

SYNOPSIS

Singapore's smartphone penetration is at 91% of the total population, with an average ownership of **3.2 devices per person**. Consumer trends also have indicated that connected consumers are doing research and purchases through both online and in-stores. According to Google, the e-Commerce growth will increase by at 5.4 times by 2025 to S\$5.4 billion.

The retail and FMCG industry has to address the business needs with all the stakeholders (retailers, brand owners, distribution centres, 3rd party logistics) involved in the entire supply chain, with traditional brick-and-mortar retailers adopting the omni-channel approach. Hence a **Connected Marketplace for the Connected Consumers**.

The Efficient Consumer Response Council of Singapore (ECR Singapore) is proud to present the ECR Singapore CEO Forum 2017 – **Future Value Chain for the Connected Marketplace** on 6 July 2017. This forum is organised by GS1 Singapore and supported by the Singapore Manufacturing Federation (SMF).

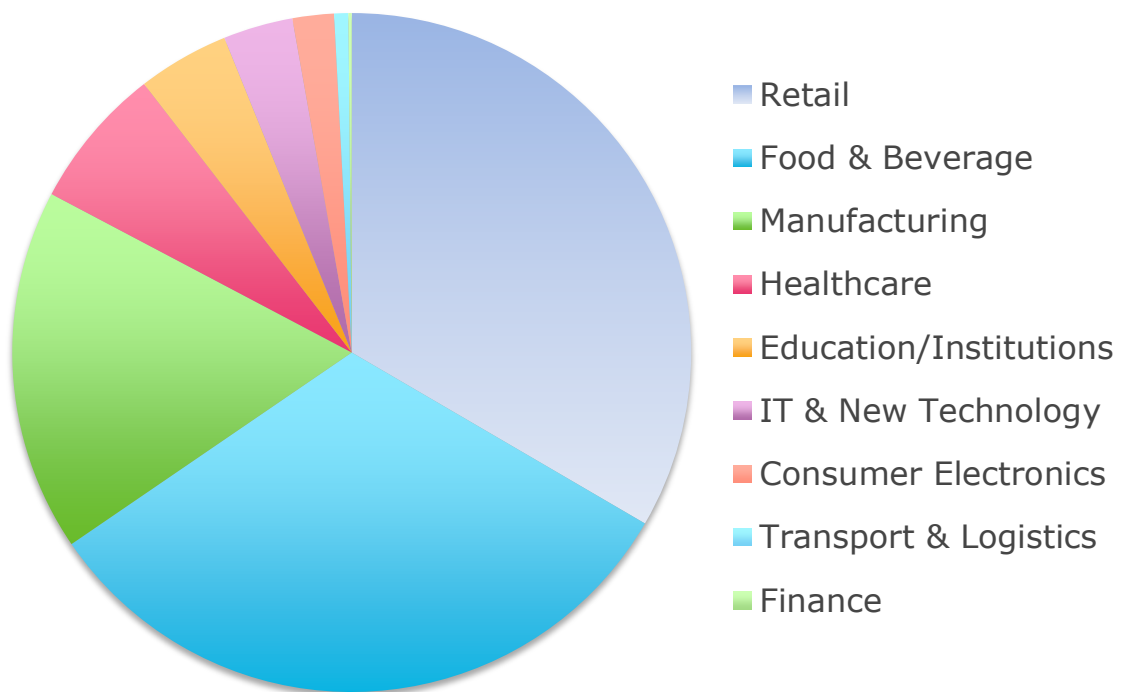
Following our hugely successful forum in 2015 and 2016, attended by over 160 retailers, brand owners, manufacturers and suppliers, we are targeting to gather more than 180 delegates to learn best implementation practices that enhance consumer shopping experiences and improved operational efficiencies.

TARGET AUDIENCE

This forum is specially tailored for **retailers, e-tailers, brand owners and supply chain service providers** who are both GS1 Singapore members and non-members.

