



# **FUTURE LEADERS PROGRAMME**

**26<sup>th</sup>-28<sup>th</sup> October 2017**  
Stockholm, Sweden



## **EXECUTIVE SUMMARY**

[www.tcgfflp.com](http://www.tcgfflp.com)

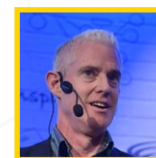




## Introducing the 62<sup>nd</sup> FUTURE LEADERS PROGRAMME

### BUILDING LEADERS FOR COMPANIES WITH PURPOSE

## The 62<sup>nd</sup> FLP's Key Quotes



"The key strategy is to make business more personal and local to engage customers more."

**Mike Barry**  
Marks & Spencer

"There isn't one type of leader. You don't have to be charismatic, but you should build on your own strengths."

**John Bradshaw**  
Pick n Pay



"In a rapidly changing world, the only long-term competitive advantage is to learn things faster than the world is changing and translate the learning into meaningful innovation."

**Johan Eriksson**  
Google

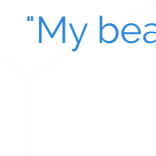
"Companies that don't have a purpose will have to get one."

**Peter Freedman**  
The Consumer Goods Forum



"It is about YOU. When you eat and drink you vote for the world you want to live in."

**Isabelle Grosmaître**  
Danone



"My beating time is useless: they do not need me beating time. Having expectations: that's what my role as a conductor is all about."

**Dr Raphael von Hoensbroech**  
Konzerthaus Berlin



"In many ways digitisation as a transformation process is like a Californian surfing competition. First, you have to get into the water; second, you must pick the right waves; and third, you must make the most of those waves."

**Joakim Jansson**  
DigJourney

"We need to shift our focus from competitor-obsessed to customer-obsessed."

**Per Strömberg**  
ICA Gruppen



"If you want to be happy, don't aim for happiness, aim for something that you love and you will most probably be happy. In business, don't aim for money, aim for doing something well, and you will probably make money."

**Charles Wookey**  
A Blueprint for Better Business





# FUTURE LEADERS PROGRAMME

Business needs, consumers and technology are changing fast and future leaders must understand how to recognise these shifts. These challenges provide a clear opportunity for businesses to innovate and have a positive impact on both people and planet.

At the Future Leaders Programme, we are committed to helping your high-potential leaders tackle how and why. With a focus on inspiring companies to do business the right way, the Future Leaders Programme has been designed to build leaders for companies with purpose. If your company is looking to make positive changes, FLP will ensure your potential C-level executives have all the tools and the network to build the industry's collective future.

[www.tcgflp.com](http://www.tcgflp.com)



## FLP Stockholm 2017 - FLP Committee

Chairman : **John BRADSHAW**, Pick n Pay, South Africa

**Demir AYTAÇ**, Migros Ticaret, Turkey  
**Patrick BACHER**, TCC, Germany  
**Niels DEKKERS**, Spar International, Netherlands  
**Viva FAHLÉN**, ICA Gruppen, Sweden  
**Jerry FLEEMAN**, Food Lion LLC, USA  
**Richard FLINT**, HEMA BV, Netherlands  
**Paul FORD**, The Coca-Cola Company, UK

**Brian HARRIGAN**, IGA, USA  
**Christian LAMPRECHT**, Develey Senf & Feinkost GmbH, Germany  
**Rhoda LANE-O'KELLY**, The Consumer Goods Forum  
**James NAYLOR**, McKinsey, United Kingdom  
**Karin VON FUNCK**, BCG, Germany  
**Tim WELCH**, PepsiCo Inc., USA

## About The Consumer Goods Forum

The Consumer Goods Forum ("CGF") is a global, parity-based industry network that is driven by its members to encourage the global adoption of practices and standards that serves the consumer goods industry worldwide. It brings together the CEOs and senior management of some 400 retailers, manufacturers, service providers, and other stakeholders across 70 countries, and it reflects the diversity of the industry in geography, size, product category and format. Its member companies have combined sales of EUR 3.5 trillion and directly employ nearly 10 million people, with a further 90 million related jobs estimated along the value chain. It is governed by its Board of Directors, which comprises more than 50 manufacturer and retailer CEOs.

[www.theconsumergoodsforum.com](http://www.theconsumergoodsforum.com)

# Contents

**The 62<sup>nd</sup> FLP's Key Quotes ..... 3**

**FLP Stockholm 2017 - FLP Committee ..... 4**

**About The Consumer Goods Forum ..... 4**

**Business Sessions - Thursday 26<sup>th</sup> October ..... 6**

**08.30** Welcome Address..... 6

**08.45** Building Leaders for Companies with Purpose ..... 7

**09.15** Leadership, Learning and Innovation : The Next Generation of Opportunity ..... 8

**09.45** Leading Strategies for Companies with Purpose ..... 9

**10.45** Building a Company with Purpose & Collaborating for Environmental Success..... 10

**11.15** How IKEA Turns Waste into Resources & How the Circular Economy will Change Business Models for Tomorrow's Retail Leaders ..... 11

**11.45** How to Successfully Lead Digital Transformation..... 12

**12.05** Collaborating for Healthier Lives..... 13

**12.20** Panel Discussion with Select Morning Speakers..... 14

**14.00** Masterclass in Multispeed Leadership - Leading in a Multispeed Context..... 16

**Business Sessions - Friday 27<sup>th</sup> October ..... 18**

**08.00** The Swedish Retail Landscape..... 18

**14.00** Amazon: the Implications for Retailers and Manufacturers ..... 19

**14.30** Using Big Data to Help People Live Better and Healthier Lives..... 20

**15.00** Setting the Scene: What is Norrsken? ..... 21

    Digital Start-Up Stories..... 22

**16.00** Panel Session with Norrsken Entrepreneurs..... 25

**Business Sessions - Saturday 28<sup>th</sup> October ..... 26**

**08.30** The Case for Businesses and Leadership with Purpose ..... 26

**09.15** The Leadership Sessions..... 27

**09.45** The Leadership Sessions..... 28

**11.00** The Conductor's Perspective on Leading with Purpose ..... 30

**Networking Moments ..... 32**

**Official Sponsors..... 34**



# Welcome Address



**John Bradshaw**  
Committee Chairman  
Future Leaders Programme  
Head of Marketing  
Pick n Pay

FLP participants were welcomed to Stockholm by Committee Chairman John Bradshaw. As part of The Consumer Goods Forum, **the Future Leaders Programme is all about bringing together the future leaders of our industry** and helping them to understand how to tackle the multiple challenges our industry is facing. The FLP's purpose is structured around four strategic pillars: Sustainability, Product

Safety, Health & Wellness and End-to-End Value Chain & Standards. These are also the strategic issues of the future. One thing is certain: the way people will shop in the future isn't going to look like the way our parents shopped. Digital disruption causes radical transformation.

The FLP puts all these future leaders in one room for three days, so magic collaboration can happen between

retailers, manufacturers and services providers. The best way to maximise this 'magic' over the three days of the event is to make as many connections as possible. Networking has always been a key part of FLP and it will continue to be essential. A large part of the delegates was attending their first FLP, which had the potential to be a life-changing moment in their career.



