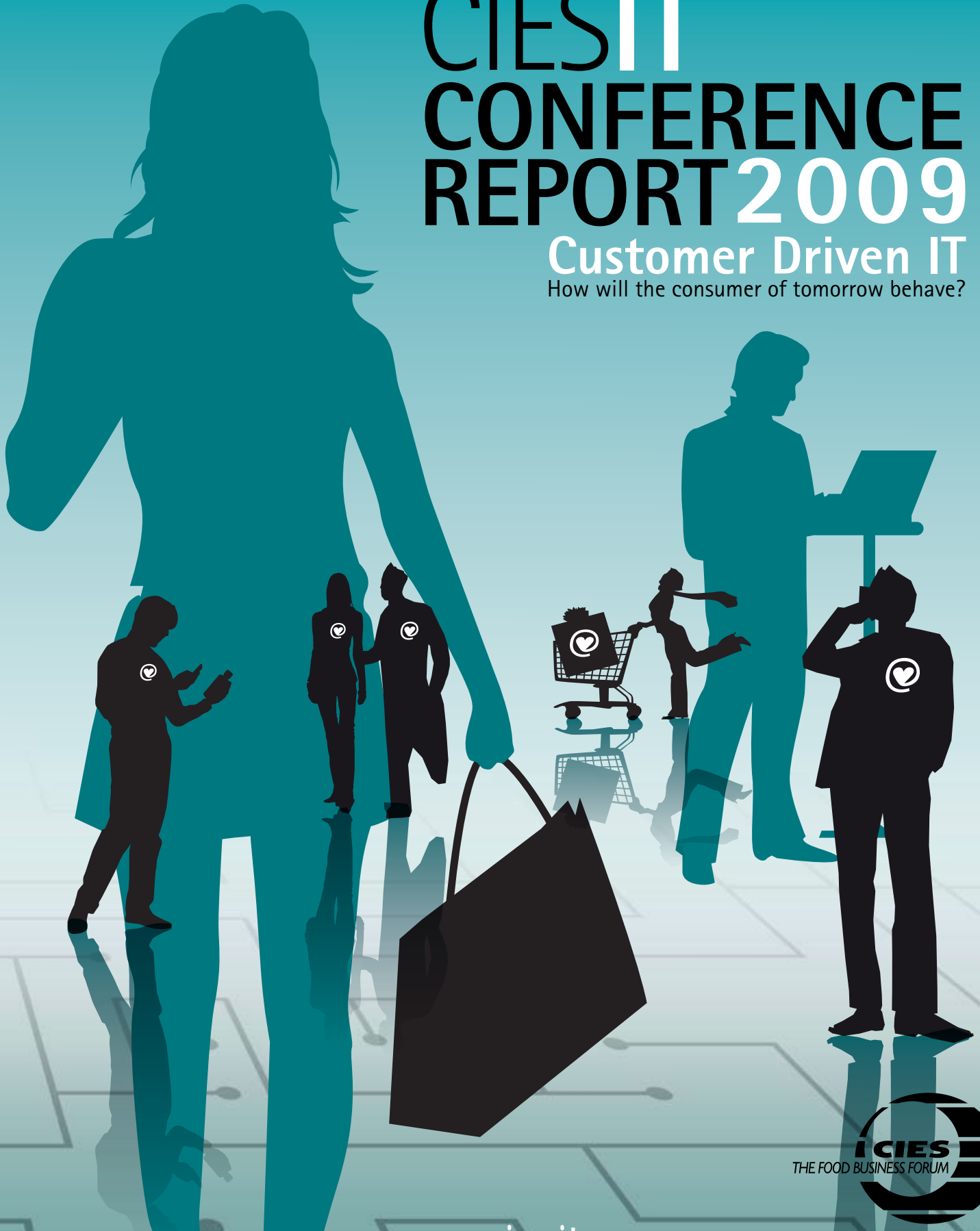


CIESIT CONFERENCE REPORT 2009

Customer Driven IT
How will the consumer of tomorrow behave?



What is the CIES IT Conference?

The CIES IT CONFERENCE

is the meeting for IT executives in the retail industry. Throughout this conference, CIES retailer and supplier members will share experiences in the area of consumer driven IT. These practical, down-to-earth and "feet on the ground" presentations are based on real experiences. Speakers will address benefits found and lessons learned and provide delegates with key learnings and "take-aways". The objective is to share best practices, exchange knowledge and provide opportunities to network and debate top of mind issues in IT.