Target job designation:

Management, Supply Chain managers, Operations managers, IT managers



GS1 Singapore Member Demographics (1995 members as of December 2016)

PROGRAMME

Time	Topic
1:00 p.m. to 1:30 p.m.	Registration
1:30 p.m. to 1:40 p.m.	Opening Address by ECR Singapore Co-Chair <u><i>Mr Alain Ong, CEO, Pokka International</i></u>
1:40 p.m. to 2:05 p.m.	Keynote Address: Retaining Connected Consumers' Interests through Reinvention and Innovation <u><i>Mr Douglas Foo (BBM), President of Singapore Manufacturing Federation; Chairman, Sakae Holdings Ltd</i></u>
2:05 p.m. to 2:30 p.m.	The New Consumerism: Redefining Ownership, Values and Priorities As consumers reassess their priorities and increasingly ask themselves what they truly value, a host of major consumer trends have emerged: from the sharing economy to the preference given to experience over possessions, to frugal innovation and trading up and down. This shift towards new priorities, which we have christened "The New Consumerism", is impacting across a multitude of industry sectors and has the power to transform even the most established markets. In this presentation, we will explore this area of consumer behaviour and its impact on various industries around the world and Asia Pacific. <u><i>Ms Laetitia Wong, Country Manager, Euromonitor International</i></u>

Time	Topic
2:30 p.m. to 2:55 p.m.	<p>The Mobile Shopping App Landscape - How People Shop on Their Phones</p> <p><i><u>Mr Alaap Tatwawadi, Business Lead, FMCG, Retail & Foods, Google Asia Pacific Pte Ltd</u></i></p>
2:55 p.m. to 3:20 p.m.	<p>Impact of Omni-channel Retailing for Retailers and Brand Owners</p> <p><i><u>Mr Elvin Too, Chief of Omni-channel Officer and General Manager, FairPrice Online, NTUC Fairprice Co-Operative Pte Ltd</u></i></p>
3:20 p.m. to 3:50 p.m.	<p>Tea-break and exhibition</p>
3:50 p.m. to 4:10 p.m.	<p>Value Creation for Ecommerce Logistics in the Digitization Age</p> <p>The relentless push for change in businesses, to keep up with the new global digitization and technology has made headline news many a times in recent years.</p> <p>The omni-channel discussion has been around but while retailers and brand owners alike are looking at their “omni-channel” approach to provide a seamless experience for O2O, they are beginning to realise the need to plan and align their logistic and customer support needs in advance to cater to their truly Omni-Channel model for their customers.</p> <p>The session shares how value can be created in ecommerce logistics to support this new wave!</p> <p><i><u>Mr Steven Sim, Head of Business Development, Commercial Sales, Singapore Post Limited</u></i></p>
4:10 p.m. to 4:30 p.m.	<p>Mobile-Augmented Shopping is Happening Now</p> <p><i><u>Mr Gennady Volchek, Founder & CEO, Authenticateit Pty Ltd</u></i></p>

Time	Topic
4:30 p.m. to 4:50 p.m.	<p>Using Technology to Maximise Inventory Efficiency in a Customer-Driven Supply Chain</p> <p><i><u>Mr Amit Vidyasagar, Solution Engineer APAC, Data Systems International (DSI) Holdings Pte Ltd</u></i></p>
4:50 p.m. to 5:20 p.m.	<p>Open Q&A</p>
5:20 p.m. to 5:30 p.m.	<p>CLOSING REMARKS by ECR Singapore Co-chair</p> <p><i><u>Mr Tng Ah Yiam, Deputy CEO, Singapore (Merchandising), NTUC Fairprice Co-operative Pte Ltd</u></i></p>

FEATURED SPEAKERS



Mr Douglas Foo

President, Singapore Manufacturing Federation
Chairman, Sakae Holdings Ltd

As Founder and Chairman of Sakae Holdings Ltd., Mr. Douglas Foo undertakes overall management, strategic planning, and business development functions of the Group.

