The Consumer Goods FORUM | THE GLOBAL SUMMIT 2016

The 60th GLOBAL SUMMIT

Seizing opportunities in the face of disruption

THE EXECUTIVE SUMMARY

15th - 17th June 2016
Cape Town International Convention Centre
CAPE TOWN, SOUTH AFRICA


«Food safety is a commitment you make throughout your whole organization.”
Danny Wegman - Wegmans
«It’s our job to set high standards. Transparency brings consumer trust.” »
Denise Morrison - Campbell Soup Company
«Data is precious but human capital is what will make the difference.»
Eric Legros - Majid Al Futtaim Retail
«We all have the same goal in mind and it’s food safety for our consumers. That’s just a reality.»
Mike Robach - Cargill
«A company is successful overtime if it creates shared value for society.»
Paul Bulcke - Nestlé
60th BIRTHDAY
THIS WAS THE 60TH GLOBAL SUMMIT
“More people today are dying of obesity than hunger.”
Jonathan Farnell - EAT Fondation
«We need to infuse more confidence in our economy and look for areas of growth.»
Cyril Ramaphosa - Deputy President of South Africa
«People is the most challenging asset. Training and development are the key.»
Hans Anggara - Alfamart
«Human capital will soon be something to make war over.»
Vivienne Ming - Socos

THE GLOBAL SUMMIT 2016 IN NUMBERS

800+ DELEGATES

300+ COMPANIES

45 COUNTRIES

38 SPEAKERS

50 JOURNALISTS

TOP COUNTRIES

SOUTH AFRICA | USA | FRANCE | UK | GERMANY | SWITZERLAND

MORE THAN **300** ARTICLES ABOUT THE GLOBAL SUMMIT 2016 (+135% COMPARED TO 2015)

The Global Summit of The Consumer Goods Forum is the business event that unites CEOs from some of the world's most successful retailers, manufacturers and service providers.

This unique event is the essential destination where 800+ successful FMCG leaders, from over 50 countries, gather under one roof every year. It is where CEOs talk to CEOs with additional input from global and regional experts. It is the place to voice and discuss the key issues and challenges facing our industry now and in the future. It is the event where the global agenda for the consumer goods sector is set.

Seizing opportunities in the face of disruption

We are living in an age when consumers trust many discount retailers more than their long established competitors.

When they trust social networks of their anonymous peers far more than well-known retailers and brands. When we are all willing to benefit from the physical touch and human service offered by physical stores, but prefer to part with our money online. When unknown start-ups are seen as better for you, better for the planet and better for society than big businesses.

We are living in an age of disruption. And beneath all disruptions lie opportunities.

The 60th Global Summit, the industry's best global CEO event, brought together innovators, CEOs from our industry and leaders of new business models, from emerging and developed markets, to share their experiences and challenge us to see disruption from new vantage points.

The Consumer Goods FORUM
The Global Network Serving Shopper & Consumer Needs

The Consumer Goods Forum ("the 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 50 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 50 manufacturer and retailer CEOs.

For more, please visit: www.theconsumergoodsforum.com.

THE OFFICIAL PROGRAMME

Wednesday 15th June

14:30 Welcome to The Global Summit of The Consumer Goods Forum
GARETH ACKERMAN - PICK N PAY STORES LIMITED — 8

14:40 Doing Business on the African Continent
CHRISTO WIESE - PEPKOR — 9

15:00 Consumer Goods for Better Lives
DAVE LEWIS - TESCO — 10

15:30 A Special Welcome to South Africa
CYRIL RAMAPHOSA - DEPUTY PRESIDENT OF SOUTH AFRICA — 11

16:00 Lessons to Be Learned from Disruptive Communication
SIR MARTIN SORRELL - WPP — 12

17:00 The Land of Business Opportunity – A Snapshot of the African Political Landscape
ZELDA LA GRANGE - FORMER PRIVATE SECRETARY - OFFICE OF THE PRESIDENT NELSON MANDELA — 13

17:30 Reasons to Believe in Africa – The Rise of the Bright Continent
MUHTAR KENT - THE COCA-COLA COMPANY — 14

Thursday 16th June

09:15 Empowering Healthier Consumers
WALTER ROBB - WHOLE FOODS
DENISE MORRISON - CAMPBELL SOUP COMPANY
JONATHAN FARNELL - EAT FOUNDATION — 15

10:00 The Digital Disruptors Have Their Say
VIVIENNE MING - SOCOS
MICHAEL FERTIK - REPUTATION.COM
KATE SAYRE - FACEBOOK — 16

11:30 Positive Impact, Real Business: Young Entrepreneurs in Emerging Markets Share Their Story
AFFIONG WILLIAMS - REELFRUIT
LUDWICK MARISHANE - HEADBOY INDUSTRIES INC. — 17

14:00 A Digital Model to Global Success
DANIEL ZHANG - ALIBABA — 18

14:45 A Voice from Asia: The Alfamart Journey
HANS ANGGARA - ALFAMART — 19

15:15 Modern Retailer in the Middle East
ERIC LEGROS - MAJID AL FUTTAIM RETAIL — 20

16:30 Retail in Africa: Contrasts and Contradictions
RICHARD BRASHER - PICK N PAY STORES LIMITED — 21

17:00 Positioning Walmart for the Future
DOUG McMILLON - WALMART — 22

17:30 Bringing Efficiency to the Market Place
JUNLING LIU - NEW PEAK GROUP — 23

18:00 Consumer Trust One Year After New York
PETER FREEDMAN - THE CONSUMER GOODS FORUM — 24

Friday 17th June

09:00 Creating Shared Value Sustainably
PAUL BULCKE - NESTLÉ — 25

09:30 Food Safety: Global View for a Global Issue
DANNY WEGMAN - WEGMANS
MIKE ROBACH - CARGILL — 26

11:00 Let's Be Challenged by the Next Consumers' Generation
TOM GORMAN - BRAMBLES
JULIE HAMILTON - THE COCA-COLA COMPANY
ENACTUS STUDENTS — 27

12:00 Fireside Conversation
ROB DAVIES - MINISTER OF TRADE AND INDUSTRY OF SOUTH AFRICA — 28

14:15 Opportunity and Transformation in a Fast-Changing Retail Landscape
DICK BOER - AHOLD-DELHAIZE — 29

14:45 Leading Retail in India
KISHORE BIYANI - FUTURE GROUP — 30

15:15 The Courage to Lead
FRANÇOIS PIENAAR - FORMER SOUTH AFRICAN RUGBY TEAM — 31

15:45 Closing Remarks
GARETH ACKERMANN - PICK N PAY STORES LIMITED — 32

Special Sessions — 34

GARETH ACKERMAN

Chairman
Pick N Pay Stores Limited
& Co-Chair
The Consumer Goods Forum

«The CGF has to play a key role in sustainability improvements for the world.»

WELCOME TO THE GLOBAL SUMMIT OF THE CONSUMER GOODS FORUM

Gareth Ackerman opened the 60th Summit. He said that he and Co-Chair Denise Morrison were delighted to welcome delegates to Cape Town, and said that he was especially happy that the Summit took place in his home town. Alluding to the rain outside, he said he was not going to apologise for the weather because the entire region had been experiencing a drought. The issues of food safety and security were never more real and present than in such circumstances.

Ackerman said that he, his family and colleagues loved being part of Africa. It was a continent with huge diversity and optimism, and he hoped delegates would feel that from the city and the region during the Summit. Their tremendous challenges were matched by enormous opportunities. **He told The Consumer Goods Forum that it was coming together with greater strength than ever before, with increased membership, a stronger programme and more impactful work.** In the past 12 months, great progress had been made on all fronts. The Forum was establishing a new board in South America, and was establishing a stronger base in South Africa. **Sustainability was ever-present in members' minds, whether with regard to food safety and security, climate change and deforestation or the social agenda, with specific attention to the issue of forced labour.** These challenges were all especially acute in South Africa, which had also experienced rapid migration and urbanisation.

The industry had to be more efficient at getting goods to its customers, and especially to those who had less. The Consumer Goods Forum had to play a key role in sustainability improvements for the world. This was the perfect subject for the 60th Summit, and he said the line-up of speakers was distinguished not just by its quality but its geographic breadth, and the highest number of women leaders.

Ackerman said he wanted to acknowledge and thank a number of people. His father had been chair of the old CIES for a number of years, and was in the hall with his mother. He expressed his thanks to the sponsors of the Summit, the Summit Committee and the local Task Force as well as the South African National Convention Bureau and all the attendees, speakers and staff. He and Denise Morrison wished all an inspiring and successful Summit.

CHRISTO WIESE

Chairman
Pepkor

« When the sun rises, whether you are a lion or a gazelle, you had better be running fast. »

DOING BUSINESS ON THE AFRICAN CONTINENT

Christo Wiese said he was an Africa optimist, but that the continent suffered from a bad press. It was in the nature of the media to focus on the sensational and in the short term, Africa offered a rich menu of poverty, corruption, abuse and crooked leaders. But the pressures of daily reporting meant that the media were not always able to pull back to look at the wider context, all leading to the impression of a backward continent.

Although it was important to make a clear distinction between **Africa's potential** and the clear realities of doing business in it, the potential **was indeed extraordinary**. It was the second largest continent after Asia – the land mass of Africa is so great that you could fit China, India, the whole of Europe, the United States and Argentina into Africa and still have space left. **It already accounted for $3 trillion in GDP and 60% of the world's uncultivated arable land as well as being very rich in natural resources**. Its 1.2 billion people would grow to 4 billion by the end of the century. **And by being late participants, Africans could leapfrog in terms of technology**. The use of smartphones was forecast to increase to 50% by 2020 compared to 2% in 2010.