# Building Leaders for Companies with Purpose



**Peter Freedman**  
Managing Director  
The Consumer Goods Forum

Peter Freedman welcomed delegates to the FLP 2017. He offered opening thoughts on why purpose matters to the consumer goods industry and how The Consumer Goods Forum can help the industry drive positive change through collaboration.

At the 2017 Global Summit of The Consumer Goods Forum, Danone CEO Emmanuel Faber gave a passionate speech about the "existential threat" manufacturers (and retailers) are facing today. He argued for a "food revolution" so consumers can "reconnect" with their food. Danone is now on its way to becoming a B-corp\*.

Traditional retailers face multiple threats: the rise of omnichannel and digital disruptors, new consumer expectations and the arrival of new

low-cost players. Furthermore, they must deal with a declining trust in business. To restore that trust, the only way to start is with what consumers really want. More of today's consumers say they are "actively looking for brands that do good for the world". So, retailers can either continue to maximise their margins and accept there is zero growth, or they can try to grow with purpose-driven, authentic products.

Although competition will continue to serve consumers, more collaboration will be necessary to respond to new consumer expectations, ensure sustainability, address human rights issues and increase transparency. **Companies that don't have a purpose will have to get one.** There's a strong business case to be made for purpose: 49% of consumers will pay more, there is

30% higher employee productivity, and it influences 75% of investors' decisions.

The Consumer Goods Forum is uniquely positioned to drive positive change through collaboration. It is CEO-led, it brings together retailers and manufacturers, it is structured around four essential pillars—sustainability, health & wellness, product safety, and the value chain. Its 400 members, 1,500 experts in working groups, and 54 CEOs on the board are committed to increasing industry collaboration.

*\*Note: the B Corporation certification is a US certification issued to for-profit companies that display remarkable "social and environmental performance".*

## Key Takeaways

- All business leaders must embrace purpose over short-term profit. It is not only a moral imperative, there's a strong business case to be made for it.
- Implementing purpose requires collaboration rather than competition.
- The CGF is uniquely placed to help the industry tackle these challenges.





# Leadership, Learning and Innovation: The Next Generation of Opportunity



**Johan Eriksson**  
Head of Specialists  
Google

Johan Eriksson pursues two careers at Google at the same time: he is an engineer and he invests in startups that are critical for the future. He started his presentation by asking the audience a series of questions like, "Do you automate faster than your competitors?", "Do you attach files to emails?", "Do you know what you will learn next week?".

What shapes the business world today is the **law of accelerating returns** in practice, which implies that everything becomes a little bit better all the time. Each and every industry is going through a transformation induced by the law of accelerating returns. The pace of that transformation is well known to us. For example, 90% of all information in the world was created in the last two years, and the creation of information is accelerating.

One of the most impactful drivers of change for the consumer goods industry today is **machine learning**, which gives computers the ability to learn without being explicitly programmed. It's a way of creating code that's radically transforming our lives. A lot of the questions that matter most to the industry will be answered with machine learning. For example, "Who is most likely to become a new customer of your product?". It can also drive efficiency in a dramatic way: overnight, at Google, the global energy consumption was cut by optimising the energy used by the servers.

In a rapidly changing world, the only long-term competitive advantage is to learn things faster than the world is changing and translate that learning into meaningful innovation. One of the ways to start a lifelong

learning process can be to adopt the "5-hour rule" which consists in dedicating five hours a week to learning new things. It can involve many things like getting a mentor, analysing data, acting as a customer or teaching someone else.

When it comes to innovation, three things matter:

- **Being relevant** is about being personal, which requires data;
- **Being convenient** is about eliminating friction: whenever there's friction, customers will be lost;
- **Being fast** is about not losing customers who try to load up your site: if it takes longer than three seconds to load, half the users will give up.

## Key Takeaways

- Machine learning changes the game for the consumer goods industry.
- In a fast changing world, lifelong learning is becoming increasingly critical.
- Driving impactful innovation is all about creating relevant, convenient and fast value for customers.

# Leading Strategies for Companies with Purpose



**Per Strömberg**  
CEO  
ICA Gruppen

ICA people come to work every day because they believe in the vision – "making life every day a little easier". Per Strömberg explained that ICA was focused on enabling and creating growth, which requires simplification within the company, taking out the old costs to make room for the new ones. As people are the company's key asset, a change in leadership is indispensable to continue to engage and motivate them.

ICA was founded 100 years ago. Sustainability has long been a key issue in the Nordic area. ICA Gruppen is focused on food and health, with 1,549 own and retailer-owned grocery stores and 382

pharmacies. It operates in Sweden and the Baltic countries and counts 30,000 employees. ICA is one of the most profitable retailers in Europe with net sales of SEK 105 bn. From the start, ICA's main idea was to empower independent retailers through cooperation. These retailers own their stores but can leverage ICA's infrastructure. Grocery isn't ICA's only growth business: its four supporting businesses—pharmacy, banking and insurance, real estate, non-food—add many new synergies.

The changing tastes of consumers are forcing retailers **to shift their focus from competitor-obsessed to customer-obsessed**. Innovation today is largely driven by smaller

businesses who can bring their ideas straight to the customers. That's why it is critical for the consumer goods industry to find ways to partner up with them.

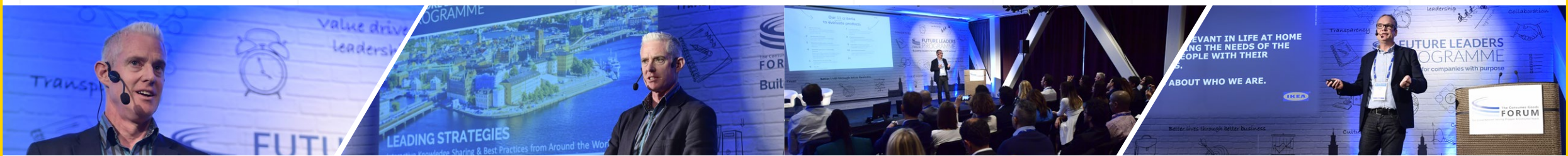
ICA is uniquely positioned to drive the kind of innovation today's consumers want. With its supporting businesses, it can build ecosystems and add services to make life easier for customers. For example, it built a digital ecosystem for pet owners. ICA's communication framework revolves around "a good tomorrow". The aim is to have 80% of corporate brand suppliers certified, 100% socially audited, and to become climate neutral by 2020.

## Key Takeaways

- People are the company's key asset, a change in leadership is indispensable to continue to engage and motivate them.
- The changing tastes of consumers are forcing retailers to shift their focus from competitor-obsessed to customer-obsessed.
- It is critical for the consumer goods industry to find ways to partner with small businesses.



# Building a Company with Purpose & Collaborating for Environmental Success



**Mike Barry**  
Director of Sustainable Business  
Marks & Spencer  
Co-Chair of the CGF Sustainability Steering Committee

A "leader of today", Mike Barry had 25 years of experience to share with the audience about how to lead with purpose. He insisted purpose will become existential in the future, particularly in food.