Mr. Foo is the President of the Singapore Manufacturing Federation (SMF), and the recipient of a string of illustrious accolades and awards that are testament of his outstanding management and entrepreneurial efforts. He was presented the prestigious ASEAN Youth Award in 2004, recognizing his contributions to youth and entrepreneurship in the region. In 2008, he was accorded the Singapore Youth Award (Medal of Commendation) and the Singapore Youth Award in 2003 – the nation’s highest youth accolade – for his exceptional entrepreneurial achievements and notable service to the community.

Mr. Foo has received recognition through various awards including the Rotary-ASME Entrepreneur of the Year 2002 by the Association of Small and Medium Enterprises (ASME) and the Rotary Club of Singapore, Top Outstanding Young Person Award in 2002 by the Junior Chamber of Singapore and the Yazhou Zhoukan Chinese Entrepreneur Award 2002 (Merit Award) by Yazhou Zhoukan Limited.

For his outstanding management action in the Food & Beverage industry, Mr. Foo was also presented with the International Management Action Award by the Chartered Management Institute, Singapore in 2007, the WSQ Champion Award 2010 by the Singapore Workforce Development Agency (WDA) for his notable contributions in promoting the WSQ (Workforce Skills Qualifications) system; and Asean-China Young Entrepreneur Award in 2011.

Most recently, he was crowned the “Entrepreneur of the Year” by Asia Corporate Excellence and Sustainability (ACES). This revered honor is bestowed upon an illustrious entrepreneur who has shown an extraordinary ability to communicate their vision to stakeholders and leads the company towards the status of a mega brand. The recipient of this award displays strong entrepreneurial passion, flair, perseverance, and stands out as a grand example of a remarkable entrepreneur.

In September 2013, Mr Foo was selected to attend the prestigious Eisenhower Fellowship in the USA which provides professionals who have demonstrated exemplary leadership, with an intensive and individually designed programme that inspires to achieve consequential outcomes across sectors and borders. Through his fellowship, he has broadened his perspective on global branding, charity and foundation establishment sustainability issues and business expansion funding. He will seek to apply this invaluable knowledge as we forge ahead.

Mr Foo also serves as director on numerous boards for Corporate, Governmental and Non-profit organizations, and holds a Bachelor Degree in Business Administration (Finance) from the Royal Melbourne Institute of Technology University.



Ms Laetitia Wong
Country Manager
Euromonitor International Singapore

Laetitia Wong is the Country Manager for Euromonitor International Singapore. Spanning more than 15 years, she has worked across multiple parts of the Euromonitor business. In the last 10 years running sales, Laetitia supported a long list of clients in their strategic business needs, helping them connect the dots to the wider dynamics that affects their business. In addition to her professional achievements, Laetitia enjoys volunteering and supporting local school fundraising efforts.



Mr Alaap Tatwawadi
Business Lead, FMCG, Retail & Foods
Google Asia Pacific Pte Ltd

Alaap leads the FMCG, Retail and Foods practice at Google Singapore and is responsible for guiding brands towards great results through a digital-first business ecosystem.

He has over 13 years of experience in developing new digital ecosystems and business models across a wide range of industries including FMCG, Finance, Retail and Media & Entertainment. Before joining Google, Alaap was a Consultant at Accenture and has spent time both on the agency side at Starcom and GroupM and on the client side at GE Capital.

Outside of his professional life, Alaap is an avid squash player and enjoys occasional sessions of cross-fit. He's an MBA, but his greatest life lessons come from his 2 year old daughter.



Mr Elvin Too

Chief of Omni-channel Officer and General Manager, FairPrice Online
NTUC Fairprice Co-Operative Pte Ltd

Mr Elvin Too joined NTUC FairPrice Co-operative Ltd. (FairPrice) in 2016. He oversees how FairPrice's online and offline channels work together to offer customers an omnichannel experience. Elvin also leads FairPrice's ecommerce unit, FairPrice Online.