The CIES IT Conference 2009 looked at the topic of Consumer Driven IT. Consumer behaviour is changing. Information Technology will help drive consumer choice, satisfaction, awareness and power. To be ahead of the game, we need to anticipate the needs of tomorrow's consumer. How will the consumer of tomorrow behave? What will be the impact on our business? Are you ready? These are the questions presented at the CIES IT Conference 2009.



The CIES IT Committee

Who develops the thematics of this event?

The thematics of the CIES IT Conference are defined by a committee of experts who meet on an ongoing basis. The CIES IT Committee creates this event as a platform for discussion on top-of-mind issues and to bring knowledge and networking opportunities to retail executives from around the globe.

The members of the CIES IT Committee are:

Chairman: KEVIN BERRY, Systems Director, WAITROSE, United Kingdom

- ▶ NUNO ABRANTES, Business Development Director & Group Controller, JERONIMO MARTINS, Portugal
- ▶ STEPHAN BIALLAS, Managing Director, METRO GROUP SOLUTIONS, Germany
- ▶ PAUL BUTLER, Global Business Services, e2e Planning Transformation & Global Demand Planning Services, PROCTER & GAMBLE, Switzerland
- ▶ AUGUST HARDER, Chief Information Officer, COOP, Switzerland
- ▶ FRANZ HÖLZL, Director, IT International Strategy, SPAR, Austria
- ▶ SHARON JESKE, Director, CIES-THE FOOD BUSINESS FORUM
- ▶ CLINTON KEAY, Senior Vice President & Chief Information Officer, SOBEYS, Canada
- ▶ ESPEN KJONSBERG, Chief Information Officer, NORGESGRUPPEN, Norway
- ▶ DANIEL MALOUF, Chief Information Officer, Information Systems & Organization, AUCHAN, France
- ▶ LUKE McCOLLUM, Vice President Strategy & Transformation, WAL-MART, USA
- ▶ TERRY MORGAN, CIO/SVP of Information Technology, DELHAIZE GROUP, Belgium
- ▶ ANDREAS MÜNCH, Member of the Executive Board, Head of Department Logistics & IT, MIGROS, Switzerland
- ▶ CLYDE PEREIRA, Chief Information Officer, COCA-COLA HELLENIC, Austria



THURSDAY 23RD APRIL 2009

Welcome to the 2009 CIES IT Conference

Kevin Berry, Systems Director, Waitrose, UK, and Chairman of the CIES IT Committee

Kevin Berry welcomed delegates from 21 countries to Amsterdam for the CIES IT Conference, which enjoyed a 22% increase in attendance on the previous year. He said that the focus of the industry had "moved from green to lean", as consumer needs and behaviour had changed rapidly. While sustainability had claimed the top spot in the CIES Top of Mind Survey in 2008, this year "The Economy & Consumer Demand" ranked first.



The multi-channel swap shop

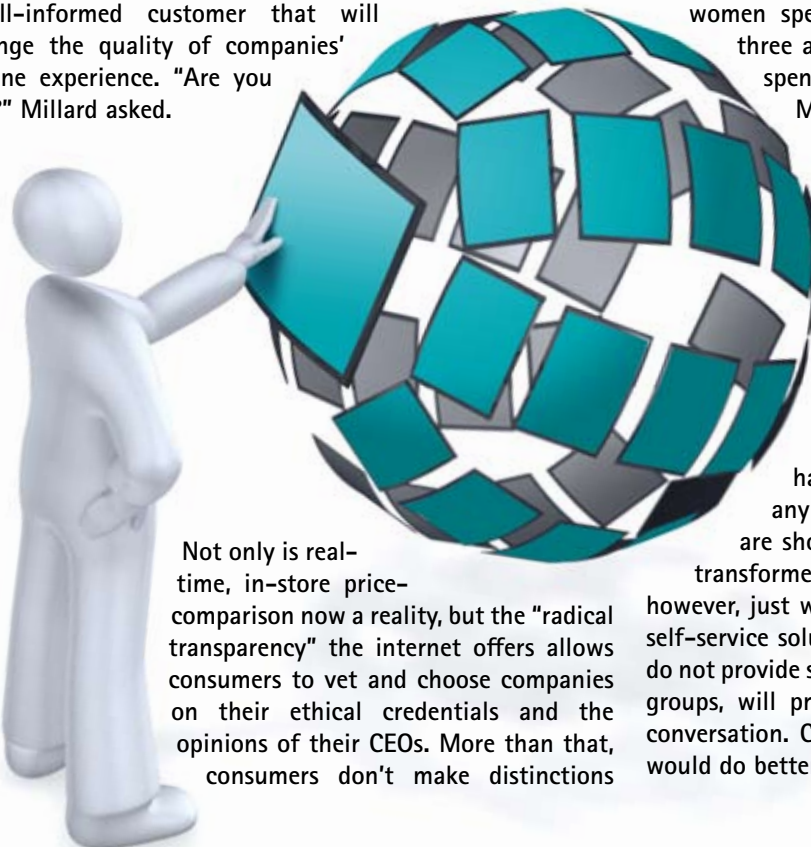
Nicola Millard, Customer Experience Futurologist, BT Global Services, UK