Change is possible and it can drive success for business and customers. There are three great challenges that will force companies to change:

- **An environmental challenge:** deforestation is accelerating, the climate crisis is more acute, by 2050 there will be more plastic than fish in the ocean;
- **A social crisis:** 8 billionaires own the same wealth as the poorest 3.6 billion people;
- **An economic challenge** that goes beyond digital: business as usual is no longer a recipe for success.

As a company, Marks & Spencer has embarked on a journey to tackle these challenges. Every supplier is expected to be more sustainable. Every single product will have to tell customers a good story. But, of course, one retailer will not change the world on its own: collaboration will be necessary.

10% of consumers are very worried about climate change while, on the other end, 20% are focused on struggling to make ends meet. It's the 70% in the middle that are key. Among them, one third are increasingly worried about their community and their town. That's why having a shop at the heart of the community is so important. Businesses that are able to engage community-focused consumers will win.

Marks & Spencer is focused on developing new sustainable models to help millions of people live healthier lives, transform communities in a meaningful way, and achieve zero waste. The Sparks Card is a good illustration of the company's ambition: whenever customers use the card, M&S gives to charity. Every time they shop, it can tell them what it does for their community.

The key strategy is to make business more personal and local to engage customers more. Increased transparency is ever more critical and is expected to change traditional models.

## Key Takeaways



- The environmental, social and economic crises are forcing businesses to change through purpose.
- Marks & Spencer has embarked on a journey towards increased sustainability: it expects its suppliers to be more sustainable too.
- The demand for increased transparency is changing business models: circular models and personalised solutions need to be more widespread.

# How IKEA Turns Waste into Resources & How the Circular Economy will Change Business Models for Tomorrow's Retail Leaders



**Per Stolz**  
Resource and Waste Manager  
IKEA Group

We take, we use, we throw away. That is the model that has made IKEA what it is today. Why change something that has been so successful? Because, today, we consume enough for 1.6 planets. We live above our means. Looking forward, we won't have enough resources to cater to the needs of the billion new consumers in the near future. IKEA is committed to offering "a better everyday life for the MANY people". Its ambition is to continue to grow, but business as usual will no longer make it possible.

Waste has long been seen as something to get rid of. But, it is really a resource. **Learning to leverage that resource represents a fantastic opportunity for both company and planet.** That is what

the circular economy is all about. But giving products a longer life involves every aspect of the company, whose activities must be synchronised and connected.

Meeting the customer is the starting point of everything. Consumers need to see value in the things they buy. Increasingly, they are tired of throwing away. Therefore, IKEA wants to help them with all of their pain points and continue to be relevant by meeting their needs.

In the UK alone, 600 million pieces of IKEA furniture have been installed. 36 million are thrown away every year and five million sold second-hand. Of the 36 million pieces that are thrown away, half could have been sold second hand. Thus, using

the resources that are already there could be a disruptive new opportunity.

The circular economy is about changing the way you operate. IKEA implemented its "democratic design" (quality, function, low price, sustainability, form) and made its supply chain circular. It implies working very differently: for example, having recyclers as suppliers. Becoming circular is a journey that won't be completed overnight. IKEA has already started that journey: in Belgium, it has a programme to help customers sell second-hand products, a workshop to repair and improve furniture, and a donation scheme. Also, many new products are made from waste, like Tomat, Kungsbacka and Kuggis, etc.

## Key Takeaways



- "We take, we use, we throw away" has long been a successful model. But it can't last because we are using up the resources of more than one planet.
- The circular economy is a regenerative system in which waste becomes a resource.
- Going circular involves every aspect of the business. It is a journey that won't be completed overnight.



# How to Successfully Lead Digital Transformation



**Joakim Jansson**  
Founder  
DigJourney

DigJourney is passionate about digital transformation and the “digital journeys” to achieve transformation. These journeys allow companies to increase their competitiveness by becoming digitally mature. Joakim Jansson told the audience about the methodology he and his team developed for digital transformation. It is called the “Digital Maturity Matrix” and it starts with an audit measuring a company’s digital maturity in several dimensions.

In times of dramatic change, it is essential to instill confidence and courage so individuals, organisations and societies can grow their capabilities and find their own path into the future. That is why transformation is always more about

people and organisations than about technology.

In many ways digitisation as a transformation process is like a Californian surfing competition. First you have to get into the water; second, you must pick the right waves; and third, you must make the most of those waves. Every company is faced with those three challenges.

Companies go through three phases of digital maturity:

- **Mobilisation** of companies and people to give them a sense of urgency. In this phase, the questions are: “WHY do we exist as a company”, “WHY should we digitise?” and “WHERE should

that take us if we transform?”.

- **Coordination** on the business, leadership and technological levels. The main question is “HOW should we work differently as an organisation?”
- **Acceleration** to ensure everyone is working towards the same goal. “WHAT should be done?”.

Digitisation affects different aspects of the company: values and mission, strategy, organisation, processes, infrastructure, data and analysis, relationships and touchpoints with customers, etc. But not everything can be done at once. Focus is key. First comes mobilisation, then coordination, and finally acceleration.

## Key Takeaways

- Digital transformation is more about people and organisation than technology.
- Digitisation is like a surfing competition: first, you get into the water; second, you pick the right waves; and third, you make the most of them.
- There are three phases of digital maturity: mobilisation is about answering the WHY and the WHERE, coordination is about the HOW, and acceleration is about the WHAT.



# Collaborating for Healthier Lives



**Isabelle Grosmaître**  
Alimentation Initiative Catalyst  
Danone

Future leaders will drive all of tomorrow’s choices. Among them, Isabelle Grosmaître insisted, women will be more and more important to the success of companies. Indeed, the companies that have women in leadership positions have been shown to outperform those that don’t.

Everybody at Danone is convinced that a food revolution is happening. Today more than two billion people are obese or overweight, while 100 million still don’t have enough to eat. But the food revolution is also about the health of the planet. Health and planet cannot be separated. One third food produced is wasted. Fortunately, there is more awareness now than there was a few years ago.

It all starts with individual purpose. As an individual, YOUR purpose is what will drive your choices. Isabelle

Grosmaître told the audience about her lifelong passion for health and well-being and her belief that business can be a force for good. She believes transformative, sustainable impact can be achieved at scale and the CGF is a unique platform at this level.

Local and organic are what tomorrow’s food business will be about. In the US, the top 25% of large companies have lost revenue or have stopped growing. They have no other choice but to reinvent themselves and find new growth models. That is why Danone has started a new historic chapter. It is embracing health in a new holistic way, understanding that what is good for our bodies is good for the planet.

Isabelle Grosmaître was elected Co-Chair of the Health & Wellness Pillar

of the CGF and created a “do-tank” for positive change. Its purpose is to gather people from around the world and spur retailers and manufacturers to find new ways to engage consumers towards healthier lives. It is about local experimentation with stakeholders, public authorities and academics, and about creating a coalition of players who can bring their capabilities together.

