100 · HORIZON
Conference Roundup

Exploring the Intersection of
Data, Sustainability and
Supply Chain Transformation

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Catch the Vision: Watch Rudy's Exclusive Foreword from 1OO · HORIZON in Sitges

Store Tour

1OO · HORIZON kicked off in Sitges (Barcelona), Catalonia, Spain on 3 October with a tour through the supply and production chain of Cafès Novell - one of the pioneers of sustainable packaging in the coffee industry. This provided valuable insights into the business of coffee production and the importance of sustainable practices. The day continued with a workshop organised by the Forest Defence Association (ADF), a local volunteer group that responds to forest fires in the Catalonia region focussing on leveraging the use of data and technology, particularly geospatial technology. The group demonstrated how effective use of data and technology has been able to address climate change issues, specifically those caused by deforestation, highlighting the crucial role of sustainability in combating environmental challenges. Finally, participants visited the Castellers de Vilafranca, a UNESCO Intangible Cultural Heritage site, where they learned everything about this fascinating Catalan cultural tradition and the vital aspect of collaboration it embodies. This captivating display served as a powerful reminder of the importance of teamwork and community in achieving extraordinary feats.

See Store tour highlights

Setting the Scene:

FMCG Trends

Kristian Gatewood
Senior Vice President, Global Sales Strategy and Innovation Procter & Gamble (P&G)

Ethem Kamanlı
Migros Group Program Management Office and Business Development Director, Migros Ticaret

Justin Honaman
Head, Worldwide Retail & Consumer Goods Go-To-Market (GTM), Amazon

Key Takeaways

▶ Retailers need to continue to explore opportunities to leverage Tik Tok and other social media platforms for brand discovery and sales.

▶ It is essential for the industry to investigate ways to improve the measurement and attribution of retail media performance.

Quote

" *People care about what they buy, how it is made, if it is well made, and the expiry date. This is a subject of discussion which connects CGF's product data and healthier lives coalition of action.*

Ethem Kamanlı

We are only at the tip of the iceberg in terms of how consumers are going to use AI to shop. And they are looking for better solutions and better recommendations.

Kristian Gatewood

For the very first time this year the conference was set up in a screenless room running an experimental and innovative AI driven Q&A moderator card system. This allowed for in depth listening, analysis, discussion and increased audience engagement to a maximum.

Featuring The CGF's Product Data Coalition co-chairs, Kristian Gatewood, Ethem Kamanli joined by Justin Honaman, the session kicked off with

an in-depth look at the latest trends in the fast-moving consumer goods (FMCG) sector. The conversation explored the relationship between manufacturers and retailers engaging in data collaboration to drive supply chain efficiencies. The session touched on the potential of AI and the ethical issues surrounding it. They addressed the need for better data integration and collaboration to improve the consumer experience.

AI and data collaboration have incredible potential to drive innovation and create richer, more meaningful experiences for our consumers.

Justin Honaman

Revolutionising Global Commerce:
Technology-Driven Solutions for Digital Supply Chains

Angelina Zhi
Director, Logistic Technology
Business Development,
EU region, Cainiao

Zhi from Cainiao, (part of the Alibaba Group), joined The CGF's End-to-End Value Chain Director, Ruediger Hagedorn, on stage for an insightful session focused on logistics, parcel delivery, and warehouse operations for e-commerce customers. She detailed Cainiao's expansion into Europe which began in 2017 with the establishment of six e-hubs, including a strategic location in Belgium. Zhi elaborated on how Cainiao is leveraging data and AI to enhance decision-making processes and streamline global operations utilising cloud distribution solutions and local networks to improve efficiency and responsiveness in Cainiao.

Key Takeaways

▶ Zhi invited the audience of supply chain and data experts in the consumer goods industry to explore opportunities to collaborate with system integrators or technology providers.

▶ Cainiao offers different technology solutions for customers in Europe. France and Germany respectively, focusing on quality and scale, while Spain focuses on cost balance.

▶ The deployment of cloud-based distribution and internal communication tools is instrumental in the management of global operations.

Quote

"
Initially, we cannot achieve 100% supply chain resilience but using our shared operation knowledge and through collaboration we can continue to provide better solutions to consumers.