The obstacles to realising this potential were headed by a **lack of adequate infrastructure**. Weise explained that Zambia was almost exclusively dependent on hydroelectric power, but because of the recent drought, water levels had shrunk dangerously low and Zambians only had four hours of electricity a day. Neither had red tape and bureaucracy been materially reduced, although there were encouraging signs with regard to graft and corruption, notably from President Buhari in Nigeria. **And Africa had to start to buy from and sell to itself. Currently less than 20% of all trading was intra-African.**

Wiese offered some advice for those wishing to do business in Africa based on personal experience. The first was to **select with care the countries in which you operated**. Thorough research would stand you in good stead, and he advised identifying those countries with a progressive attitude towards foreign direct investment and a growing middle class. Second, **you needed a long term commitment to the continent**. When Shoprite entered the rest of Africa the principals had agreed the development was for their children and grandchildren, not for themselves. In the end, they had ended up making higher returns than in their home market, but that had sometimes required their building the roads to get people to their stores.

Wiese cited an African saying. Every morning a lion wakes and thinks it must run faster than the slowest gazelle. And every morning, a gazelle wakes up and thinks it had better be able to run faster than the fastest lion. **The moral? When the sun rises, whether you are a lion or a gazelle, you had better be running fast.**

DAVE LEWIS

Chief Executive Officer
Tesco

« By 2050 we would not have enough food to feed the planet. »

CONSUMER GOODS FOR BETTER LIVES

Dave Lewis spoke principally in his capacity as chair of Champions 12.3, the body set up to engage with Sustainable Development Goal 12.3 of the United Nations 2030 Agenda for Sustainable Development, but he explained in some detail **how Tesco were making their contribution to eliminating by half per capita global food waste at the retail and consumer levels**.

Coming to a retail role after nearly 3 decades at Unilever, he realised he had understood only a fraction of the food chain. Learning more had stirred up quite a few emotions, not all of which were positive. It was embarrassing to explain why retailers did some of the things they did; sometimes you saw things you were ashamed of. **By 2050 we would not have enough food to feed the planet – except that already we were wasting a third of what we produced**. But as an optimist who believed in the power of people to change things, Lewis said he wanted to go beyond the negative.

Lewis said the problem was not simple. **In the developing world there was very little consumer waste, but significant loss in the supply chain. In the developed world, it was the other way round**. In North America and Europe, consumers in their homes were throwing away some 95-115kg of waste per capita a year.

In the UK, retailers typically accounted for the smallest proportion of waste directly, but it was important they had their house in order. At Tesco they measured and published waste monthly, recently adding bakery to the numbers after long standing methodological debates. Bakery and produce accounted for the largest proportion of some 1% of throughput going to waste. **They had committed no edible food would go to waste before the end of 2017** and had developed an open system smartphone app to enable charitable distribution which others were welcome to share.

Tesco had revisited quality and consistency criteria, introducing **"wonky food" options** in store as well as improving systems for linking sales directly to farms to determine which fields to pick when – and when to open up store capacity for crop flushes. Sourcing further afield, they had eliminated restocking points between Spain and the UK, getting produce into stores two days earlier to cut down code life waste.

With regard to consumers themselves, they had simplified coding itself to show just one date, and cut «Buy 1 Get 1 Free» promotions in fresh categories. They had introduced packaging innovations to keep food fresher longer, as well as providing education to adult customers and to their children with their Eat Happy programme.

Lewis asked retailers to stop debating measurement techniques and just **sign up for the transparency initiative in order to measure progress**; he asked manufacturers to partner with retailers to reduce waste in the supply chain, review promotional strategies to help consumers waste less and help in joint efforts to educate and redistribute where waste was truly unavoidable.

CYRIL RAMAPHOSA

Deputy President
South Africa

« Informed, satisfied consumers were the most important stakeholders in any business. »

A SPECIAL WELCOME TO SOUTH AFRICA

Deputy President Ramaphosa said that it was a special occasion for South Africa and the continent as a whole that The Consumer Goods Forum had come to Africa for the first time. It was also appropriate, as its people were beginning to bear witness to the **birth of Africa as a great consumer market**.

Ramaphosa said that it was in the DNA of South Africans to embrace and manage change. Cape Town, the mother city, had gone through centuries of disruption from colonialists in the 17th and 18th century, slavery through the 19th century and segregation and apartheid in the 20th century. Indeed, these had been times of both disruption and resistance. Ramaphosa said he continued to be moved by the memory of standing next to Nelson Mandela, holding up the microphone as he made his famous address from the balcony of Cape Town City Hall. Mandela had delivered another and more pleasant disruption with his message of hope and reconciliation for the country and he had kept all South Africans, black and white, on course to accomplish their difficult transition to a national democratic society out of the ashes of apartheid.

Ramaphosa said business could play a vital role in creating decent employment and underpinning entire national economies. **Informed, satisfied consumers were the most important stakeholders in any business**, and he said that consumer-focused businesses had to be responsive to the financial pressures under which their customers found themselves. Personal income and therefore expenditure continued to shift for individuals and families on an ongoing basis. He applauded the Forum's putting consumers at the heart of the value chain, and observed that its members were able to spend most of the year competing vigorously with each other but still come together once a year to break bread. **He commended the drive to end forced labour and modern era slavery by promoting decent working conditions around the world**.

He added South Africa had fought back against what could sometimes feel like an unfair share of economic challenges, and said that collaboration had been a vital part of that effort. Recently, the three major rating agencies had scrutinised the country's finances and debt very closely, and they had faced the risk of downgrading to junk status. By bringing government, business leaders and organised labour together, and by going to New York and London to make their plan and their solidarity clear, they had just received word that while Fitch, S&P and Moody's saw there were real challenges for the country, they would not downgrade the country's debt because they recognised South Africa had strong, stable and independent institutions in its business and society.

SIR MARTIN SORRELL

Founder & CEO
WPP

«Doing good is good business.»

LESSONS TO BE LEARNED FROM DISRUPTIVE COMMUNICATION

Martin Sorrell said the world was characterised as much by its new normal state as by being disruptive: it was one in which both real and nominal GDP growth were low, with little or no inflation, little pricing power and a near universal focus on cost reduction as the means to competitiveness. **Shareholder sentiment and diminishing executive lifespan were leading to a very short term attitude**. He noted how the S&P500 was effectively shrinking, going from earnings distribution and share buybacks of 60% in 2009 to over 100% more recently.

He suggested ten phenomena represented the key sources of disruption for WPP and its clients. First, New York might continue to be the centre of the world, but there was a **discernible shift in multiple directions**: to the east in China, south to Latin America and south-east towards Africa and the Middle East. Second, in most industrial areas, demand was lower than production – while the demand for talent exceeded supply. That would only get worse; UNESCO had shown the world would continue to age until at least 2060. Third, the rise of the Internet was marked by inexorable disintermediation, shortening supply chains and eroding long standing oligopolies. There were currently two dominant forces in the digital landscape in the form of Google and Facebook. **In 2016 WPP would spend over $5bn with Google, and $1.5bn with Facebook**. Fourth, there was a major rebalancing occurring between media use and media spend in marketing. **Mobile remained underexploited**, just as print was massively over-indexed. Fifth, there was a **transformation in the relationship between retailers and manufacturers** because manufacturers had the technology to reach directly to the consumer over the top of the retailers.

Sorrell's sixth phenomenon was the rising relevance of internal communications as **companies tried to integrate further, becoming more global, more local – and less regional**. Regional organisations and managers only really had the power to say no, both upwards and downwards. Seventh, he noted how finance and procurement had become the dominant functions, with marketing taking the back seat. Eighth, government was playing a bigger and bigger part in civil society; often in a national market, government was their biggest client. Ninth, **sustainability and purpose were ever more relevant to consumers and employees**. And tenth, a new wave of consolidation and convergence in media industries was under way, with more to come.

If the audience was in any doubt as to the speed of change required to keep up with this level of disruption, Sorrell reminded them that half of WPP's business hadn't even existed 15 years before.

ZELDA LA GRANGE

Former Private Secretary
Office of the President
Nelson Mandela

« Education is the most important of all weapons with which to change the world. »

THE LAND OF BUSINESS OPPORTUNITY
A SNAPSHOT OF THE AFRICAN POLITICAL LANDSCAPE

Zelda La Grange recounted a number of memories from her time working with President Nelson Mandela. She emphasised his commitment to education, which he said was the most important of all weapons with which to change the world. In the 1990s she became known as the source of invitations to the most expensive breakfast you would ever had. The President would read about corporate results one day and then invite the CEOs to breakfast the following morning, invariably convincing them to support the building of a rural school for $5,000 to $8,000.

Upskilling people was the investment South Africa needed the most, not least because just about any other investment was more subject to market and commodity fluctuations.

La Grange said that Mandela was the most revered statesman of our time. Invariably she was asked what he would have said or done in one or other set of circumstances. Her experience of working alongside him had not enabled her to answer those questions, but she observed he had lived according to a strict set of morals and principles daily. **He made sure that even in the smallest things, people could see what he was like and draw their own conclusions**.

She had learned lessons from him about **discipline, respect, honesty and integrity**. In 1998, the President had been chairing a meeting at the Southern African Development Commission in Mauritius. Robert Mugabe entered the room about an hour late. Without mentioning any names, the President launched into a 20 minute impromptu speech about the discourtesy of arriving late, and of thinking rank excused people from valuing the time of others. **He flatly contradicted there being such a thing as "African time"**.