"We've all got the same customers," Nicola Millard told the conference, explaining why a telecoms company would come to speak to delegates at a food business conference. "And they're all doing slightly strange things." Notably, consumers are changing the way they use channels. The traditional value chain is being replaced by a system in which consumers play a central, active role. The key element is the fact that, now, consumers are co-opted to create part of the value they seek. The internet, in particular, handheld internet access, is creating a well-informed customer that will challenge the quality of companies' frontline experience. "Are you ready?" Millard asked.

between channels. They expect a seamless experience between web, phone and store and expect the same prices offline as online. Men and women shop differently online, Millard said. She had found that in physical channels, a man's average dwell time is six minutes, with a spend under GBP 50, while women spend an average of three and a half hours to spend GBP 430. "Oddly, the inverse is true online,"

Millard continued, as here it is men who dwell and browse, while women prefer to get offline quickly.

It is important, when looking at multichannel offers, not to "design out customer contact". In a BT study conducted in 2008, 60% of US consumers and 65% of UK consumers said they would rather phone with a problem than read the online frequently-asked questions (FAQs). Indeed, Millard came up with a model for three different types of shopper. "Visionaries" have enthusiasm, time and energy and will use any channel to get to their goal. "Utilitarians" are shopping because they have to. "The internet has transformed their lives," Millard said. "Customers in crisis," however, just want someone to talk to: they are intolerant of self-service solutions. The last point is vital, as if corporations do not provide support, websites such as Tripadvisor, or mothers' groups, will provide it, cutting the corporations out of the conversation. Companies cannot stop this happening, so they would do better to join in.



Not only is real-time, in-store price-comparison now a reality, but the "radical transparency" the internet offers allows consumers to vet and choose companies on their ethical credentials and the opinions of their CEOs. More than that, consumers don't make distinctions

Tips for using technology

- ▶ Use it to blur the line between front and back office
- ▶ Find out who your experts are and make them available via networks
- ▶ Networked experts can work from home
- ▶ For today's 14 year-olds, e-mail is passé. They connect via social websites and mobile devices
- ▶ CRM is not a box – it's a strategy: harvest consumer data from all channels

Shopper advocacy

Laura VanTine, Managing Consultant, IBM, USA

Consumers have fundamentally changed their shopping behaviour recently, cutting many discretionary purchases out of the shopping trip. When it comes to the recession, so-called "trading down" to lower-priced products – while representing 43% of grocery shoppers – is "the least of the problem". The most common tactic for managing budget squeeze is buying fewer items overall or postponing purchases.

However, consumer advocates (those loyal to their primary brand or retailer and likely to recommend it to friends and family) are on the rise in grocery, even as "antagonists" diminish in number. A valuable new group, dubbed "shifters" comprises those who are moving some or all of their purchases to other retailers. These consumers are motivated to seek new relationships.



Not only this, but they spend 7% more on average per month, 3% more during each shopping trip and 9% more of their total dollars at their primary retailer. IBM's research shows that shoppers will switch retailers after 3.1

bad experiences, or "three strikes and you're out," as VanTine put it. These dissatisfied shoppers are defined as "shifters". The value therefore lies in turning the shifters into shoppers and the shoppers into advocates. The good news is that those who abandon their primary retailer can still become loyal to their new preferred retailer.



Top three attributes that turn shifters into shoppers

- ① Price/promotion
- ② Convenience
- ③ Product availability

Top three attributes that turn shoppers into advocates

- ① Quality
- ② Store experience
- ③ Convenience

The consumer's view

Jean-Jacques Vandenheede, Director of Retailing Insights, Europe, The Nielsen Company, Belgium



Why are the retailers of today so disconnected with the wants and needs of today's consumers? Jean-Jacques Vandenheede offered some perspective. He began by sharing numbers from the Nielsen Consumer Confidence Index. "The economic crisis doesn't hurt 100% of shoppers," he said. "It only affects those who have lost their jobs. Those

who are in work have seen their purchasing power increase." Despite this, consumer confidence had fallen to an index of 77 in the first half of 2009 from 84 in the second half of 2008 and from a four-year high of 102 in the second half of 2006, according to Vandenheede. "Banks have never received as much money as today," Vandenheede continued (meaning personal savings). "But consumers are afraid to spend it."