Together with the CGF, Danone aims to lead change. **It’s not about product, it’s about people.** The consumer goods industry will have to align on a common agenda, share data to achieve change, learn about what works and what doesn’t. We all have the power to be part of that revolution. *“It is about YOU. When you eat and drink you vote for the world you want to live in.”*

## Key Takeaways

- Health and planet cannot be separated. The “food revolution” will change both.
- Local and organic will drive tomorrow’s food business.
- Together with the CGF, Danone wants to accelerate change.





# Panel Discussion with Select Morning Speakers

Moderated by Alex Thomson



**Mike Barry**

Director of Sustainable Business  
Marks & Spencer  
Co-Chair of the CGF Sustainability  
Steering Committee

**Isabelle Grosmaître**

Alimentation Initiative Catalyst  
Danone

**Joakim Jansson**

Founder  
DigJourney

**Alex Thomson**

Presenter & Chief Correspondent  
Channel 4 News

**Alex Thomson (moderator):** We're facing a "food revolution". Is that being overly dramatic?

**Isabelle Grosmaître (Danone):** No, we don't have time. We can't handle the upcoming healthcare and environment costs triggered by our unsustainable food industry. There is no other way but to act now.

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**Alex Thomson:** Can companies do it alone? Or do we need more government regulation?

**Isabelle Grosmaître:** Regulation is needed, but it won't solve all the problems. It's a collective effort that must involve everyone.

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**Alex Thomson:** What's your reaction at Marks & Spencer?

**Mike Barry (Marks & Spencer):** Healthcare lies in a profound funding crisis. So understandably government will turn to us. We have stark choices to make as business leaders. These choices can help us get ahead of the curve.

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**Alex Thomson:** How do you integrate the digital with the brick-and-mortar side of the business? Who are the companies doing a good job?

**Joakim Jansson (DigJourney):** There are good examples in the media. Among retailers, we haven't seen that much success yet, but there are good initiatives from ICA and IKEA. But we haven't seen it all the way. Digitisation started earlier in the media: they've had a sense of urgency for much longer. In retail, the sense of urgency is still recent. Now it's there.

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**Alex Thomson:** How does change involve logistics and the whole supply chain?

**Per Stoltz (IKEA):** It is an all-encompassing process that can't happen overnight. It has started at IKEA, but, to be honest, we started late because we used to be a bit complacent.

**Mike Barry:** At Marks & Spencer, we believe we must be more creative in terms of who we partner up with. We have developed a partnership with Oxfam in the UK to encourage customers to bring their second-hand clothes there.



**Isabelle Grosmaître:** Young people will drive decisions. It will be less about the product and more about a holistic people-centric approach. It'll also be about breaking the silos.

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**Alex Thomson:** What do you want to tell future leaders today?

**Mike Barry:** Leadership is as much about EQ as it is about IQ. Purposeful leaders are the future.

**Joakim Jansson:** Think both about digital and

sustainable. Transforming your organisation is YOUR responsibility, not somebody else's. Because you can't do it all at once, think strategically about where you want to start. Think in phases.

**Per Stoltz:** Up until recently, sustainability was a task for experts. Now it is for you as leaders to embrace it. And you will have to involve all of your coworkers.

**Isabelle Grosmaître:** The most important thing is for you to believe in yourself. You have the power to decide what matters to you and your company. Collaboration is essential.





# Masterclass in Multispeed Leadership - Leading in a Multispeed Context



**Claus Rydkjaer**  
CEO  
Mannaz

If we take a step back, we can see it's not only about technology. Multiple macro factors are changing fast: the political side (Brexit), the economic side, the socio-cultural side (refugees, population ageing, large-scale urbanisation), technological, legal and environmental, etc. We have to deal with all of these things every day, not just with technology.

The 3-hour workshop included a 45-minute presentation of the "new multispeed context" and group work to apply the concepts to specific issues and organisations. Two moderators from Mannaz asked questions to participants throughout, so as to produce a live magazine online with key points for participants to take away.

The "disrupt or die" doomsday prophecy sells many books—in Denmark alone, 12 books have been published this year on the subject—but it is a limitative way of looking at reality. Domsayers always point to the same examples. But did those companies die because they were disrupted overnight or because they missed an opportunity long before?

store (WholeFoods) because, as Jeff Bezos said, "*It's really good business*". Meanwhile, Walmart CEO Doug McMillan insisted that Walmart's main competitive factor was the number of its physical stores, but partnered up with Google to develop its AI muscle. What all of this shows is that the picture is complex and one size does not fit all. **We operate in a multispeed reality.**

In our multispeed business environment, the number one challenge is the coexistence challenge of physical and digital. Physical is linear. Digital should not be seen as a mere extension of the old way of doing business, but as something exponential that fundamentally changed our business models by leveraging machine learning, AI and VR, etc. Extending the good old ways of doing business in the physical world to the digital world creates misalignment problems. It is key to ensure that the different business dimensions are aligned so synergies can be found.

On the leadership side, we run into hierarchical models in traditional retail, which are cumbersome in an exponential world of agility and speed. Therefore, companies are beginning to look at more flexible ways of leading that become more about asking the right questions and coaching the organisation to come up with answers, than providing all the answers in a top-down way.

In terms of strategy, it will be more about going towards direction-based strategising, using transformative purpose and values, making sense of the company to motivate the people and promoting co-creation, etc. As for the organisation, it will have to become flat, agile, dynamic and client-centric.



Everybody can see they are operating in a new reality that is often summed up as a "disrupt or die" imperative. As Google's Eric Schmidt put it, "*The pace of change is accelerating*", and technology is the main driver of change: "*from Gutenberg to Zuckerberg*". But is the outlook really that dire?

We do need to change. But can/should it happen overnight? Is the picture not more balanced than what the doomsayers say? Speed is not necessarily a recipe for success. Amazon has for years been the perfect example of how to operate in a digital context, but it recently acquired a brick-and-mortar retail



It will have to rely on self-managed and empowered units; think in terms of ecosystem and network and move faster. The appropriate governance is a fit-for-purpose type of governance that is based on agile decision-making processes. Finally, the culture will have to be inclusive, champion integrity and authenticity and encourage questions. The "versatile leader" is necessary in a versatile business world. As we move towards an exponential world, we will move from focused leadership to distributed leadership. Many agree

that multispeed leadership profiles are adaptable, self-aware, empathetic, courageous, agile, collaborative and open to chaos.

Participants were invited to take a "multispeed deep dive": each group had to apply the described framework to their organisations and business. They received an envelope with different statements about leadership. Group assignments consisted of looking at these statements and having a dialogue about how they applied to their business cases. When

are you physical, when are you digital and when are you exponential?

In conclusion, participants were asked to ponder what they can do tomorrow:

- What do we, as leaders, have to pay attention to in order to navigate well in a multispeed environment?
- Based on today's workshop, what leadership actions or initiatives do we foresee from our position?
- Actions wrap-up: prioritise 2-3 key findings or actions and tap them into the conference app.