On the matter of respect, La Grange observed that when the South African Rugby Football Union had mounted a legal challenge to the President's appointment of a Commission of Inquiry into its financial affairs, he had insisted on attending the courthouse in person. On arrival, he walked right up to the opposition lawyers and chatted with them in Afrikaans.
When she had asked him why he had afforded them so much respect, the President had told her two things. **First, you never allowed the enemy to determine the grounds for battle. Second, the way in which you approached a person would always determine how that person subsequently treated you**.

La Grange concluded by recounting the President's belief that it was easier to change others than change yourself. He had truly believed that if he could influence one person a day, he could change the world. And he did.

MUHTAR KENT

Chairman & CEO
The Coca-Cola Company

« By 2025, Africa's population would represent 25% of the global population.»

REASONS TO BELIEVE IN AFRICA
THE RISE OF THE BRIGHT CONTINENT

Muhtar Kent said that a brand was a promise, and a good brand was a promise kept. In that sense, brand Mandela was extraordinary. He added that Coca-Cola had been believing in Africa for more than 90 years, investing more and more in recent times: **some $6bn in the first decade of this century, and on course to commit $17bn in the second**.

Kent said the greatest asset of Africa was its people. It had the **youngest population in the world,** with 65% of people under 35. **By 2025, Africa's 2.4 billion people would represent 25% of the global population**. And the health and affluence of those people were improving rapidly. Child mortality was down sharply, malaria deaths were down by more than 60% and maternal HIV transmission was on the way to being eradicated. Inflation had been tamed, mobile telephony was transforming markets, and better governance was yielding exponential improvements.

He added that Coca-Cola's business could only prosper if people were thriving, and that their commitment to playing a role in what he described as the **golden triangle of government, business and civil society** was therefore enlightened self-interest. As a company and as an industry, it was vital to find solutions to big challenges. He highlighted a number of initiatives.

Recently, Melinda Gates had asked why, if it was possible to get a Coke anywhere in the world, it was not possible to get medicines to people in hard to reach places. Coca-Cola had played a leading role in **Project Last Mile** with Minister of Health in Ghana and Tanzania to improve medicine availability by 30%, putting to work one of the most diverse distribution systems in the world and their expertise.

In another initiative, **Source Africa**, they had worked with TechnoServe and the Gates Foundation to drive the building of better and more sustainable supply chains by helping small scale African farmers improve their yields, expand environmental growing and double the income of some 50,000 farmers.

Kent said he had just came from Rwanda where Coca-Cola had launched a water project called Ekocenter, a social enterprise model of community development. It was based around a kiosk broadly similar to a 20 foot container equipped with basic services for solar energy, clean water and internet connectivity. Part of the facility was first line medical support, to whom clean water was provided free of charge. To date they had 100 Ekocenters and expected another 177 by the end of the year. The water reclamation potential they provided were just one part of Coca-Cola's commitment to becoming fully water neutral by 2020.

DENISE MORRISON

Chief Executive Officer
Campbell Soup Company
& Co-Chair of the CGF

JONATHAN FARNELL

Chief Executive Officer
EAT Foundation

WALTER ROBB

Chief Executive Officer
Whole Foods

EMPOWERING HEALTHIER CONSUMERS

Jonathan Farnell said that the EAT Foundation brought together over 500 of the key players in the food chain to break down barriers between different stakeholders in the food chain and improve nutrition worldwide. He reminded the Forum of the unprecedented magnitude of the situation the world faced. We were in the **wake of an obesity epidemic and yet also faced significant areas of malnourishment** (and the two sometimes overlapped). Our food production systems were just about adequate to feed the world's growing population, but only if we stopped throwing 30% of our production away. And what we chose to put on the plates of the population would have a tremendous impact on the planet, especially as increasing wealth saw diets pivoting towards meat and ultra-processed food.

Farnell then joined Walter Robb and Denise Morrison for a panel discussion moderated by Alex Thomson. Morrison said that although **health and wellbeing** were in the DNA of the Campbell Soup Company, **it had had to be activated in a more contemporary way**. She had really gone to work on the company's purpose and assembled a cross-functional team of leaders to work out how to articulate it in a way that really resonated. It had been the most galvanising thing she had ever observed in an organisational setting.

Robb also emphasised the **importance of purpose**. That of Whole Foods Market was all about fresh food, love and respect, and the belief that full health was not so much the absence of something, but the presence of something. They had built steadily on the basis of **offering food with no additives and no preservatives**, increasingly using third party verification to set and maintain standards. They had a passion for **transparency** and **accountability**, in turn driven by consumer hunger to know where their food came from. He applauded the steps the Campbell Soup Company had made to do the same and said that, as consumer goods companies, they could use their power with producers to raise the bar.

Morrison related how her company had decided to improve the health and wellbeing of its headquarters home town in Camden, New Jersey. In a **public-private partnership** they had committed to reducing the 40% obesity rate to 20% within the next ten years. She noted how public budget pressures made the challenge harder because nutrition education was often the first item to be cut, and physical education the second.

Robb said it was also important to revisit the prevailing relationship between quality and price. **Not all food was created equal. There was a cost to good food and it was important to resist a race to the bottom**. He noted that in the USA, people spent just 9% of GDP on food versus 15-16% in Europe.

VIVIENNE MING
Founder & Executive Chair
Socos

MICHAEL FERTIK
Founder
Reputation.com

KATE SAYRE
Global Head of Consumer Goods Strategy
Facebook

THE DIGITAL DISRUPTORS HAVE THEIR SAY

Moderated by Michael Chui, Partner, McKinsey Global Institute

Michael Chui introduced the session by showing analysis which demonstrated that **digitisation had a very uneven effect on industries once you took into account how well companies were applying it**. Those who were doing it best were accelerating away from the competition, and the laggards were falling further behind. In his famous quotation, William Gibson had got it right: the future was already here, except it was unevenly distributed. He said that data and artificial intelligence were not on the horizon so much as competitive weapons already in use today.

Vivienne Ming said her work had started in the intelligence services trying to understand how data analytics could make sense of facial expressions well enough to know whether people were lying. She had repurposed that **technology for the United Nations Orphans Reunited programme**, which used scanned photographs of children in camps globally to tell parents, uncles and aunts and grandparents definitively whether their children were in a UN camp somewhere within about three minutes. Another application they had built allowed **autistic children to be taught in real time how to read human emotions**. She said there was a fine line between data privacy implications and creating real benefits: for instance, setting up a model to predict diabetes sugar level crises in advance, or using just the sensors on a cellphone to track covertly mood states and thus anticipate potentially dangerous manic episodes in serious cases of bipolar disorder.

Michael Fertik said a lot of what Silicon Valley talked about was almost designed to make people feel unnecessarily stupid. He said most of what was going on could be related to just three big ideas. **Search**, which for the purposes of this discussion was effectively Google, was still mostly text-based but **would soon extend to visual and audio sources**. Storage was more or less the cloud. Fertik said the **cloud needed to be demystified**: it was basically your data on a server in another guy's office, or your stuff somewhere else. And finally there was **analytics**, where Hadoop and MapReduce were doing for analytics what Excel had done for numbers – which was to **allow generalists to do what previously required specialists**. He also said he had noticed some certain signs of failure in legacy businesses – of which appointing a Chief Digital Officer was one, and the CEO not understanding the difference between the CIO and the CTO was another.

Kate Sayre said there was an unprecedented opportunity to make new meaning for brands, but to succeed companies had to adapt to changes in behaviours and where people were spending time. Second, there were new marketing technologies to adopt as soon as possible. And third, they had to accelerate testing and learning. She said there was a lot of talk in Silicon Valley about **how technology could make us better, but we also needed to make technology better for people**.

AFFIONG WILLIAMS
Founder & CEO
Reelfruit

LUDWICK MARISHANE
Founder & MD
Headboy Industries Inc.

POSITIVE IMPACT, REAL BUSINESS: YOUNG ENTREPRENEURS IN EMERGING MARKETS SHARE THEIR STORY

Moderated by Michael Chui, Partner, McKinsey Global Institute

Michael Chui introduced founders Affiong Williams and Ludwick Marishane to tell the stories of their businesses.

Williams said her company, **Reelfruit**, was the **first company to launch dried fruit as a snack in Nigeria**. Her market opportunity was tremendous. Nigeria had the largest population and economy in Africa. But she had also wanted to **reverse a trend**, which was Nigeria's tendency to export raw materials and import most of its refined food products. She believed there was an opportunity to create a world class product that could sell on any shelf in the world.

Since launch in 2013 they had introduced four products and sold 300,000 packets in three years. They had an impressive roster of customers, including United Airlines, Delta, SPAR, Shoprite and hotel chains such as Radisson Blu and Southern Sun. They had international interest from the Netherlands and Germany to bring their products to those markets. Their next steps included **expanding factory capacity** so they could meet increased demand in the years ahead, and diversify to different types of products responding to market trends.

Marishane said he had started his company in his first year at university in order to deal with the **hygiene challenges of many Africans** who used the sponge bath method. Trying to wash with limited water and using conventional detergents typically left people very soapy, and even so, also used very scarce water which might be better kept for drinking. He was determined to produce a solution which was more practical. Looking around the world he found a product called **One Rinse**, but that only partially solved the problem, not the root cause. He started work on a gel which could do this, protected it and then had to write a business plan. He explained how his cellphone was his most useful tool – using cut and paste and Gmail in an internet café, he had managed to assemble a text document he could import into Word and then Excel. **Doing business in Africa meant you learned to think differently.**

In order to get funding, **he had become a serial business plan competition entrant**, in total winning some $100,000 which he had used to develop and then improve a working prototype to a very high level of efficacy. It had made him a minor celebrity on business television, but he struggled to sell it locally because it was regarded as a poor man's product. In order to keep the company going he had learned to increase the mark up, add the word "premium" and sell it overseas for specialised use. Recently, his company had realised that the **local consumers most ready to adopt new solutions were the young**, and they had successfully embarked upon marketing through schools.