Exploding further myths, Vandenheede said there was little evidence to support the theory that the so-called big switch to the discount channel and private label was driven by recession. The former was due to continued growth in the discount channel and therefore greater proximity to consumers, while the latter was consistent with long term strategies for retailers to increase private label penetration, Vandenheede said. It should be noted that Nielsen itself reported in October 2008 that 13% of consumers said they would shift to discounters in response to the recession. Vandenheede also had an answer for this: "Consumers don't always say what they mean. We ask them

leading questions and they give us politically correct answers," he revealed. These need to be filtered. In his "importance of attributes" graph, low prices fell into the "say it, but don't mean it" corner.

Sharing numbers from the 2009 Nielsen Shopper Trends report, Vandenheede showed that low price for most items was practically the least of consumers' concerns when selecting a shop. It ranked 22nd out of 23, the least important being ease of parking. No – what consumers value the most is "everything I need in one shop" (ranked first) and "a place where it's easy to quickly find what I need" (second). "Has high quality brands" ranked 11th. "We think consumers want low prices. Are we really listening to the consumer?" Vandenheede asked.



Round table

During discussion time, Ms Millard said that while there was a distinct uptake in online retail services, it was important to note that consumers did not see online as a separate "channel". They expect the same service levels, deals and prices in all channels. Mr Vandenheede underlined the importance of brand equity, or getting your brand into the customer's "Top of Mind". Tesco, he said, was consistently named among the top retailers in any given market, even where it had a very small market share. Ms Millard agreed and added that Tesco's use of customer data to give customers what they want was instrumental in this. She added that listening to consumers was important, but equally important, given they don't always say what they mean, was to watch them.

Welcome by Session Moderator

Stephan Biallas, Managing Director, METRO Group Solutions GmbH, Germany, & Member of the CIES IT Committee



Innovative payment methods in retail

Ulrich Spaan, Vice President Research, IT, EHI Retail Institute, Germany

Twenty or thirty years ago we paid retailers in cash "because that was all there was", Ulrich Spaan told the conference. Today, payment methods abound. In Germany, non-cash payments are worth 38.6% of the total, but are forecast to rise to 43% by 2012.

But is this simply adding unwanted complexity at the checkout? Not necessarily, if payment can be used as a way to improve the customer experience. Four innovative ways of paying are currently gaining traction: contactless payment, by card or by mobile phone; fingerprint; self checkouts. Research by EHI found that 30% of retailers believed contactless payment would have a use in their stores in 1-3 years. Contactless payment by card can greatly speed up the checkout process, and benefits from the fact that most people already have a card of some kind. Chief among the drawbacks is the fact that the systems are dominated by credit card companies, which extract transaction fees. By contrast, contactless payment by mobile phone requires telephones enabled with near-field communication (NFC) technology; at present only two telephone models of this type exist and manufacturers are reluctant to implement the technology. In addition, the systems are still dominated by the credit card companies.



This leaves fingerprint payment systems. Germany is forging ahead with this, although EHI's research suggests close to 45% of companies see no relevance for the technology in the foreseeable future. The system also adds risk for the retailer beyond the obvious privacy issues: the retailer also bears the risk of default. EHI's data also suggests a sizeable majority see no use for self-checkouts in the foreseeable future, despite the system's rapid growth. The question therefore remains: is too much technology at the point of sale likely to confuse and put off customers? Ultimately, consumers will decide how they want to pay, but retailers need to be ready.





CIES IT Conference 2009

Amsterdam | 22-24 April

Customer Driven IT

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Point of sale banking as partnership

Per Knut Christiansen, General Manager/Head of Administration in Postbanken Norway, DnB NOR; Odd Birkenes, Director, Value-added Services, NorgesGruppen; Norway

Per Knut Christiansen and Odd Birkenes gave an overview of a partnership between NorgesGruppen, Norway's largest retailer, and DnB NOR, the country's largest bank. NorgesGruppen had had a positive experience adding post offices to its stores, which offered limited banking services. When the "Post in Store" concept reached 700 stores, the retailer considered it had the experience and competence to handle more complex banking operations. This fit well with the aspirations of DnB NOR. The country's leading financial service provider was no longer interested in providing daily banking services – deposits, withdrawals, payments and transfers – to its customers, due to the high cost of operating branches and handling cash. NorgesGruppen had the necessary infrastructure – 1500 stores with long opening hours – and could offer the daily services at a lower cost. As a result, the bank was able to eliminate the entire cash operation: "We don't have any cash handling at the banks now – the stores do it," Christiansen said. DnB NOR closed down



50 bank offices in 2008 and has closed a further 80 so far during 2009. The bank has also shut down 50 of its 450 ATM machines, claiming they were not profitable. "Customers have to come to our store to use the bank," Birkenes, concluded. Indeed 28% of traffic at NorgesGruppen stores is banking only, but "the majority are coming for both". NorgesGruppen has been so taken with the scheme that it is now bidding to handle other banks' cash: a pilot with Spare Bank 1 began in March 2009.