Prior to joining FairPrice, Elvin was with Singapore Post where he led the transformation of its post office network. He also served as Chief of Staff to the Group CEO. Before SingPost, Elvin was based in the USA, where he held product management, business development and strategy roles with Walmart Global eCommerce and Microsoft. Elvin started his career as a management consultant with Bain & Company serving clients in China, USA and South-east Asia.

Elvin graduated summa cum laude from the University of Pennsylvania, USA, with bachelor degrees in finance, management and international studies.

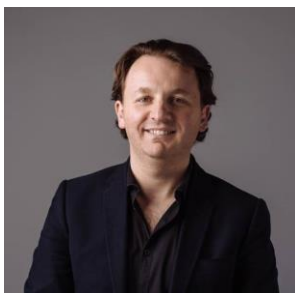
**Mr Steven Sim**

Head of Business Development, Commercial Sales
Singapore Post Limited

Steven heads up the business development for SingPost, focusing on end-to-end E-Commerce logistic solutions for our global customers. He is central to working across business units to drive effective and efficient solutions based on evolving customers' needs for online and offline fulfilment cross border capabilities. Steven leads a business development team driving complex deals based on consultative approaches that differentiate SingPost from her competitors.

Prior to SingPost, Steven was a Partner Director in DELL, driving ISVs and Solutions partnership across APJ. His role was to build up the ecosystem of partners to help scale out and grow DELL businesses. He had also spent close to 13 years in Microsoft running sales and partner functions, across Greater China and APJ regions. Businesses included Cloud and Dynamics businesses, just to name a few. He had played a pivotal role in growing new incubating businesses during his tenure leading the Cloud Business and Developer Tools Business.

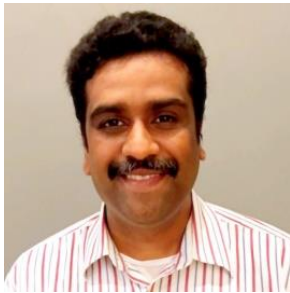
Steven has over 20 years of sales, marketing and partners experience internationally in the ICT industry, having come from a Telco and Media background in his initial career with SingTel, MobileOne, Siemens Business Services, and driving best of breed solutions internally and for customer in the APJ region. Steven holds a Bachelor Degree in Computer Engineering with Nanyang Technological University in Singapore.

**Mr Gennady Volchek**

Founder & CEO
Authenticateit™ Pty Ltd

Entrepreneur, Gennady Volchek was born in USSR and, as a child came with his parents to Australia. All of the business ventures that Gennady has set up had an element of innovation. He has successfully built and sold a number of businesses, commencing his career when he was 18 years old as a publisher of ethnic newspapers in Australia, then also started a telecommunication company - a pioneer then in new VOIP technology and Satellite Pay TV business in Australia and New Zealand.

From 2011 Gennady is a founder and CEO of Authenticateit the cloud base brand protection and marketing platform servicing clients world recently opened offices in Australia, Singapore, China and Russia.



Mr Amit Vidyasagar
Solution Engineer APAC
Data Systems International (DSI) Holdings Pte Ltd

Mr Amit Vidyasagar has over 20+ years of IT experience covering a wide range of information technology disciplines like Data Management, Integration, Business Intelligence & Analytics, ERP Solutions and Enterprise Mobility.

Presently based in Singapore and working as a mobile strategist in DSI's global solution engineering team.

Primary focus is on assisting various CxO executives and DSI business partners within Asia-Pacific region to build and deploy a digital transformation strategy with a strong focus on optimizing various supply chain related business processes.

ECR CEO FORUM 2016 – POST EVENT

Efficient Consumer Response (ECR) Singapore CEO Forum well received by retailers

If a packed NTUC Fairprice Auditorium was anything to go by, the 2016 ECR Singapore CEO Forum held on 25th May was clearly well-received and hugely successful.