Angelina Zhi

Retail Media Services

Frédéric Lataste
End to End Supply Chain Director
Altavia Group

Moderated by Ruediger Hagedorn, the session focused on Altavia's transition from physical to digital marketing, with Lataste emphasising the importance of agility and flexibility in responding to disruptions like COVID-19. This topic, often overlooked, prompted an engaging discussion among participants about the challenges of aligning supply chain and marketing goals, the need for qualitative data, and the role of generative AI in fostering innovation. Additionally, they explored sustainability trends, including Forest Stewardship Council (FSC) and Programme for the Endorsement of Forest Certification (PEFC) certifications. The necessity of clear, consumer-friendly storytelling was also highlighted as an essential for driving the adoption of sustainable products.

Key Takeaways

▶ Businesses should explore using generative AI tools to help marketing teams create solutions more quickly by investigating blockchain and other technologies to improve transparency and traceability in the supply chain.

▶ Discuss the use of QR codes and multi-layered storytelling to provide more detailed sustainability information to consumers.

▶ Collaborate with E2E's "New Ways" project to learn about solutions for bridging the gap between customer sustainability preferences and actual purchasing behaviour.

Quote

" *Our customers have different expectations but all recognise the importance of sustainability albeit to different extents.*

Frédéric Lataste

The Importance of Data Taxonomy

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Hans de Gier
CEO
SyncForce

Hans de Gier delved into the complexities of data taxonomy, particularly in the context of sustainability and packaging data for food manufacturers. Using a workshop-style interactive approach, De Gier highlighted the difficulties in assigning emissions across the value chain, the proliferation of different standards, and the complexity of cradle-to-grave emissions calculations. He proposed a detailed definition for carbon footprint, including greenhouse gas conversion and declaration units, to make data management and comparison much easier.

Key Takeaways

▶ A standardised carbon footprint definition should be defined that includes all greenhouse gases, conversion factors, and declared units for example; defining a clear taxonomy for "primary materials" and "natural materials".

▶ It is essential to resolve the discrepancy between the different standards and systems that use "global warming potential" and "carbon footprint" interchangeably.

▶ De Gier suggested establishing a taxonomy working group to address the lack of clear definitions and standards.

Transportation Automation:

Game Changer for Industrial Operations

Torsten Scholl

Co-founder, CEO and
Board Member,
Aitonomi

Xenia Scholl

Co-founder, COO and
Board Member,
Aitonomi

Torsten Scholl opened this session's discussion by sharing insights into the development and application of automated vehicles in industrial environments. Inspired by the groundbreaking work of Amazon's drones, the duo developed software to operate autonomous vehicles of various sizes, initially focusing on freight transport rather than passenger use. During the session moderated by Ruediger Hagerdon, they highlighted their safety-certified autonomous operation, which sets them apart from competitors that rely on safety drivers. The technology is currently being used in industrial settings, with plans to expand to public roads.

Key Takeaways

▶ During the session Scholl showcased the current industrial deployments of the autonomous vehicles - exploring new use cases in airports, harbours, and railroad stations.

▶ It is a challenging exercise to design and upgrade autonomous driving vehicles, including the integration of various sensors and the development of new radar sensors.

▶ Significant cost-savings can be achieved for on-yard logistics such as pallet, container transport or trailer shunting.

Warehouse Automation:

CGF-E2E Steering Committee White Paper Presentation

Max WINKLER
Managing Director
Winkler Technology GmbH

Ruediger Hagerdon
Director End to End Value Chain
The Consumer Goods Forum

This session, moderated by co-author Ruediger Hagedorn served as a platform to introduce the latest whitepaper from the CGF End to End Steering Committee. Developed with support from Winkler Technologies, this whitepaper is designed to guide businesses in their warehouse automation journeys.

Winkler and Hagerdon condensed over 20 years of warehouse automation project experience into key Do's and Don'ts that really matter. They highlighted often- overlooked aspects of a

real-life ROI calculation and actual key success factors for initiating and managing a warehouse automation implementation. Additionally, they emphasised the importance of establishing a capable project team and organisational structure to ensure successful implementation.

By providing insights into the whitepaper's contents, this session aimed to assist businesses in navigating the complexities of warehouse automation and making informed decisions that align with their specific needs and objectives.