DnB NOR's IT solutions for Bank in Store services are wholly integrated with the store systems, linking EFTPOS terminals and card readers in store back to the bank's data centre. Cashiers see a simple and highly ergonomic interface that prompts them to select Bank in Store, before clicking on "Giro in", "Giro out" and so on. Meanwhile, customers using banking services at the point of sale receive a standard till receipt itemising bank transactions.



Consumer-driven IT

Marijn Fillekers, Innovation Architect, Albert Heijn, Europe



Albert Heijn believes innovation is a critical function of its success. The chain was instrumental in the development of the barcode system and was the first supermarket to introduce self-service and consumer magazines, in the fifties. In 2005, Albert Heijn invented a self-scanning system "guaranteed to get you out of the

store in one minute". Customers pick up a hand-held scanner as they enter the store and scan their purchases as they go. At the end of their shop they connect to a "pay tower", pay and return their scanner. More recently, Albert Heijn has institutionalised innovation within the company. Each employee receives an "Innovation Bible", encouraging the propagation of ideas. There is a dedicated innovation team, whose brief is to capture these new ideas and follow them up, involving customers right from the start and letting them decide on the future of the project. "The customer really is driving our innovation," Marijn Fillekers told the conference. Other innovative projects currently being tested include: "Allergy Check", which alerts customers to allergens in food products; "Tip 2 Pay", a system for fingerprint payment on trial with 600 customers; and a similar pilot with mobile phone payment. The latter allows the chain to add 10 checkouts at virtually no extra store space. The innovation team

reports back to the rest of the business in a newsletter and runs an innovation café where people can drop in to discuss ideas.

The secrets of continual innovation involve thinking big and acting on a small scale to avoid wasting money. Things seldom drag on: projects are allowed a maximum of 100 days to trial. "It's important to keep speed in the process," Fillekers said. "Just start and one thing will lead to another." He acknowledged, however, that good, creative ideas will not succeed without buy-in from senior management. "It needs to be supported by the board, which we are."

Key takeaways

- ▶ Innovation pays off
- ▶ Connect and create an open community
- ▶ Execute many small trials
- ▶ Let the customer guide you
- ▶ Learn to understand the customer's future needs
- ▶ Maximise added value for the customer

Bringing technology into the hands of the shopper

Gerd Wolfram, Managing Director, MGI Metro Group Information Technology, Metro, Germany