Some 160 brand-owners, retailers, manufacturers and suppliers attended this year's ECR Singapore CEO forum, co-organised by ECR Singapore and GS1 Singapore. They were all keen to learn about the latest trends and the best industry practices that will enhance consumer shopping experiences, consumer safety and operational efficiency.



Delegates receiving goody bags upon registration

With the theme “Sustainability – Safety – Success”, the forum featured five speakers each bringing different perspectives of the retail industry, including a keynote presentation by Mr Seah Kian Peng, CEO, NTUC Fairprice Co-operative Limited. Mr Alain Ong, Co-Chair, ECR Singapore and CEO of Pokka International Pte Ltd gave the opening address.

In his keynote presentation entitled “Drivers that Will Shape the Future Retail Landscape”, Mr Seah highlighted that the Internet of Things is set to become the key driver in transforming the retail landscape, bringing about a world of connected devices. Using video clips, he shared with the audience how some of the brand-owners have been leveraging on key technologies such as RFID, Augmented Reality, Virtual Reality, Home Hub/Automation, Health Data Mining and Wearable Technology, to help reshape customer experience. He said that “technology should not replace the need for human touch, but should be used to provide a better customer experience, in terms of improved efficiency and lower costs.”



Mr Seah Kian Peng receiving a token of appreciation, presented by Ms Joy Price

The exciting digital trends in retailing and the huge market potential of the Asia-Pacific market were covered by Mr Edward Stark, Managing Director, ASEAN Consumer Goods, Accenture Pte Ltd. In his presentation on “Across Digital Dimensions: Test and Learn to get Outcomes”, Mr Stark indicated that in 2020, the modern consumer expects smart enhanced and seamless shopping experiences that save time and make life easier. These expectations are evolving in a dynamic new marketplace that creates a goldmine of opportunities worth US\$10 trillion for both consumer packaged goods companies and retailers. Examples of progressive retailers that have leveraged on new technologies include Coop Supermarket, Nike, Amazon, Coles, L’Oreal and Fast Retailing.

Mr Alvin Tan, Business Development Manager (APAC), DSI Holdings Pte Ltd, who spoke on the subject - “Game-Changing Trends in Supply Chain – Find Out New Ways to Reduce Supply Chain Costs”, emphasized that the digital supply chain platform is key in helping the retailer to transform the retail business and to stay ahead of the curve.

Using technology for brand protection, anti-counterfeiting and customer engagement was the key takeaway from the presentation on “Widespread Problem of Combating Trade in Fake Goods – How can Brand Owners Increase Consumer Trust?” by Mr Chris Milliken, Founder & CEO, PengWine International Pte Ltd. The use of smart phone applications such as the Authenticateit module has enabled his company to effectively track, trace and deter counterfeits and instances of unauthorised distribution in a fast and convenient manner, while serving as a unique marketing tool to communicate additional information to consumers, as well as to capture product feedback and consumer behavior.

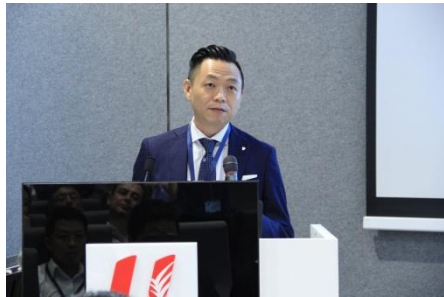
Dr Michael Teng, CEO, Singapore Innovation & Productivity Institute (SiPi), highlighted the importance of “Business Model Innovation (BMI)” as the way forward for retailers to capture, create, develop and deliver value to the customer and market. Dr Teng stressed that BMI is important for retailers as it helps them to be future-ready, achieve profitability with high compound annual growth rate and to deploy lean manpower. According to Dr Teng, research has shown that business model innovators outperform traditional innovators over time, and therefore retailers must review and revamp their business model in order to survive and thrive.