Innovation Driving Supply Chain Transparency

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Jonas Sødergran

Nordic Lead Sustainability - Data and AI, Google Cloud

Jonas Sødergran led this session, outlining the challenges of data silos and duplicated efforts within current sustainability initiatives, and emphasising the need for a unified, secure and efficient system. He highlighted the role of Fractals as a transformative, open source platform designed to foster collaboration and transparency across the supply chain to improve sustainability efforts.
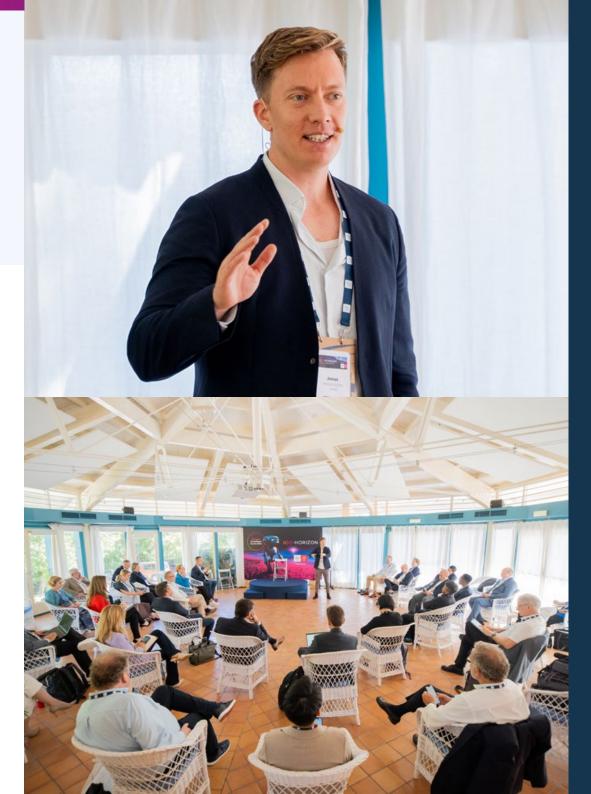
With Fractals, suppliers would be able to share their sustainability data securely and efficiently,

contributing to a more transparent and collaborative ecosystem. Retailers, in turn, would have access to reliable and comprehensive data for their ESG reporting and consumer-facing initiatives.

To learn more about Fractals:

Understand the technology

Insights video

Generating RoAI

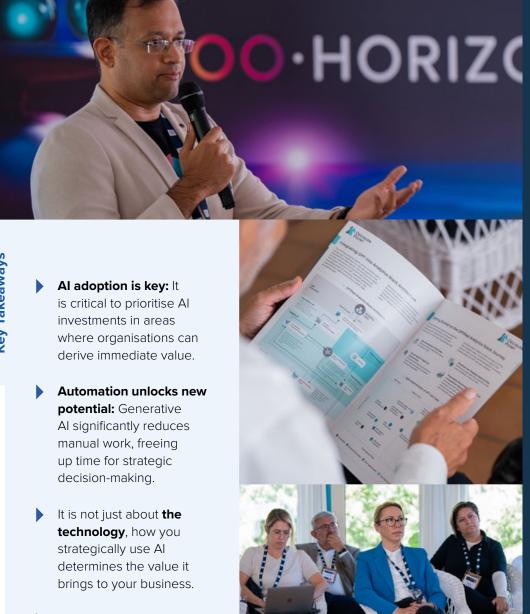# The Levers to Unlock Value from GenAI

Ravi Shankar

CEO, Decision Point

The main focus of this session's discussion was around how consumer goods companies can integrate AI, especially the role of this technology in revenue management and retail execution. The conversation explored the evolution of AI, and generative AI in particular, driven by increased data accumulation and advancements in computational power.

Shankar also took the audience on a journey through the **four value levers** that are unlocking the potential of **generative AI** in the consumer goods industry: **Adoption**, **Augmentation**, **Automation**, and **Acceleration**.

▶ **AI adoption is key:** It is critical to prioritise AI investments in areas where organisations can derive immediate value.

▶ **Automation unlocks new potential:** Generative AI significantly reduces manual work, freeing up time for strategic decision-making.

▶ It is not just about **the technology**, how you strategically use AI determines the value it brings to your business.

▶ **Share success stories** to maintain momentum and interest in AI.

Demystifying Supply Chain Transparency

**Leontien
Hasselman-Plugge**

Chief Executive Officer
ImpactBuying

Addressing one of the biggest challenges in modern retail - **supply chain transparency**, Hasselman-Plugge took to the stage to discuss this crucial topic. In a world where not only consumers demand to know the origins of their products, but a growing number of regulations and laws require transparency, Hasselman-Plugge emphasised the need for retailers to report on environmental impacts, human rights and deforestation. She pointed to the importance of new technologies like blockchain and AI as essential tools for ensuring traceability while protecting sensitive data if the data needs to be exchanged between brands and retailers.