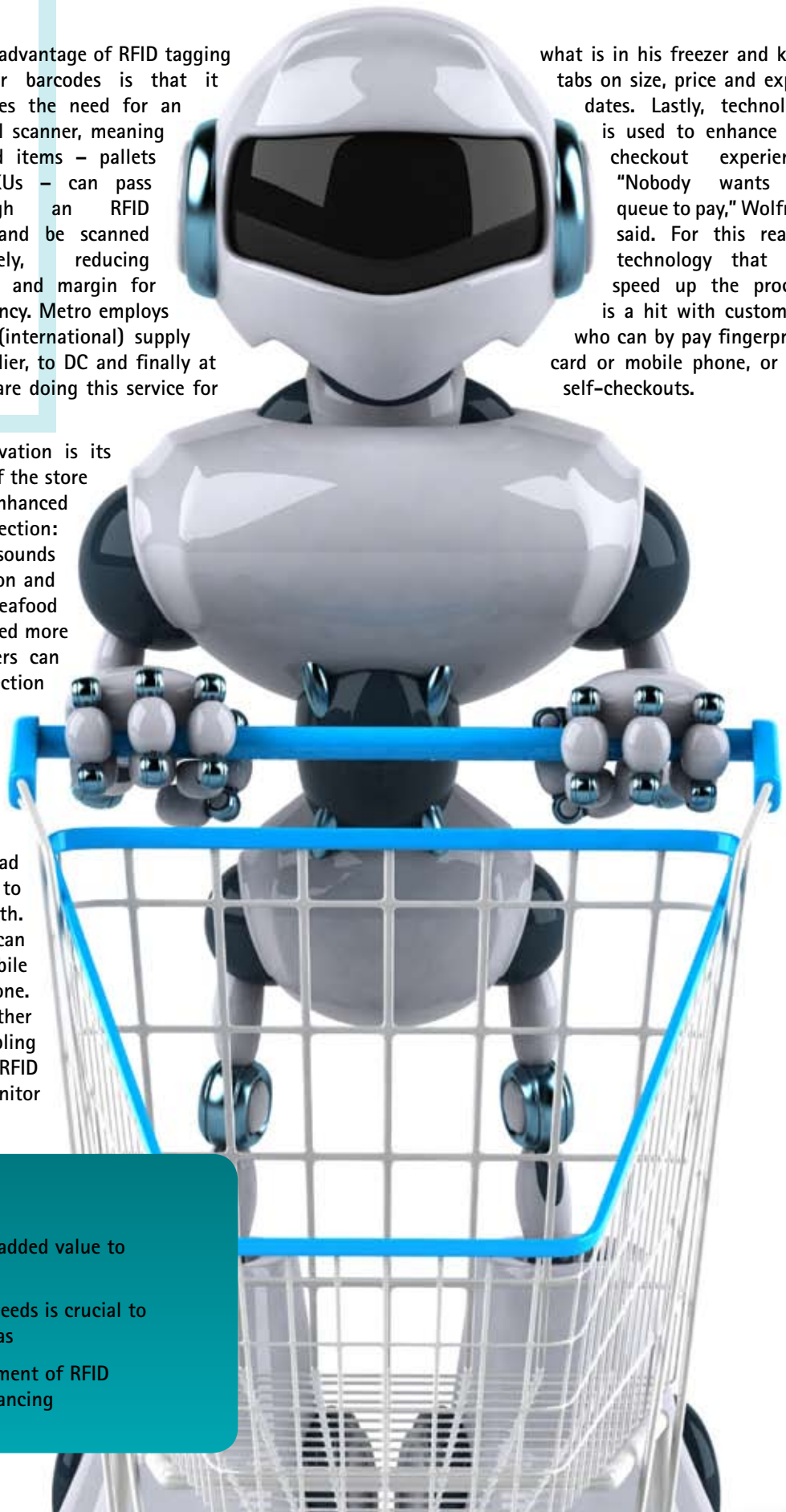


The advantage of RFID tagging over barcodes is that it obviates the need for an optical scanner, meaning tagged items – pallets or SKUs – can pass through an RFID gate and be scanned passively, reducing labour and margin for

error, while increasing time-efficiency. Metro employs the technology along the entire (international) supply chain, from manufacturer to supplier, to DC and finally at stores. "Each day, more suppliers are doing this service for us," Gerd Wolfram said.

But Metro's main focus of innovation is its "Future Store" concept. Features of the store include "sound showers" and enhanced scent in the fresh seafood section: customers can hear birds and other sounds of the sea, while the scent of lemon and herbs mingles with the natural seafood smells. The sports section is designed more like a showroom, where customers can try out equipment and the wine section offers a wine-tasting facility and terminal, where customers can access information about the products. The company uses a giant "megalight" billboard to advertise promotions outside the store; customers can also download information about promotions to their mobile devices via Bluetooth. Inside the store, customers can scan barcodes with the camera of a "mobile shopping assistant" or mobile phone. RFID technology has found another application inside the store, enabling Metro's "Smart Freezer". On-item RFID allows the butcher to remotely monitor

what is in his freezer and keep tabs on size, price and expiry dates. Lastly, technology is used to enhance the checkout experience. "Nobody wants to queue to pay," Wolfram said. For this reason technology that can speed up the process is a hit with customers, who can by pay fingerprint, card or mobile phone, or use self-checkouts.



Key takeaways

- ▶ Innovation must provide added value to customer
- ▶ Responding to customer needs is crucial to the development of new ideas
- ▶ Next steps in the development of RFID technologies are rapidly advancing

FRIDAY 24TH APRIL 2009

Breakout sessions

Welcome by Session Moderator

Andreas Münch, Member of the Executive Board, Head of Department Logistics & IT, Migros, Switzerland & Member of the CIES IT Committee



C-Stores: 'C' stands for Customers

Yoichi Yokomizo, Executive Vice President, CIE, Lawson Stores, Japan
Takaaki Haraguchi, Senior Executive, Accenture, Japan



Some 95% of Lawson convenience stores are franchised. The franchisee takes its own risk on inventory and pays a royalty to Lawson on gross profits; in return, Lawson provides merchandising, logistics, systems, marketing and knowledge. Japan's convenience store market

is saturated and so growth can no longer come from simply opening new stores. A new approach to organic growth is needed. The solution was to analyse and use shopper data and tailor offers and store formats to regional preferences and customer profiles.