## Key Takeaways

- The "disrupt or die" doomsday prophecy sells many books but it is a limitative way of looking at reality.
- In our multispeed business environment, the main challenge is the coexistence challenge of physical and digital. Different business dimensions must be aligned for synergies to be found.
- In a multispeed reality, the organisation will have to become flat, agile, and client-centric. The leader will have to be adaptable, self-aware, empathetic, courageous, agile, collaborative and open to chaos.





# The Swedish Retail Landscape



**Henrik Andersson**  
Partner  
McKinsey & Company



Sweden counts 10 million inhabitants today – 11 million expected in 2030. Like other Western countries, the Swedish population is aging fast. It is also composed of more and more single-person households and increasingly diverse, as Sweden has welcomed numerous new migrants over the past few years – by 2030, 22.3% of the population will have been born outside of Sweden.

The Swedish food market is growing at 4% per year: discount and food service companies are significant drivers of growth. Although an increasing number of Swedes choose to order out or eat out, supermarkets still enjoy fairly healthy growth. New food delivery services have “popped up” in the last few years and radically changed the way Swedish urbanites think about food.

The Swedish retail market is **one of the most concentrated in Europe**: the leading three players, ICA, Coop and Axfood, control 80% of the market. ICA, the largest, relies on store owners who have a high degree of independence, whereas Coop and Axfood have more traditional models. The top three chains largely dominate in brand strength, with ICA being the first choice of an overwhelming majority of consumers.

So far discounters have made little headway: they have a low market penetration in Sweden. Unlike Norway, Sweden has no native discounter. A lot of “soft” discounters (including Axfood) cover the segment in some way. Naturally, discounters see their low market penetration in Sweden as

an opportunity for the future, which is why Netto and Lidl, to name only two, have been opening stores in the country.

Although Sweden is leading when it comes to internet penetration, there is still little online grocery shopping, compared to the UK, for example (three times more online shopping in the UK). This is mainly due to supply-side blockers. There's no Amazon in Sweden. And the top three players have a low online presence: the country is spread and low-density and labour costs are high. Online shopping hasn't yet proved economically viable enough for them to make a more aggressive push. One concept, the “Maltkasse”, a basket of ingredients conveniently assembled for one meal, represents half of all online groceries.

## Key Takeaways



- The Swedish food market is dominated by three major players—ICA, Coop and Axfood.
- Discounters have a low market penetration in Sweden.
- There's a lot of untapped potential when it comes to online shopping.

# Amazon: the Implications for Retailers and Manufacturers



**Mark Elkins**  
Partner  
McKinsey & Company

In all discussions about retail, Amazon is always the “big elephant in the room”. Of all retailers, Amazon has the highest market capitalisation in the world and it enjoys a growth rate of more than 30%. But it is so much more than a retailer: it is a technology ecosystem that includes a marketplace, devices, traditional retail, web services, content, loyalty and rewards. This ecosystem makes it possible to lock customers in.

Amazon's mindset and “flywheel” drives everything it does:

1. Obsess over the customer. Categories don't matter as much as customer value.
2. Disrupt big markets (at least \$1bn).
3. Take long-term view.
4. Create lock-in.
5. Automate by default.

Amazon's marketplace has been

a significant driver of profit as it has enabled Amazon to maximise selection and have higher margins (with outside sellers). Amazon is also rapidly becoming THE search destination, progressively overtaking Google for an increasing number of searches. That's why it should be regarded as a marketing platform.

With its **data-driven approach**, Amazon is mastering the art of “dynamic pricing”, creating the perception that it is the price leader, even though it doesn't always offer the lowest prices, but rather prices so smartly as to maximise revenues. The same data-driven approach has made Amazon world leader in the personalisation of the purchase experience. The company is setting all standards for convenience, setting the bar high for every other company in the world. And, by becoming a logistics company, it is

making one-day delivery the new norm.

As far as grocery is concerned, Amazon controls a set of different platforms: Amazon.com, Amazonpantry, Amazonfresh and Primenow. The \$13.7bn acquisition of WholeFoods is the start of a new chapter that will create synergies with 450+ physical locations. The best way for other retailers to deal with the consequences of Amazon's domination is to partner up with Amazon, understand and emulate its mindset—learn to test and learn—and adopt that mindset across all of the business: strategy, planning, execution and capabilities, etc. When executing, it is critical to continuously fix the basics. Last, but not least, every retail company must now think from an ecosystem perspective and find its own algorithm.

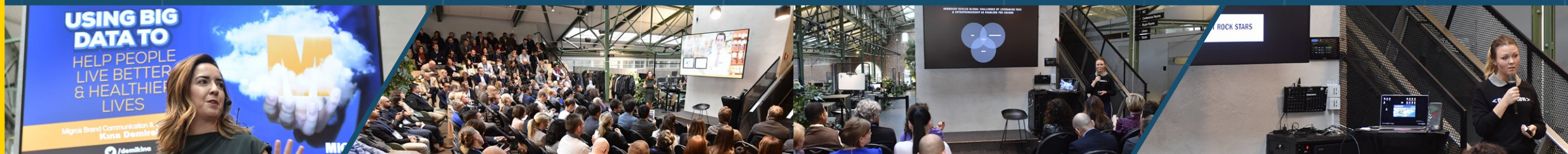
## Key Takeaways



- Amazon will force every company to adopt a test and learn approach. Speed is of the essence.
- Focusing on what differentiates you in a connected world is how you will survive. What's your algorithm?
- No long-term success will be possible without an ecosystem.



# Using Big Data to Help People Live Better and Healthier Lives



**Kina Demirel**  
Communications & CRM Director  
Migros Ticaret A.S

Migros is Turkey's leading retail company. It is also one of the most innovative companies when it comes to driving customer loyalty, which is the core of Kina Demirel's mission. As the 17th largest company in Turkey with €3.3bn in sales in 2016 in 1,850 stores, Migros collects abundant data: it has 10 million active customers on its loyalty programme—roughly the population of Sweden! But, "big data" doesn't mean anything if one isn't able to **translate the data into meaningful actions**.

Migros store managers are always on the store floor to interact with customers, learn about sales and look into customer insights. They are empowered to act like store owners. They can change the promotional part of the store. They can learn if

they lost customers. They can look at everything happening in the store.

Driving customer loyalty every year starts with basic things. Migros managers offer their best customers a bunch of flowers and thank them for being loyal to their stores. Most sales depend on the loyal customers: only 26% of customers drive 80% of sales. Therefore, knowing these customers and making sure they are happy is exceedingly important.

Big data helped Migros discover the following consumer trends:

In Turkey, whichever brand understands the importance of family values will stay on top. Time management is increasingly critical for those who live in large cities—15 million people in Istanbul. Consumers must be helped with it.

Consumers want more products and services to look after their health. Migros has made it one of its missions: creating awareness, encouraging farmers to follow sustainable agricultural practices, educating the next generations and encouraging consumers to eat more fresh fruit and vegetables.

About three years ago, Migros designed a mobile app to help consumers change their attitudes thanks to personalised advice. Indeed, health is about more than just diet. Migros encourages consumers to "get moving". If they walk in their city, they accumulate points.