Key Takeaways

▶ **Tech can help:**
Blockchain and other technologies can provide visibility without exposing competitive secrets.

▶ **Transparency is key:**
New regulations are driving retailers to disclose more about their supply chains, especially on topics around sustainability and human rights.

▶ **Collaboration** among retailers and supply chain partners like brands and producers are necessary to establish clear rules on data sharing and reporting.

Transforming Retail Supply Chains Through

Innovative Commerce Technology Solutions

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Sunil Kumar
Global Vice President & General Manager, Walmart Commerce Technologies

Sunil Kumar shared insights into how Walmart Commerce technologies is helping retailers and brands transform the future of retail supply chains with innovations like store fulfillment stacks and mid-mile optimisation solution. Kumar's vision for a tech-driven retail ecosystem showcased

a commitment to bringing the gap between online and offline shopping experiences to create seamless experiences for customers. Through AI and automation, they are ensuring that shelves are stocked and ready, with every delivery optimised for efficiency and speed.

Key Takeaways

▶ **Integrated fulfilment:** The Store Assist fulfillment app helps ensure that both online and in store operations are aligned to optimize operational efficiency.

▶ **Mid-mile optimisation:** Route Optimization solution enhances the flow of goods from suppliers to distribution centres, helping ensure that stores remain well-stocked.

▶ **Unified customer experiences:** Walmart Commerce Technologies focus is to help unify customer experiences across multiple channels to boost retailer growth.

Quote

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These technologies are paving the way for a future where technology ensures seamless operations, delivering the right product to the right place, at the right time- whether it's online or in-store

Sunil Kumar

Sustainable Sips:

Familia Torres Journey Towards Sustainable Winemaking
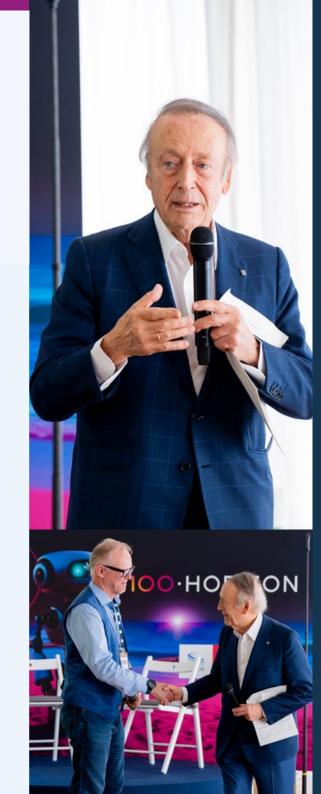
Miguel A. Torres

President, Familia Torres

Making a unique appearance at the conference, the President of Familia Torres discussed the company's sustainability efforts, which were inspired by Al Gore's film "An Inconvenient Truth" in 2008. To adapt to the changing conditions, they acquired Familia Torres in the cooler regions of Catalonia and Spain, and installed

photovoltaic systems that generate 50% of their electricity, significantly mitigating their carbon footprint. In addition to their own initiatives, Familia Torres has actively influenced other wine companies, leading to the creation of an international action group (IWCA-International Wineries for Climate Action) that includes 170 wineries that all follow their sustainability protocols.

Key Takeaways

▶ Collaboration amongst companies is key to realising a sustainable future.

▶ Adapting renewable energy solutions is an effective way to reduce greenhouse emissions industries.

▶ The owner emphasised the urgent need for collective action against climate change, reinforcing the role of businesses in environmental stewardship.

Findings on Resilience and Sustainability

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Valentin Elistratov
Global Strategic Sales Director
Maersk

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Valentin Elistratov took the audience on a deep dive into the pressures and challenges faced by global supply chains in an increasingly volatile world. With disruptions like the Pandemic or Red Sea crisis still fresh in memory, Valentin outlined the importance of supply chain resilience, sharing strategies that European companies are adopting

to mitigate risks. From near-shoring production to investing intechnology, his insights offered practical solutions to ensure that businesses remain agile and adaptable in the face of uncertainity and disruptions.