DANIEL ZHANG

Chief Executive Officer
Alibaba

"In many ways, China is at the vanguard of e-commerce."

A DIGITAL MODEL TO GLOBAL SUCCESS

Daniel Zhang described the unprecedented scale of Alibaba's business. **Of China's $600 billion in e-commerce revenues in 2015, their platforms had accounted for $485 billion**. Their growth expectations for the market meant **they aspired to be the first retail company to generate $1 trillion in revenue by fiscal 2020**.

Much of their growth could be accounted for by offering a **seamless experience** to a generation of new, young users who had rapidly adopted the **Internet** and **mobile** technology: 700 million people in China were internet users, and some 90% of them were mobile users. Equally, of Alibaba's users, only 2% were aged 50 or older. In many ways, China was at the vanguard of e-commerce.

Zhang said it might be more accurate to **describe Alibaba as a data company**, because they viewed their various businesses – video streaming, social media, Android brower, Taobao and TMall – as use cases to create data which could be deployed to help a series of partners do business more easily anywhere in the world. Alibaba needed that to happen since strictly speaking, it did not own or sell anything.

He described the origins of the **11/11 shopping festival**, originally a purely Chinese phenomenon to mimic Black Friday which had now become global. In 2015 they had accounted for $14.3 billion in sales on this one day, shipping 400 million packages and setting multiple new world records for sales on a single day. **Consumers from 214 countries shopped with them**, registering 140,000 orders a second at peak time.

Zhang explained how media use was increasingly integrated with commerce. For this year's 11/11 festival they had engaged Kevin Spacey to reprise his role from House of Cards to encourage Chinese shoppers to buy, and they were **increasingly using live streaming to sell specific products**. For instance, Angelababy (the Chinese Kim Kardashian) had appeared in a Maybelline livestream which sold 10,000 units in two hours, but perhaps more importantly, had 5 million people watching. In the digital world, Alibaba would increasingly supplant the conventional distribution channel with a platform giving brand partner manufacturers a much broader connection with consumers, both **offering direct sales and continuous customer engagement**.

Zhang added that future growth was also predicated on two wings – those of **globalisation** and of **rural development**. Their acquisition of Lazada in South East Asia had augmented strong businesses in markets like Russia and Israel. But within China, half of the population still lived in 600,000 rural villages with fewer than 1,000 households in each. Identifying young Taobao partners locally allowed Alibaba's partners to sell into these villages. **They had already managed to cover some 15,000 villages**.

HANS ANGGARA

Chief Executive Officer
Alfamart

«People is the most challenging asset. Training and development are the key.»

A VOICE FROM ASIA: THE ALFAMART JOURNEY

Hans Anggara introduced delegates to the Alfamart Bee, their mascot, who was small but friendly and cute, lived in a communal society and provided plenty of value and benefits. **The bee symbolised the company's commitment to fulfilling collective goals**.

Anggara said that Indonesia itself was a complex system in every sense: **18,000 islands with more than 253 million people living on them**. It was a young country being principally driven by consumption growth; more than 50% of its people were under 30 and that proportion was projected to reach 60% by 2020. Conversely, the economy faced significant challenges with **infrastructure a major constraint**. Traffic congestion was widespread and contributed to inefficiencies; these were magnified the further you went from Java island (hence a pack of cement in Papua could cost twenty times the price at origin). Finally, though predominantly Muslim, the country had **a number of different cultures** which were dominant in different regions, notably ones which were Christian and Hindu.

Alfamart and its older competitor, Indomarket now accounted for twice the market share of hypermarkets and supermarkets with their minimart format. Starting only in 1999, Alfamart now operated 11,359 stores under their main format, typically operating over 90 to 100m² with some 4,000 SKUs. Their vision was based on five elements: to be the largest minimart player and be globally competitive, to be widely owned (some 28% of the network was in the hands of franchisees), to have a powerful distribution network (already 32 warehouses with 235,000m² of space), to empower small entrepreneurs and, critically, to fulfil their customers' needs and expectations.

Anggara added that, consistent with that vision, they also wanted **to operate true community stores**. Many of their sites had vacant space on the second and third floors, and they had started to use them for community gatherings and for beauty and cooking contests. Downstairs, they were expanding their value added services for the community. Their Albi kiosks offered payment points, financing, phone top up, ticketing and e-commerce.

Specifically with regard to the **empowerment of small entrepreneurs**, some 2,000 of the 11,359 stores were used as hubs to distribute to micro, small and medium businesses engaged in traditional grocery, supporting outlet renovation, retail management training and sharing product trend information. But some of the most dramatic changes Anggara described related to **digitization**, where smartphone apps for customers and social media assets were matched by an innovative new 3D virtual reality franchisee store concept.

ERIC LEGROS

Chief Executive Officer
Majid Al Futtaim Retail

«We need to share common values: being bold, passionate and together.»

MODERN RETAILER IN THE MIDDLE EAST

Eric Legros explained that Majid Al Futtaim was based on the founder's vision of **creating great moments for everyone, every day**. Thus what characterised the company was providing wonderful customer experiences, whether in their malls or their directly operated stores. **They operated 20 malls in the Middle East, 180 cinemas, 25 entertainment centres and 170 Carrefour stores**. The latter were currently trading in 16 of the 38 countries for which the company had the franchise, with the most recent market entries being in Kazakhstan and Kenya, and Legros addressed most of his remarks to this business.

Legros said that the key characteristics of the region related to its growth potential, with the **emergence of a new middle class targeting higher levels of wellbeing, education and health. Already growth in the region was running in the range 8-11% per year**. And because the proportion of trade carried out by modern formats was still relatively limited in many of these countries (10% or less in countries like Pakistan and Iran), the company could meaningfully aspire to double its size in the next five years. They were opening 30 new stores just this year.

Of course **the region also typified the VUCA environment of volatility, uncertainty, complexity and ambiguity**. A big part of the company's response was to match speed of expansion with quality of operations and, in turn, robust selection and development processes for a new generation of managers. They aspired **to be a true university of retail**, and were building their own leadership institute, their own professional training schools and investing in new e-learning technologies to standardise their programmes across the region.

In order to win the competition with the traditional trade, Legros added they had to recognise that they were not only capable of great service but were also sometimes really **strong price competitors**. What would really make the difference was **human capital**. The hypermarket had to match the experience of the traditional market and had to offer the best baker, the best butcher and the best grocer in town.

Legros recognised that the geographical breadth of their franchise required the company to deal with two different cultures in the company. One was high modernity; in Dubai and Qatar, consumers wanted the latest and best product with the most recent technology. But at the same time, growth in newer markets required a real pioneer mentality. What united these two cultures were common values: being bold, being passionate and being together.

RICHARD BRASHER

Chief Executive Officer
Pick N Pay Stores Limited

«If you're just too focused on the target you will end up missing it.»

RETAIL IN AFRICA: CONTRASTS AND CONTRADICTIONS

Richard Brasher said that as a relatively new resident of South Africa, he had realised that negotiating the balance between optimism and pessimism about the region could subtly imply **the only important question was about a return on assets**. Of course, everyone in the room was in the business of business and making a profit was important, but he also said Africa was a place where 1.2 billion people lived, getting up each morning and going to bed each night with hopes and ambitions. **Africa was about people as much as about spreadsheets**.

As other speakers had noted, nearly 60% of the population was under 25. GDP growth had resulted in a marked reduction in poverty so that **people living on less than $1.25 a day had reduced in number by 25% in a decade**. That was by no means perfect, but four of the five countries with the largest one year gains on this measure globally were in Africa. And education was increasingly much more effective, as was life expectancy. Higher education was available to nearly a million students in South Africa, and life expectancy had increased by nine years just during the period 2000-2005.

Brasher emphasised the sheer diversity of South Africa, whether assessed in terms of racial origin or language spoken. English might be the language of business, politics and the media but it only ranked fourth out of eleven in the list of languages spoken at home after Zulu, Xhosa and Afrikaans. The 2 million immigrants to the country had effectively brought another 4-5 widely spoken languages with them.

As a retailer, **Pick N Pay had always prided itself on anti-discriminatory practices** and this applied as much to their serving the widest possible range of customer as it did to their labour and management practices. It required real agility to serve customers in a population where 94% of households receive less than $24,000 a year in income, with a quarter surviving on less than $2,400 a year. However, having great values without strong performance only allowed you a limited lifespan to do the right thing.

Three and a half years ago Pick N Pay had embarked on a major turnaround during which their first priority had been to stabilise decline, then change its trajectory to growth and then finally to build a platform for sustainable long term growth. That was bearing fruit, with turnover up 7% annually and profit 26% annually over the last three years. **As the business grew, so did their contribution to the society around them**. That included making their systems available to independent traders as well as their internal employment practices. **Brasher said he was proud they paid as much as they could afford, not as little as they could get away with**.

DOUG McMILLON

President & Chief Executive Officer
Walmart

«Mentally you have to start thinking about what the future is going to look like and lean in into it.»