## Key Takeaways

- If "big data" isn't translated into meaningful actions, it is useless.
- There is no one recipe to meet consumer expectations: you have to try and try again!
- Big data doesn't kill human creativity. Transforming data into actions requires a huge amount of creativity.



# Setting the Scene: What is Norrsken?



**Frida Siwe**  
CFO  
The Norrsken Foundation

The Norrsken Foundation is a Swedish foundation focused on social tech entrepreneurship, which "*investigates, ideates and invests in big ideas for a better world*". Started one and a half years ago, the foundation is in many ways still in "*Beta mode*". The initiatives that it supports combine high risk with high impact. This is a largely unexplored territory in a world where non-profits avoid financial risk while venture capitalists focus only on financial

return.

The founders all have a tech background and share the belief that **technology and entrepreneurship are powerful enablers of change**. The foundation they created is based on effective altruism, is non-partisan, non-religious, non-profit and runs an annual budget of five to six million euros. It aims to inspire others to do more.

Norrsken is also a co-working space and an ecosystem designed to combine and maximise the impact of different players with a creative cluster to enable, scale and inspire. Its two missions are to "enable impact unicorns"—which can be defined as startups that affect more than one billion people in a positive way— and to empower impact entrepreneurs, who deserve their "rock star status".



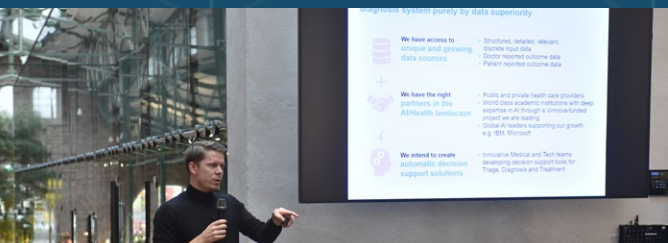


# Digital Start-Up Stories

## Startup #1

### Doctrin: Radically Improving Healthcare

**Magnus Liungman**  
CEO & Founder  
Doctrin



Magnus Liungman created Doctrin to "save healthcare" with artificial intelligence. Doctrin is a cloud based B2B system for healthcare providers that helps its customers to digitise their patient visits. The technology replicates how doctors interview their patients, thus enabling doctors to free up time and increase medical quality.

By automating the patient journey and creating a patient history engine, a lot of hurdles along the patient's journey can be removed. This has the potential to radically transform healthcare. Doctrin was launched

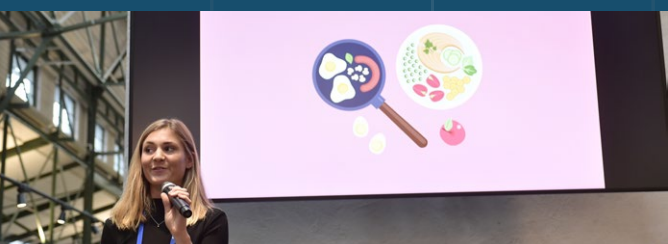
one year ago. So far, its users are very satisfied (3.7/4 patient satisfaction). 750,000 patients have used it. And four countries have already signed.

Magnus Liungman believes Doctrin will be in a position to create the world's leading diagnosis system purely by **data superiority**. It has access to unique and growing data sources (structured, detailed, relevant, discrete input date, doctor reported outcome data and patient reported outcome data) and chooses the right partners to achieve the best outcome.

## Startup #2

### Karma: Using Digital Tools to Reduce Food Waste

**Elsa Bernadotte**  
COO & Co-founder  
Karma



**One third of all the food produced goes to waste.** The more developed the country, the higher the statistic: in the US, nearly half of all food produced (45%) is thrown away. More often than not, we throw food that is still good to eat. Elsa Bernadotte co-founded Karma to reverse that behaviour.

Karma has built an app that helps restaurants, grocers and cafés reduce their food waste by selling their surplus to consumers at reduced prices. After a booming start in Sweden, the startup is now ready to take on Europe. With an 80% sell rate, the professionals can count on an average \$8,500 extra revenue per year

per location. So far grocery stores have been Karma's biggest customers.

For Elsa Bernadotte, Karma creates a "win-win-win situation": for buyers (who can have great food for less money), for sellers (who can count on additional revenue streams), and for the environment (as resources are optimised for a more sustainable living). Karma launched just a year ago, but it already counts 150,000 users and more than 600 customers, among which several ICA stores, Scandic hotels and Sodexo, etc. So far, more than 100,000 meals have thus been rescued!

## Startup #3

### Worldfavor: Structuring the Sustainability Data Of All Companies

**Frida Emilsson**  
Co-founder & COO  
Worldfavor



Companies have a huge impact on people's lives and the environment: they can either create a lot of good or a lot of damage. **None of the global challenges the world is now facing will be solved without the private sector.** Worldfavor was created one year ago as a global digital platform and software as a service that makes it simple and efficient to access and share sustainability information and manage sustainability performance for companies.

The startup's aim is to make all corporate sustainability information easily accessible for anyone in the cloud, enabling informed decisions and sustainable growth. It also meets the needs of both consumers and investors, as 70% consumers claim they would pay more to

companies committed to sustainability, and 30% of institutional investors say they screen their investments with sustainability criteria.

When information is not gathered or structured, it is completely inefficient. Worldfavor's mission is to structure all of the sustainability data. "*We make sustainability data digital in one global platform*". When a company makes its work processes digital, it becomes a lot easier to share information and influence others. The aim is to enable everyone to make a more informed decision. So far 4,000 companies are connected to the platform, from some global brands to local, Swedish companies.

## Startup #4

### Just Arrived: Connecting Foreign Born with Employers

**Andreas König**  
COO and Co-Founder  
Just Arrived



Among immigrants and refugees who have made Sweden their home, 40% cannot support themselves after ten years. Meanwhile, 59% of Swedish employers claim they have difficulties recruiting staff. 45% of these employers say they have to ask their existing employees to work more hours as a result. That was the premise that led to the creation of Just Arrived last year.

In the summer of 2015, Europe was transformed by the growing flow of refugees fleeing their home country to make their way to Europe. Along with Germany, Sweden absorbed a high number of refugees. In 2015 alone, close to 163,000 people sought asylum in this

country of just under ten million people.

The Just Arrived app matches newcomers with employers in need of workers, without them actually having to hire anyone full time. Andreas König explained. That is how the "gig economy" or "platform economy" can be made to help. Just Arrived was founded with a strong belief in the business benefits of companies working with foreign-born talent. Numerous studies show that the **workplaces that have more diversity are more innovative and drive more growth**. Just Arrived can thus kill two birds with one stone: increase the collective problem-solving abilities of companies and drive social impact.





# Panel Session with Norrsken Entrepreneurs (Doctrin, Karma, Worldfavor, Just Arrived)



**Pelle Sommansson**  
Principal  
Boston Consulting Group

**Pelle Sommansson:** On one side, there is the muscle of the corporations, on the other side, the entrepreneurs who have the purpose and the tech. It is interesting to bring these two worlds together. Great corporations need to open-up their ecosystem and find new ways to work with talents and technology. They need to tap into what's happening in houses like the Norrsken Foundation, all around the world.