Key Takeaways

▶ **Resilience through flexibility:** Companies are shifting toward **near-shoring** and increasing flexibility in supply chain planning to reduce dependency on long-distance routes.

▶ **Smart technology driven solutions:** Investing in tech-driven replenishment and forecasting tools can help manage disruptions and maintain supply chain efficiency.

▶ **Collaboration is key:** Data sharing and closer collaboration with suppliers can provide a clearer, end to end view of the supply chain, enabling better decision making in times of crisis. Additionally, collaborating with customers builds solutions for better supply chain management.

100 · HORIZON
Conference Round up

Navigating 2D Labelling

Learnings and Recommendations

John Phillips
SVP Customer Supply Chain & Global Go-To-Market
Pepsico

Justin Honaman
Head, Worldwide Retail & Consumer Goods Go-To-Market (GTM),
Amazon

Maryann Moschides
CMO and General Manager
Scanbuy, Inc.

John Phillips and Justin Honaman led the discussion, outlining a world where simple barcodes evolve into smart digital labels. They painted a picture of how 2D labelling is not just about better stock visibility but also about enhancing the consumer experience with instant access to product details- from nutritional facts to sustainability stories.

Key Takeaways

▶ **Smart labels for smarter choices:** 2D labelling gives consumers quick access to essential information such as nutritional content, with just a scan.

▶ **Consumer trust matters:** To fully realise the benefits of 2D labels, brands and retailers need to communicate clearly to avoid misunderstandings.

▶ **Analytics drive success:** Behind the scenes, data analytics from these smart labels can offer brands insights into stock visibility and consumer behaviour.

Quote

" *QR codes are becoming a critical part of omnichannel digital strategies, enabling companies to deliver information more efficiently and effectively to consumers and when using DigitalLink QR Codes product packaging will simultaneously speak to consumers, inform POS systems, improve supply chain visibility, and ensure regulatory compliance*

Maryann Moschides

Rethinking Promotions:

A Collaborative Path to Sustainability and Profitability

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Bram van Schijndel Tromp
Founder & CEO
Pure Value

Key Takeaways

▶ **Less waste = More value:** Adopting smarter and foldable display systems can dramatically reduce the environmental impact of retailers.

▶ **Data driven decisions:** Technologies such as IoT help retailers track compliance and optimise in-store promotions, boosting both sustainability and sales.

Bram van Schijndel Tromp began the session by sharing his vision for reducing waste in the retail sector, specifically the **billion kilograms of cardboard** wasted on promotional displays every year. With innovations like **foldable, telescopic displays and Internet of Things (IoT)** **devices** that monitor compliance, Pure Value is helping retailers such as **Jumbo Supermarket** to cut down their cardboard use by 85%, making sustainability both practical and profitable.

The Consumer Goods Forum

The Consumer Goods Forum (CGF) is the only CEO-led organisation that represents both manufacturers and retailers globally. It brings together senior leaders from more than 400 retailers, manufacturers and other stakeholders across 70 countries.

The CGF accelerates change through nine Coalitions of Action: Forest Positive, Human Rights, Plastic Waste, Collaboration for Healthier Lives, Food Waste, Global Food Safety Initiative, Sustainable Supply Chain Initiative, Product Data and Towards Net Zero.

Its member companies have combined sales of EUR 4.6 trillion and directly employ nearly 10 million people, with a further 90 million related jobs estimated along the value chain. It is governed by its Board of Directors, which comprises more than 55 manufacturer and retailer CEOs.

For more information, please visit
www.theconsumergoodsforum.com

End-to-End Value Chain

About Product Data Coalition The Consumer Goods Forum (CGF)'s CEO-led Coalition of Action on Product Data aims to address weaknesses faced in today's data exchange processes. To achieve this, the Coalition works to ensure that all products have a unique identification, all unique product IDs can be verified in real time, and all brand owners, retailers and platforms follow the same foundational Global Data Model by 2022. This is to be done in parallel to voluntarily testing DataPorts technology to facilitate use of new technologies and federated data sharing in the medium term. Members of the Coalition, and their partners, share a vision for an industry in which trading partners have access to real-time, accurate and independently-assured product data; consumers can get accurate, on demand answers to their questions on the products they buy and where they come from; and consumers can also be confident that companies will reliably use and safeguard their data.

To learn more, visit
www.tcgfvaluechain.com

The Consumer Goods FORUM

End-to-End Value Chain