POSITIONING WALMART FOR THE FUTURE

Doug McMillon said that the first word that came to mind when he thought about Walmart was **"change"**. The company had a history of it and the founder had believed in it to the point that it was the only constant at Walmart. That change took place around some constant moorings. The company's purpose remained to lower the cost of living for everyone, giving people the opportunity to save and have a better lifestyle. And its culture continued to rest on service to the customer, respect for the individual, striving for excellence and acting with integrity.

McMillon said these were timeless values, but that as you looked more closely at how they were lived out by associates, customers and the communities in which they lived, the level of change had to be radical. **He said he assumed the world would be one where 100% of customers had a smartphone, where 100% were interested in using voice activated interaction technologies and where 100% were prepared to use self-driving cars**. A company the size of Walmart really had to lean in on such thinking if it was to change at all.

One major change had been with regard to **associates**. In recent years, Walmart had made a more than incremental investment in wages and learning. **Announcing a $2.7 billion package of spending in 2015 and 2016 had initially led to a loss of some $20 billion in stock market valuation, but down the line stores were engaged and getting faster** at processes, with a better cashflow stream from stores and thus the means for Walmart to invest and make transformational change happen. He also pointed out that Walmart associates were no just in stores; 2,500 people worked for the company in Silicon Valley and they had associates in India working on logistics, the mobile app and other forms of new technology. Today's Walmart already did not look like yesterday's.

The second big area was in what customers saw, for they wanted to save time as well as money. McMillon explained how they were taking the assets they had currently, looking at those which were still relevant and adding onto them a **new digital business** across the company. Then they had to make those things connect to each other so they were truly seamless.

A third area of dramatic change had now been under way for some years, and that was **paying more attention to societal expectations** and the power Walmart had to make the world a better place for all stakeholders. Being a big company they could have a lot of impact, and **had already diverted 75% of their global waste from landfill**.

McMillon said that in all of this, it was easy to see Walmart for its current size and not its growth potential, but the company was prepared for $45-60 billion in new sales in just the next three years. It was still very much a company with whom you could do business to get growth.

JUNLING LIU

Co-Founder & Chairman
New Peak Group

«The company's dream is to create a platform whereon Chinese people could access decent healthcare at reasonable cost.»

BRINGING EFFICIENCY TO THE MARKET PLACE

Junling Liu talked about his experiences leading two rapid growth internet businesses in China. Some eight years ago, he and his colleagues had founded **Yihaodian** (a word translating as "number one store" in English) to deliver supermarket groceries to consumers' homes. Their very first day of trading had not been so auspicious; there were only 20 orders and they all transpired to have come from members of staff. But **by 2011 they were the fastest growing retailer in the Asia-Pacific region with 100 million registered users and 10 million unique daily users with customer satisfaction rates of 99%**.

The front end benefits for customers were easy to understand, but how had they coped developing the back end? To start with, not so well: inventory days were 120 to start with. In due course they managed to reduce this to 18 days by employing vendor managed inventory and better demand forecasting. **They also understood the importance of the first, as opposed to the last, mile**. Relying on small suppliers, they significantly improved supply chain efficiency by going to collect goods on a milk run rather than relying on inbound logistics from suppliers, who tended to save short term costs by bulking up and thus sending too much. They also used drop ship vendors for more expensive and more bulky products, as well as decentralising their warehouse system for the highest volume SKUs, pre-stocking them nearer customers' homes. Taken together, these measures allowed them to take delivery time down from 24 hours to 3, and for costs to be reduced from 30 RMB to 7 RMB.

Liu said that, conversely, they had organised really significant promotions – including setting an officially accredited new Guinness World Record for selling the most milk in 24 hours. Buying in 30 containers, they sold out in 52 minutes; two months later, they did it again but sold 100 containers' worth in the same kind of time.

Now, Liu said, he believed **another industry – that of healthcare – was about to go through a comparable transformation**. Current patient experiences in China were very poor. He explained that his mother, who had a long term heart condition, had been compelled to spend half a day a month queuing first to see a doctor for a repeat prescription and then queuing again to get her prescription. By establishing and registering their own internet-mediated hospital, **New Peak could integrate the consultation and prescription processes with fulfilment in a closed loop platform**. Subsequently they had branched out to a B2B arm to facilitate the transfer of medicines from pharmaceutical companies to hospitals, doctors and clinics, and in the latest development, they were offering the infrastructure necessary to bring e-commerce to existing drugstores, and extend their effective range from 3-4,000 SKUs to something closer to 100,000. Liu said that the company's dream was to create a comprehensive platform whereon ordinary Chinese people could access decent healthcare at reasonable cost.

PETER FREEDMAN

Managing Director
The Consumer Goods Forum

«Since the last Summit in NY, the words 'consumer trust' kept resonating and we've been focusing on implementation.»

CONSUMER TRUST ONE YEAR AFTER NEW YORK

Peter Freedman said that he had been struck how often it was, during the year since the last Summit in New York, that the words **"consumer trust"** kept resonating. The work of The Consumer Goods Forum was very much about helping companies build consumer trust and during that last year, they had been focusing on implementation.

Freedman reviewed some of the initiatives undertaken by the Forum. He drew attention to the elements of **The Consumer Goods Forum Model for Change**: to first identify the need for action, then coalesce around a commitment to action, build the "how to" elements, help members implement them and finally engage with stakeholders to communicate progress.

These steps were absolutely critical. Unless the Forum and its members went through each, consumers would call them.

The other word he had heard repeatedly was **"transparency"**. This was an easy word to use, but harder to put into practice because **even when the necessary data existed, they typically were not easily connected**. So the Forum had worked with 7 global leading edge providers to provide members with an **open API** and a **new standard approach to interoperability**. That meant they would have the ability to exchange agreed product information across borders and organisational boundaries to be available to shoppers at the end of the value chain.

The API would enable companies to collect the right data at the right time. The interoperability technology existed, the need for its use was growing and the future had arrived.

PAUL BULCKE

Chief Executive Officer
Nestlé

«We as an Industry are touching an amazing amount of consumers; we must be a force of good.»

CREATING SHARED VALUE SUSTAINABLY

Paul Bulcke said he was not going to speak about environmental sustainability in isolation but rather how business could stay involved for the long term. The mission for The Consumer Goods Forum is better business for better lives, and being good for society is what business had always been, creating shared value.

Africa showed what creating shared value sustainably was about. It was definitely a continent of opportunity and growth, but how did you go beyond that? You needed the right mindset. Nestlé was 150 years old this year, a 90 billion Swiss Franc company with operations virtually all over the world selling 1.3 to 1.4 billion products a day. In Africa Nestlé was 100 years old in South Africa this year. The company had 26 factories in Africa, and a research and development centre in Abidjan.

Creating shared value was a fundamental concept at Nestlé which combined both a what and a how. It was a conviction that to be successful over time, **you had to create both shareholder value and create value for society as well**. The company looked at this in terms of three intersecting areas: **nutrition, rural development and water**. In nutrition, the company had been developing products which were fortified with micronutrients. Products like stock cubes were a potential vehicle for iron, tackling anaemia in pre-school children. In total, some 200 billion products globally were fortified by Nestle. But nutrition was as much about education as formulation of products. The **Healthy Kids program** was operating across the world, touching over half a million children in sub-Saharan Africa alone. The company also provided cooking lessons to mothers at wet markets.

Rural development was intimately linked with **local raw material sourcing**. Two thirds of Nestlé products used such ingredients, up from just a half a few years ago. One example was the company sharing plantlets for coffee with local farmers, training some 13,000 farmers to get better, stable yields. Similar programs existed to promote grain quality locally, **increasing the volume of locally sourced grains by 28%**.

Water was the most precious resource of all, and at the heart of Nestlé's business. **Water programmes**, like those for food and nutrition, were long term commitments. Providing treatment plants and local access to water were accompanied by long term reductions in water usage in manufacturing. All of this work had still to be consumer-centric, respecting different tastes and common concerns globally.

In all of this activity, business and societal engagement were combined for the long term, and based on respect for society, the environment and diversity. But Bulcke said all economic activity created value for society and at some point civil society had lost sight of this fundamental link between financial and societal value. By communicating clearly and transparently, companies could show how the United Nations' Sustainable Development Goals could be served by business that was conducted responsibly.

DANNY WEGMAN

Chairman
Wegmans

MIKE ROBACH

VP Corporate Food Safety
Cargill

FOOD SAFETY: GLOBAL VIEW FOR A GLOBAL ISSUE

Danny Wegman said people all over the world both enjoyed fresh food and were concerned about their health. **The one big disruption in that system came from pathogens**. He showed a film in which a New Jersey woman described the fatal effects of listeria on her unborn child, and related the account of a customer who had been hospitalised with suspected E. coli.

By owning their own organic farm, Wegmans understood the challenges of operating properly and the costs of compliance. It also allowed them to talk to other suppliers with credibility. Wegmans had been investing in food safety since 1998, basing HACCP processes on a solid retailing operations base. **Establishing a solid food safety culture** required significant and continuing commitment by the CEO and senior leadership, and food safety experts acting as coaches rather than as the police.

Wegman said his family had been involved with food safety for many years. The food industry was made up of a combination of large and small companies, but the challenge faced by the industry – represented by GSFI – was to **bring all of these players together acting in common**. In discussion with Mike Robach of Cargill, Wegman stressed that **safety was not a competitive issue; it was in everyone's interests to share best practices**. Robach agreed that it was pre-competitive and observed that 25 years ago, the ground beef producers of the United States got together to fight E. Coli after the Jack in the Box outbreak. Cargill now had a line of irradiated beef marketed through Wegmans which could safely be eaten raw. Wegman said that ultimately, customers wanted to know the truth. Telling them explicitly to cook ordinary ground beef to 160 degrees Fahrenheit to make it safe actually increased sales.