The forum ended with a panel discussion moderated by Mr Liew Wai Leong, CEO of GS1 Singapore.



Panel Moderator (1st from left): Mr Liew Wai Leong (GS1 SG)
Panel Speakers (starting 2nd from left): Mr Tng Ah Yiam (NTUC Fairprice), Mr Edward Stark (Accenture), Mr Alvin Tan (DSI), Mr Chris Milliken (PengWine) and Dr Michael Teng (SiPi)

Gallery



1. Mr Alain Ong, Co-Chair ECR Singapore and CEO of Pokka International Pte Ltd, giving the opening speech for the forum
2. Mr Edward Stark, Managing Director, ASEAN Consumer Goods, Accenture Pte Ltd, presenting his analysis on how digitalisation will transform consumer behaviour
3. Mr Alvin Tan, Business Development Manager (APAC), DSI Holdings Pte Ltd, emphasising on how digital supply chain platform is key in the future
4. Mr Chris Milliken, Founder & CEO, PengWine International Pte Ltd, presenting passionately on his point as a Brand Owner
5. Dr Michael Teng, CEO, Singapore Innovation & Productivity Institute (SiPi), educating participants on the importance of innovation
6. Participants networking during tea-break

Visit www.gs1.org.sg for more past events' information.

What is ECR?

- ECR is a strategy to remove unnecessary cost from the distribution system and to make it more responsive to consumer demand.
- ECR requires distributors & suppliers to focus jointly on the efficiency of the total supply chain, rather than the efficiency of the individual components.
- ECR aims to increase consumer choice, satisfaction and service.
- At the same time, ECR aims to achieve a reduction of total costs, inventories and physical assets.

ECR History

- Started in 1980's in USA
- Wal-Mart recognised as father of ECR

ECR in USA Wal-Mart

- Wal Mart first ECR operator in USA because of:-
 - Negative macro economic forces
 - Recession
 - Reduction in consumer spending
 - Competitive pressures
- Strategy of co-organisation with suppliers
 - Assortment
 - Logistics

Why ECR?

- In the early 1980s, the North American continent was hit by a deep recession. Consumer expenditures were declining.
- ECR had successfully pulled the retail sector of the USA out of the recession in the early 1990s.

Why ECR? How it came to Europe

- Economic conditions in 1990's Europe similar to US in 1980's.
- Multinational manufacturers in USA had experienced the benefits of ECR in North America and wanted to introduce ECR to Europe to enjoy the same benefits.

ECR Europe

Key Findings by ECR Europe:

- A key benchmarking exercise was sponsored by ECR Europe during latter half of 1995.
- It revealed that the overall cost reduction to be obtained in European markets from applying the whole range of ECR improvement concepts is in the region of US\$33 billion.
- The UK's Institute of Grocery Distribution has estimated that in 1994 the retail value of these markets exceeded 700 billion ECU.
- The Coca-Cola retailing research group has further estimated that supply chain costs, from factory gate to store backdoor accounted for 9.6% of this total, nearly 70 billion ECU per year.
- Every percentage point of improvement in these cost will thus contribute savings of 70 million ECU per year.
- ECR Europe projects demonstrate that many of the savings theoretically estimated in the benchmarking study are practically achievable and may even be exceeded, often simply by better management.
- Over 30 companies participated in ECR Europe
- ECR Europe participants generated a total of 420 billion Euro
- Participants turnover ranges
 - <1 billion Euro
 - >30 billion Euro
- The prizes for embracing the ECR philosophy are huge.
- The European benchmarking study concluded the companies embracing ECR first will secure the greatest benefits.
- The supply chain is increasingly a major focus for business development by both manufacturers and retailers
- ECR is more and more a main agenda item between trading partners in Europe.

ECR Asia

- ECR has now been established in China, Hong Kong, India, Japan, Malaysia, Singapore, South Korea and Thailand

ECR Singapore

- ECR Singapore is a private sector initiative comprising of suppliers, manufacturers, distributors and retailers.
- ECR Singapore is open to all companies in the grocery and fast moving consumer goods sector.