Lawson worked with Accenture to create the Intelligence Competency Centre (ICC) which was developed. This entailed confronting certain "monsters", or challenges, such as the unwillingness of franchisees to make strategic inventory investments. Lawson slayed the monster by sharing the investment burden and offering franchisees a fact-based rationale for compliance. Lawson now operates five formats and tailors assortments within these to meet the demands present in each location. Mr Yokomizo's advice for innovation: "Think fully. Think slowly."

Technical Applications of POS Consumer Banking

Svein Krakk, IT Director – Retail, NorgesGruppen, Norway
Rune Indrevoll, Senior Manager, Accenture, Norway

The Bank in Shop project has realized several benefits:

- ▶ Improved customer service and convenience in day to day banking services
- ▶ Improved simplification, automation and efficiency for the user



- ▶ End-to-end process design across the total value chain
- ▶ More cost efficient delivery of service to the consumer
- ▶ Seized new business opportunities



Mobile phones: putting consumers in the driving seat of IT innovation

Joe Horwood, GS1 Marketing, GS1, Belgium

Jens Eckholdt, Retail Innovation, MGI Metro Group Information Technology, Metro, Germany

Olivier Raynal, Innovation Manager, Carrefour, France

There are 4 billion mobile phones in the world, compared to 1.5 billion TVs and less than 1 billion cars and PCs. Consumers are harder to reach and yet better informed than ever. According to GS1, Germany has achieved 100% penetration for mobile phones: "Everybody has one." Mobile phones can transform the shopping experience. But people use their mobile phones in different ways. They can be used

for convenience, to scan prices and so on. They can also be used to deliver information. Applications include payment, calculating shopping basket sum, CRM, coupons and loyalty and information on promotions. However, the use of mobile phones for these applications is not without barriers. Consumers change their phone on average every 24 months, whereas supermarkets change their checkout systems around every three to five years. The technology is also a barrier: there are variable standards with no interoperability. GS1 is working towards a set of standards for interoperability and scalability.



Plenary Sessions

Welcome by Session Moderator

Paul Butler, Global Business Services, e2e Planning

Transformation & Global Demand Planning Services, Procter & Gamble, Germany & Member of the CIES IT Committee



The manufacturer response

Alistair Hill, Supply Network Solutions, Associate Director, Procter & Gamble, Switzerland

In the late nineties, Procter & Gamble noticed its demand forecast accuracy was getting worse over time: demand swings on a weekly basis were volatile and increasingly erratic. And yet, the company had no visibility on these fluctuations. Clearly a richer flow of information was needed in order to better manage the promotions that were such a large part of the company's business. The company's solution involved a dynamic algorithm – an "artificial intelligence" system – that used actual sales history to "learn as it goes" and make predictions. By switching information sources at different "event horizons" (or times) – from classic demand planning to order information, to shipments, warehouse withdrawals and inventory and consumer sales – the system could offer Procter & Gamble demand "sensing", reducing the margin for error from 50% to

20%. In addition to the promotion analytics this afforded, the system's alarm system could alert the company to distribution voids and non-performing inventory. The business benefits included a reduction in supply into the network, out of stocks, phantom stock and labour. As a result Procter & Gamble could operate a leaner manufacturing process, using the system to set manufacturing targets for the following day.



Key takeaways

- ▶ Service improves with end-to-end demand visibility
- ▶ Enable visibility through agile operating strategy changes
- ▶ Retailer-supplier collaboration is imperative

Using technology in innovative ways to delight the consumer

Clyde Pereira, CIO, Coca-Cola Hellenic, Austria

Although Coca-Cola Hellenic, as a bottler, doesn't have any shops, the company still operates "a retail business managed through thousands of points of presence, to serve consumers with hot and cold refreshments and snacks, 24 hours a day, all year round". Vending machines. While the business model and overheads are somewhat different, Clyde Pereira told the conference that Coca-Cola Hellenic faced "similar challenges to our retail partners in establishing a purchasing experience for our consumers that will determine if they buy or pass by".

Traditional vending machines have several drawbacks: they require a physical visit from the bottler to take stock and remove cash and offer little in the way of a "draw" for passers-by. It is difficult to estimate in advance how much stock will be needed on each visit, creating wasted journeys and the need for return trips.