**Pelle Sommansson:** Can more traditional companies also have a purpose?

For Karma, it all boils down to asking the right questions: *"Is this really the way this has to be?", "Is there really no other way to do it?"*. The startups presented in Norrsken need financially sustainable corporations if they want to have an impact.

**Pelle Sommansson:** What does it mean to be a social entrepreneur and solve issues through tech and purpose?

For Karma, it is both rewarding and frustrating, as the problem they are trying to solve (food waste) is so hard to grasp. For Doctrin, purpose impacts everything they do and they always talk first about the why.

**Pelle Sommansson:** Is there a disconnect between what investors expect and what the entrepreneurs want to achieve?

The entrepreneurs present agree that this isn't really an issue because they selected investors who believed in their purpose.

**Pelle Sommansson:** Is there a visible balance to strike between profit and social impact?

For Karma, there was at first a lot of scepticism on the part of corporations. When Karma started in Sweden the world of food "experts" insisted that what they were trying to achieve was "impossible". But they found the visionaries who were willing to prove the sceptics wrong. Likewise, for Worldfavor, finding the "champions" when you have no reference customers is the most important thing at the beginning. The champions help the startup build its "proof of concept". There is always a risk for these companies to work with young startups because they don't fit into their risk assessment model.

For Just Arrived, purpose is compatible with profit as Just Arrived, a social impact startup, utilises existing capitalistic mechanisms and aims to make a profit. The purpose is integrated into the value proposition. The startup's very *raison d'être* is also the unique selling point when they talk to their customers.



# The Case for Businesses and Leadership with Purpose



**Charles Wookey**  
CEO  
**A Blueprint for Better Business**

Charles Wookey told the audience about the personal journey that led him to the creation of A Blueprint for Better Business. On his way he met amazing people, one of whom was the Catholic Archbishop of Westminster, who made him reflect on leadership. According to Wookey, there are two sorts of great men: *"great great men make you feel great, small great men make you feel small"*. According to him, the job of a leader is to create the right conditions for people to thrive.

To be a good leader, one must understand the importance of delegation and avoid "micromanaging" one's team. The recognition of one's own vulnerability is an essential leadership quality. Distinguishing between *leadership as service* and *leadership as ego* is also important. Finally, great leaders

understand how powerful a simple *thank you* can be.

Wookey co-founded A Blueprint for Better Business, an independent charity that acts as a catalyst for change in business, with the purpose to help business realise their true long-term potential – to serve society, respect people, rediscover their purpose and thereby earn a fair and sustainable return for investors. The idea behind the charity's approach is that people cannot be solely self-interested and business solely driven by profit. The Blueprint movement is about challenging business to be a force for good. Because the market is always a social and cultural construct, it can be changed for good.

From a small initiative launched in 2012, Blueprint became a charity

that is now engaged with a growing number of major global companies and whose ambition is to help corporates lead with purpose. It is in our human nature to be *"hard-wired for deep connections and meaning"* so the quality of our relationships is essential. There lies **abundant untapped potential for companies**. Leaders who care about people will help them care about business.

The job of a leader is not to maximise anything, but to balance a set of objectives with given constraints. *"If you want to be happy, don't aim for happiness, aim for something that you love and you will most probably be happy. In business, don't aim for money, aim for doing something well, and you will probably make money."*

## Key Takeaways

- The job of a leader is to create the conditions for people to thrive and to make them feel "great".
- Great leaders understand they serve others and not themselves. *Leadership as service* is more effective than *leadership as ego*.
- The Blueprint movement is about challenging business to be a force for good.

# The Leadership Sessions



**Taavi Heikkilä**  
Chairman and CEO  
**SOK Corporation**

Taavi Heikkilä started his presentation with a few words about his career. He was recruited by the S Group many years ago and had his whole career at the company, which, he acknowledged, was no longer a typical career today. But large corporations still provide lots of different opportunities, which he chose to seize. For 10 years he worked as a finance director, then he moved to purchasing. And now he is the CEO of the company.

The S Group is a Finnish retailing cooperative organisation whose head office is in Helsinki. Founded more than 100 years ago, it operates 22 regional cooperatives in the markets for groceries, consumer durables, service stations, hotel and restaurant services, agricultural

supplies, and car sales. The group has businesses in Finland, Estonia and Russia.

As a Co-op, the S Group and its leader, Taavi Heikkilä, are driven by purpose – to serve the members and create benefits for them. Every day, the cooperative feeds half of all Finns, 80% of whom are members. Each client can invest a small sum in the local co-operative and become a client-owner, who can then receive a membership card and special bargains. He summed up the Group's values as *"we exist for our customers, we constantly renew ourselves, we take responsibility for people and the environment and we operate profitably"*.

As the co-operative's primary mission is to serve its members, it decided to lower its food prices in 2015. Digital represents a huge opportunity to offer customers a more personalised experience. With omnichannel services, the best mobile and ecommerce solutions can help improve the customer's journey even more. Lastly, greater value chain efficiency serves further simplification and innovation.

**Today's management resembles coaching.** The most important managerial skills for the future revolve around strategy, values, mission, ethicality, communication, dialogue and networking. The Finnish way to lead focuses on hard work and a strong sense of humility.

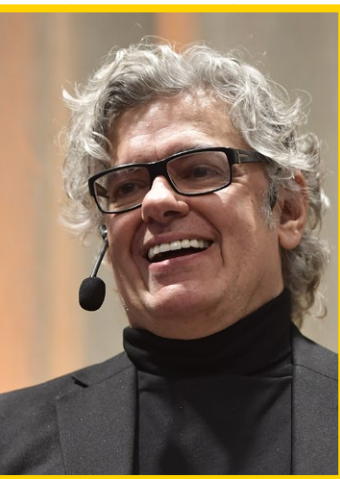
## Key Takeaways

- There isn't one type of leader. You don't have to be charismatic but you should build on your own strengths.
- The S Group is a Finnish cooperative that feeds half the Finns every day.
- The Finnish way to lead focuses on hard work and humility.





# The Leadership Sessions



**Paulo Pereira da Silva**  
CEO  
Renova

Paulo Pereira da Silva started his career at Renova as an engineer, but soon found he needed to meet many new people if he wanted to continue to grow. He was appointed CEO of Renova in 1995 and had since steered the company into its current status as an emergent new global brand in the sector.

Toilet paper was the “most boring product”, so Paulo Pereira da Silva felt he had to try something different. He had the idea of the mega-star black toilet paper that changed his company while watching a Cirque du Soleil show in Las Vegas. In Las Vegas where everything is fiction, he learned the importance of fiction and storytelling in sales. It took some time to actually make the black paper a reality because of the

rigidity of the production process. The toilet paper was presented at the salon *Maison et Objets* in Paris and Paulo had his “two seconds of fame” when an article about it was published in the *New York Times* in 2006.