Robach said GFSI's operations across multiple borders, based on sound science, allowed Cargill to ensure their factories and customers operated with safe practices. The manual they had produced could be used by anyone, anywhere and was available for systematic, progressive implementation. Wegman said that one reason for participating in GFSI was the range of risk involved. He stressed that fresh produce was really important for people's health, but it was also potentially very risky because there was no kill step in the food chain.

Robach added that **governments around the world were aware how closely the food business had worked together globally** and were beginning to realise there was something in this for them as well. They had an obligation to provide oversight, which GFSI members respected, but equally they should make sure their oversight systems were based on the same goals and principles. That in turn would greatly enhance freedom to operate. Just this week, GFSI had signed an agreement with the United Nations Industrial Development Organization for better co-ordinated content and delivery of training programmes for food safety.

TOM GORMAN

Chief Executive Officer
Brambles

JULIE HAMILTON

Global Chief Customer &
Commercial Leadership Officer & Service VP
The Coca-Cola Company

ENACTUS STUDENTS

LET'S BE CHALLENGED BY THE NEXT CONSUMERS' GENERATION

Tom Gorman said challenging United Nations aims to cut food waste required everyone in the industry to work together and stay focused together. Julie Hamilton observed it would also require members of The Consumer Goods Forum to work with a range of other stakeholders, and introduced teams from Enactus in Morocco, Kenya and Brazil. They said that their name stood for the longer phrase **"Entrepreneurial action for others creates a better world for us all."**

Enactus representatives from Morocco said **small actions taken at community level could make a big difference**, harnessing the power of business and entrepreneurship. They explained how the Enactus programme involved 69,000 participating students in 38 countries developing sustainable solutions on a project basis, growing consistently across the world for 36 years. The representatives on the stage from Morocco, for instance, had **worked on clean and affordable energy solutions, no energy food preservation and improved sanitation**.

The Enactus programme used five basic steps: project team formation from amongst university staff, students and business leaders; team development; a needs assessment with mutual, collaborative guidance provided by various stakeholders; entrepreneurial action undertaken to develop solutions and then subjecting these to competition, leading up to the Enactus World Cup, where the very best of 4,000 projects a year were showcased.

An Enactus team from **Kenya** presented a **waste reduction solution**. Agriculture was the backbone of the Kenyan economy, but 40% was lost in food waste. Just a 1% reduction in post-harvest loss could lead to economic gains of $40m. The Enactus project presented to the Forum involved a solar powered cold storage room efficient for small scale farmers and vendors, which increased storage life from 3 to up to 21 days. They were in production and now renting their solution to small vendors for $5 a week, and selling to farmers for $2,000.

Enactus representatives from **Brazil** presented two further projects. The **Desfrutando** project tackled retailer produce loss through bruising. By processing these fruit and passing new raw materials to individual women entrepreneurs, training them to produce and sell new food products, they had been able to develop more than 50 new recipes.

The **Sumaúma** project concentrated on fruit from the Amazon, exploring the culinary potential of still little known species. By producing fruit pulp and empowering the community to produce new recipes, they were able to produce new income of $20,000 for a rural community of 20 people while focusing research attention on uncovering more of the potential of the most biodiverse area on the planet.

ROB DAVIES

Minister of Trade and Industry
South Africa Government

«The African consumer goods market is expanding: be here if you want to be part of the future.»

FIRESIDE CONVERSATION

In conversation with Alex Thomson, Rob Davies said that there was plenty of evidence that the **growth frontier after Asia was Africa**, and that this was driven by demographics and the growth of the middle class. In South Africa, there had been significant changes in the wake of democratic transformation. The continent was going through a period of disruption, however, because the end of the commodity supercycle had accelerated a transition already under way towards industrialisation and away from simple extractive industries.

Companies were investing in South Africa as the most industrialised country in the continent and as a base for expansion into the rest of Africa. There was a **free trade agreement** amongst 17 countries in the Southern Africa Free Trade Area. Another initiative looked to link 26 countries up the east side of the continent, and in due course, a continental free trade agreement. That would create more opportunities still. **A pan-African free trade agreement would be game-changing**. Creating large markets would be in turn accompanied by changes in infrastructure which actively linked different African countries to each other.

In an answer to questioning about difficulties for overseas businesses getting access to the South African market, Davies mentioned the creation of a one-stop inward investment body to streamline approvals, headed by the President. Digitising company registration, and working with banks and the revenue services, already allowed much more rapid progress in getting under way legally, while within the same one-stop framework they were looking at the issues of business visas. That process had been simplified, and the government recognised that where there were clear skill deficiencies locally, visas needed to be expedited.

Davies said that the need to move up the value chain had led the government to launch regular plans of immediate action for supporting industrialisation. There were some **success stories**, notably in the **automotive sector**. The clothing and textile industry in South Africa had been bleeding to death before they changed the incentive model. The relationship between retailers and manufacturers had changed as retailers learned to look for faster response locally than importing everything from abroad. And in agro-processing they had developed more specific solutions.

Davies said investors in South Africa had already generated good outcomes, but that being better about making decisions and communicating them faster would make the environment more business-friendly still. His government was committed to making the experience of doing business in South Africa and beyond a more positive one.

DICK BOER

Chief Executive Officer
Ahold-Delhaize

«We need the healthy living trend to be owned by us as retailers.»

OPPORTUNITY AND TRANSFORMATION IN A FAST-CHANGING RETAIL LANDSCAPE

Dick Boer said that with the Forum in Cape Town, he first wanted to celebrate the fact that 10 years ago, Ahold-Delhaize had established the Albert Heijn Foundation to put 5% of purchase cost in Africa to growers across Africa. That helped build capabilities locally. As an example, fresh cut fruit from Ghana was prepared by 3,000 people in factories there, and in store in the Netherlands within 24 hours.

He commented briefly on the Ahold-Delhaize merger, having shown a video which demonstrated the remarkable similarities in their joint history over almost 150 years. He said both were characterised by operating great local brands within common beliefs.

The macro trends facing the food business were profound: a fragile economy prone to shock, major demographic change and the disruption of new technology. But on the other hand, Boer said he still believed in the potential of existing food retail companies to identify and deal with the specific trends facing the consumer goods industry. He characterised those as a **drive for more value, the sense that time is a luxury, the desire for living better and going digital**. If he had to concentrate on two, they would be the third and fourth of these. And he also believed that change was in their DNA, because they already had a history of driving transformation from within.

Their **omnichannel transformation** had started almost 30 years ago and included the acquisition of Peapod.com and bol.com. Bol.com had taught them a great deal, because they sold 11 million items online, and a significant proportion came through third party vendors. They were thinking about opening up their network to other food vendors as well. They believed they could achieve a sustainable 6-7% of their sales online by 2017 because they owned the supply chain in fresh and regarded it as a real lever for growth. That meant sometimes they could catch up. Having missed the meal box market initially, they had become the number 1 in the Dutch market within 6 months of launch. And there were huge opportunities for innovation, improving accessibility and convenience, in fresh. Their ability to marshall food knowledge also allowed them to be effective specialist media owners, both in printed and online channels.

Digital change was reflected in the roles within the organisation. More **than 1,000 people now worked on digital around the world**, focusing both on mobile interfaces and on the distribution backbone to support the business. Track and trace functionality allowed customers to see where the delivery van (or delivery electric bike in Amsterdam) was on its journey to their home. But it also allowed Ahold businesses to be much more personalised in their shopper interfaces. For instance in the Peapod app, they were tailoring proposed shopping lists to historic purchasing habits and health needs. Other applications could include helping customers with exercise and integrating their diet and lifestyle, because as a food retailer, they were at the centre of that personal ecosystem. Being able to connect with consumers at the point of need allowed both the retailer and its suppliers to provide relevant solutions at the right time.

KISHORE BIYANI

Founder &
Group Chief Executive Officer
Future Group

«By 2021, Indian consumer spending would reach $3.6 trillion.»

LEADING RETAIL IN INDIA

Kishore Biyani said that India accounted for 17% of the world's population but only 3% of its land mass. Even if in the modern world it was not known for trade, it had a very long history of leading global trade flows. In the Middle Ages, India was the Land of the Golden Bird, and attracted waves of invaders – who in turn, tended to stay.

Now the country was at another historic inflection point. Biyani said **India was an exceptionally young country**, with a Millennial generation of some 400 million. It was a **generation without guilt about consumption**. By 2021, Indian consumer spending would reach $3.6 trillion. However, India was also the most diverse country in the world, with 29 states and some 72 major festivals, each of which was an excuse for consumption.

The Future Group had spent its first decade building a **network of stores in multiple formats and its own shopping malls**. The stores were originally designed to look like Indian bazaars but had subsequently started to resemble stores anywhere else in the world, harnessing new design and innovation hotspots. They studied memetics, semiotics and design thinking to interpret and act on developing trends. At the same time, he noted that Indian consumption patterns were still more based on lunar and solar calendars than the Gregorian one.

Biyani explained that the Future Group had started as a fashion business and branched out. Some 90% of their apparel stores were own brand. Given that barely 10% of the Indian food market was branded at all, they also believed that a phase of expansion would follow where both existing and new brands would start to take more market share. Anyone trying to bring existing products to India and hoping to change habits, however, might be better advised to **adapt to India** and its tapestry of eating habits and cooking practices, and the Future Group saw an opportunity to build its own food business. Being a retailer had been good training for thinking in multiple categories at the same time, and the group was integrating vertically, building its own food manufacturing facilities.