They are also dependent on coins: inconvenient for users and risky for the bottler. Using the GSM telemetry platform, Coca-Cola developed machines that could communicate stock levels back to the bottler, giving a realistic idea of demand and enabling more efficient visits. They also allowed cashless payments. In Japan, where Coca-Cola operate on million machines, consumer e-cash use is high. Moving on from GSM, Coca-Cola developed vending machines based on the broadband internet platform. These could host wireless hotspots and offer a high level of consumer interaction and offer digital products such as ring tones, phone top-ups, music downloads, games, ticketing for concerts and travel and "instant rewards". In that sense the machine became more of a hub. Finally, large touch-screen vendors were showcased at the 2008 Beijing Olympics and will be tested in selected US malls.

How the word will change: are you ready?

Andreas Schöenberger, CEO, Google Switzerland



Andreas Schöenberger spoke about the democratization of information afforded by the internet and placed Google at the centre of this revolution, showing an advertisement in which a star student reveals he is getting his stellar learning from Google on his mobile phone. The clip underlined the point that – notwithstanding

government restrictions on web access and search engine results in some nation states, fully complied with by Google – the "same information is available in Africa and Harvard".

Another key point was that, increasingly, consumers are online during TV prime time. Again, Schöenberger saw Google as central to this shift, demonstrating user-generated video website Youtube, now owned by Google. "For kids, life is where the net is," he asserted. What's more, for younger generations, those he called "digital natives", the statement "if it isn't on the net, it doesn't exist" rings true. The message for the food business was twofold: firstly, Schöenberger demonstrated Google's targeted advertising system, the implication being that marketers would do better to focus

on this platform than plough money into TV. Secondly, the revolution in networked communication and user-generated content – known as Web 2.0 – has changed consumer markets from a "push" to a "pull" model, meaning that consumers were actively seeking to influence or indeed create the products and services they want and need. Unsurprisingly, as the pre-eminent web search engine in most countries, Google was seen as central to this change too: "Google is a platform to connect people with needs to the people who fulfil them," Schöenberger concluded.



Next Events

2009	17 th – 19 th June New York, USA	The CIES World Food Business Summit <i>Ingredients for success in turbulent times</i>
	14 th – 16 th October Istanbul, Turkey	The CIES Supply Chain Conference <i>The Keys to Success in a Volatile Market: Speed, Agility, Collaboration & Innovation</i>
	18 th – 20 th October Shanghai, PRC	The CIES Future Leaders Congress <i>The new world of cost and value</i>
	3 rd – 5 th November Athens, Greece	The CIES Marketing Forum <i>The Event for Marketing Executives Seeking Retail Insights, Innovation and Inspiration from Around the World</i>
	8 th – 9 th December Shanghai, PRC	The Global Social Compliance Programme
2010	3 rd – 5 th February Washington D.C., USA	The CIES International Food Safety Conference
	21 st – 23 rd April Vienna, Austria	The CIES IT Conference
	23 rd – 25 th June London, United Kingdom	The CIES World Food Business Summit

CIES – The Food Business Forum would like to thank the following companies for hosting the site visits on Wednesday 22nd April:



Heineken
International

CIES – The Food Business Forum would like to thank the following companies for their valued contribution to this event:



Aldata



WINCOR
NIXDORF

What is CIES?

CIES - The Food Business Forum is the only independent global food business network. It brings together the CEOs and senior management of around 400 retailer and manufacturer members of all sizes, across 150 countries.

CIES retailer members alone generate over €1500 billion, employ 6.4 million people and operate close to 200,000 stores. The manufacturer members account for €640 billion in sales.

CIES has been growing with the food business for over 55 years. It provides a real global platform for thought leadership, debate and networking between retailers and their partners. Its strength lies in the privileged access it offers to the key players in the sector and the sharing of best practice at the highest level. It has a mandate from its members to develop common positions on key strategic and practical issues affecting the food business.

With its headquarters in Paris and its regional offices in Washington, D.C., Singapore, Tokyo and Shanghai, CIES serves its members throughout the world.

CIES Mission is:

- ▶ to provide a platform for knowledge-exchange, thought-leadership and networking and
- ▶ to facilitate the development of positions and tools on key strategic and practical issues affecting the food business.

CIES Products include international "management programmes, newsletters and studies as well as tailor-made member services. Each programme is headed by a retailer-led committee or a task force whose role is to identify top-of-mind issues.

Current programmes are The World Food Business Summit, Future Leaders, Marketing, IT, Supply Chain, & Food Safety & The Global Social Compliance Programme.

For more information visit www.ciesnet.com



"MORE FOR LESS"

Optimizing Operational Excellence in Challenging Times

2010

Vienna, Austria, on 21st - 23rd of April

CIES IT CONFERENCE

www.ciesit.com