What the story of Renova illustrates is that **connectivity is replacing geography**. Today’s leaders have to manage a superposition of networks, rather than a geography. The wisest thing to do is to try and discover what those networks consist in and manage them. Renova has been able to do just that. As a small company, it has found ways to adapt continuously thanks to increased fluidity inside the organisation. As a leader, Paula Pereira da Silva needed to share a vision and a path.

To lead is fundamentally to *care*, which is particularly important when it comes to discovering talent. Renova developed a people “nursery” to care for and grow the talent it needed. It succeeded in developing a diverse workforce of people from different countries and backgrounds. As most of Renova’s managers were women, Paulo Pereira da Silva joked they had to “make a quota for men”.

*“I’m doing nothing at the company. I’m the CEO, I’m a thermostat”*. He explained that he believed his job to be about creating harmony, starting with the small things and allowing people to fail so they will want to do things.

## Key Takeaways



- Toilet paper was the “most boring product”. Paulo Pereira da Silva turned it into the “sexiest product”.
- Leadership is fundamentally about caring, creating harmony and allowing people to take risks.
- Renova became an innovative brand in communication, innovation and management.





# The Conductor's Perspective on Leading with Purpose

## Keynote Closing Address and Workshop with a Live Orchestra



**Dr Raphael von Hoensbroech**  
Managing Director  
Konzerthaus Berlin

Dr Raphael von Hoensbroech created a live musical animation that involved everyone present and illuminated them on leadership and art. The workshop started with a live concert – the first movement of Franz Schubert's Fifth symphony which Schubert wrote in 1816, at the age of 19. Of the seven symphonies he wrote, the fifth is the only one in a chamber setting (without trumpets and clarinets).

Making music is an often-used metaphor in business and management. Teamwork, harmony, movement, discipline, position and role, attention to others, vision and meaning, are all constitutive elements of orchestra music and qualities sought after by business leaders. The workshop (or rather masterclass) led by Dr Raphael von Hoensbroech for the FLP delegates was an enlightening demonstration of the relevance of the analogy.

Together with an orchestra—musicians with their instruments sitting in the room among FLP delegates –

To create something together usually requires many years. Although most of the musicians present in the room were playing together for the first time, they quickly achieved team flow, because all shared this aspiration of playing as one instrument, together. Orchestra music and chamber music do not exist without this sense of togetherness, which can be brought about by involving ears, eyes and skin.

**The role of the leader/conductor is to create a communal movement that involves everyone**, to strike a subtle balance between allowing the expression of different individual personalities and creating a sense of togetherness. The musicians in the orchestra are generally exceptional musicians, many are also soloists. They bring their unique talents and personalities to the orchestra. Yet the orchestra is more than the sum of these individual parts.

In fact, orchestra musicians *can* play without a conductor as Dr von



Hoensbroech showed when he let the orchestra play the beginning of the second movement without him. Not only will the first violin generally take over, but the rehearsals usually make it possible for them to play without the conductor. So, what is the value of a conductor? The conductor's role is to articulate the purpose (make the music and move the audience) and the vision (how to achieve that). *"There's a world of difference between making music and playing notes"*.

Here are some of the typical leadership traps that conductors can fall into:

- They can "micromanage" the musicians by giving them too much information. The orchestra won't be able to play any music anymore. The musicians find it hard to make music as they have to look at the conductor all the time.
- They can stand listlessly, just beating time, not giving enough information and guidance, which can be equally disturbing.
- They can let their ego conduct the orchestra. The "ego conductor" wants to show the audience it's all about him. Musicians want to

ignore the conductor because they don't feel enrolled. Not much music is made.

Standing in front of the orchestra is what makes it possible to take the great perspective: you listen differently, the impact and the loudness is more massive than when you sit in the back. The music takes a different dimension. The challenge of the conductor is to make everything fit together. The leader's role is to have expectations, show the future. *"My beating time is useless: they do not need me beating time. Having expectations: that's my role"*.



## Key Takeaways

- The role of the conductor is to create a sense of togetherness and bring the best out of the orchestra, so it is more than the sum of its individual parts.
- Each musician's perspective is different. The conductor is the only one who has the full score and has a big picture view of the orchestra.
- There is a world of difference between playing notes and making music.





Networking Moments



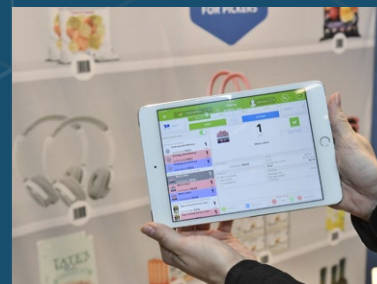


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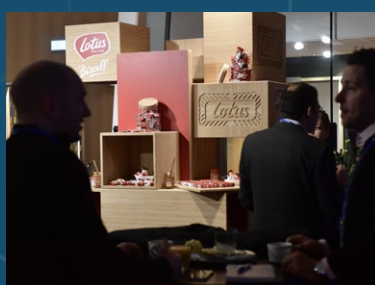
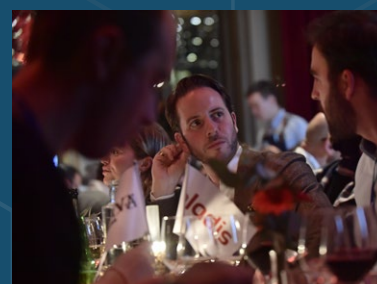
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# WORKING TOGETHER EFFICIENTLY FOR POSITIVE CHANGE

Here's an overview of our activities in five focus areas and where our members can get involved and engage with us. Our working groups and events develop toolkits, guidelines and reports, and offer opportunities to share best practices. All of which helps support our members while they implement our resolutions and commitments in a collective bid to drive positive change globally.

1500  
EXPERTS  
ENGAGED  
WITH US

**CAPTION**  
Working Groups  
Events & Meetings

## SUSTAINABILITY

Climate Change & Waste Workstreams

Sustainability Resolutions

Deforestation  
(Soy, Palm Oil, Paper & Pulp, Beef)

Refrigeration

Measurement

Food Waste

Solid Waste

General & Member Meetings/Workshops

Social Workstreams

Social Resolution on Forced Labour

Priority Industry Principles

GSCP - Global Social Compliance Programme

Advocacy Supplier Events

Reference Tools

Equivalence Process

General & Member Meetings/Workshops

## PRODUCT SAFETY

GFSI - Global Food Safety Initiative

Benchmarking - Schemes & Certification

Global Markets Programme

Local Working Groups

Technical Working Groups

Global Food Safety Conference

GFSI Focus Days

General & Member Meetings/Workshops

## HEALTH & WELLNESS

H&W Commitments & Resolutions

Collaboration for Healthier Lives

Regional Steering Committees

Employee Health & Wellness

Measurement & Reporting

General & Member Meetings/Workshops

## E2E VALUE CHAIN & STANDARDS

Smart Label

Modularisation

Traceability

Future Value Network

Learning Series

General & Member Meetings/Workshops

KNOWLEDGE & BEST PRACTICE SHARING

The Global Summit

The Sustainable Retail Summit

The Future Leaders Programme

IT Share Group

Supply Chain Share Group

Japan Day





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