Objectives of ECR Singapore

- Improve consumer choice, satisfaction and service
- Achieve a reduction of total costs, inventories and physical assets.
- Remove unnecessary cost from the distribution system and make it more responsive to consumer demand
- Network with ECR organisations in USA, Europe and Asia

Three focus areas of ECR:

- Replenishment
- Enabling Technology
- Demand

What is Efficient Replenishment?

- This is the process of filling store shelves with the right products and minimum waste of effort, which can be measured in terms of low cost and high level of customer service.
- It is the active use of bar-coding, scanning and electronic communications so that information precedes the flow of products.
- It also involves moving processes and responsibilities to partners in the supply chain.
- Overall efficiency can be achieved on 2 levels by maintaining high levels of supply with minimum levels of inventory - Just in time to meet demand and storing & transporting products in the most efficient way.
- Efficient Replenishment also includes the need to make products available today in anticipation of what will be sold later today.

What is Enabling Technology?

- The concept of ECR can be broken into a number of techniques each of which are supported by one or more EAN standards.
- The following are the use of EAN standards with 4 ECR techniques:-
 - Computer Assisted Ordering
 - Continuous Replenishment Programme
 - Cross Docking
 - Item, Price & Promotional database
- The Enabling Technology will support the following:
 - Point of Sale (POS) data
 - Warehouse Data
 - Market Level Data
 - Consumer Preference Data
 - Consumer Household Panel Data
 - Geo-demographic Data
 - Competitive Pricing Data
 - Shelf Space Data
 - Promotional Data

What is Demand?

- In our analysis of the concerns expressed by the respondents to our ECR survey on matters pertaining to demand, we have grouped these under 3 categories:-
 - Space utilisation
 - Assortment
 - PromotionWe have also grouped the above under Category Management
- Represents a method for managing complex changes that are occurring in consumer needs and shopping behavior.
- Retailers and suppliers need to better understand consumer needs and to meet those needs more effectively.

What is Category Management?

- Represents a method for managing complex changes that are occurring in consumer needs and shopping behavior.
- Retailers and suppliers need to better understand consumer needs and to meet those needs more effectively.
- Category Management is an information driven process for analysis, planning, execution of Category Business Plans.
- At the core of Category Management concept is a focus on better understanding of consumer needs as a basis for retailer and supplier strategies, goals and work process.
- ECR Europe Best Practices Category Management model consists of 6 inter-related components as follows:
 - Strategy
 - Business Process
 - Organisational Capabilities
 - Information Technology
 - Cooperative Trading Partner Relationships
 - Performance Measurement

ECR & Logistics

- The new organisational alignments allow for full ECR execution. E.g -
 - Logistics
 - Marketing
 - Store operations
 - Revenue flow
- Category Management is often the core driver of new organisational forms for both retailers and suppliers.
- Under ECR, we have quick response logistics. These deals with the following:-
 - Consolidated Shipment
 - Integrated Forecasting via EDI
 - Direct Store / Warehouse Delivery
 - Flow through Distribution
 - Systems & Support via EDI
 - Data Linkage
 - Forecast / Account Specific
 - Delivery Payment System

Flow Through Distributions

- Flow Through Distribution is a distribution system in which merchandise received at a warehouse or distribution centre is not stocked but immediately prepared for onward shipment.
- Close synchronisation of all inbound & outbound shipments is crucial.
- 2 types of Flow Through Distribution
 - Trans Shipment (e.g. Pallets, cases)
 - Goods are consolidated for shipment without further handling
 - Cross Docking (e.g. Pallets, cases)
 - Goods are broken into smaller lots e.g. roll cages and delivered to distribution centres for re-distribution in roll cages to outbound destinations without further handling

ECR Singapore Council Members





The Global Language of Business

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