In subsequent questions from Alex Thomson, Biyani said his inspiration had been as much from books as the trade – he had opened his first store without visiting anyone else's (although he had now been to see many of them). **Inventiveness, going with the flow, positivity and humility were key to the company's success**. Making mistakes in such an environment was inevitable, so the company also had to **learn how to fail fast and change fast**. India had started to share more global habits and be transformed by technology. The India of five years' time would not be the same as the India of today, and technology would shrink space requirements, save time and increase the amount of social interaction and information sharing.

FRANÇOIS PIENAAR

Former Captain
South African Rugby Team

«Rugby is a hooligan's game played by gentlemen.»

THE COURAGE TO LEAD

François Pienaar opened by quoting Muhammad Ali: "Don't tell me I am the greatest, I am the double greatest." Pienaar said Ali was one of four kings in his life: the others were Bruce Lee, Elvis Presley and Nelson Mandela.

He said **rugby was a hooligan's game played by gentlemen, played in 120 countries in the world**. The World Cup was played in front of huge crowds, and was now the third biggest sporting event in the global sporting calendar. But even if people knew nothing of rugby, he was sure **there would have been a time when most people would have become absorbed by one or other moment in sport**: perhaps Bannister's first four minute mile, Bob Beamon's two foot extension of the long jump record, Ali beating Foreman, Nadia Comaneci scoring 10.0 seven times or Usain Bolt slowing down as he broke the world record. Perhaps especially Jesse Owens, winning four gold medals in front of Hitler. As Nelson Mandela had said, sport had the power to change the world, to inspire, to wake hope where there was only despair, and to speak to children. It sometimes challenged its participants to have the courage to lead.

Pienaar said three things stood out about sport. It was personal. It was very time specific, because players trained harder and longer than they played but everything depended on a couple of hours on Saturday afternoon. And it had an unyielding human resources policy based solely on performance and the coach's opinion.

In his own life, Pienaar had relied on sport to get him scholarships and entrance to university. It brought him to a new world. **As a child, he had learned that Nelson Mandela was a bad, evil man**. But at the same time, his release allowed South Africa back into international sport. Three months after his release, Nelson Mandela asked to meet the new South African rugby captain. He had sat outside his office with sweaty palms. Mandela greeted him in Afrikaans, took his hand and walked Pienaar into his office. They had an extraordinary conversation for an hour. **Afterwards, Pienaar sat silently in his car, aware that he had felt safe and in the presence of a wide, authoritative leader**.

The famous Rugby World Cup win in 1995 was less remarkable than it might have appeared, because the squad was in very good shape and knew how to win. But Australia were the favourites. Mandela visited the squad before their first game, and made a huge impact upon them by knowing the name of every player. Pienaar said that afterwards, the players would have run through walls for him. They beat the Australians, the favourites, with ease. **But then they had to face Jonah Lomu in the final. The team was waiting to go out when Mandela again appeared, wearing the Springboks shirt**. It was an intense game which went into extra time. The crowd, 99% white, started singing an African song, Shosholoza, and the team got the winning drop kick. **For the first time the nation had truly come together**.

Hollywood had got much wrong in the film Invictus. It was not so specially down to Pienaar; there were other leaders, and the team was much more socially enlightened than its depiction. If it had been down to one man and the courage to lead, that man was Nelson Mandela.

GARETH ACKERMAN

Chairman
Pick N Pay Stores Limited
& Co-Chair
The Consumer Goods Forum

«We have all been driven
to think seriously about disruption.»

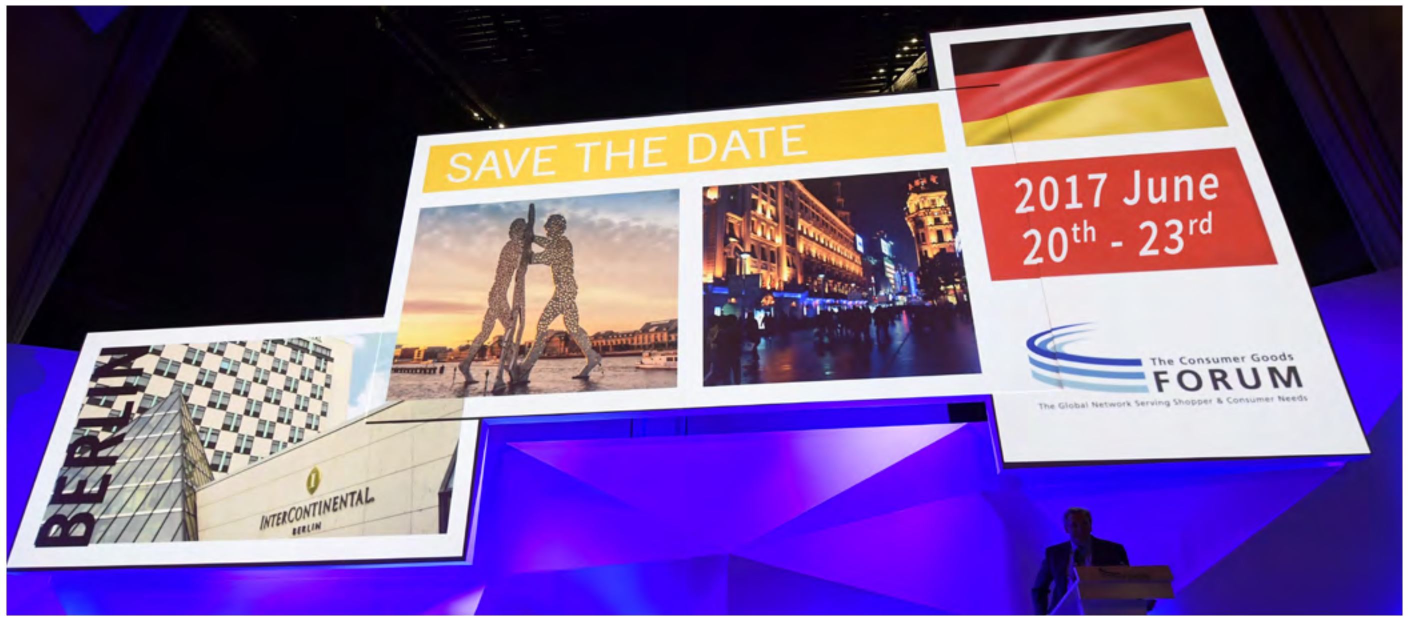
CLOSING REMARKS

Gareth Ackerman thanked delegates for attending the Global Summit. He hoped they had managed to gather something of the energy and potential of Africa.

Over the past three days, delegates had been informed and inspired. From The Consumer Goods Forum perspective, they had learned about progress on all of the pillars but they had also been challenged to do more, and **be better citizens in the societies in which they lived and worked.**

Ackerman said they had all been driven to think seriously about disruption and at corporate level should be revisiting their strategic plans. He hoped the challenge of Africa had been an inspiring counterpart, along with **the message that people were more important than spreadsheets**.

He thanked Peter Freedman and his management team for the serious amount of work they did all year, Amaya Bloch-Lainé and her event team for the Summit, and Alex Thomson for his moderation. Ackerman thanked the sponsors and partners for helping make the Summit possible, and reminded delegates of the Deputy President of South Africa's request that as consumers themselves, they should spend freely in Cape Town.



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MARK CURTIS

Chief Client Officer & Co-Founder
Fjord

TEO CORREIA

Senior Managing Director
Accenture Consumer Goods & Services

THE INVISIBILITY PARADOX FOR BRANDS: HOW TO THRIVE IN THE THIRD ERA OF DIGITAL

Mark Curtis argued that **technology was driving a shift between what was visible and what was invisible in consumers' lives**, and that conversely, some unchanging features of the human brain and how we constructed and remembered relationships meant there would be significant pressure on incumbent brands to maintain their current share of mind and wallet.

Some products and activities were just coming off the "thinking list", whether they were being managed by digital assistants or automated subscription services. But just as these transactions were becoming invisible, so others were becoming visible. Data visualisation techniques not only made utility and other self-care apps easy to understand, but often drove far higher levels of use and engagement.

Curtis explained how anthropologist Robin Dunbar had developed an insight about neocortical capacity in different primates to identify how stable the number 150 was for those people we could both remember as individuals and comprehend in terms of their relationships with each other. He contrasted this with 12, which was reckoned to be the number of close family and friends whose death would cause an individual, significant and enduring grief, and 2,000 – the number of people whose faces you could at least recognise.

Applying these numbers to brands offered some intriguing insights, especially if you then separated them out in terms of two dimensions: love and frequency of use. Perhaps those brands we both loved and used all the time were analogous to the 12 people whose loss we would deeply mourn. Curtis noted how many of the brands in his top right quadrant were digital and mediated by his mobile phone.

He noted how important it was for these brands to be able to fit within other, dominant interfaces: for instance, Spotify making itself function within the Uber experience, or the environment of a Ford or BMW. **As a general rule, he added, in most brands there was a service struggling to get out**. Sportswear manufacturers like Adidas and Nike were going beyond making apparel and equipment to build network platforms more generally dedicated to fitness lifestyle.

Network effects favoured a shift from pipes – value chains of the type we were used to – towards platforms. If you wanted to know whether your company was capable of building a platform, you had to **ask whether your brand was authentically social**, whether your **ecosystem was one ripe for disruption**, whether you had an abundance of content and whether currently you were operating in a space characterised by fragmentation and choice.

CHRISTOPHE BECK

Executive Vice President
Ecolab
& President
Nalco Water

SPECIAL SESSIONS

ECOLAB

THE INTERNET OF THINGS: HYPE VERSUS REALITY. HOW TO TURN DATA INTO ACTIONABLE INSIGHTS THAT DELIVER VALUE

Christophe Beck described the Internet of Things as the means by which everyday objects had network connectivity, allowing them to collect and exchange data. That was an extraordinarily wide range of objects – it extended from aircraft engines and toasters to cows in field, each with devices which could record and share data. **More than a trillion devices would be connected to the Internet in this way by 2022**.

Most of us were familiar with some of the early B2C applications for the IOT such as Amazon Dash and home environment monitoring and management. But Beck said **some 70% of potential savings were in fact in the B2B space, of which food safety represented a significant proportion**. Already it was possible to imagine tracking from one end of the food chain to the other, and plants which would reuse 100% of water because none would ever leave or leak, applications which would allow hospitals to detect and anticipate infection, or oil exploration which was safer.

Beck said that their work at Ecolab was about trying to move this future reality as close as they could for their 1.3 million customers around the world, connecting them to 26,000 engineers. They helped make 27% of the world's processed foods safe, as well as assuring some 42% of milk suppliers and some 45 billion restaurant meals a year. In total they helped manage some 1.1 trillion gallons of water.

One of their most significant initiatives related to water management was the descendant of a very early experiment in connected technology, using trace materials in water to allow data collection in real time. Their **Trasar system** was now deployed in some 36,000 water systems around the world and they estimated they had saved some 142 billion gallons of water (or the annual drinking equivalent of over 400 million people).

Beck said their ambitions were to go much further and by 2030, saving the drinking needs of 1 billion. He described a transition driven by technology: from big data to predictive analytics; from data capture to global process control; from open networks to secure networks; from regular checks to real time monitoring and a model based on service to one based on on-site expertise.

Beck said that in reality, the train had left the station and it was going very fast, but with the right partners, it was possible for companies to catch it at the next stop. Even so, the pace was daunting in an environment where the long term could be described as 18 months.

SPECIAL SESSIONS

IRi Growth delivered.

BRENDA KOORNEEF

Business Executive, Group Marketing & Corporate Strategy - Tiger Brands

JOSÉ CARLOS GONZALEZ-HURTADO

President of International IRi

SHRINK TO GROW: HOW TO USE ANALYTICS AND TECHNOLOGY TO OPTIMISE YOUR LINE-UP

José Carlos Gonzàlez-Hurtado said there was a universal desire in the industry to get people into the store, but too many products to fit into it. He said there were about a million SKUs in the United States but only about 9,000 SKUs in the average supermarket. Moreover, bricks and mortar retailers were taking active steps to reduce their assortment breadth. In the UK alone in 2015, the major supermarkets on average took about 5% of their SKUs out. In the face of this pressure, manufacturers found themselves facing something of a prisoner's dilemma, trying to work out whether they could preserve some individual advantage while adding more complexity to the system as a whole.

Brenda Koorneef explained how Tiger Brands had used analytic techniques in conjunction with IRi to help them identify whether there were any SKUs they could remove from their ranges. She provided an example relating to their Oros range of beverage concentrate, where they had managed to cut 7 SKUs to 3, and not just gained from cost benefits by reducing complexity but also managed to achieve volume growth of 18% in the retail space, with a value growth of more than 23%.

They had tried to solve a more complex problem with regard to the jam category, where Tiger was the clear national leader but was facing a very static market. They had to understand how to make sense of their brand portfolio, led by national leader All Gold and flanked by a value brand and a brand extension. IRi's assortment tool allowed them to disaggregate each of these into a series of attributes, and then relate those attributes to sales. Their analysis also showed that different retail customers had ended up with quite different assortments of the various SKUs from each brand. By rationalising the range and then optimising the allocation of the remaining SKUs, they had again increased sales volumes. About a quarter of these could be attributed to new attributes and 75% were straight substitution where Tiger could be confident that an alternative would successfully play the same role as the brand and SKU it replaced. Interestingly, she noted that their premium brands offered relatively little differentiation amongst each other in some accounts.

In summarising, Gonzàlez-Hurtado said that what differentiated winners from losers was focusing on what mattered: not just looking at the shelf and optimising relative rotation, but rather, understanding what mattered for the shopper. That required them to "kill the bad guy" – the existing product hierarchies which tended to dominate our mental models for brands and categories – as well as assembling a true 360 degree view of consumers on a single IT platform. And finally, he said, any tool had to be extraordinarily easy and quick to use. Long experience (and unsuccessful pleading on his part) had taught him the lesson that nobody would use a cumbersome tool, regardless of how much it had cost.

STEVE MATTHESEN

Global President of Retail Vertical Nielsen

SPECIAL SESSIONS

nielsen

NAVIGATING THE NEW RETAIL AGENDA

Steve Matthesen said that in the face of a more complicated world, there were some dangerous myths going around which required refuting.

First was the idea that emerging markets had run their course and were no longer the source of future growth. But although in the very short term emerging markets might only be providing a single additional percentage point of growth, the outlook for the next ten years was something like twice the rate of growth for developed markets. This was where the young people were. Millennials accounted for 24% of these populations, two thirds of people were in urban markets and there would be an emerging markets middle class of 3.2 billion by 2050. Even if you took a very limited view and just concentrated on the very richest customers, the opportunities were huge: the top 10% in India were 100 million people.

The second was that bigger continued to be better. What consumers were telling Nielsen, however, was that big stores were hard to shop. And around the world, not everybody had cars or storage space. The global average for fresh food shopping was in the order of 2.5 times per week. On the supply side, the efficiency advantage of larger stores was being rapidly eroded by new technology. The growth of small formats was striking, and was linked to the hitherto unexpected survival of the traditional trade in many markets. Those stores typically experienced 28 visits a month from their regular customers, of whom 68% arrived on foot.

The third was that promotions are the best way to drive sales. Globally over half a trillion dollars were spent annually on trade promotions, and the long term trend continued to be to more events with lower effectiveness. Even though this might appear primarily a problem for manufacturers, there were plenty of covert costs for retailers involved in excessive promotions. In any case, taking stated preferences into account, consumers globally were more concerned about fresh produce, convenient locations and stores having the products they wanted, and being in stock. And when it came to price, they were prepared to pay significantly more for innovation.

Fourth was the idea that grocery players didn't need to worry about e-commerce because people would never buy food online. The reality was that the rapid growth of connected commerce was inevitable. In the USA, direct to consumer brands already had 10% of share in certain categories, and FMCG online sales were growing at over 20% a year. The role of the physical store would change as some categories moved online, challenging the historic importance of the centre of the store for generating profit.

Matthesen's strategies for success were to adopt converse positions on each of these myths, making a long term commitment to emerging markets, recognising the need for convenience, building rather than discounting brands and understanding the different cost drivers and factors for success of online.

THE STORE TOUR

Cape Town top-notch retailers hosted Summit delegates in their stores and offered a unique opportunity to interact with store managers and understand the **eclectic local markets**!

From metropolitan areas with stores that hold their own against food retailers across the world, to small towns and township areas, there are retail groups that cater to all levels of society. The diversity of the retail sector reflects the diversity of the lives of the some 40 million people who call South Africa home.

Delegates discovered how retailers use this diversity to move their businesses in new and exciting directions, and meeting the challenge of giving customers what they want.

Kindly hosted by MARS

PARTNER'S PROGRAMME

The Consumer Goods Forum and Danone were delighted to welcome the Global Summit life partners to a unique Cape Town experience and to witness the rich heritage seen through the diversity of culture, architectural treasures, and authentic, world-class cuisine.

Engaged in an intimate talk with Zelda La Grange, the former private secretary of Nelson Mandela, during breakfast, the Global Summit partners experienced a tour through the historical sites and new leisure spots of the "Mother City" and exchanged with chef Cass Abrahams during lunch time.

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I-ZONE

I-NSPIRATION
I-NNOVATION
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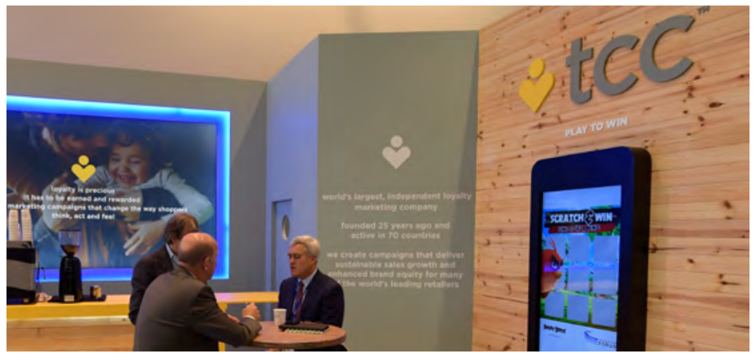
At the heart of the Global Summit, the **I-Zone** showcases the most cutting-edge creative ideas from the retail and consumer goods industry. The stylish display area offers a window on the most innovative concepts that each participating company has to offer, adding genuine value to the sector. The I-Zone provides **GREAT INSPIRATION** while focusing on **TRUE INNOVATION**. A select number of companies share with Summit delegates the latest innovations which add new value to the retail and consumer goods industry. The I-Zone is a world-class window of the best concepts being developed by The Consumer Goods Forum members.



Working Together for Efficiency & Positive Change

Identify Focus Areas - Commit to Action
Support Implementation - Build "how to" & Share Solutions
Engage External Stakeholders

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- Nutrition & Product Formulation

ENVIRONMENTAL SUSTAINABILITY

TACKLING CLIMATE CHANGE & REDUCING WASTE

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- Deforestation
- Food and Solid Waste

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- Harmonised Standards
- Capability Building
- Public Private Partnerships

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