Solving the plastic packaging problem

Using data to deepen customer experience

The cost of poor supplier engagement

Scaling up in-store technology
Transparency, the key to success

Welcome to another issue of Inside Own Brands. A common theme for this summer issue is transparency. Not in the traditional sense often discussed for food, around traceability and farm-to-fork, but transparency between retailers, suppliers and consumers. Transparency is a key pillar of successful engagement and collaboration. Openness about objective, rationale and performance. Transparency is essential to engage consumers.

In this issue, Jay Ramsay explores the importance of collaborative working. Guest contributor Richard Hyde, associate professor, explores how data can be presented to consumers in a more transparent way; a more 'appetising' way, especially around areas of quality as one of the three main triggers for food purchase. Domain expert Justin Kempson, continues the theme as he explains how collaboration is also an essential part of solving the plastic puzzle, with some bold recommendations for best practice in sustainable packaging.

Whilst Jay explains the benefits of collaborative working, Steven Howell explores what US private brand teams can learn from the more established own brand retailer practices and systems in the UK. Kelly Cookson explores the topic from the other side; what is the cost of poor supplier engagement? Finally, Red McKay from Bossa Nova Robotics, in a guest contribution, explores how retailers can better harness in-store data.

Thank you to all our guest contributors, in what I hope you will find an interesting issue. Enjoy the summer.

James Butcher, CEO
Collaboration beyond colleagues

It is a truth universally acknowledged, that when people collaborate and work together, things get done and they get done better than when operating in an isolated project-by-project way.

The benefits of collaborative working can extend well into the future and become the normal operating procedure of businesses big and small. From the increased self-awareness that comes with having to explain your thinking and processes with people outside your field, to the simple and clear benefit of many heads being better than one; successful modern businesses have accepted that working more collaboratively has long-term benefits.

In retail, nothing highlights this better than the operations around collecting and managing customer feedback, especially with unsolicited and unstructured feedback such as that coming in from contact centres or social media. The breadth of subject, sentiment, actions and reactions required means that a collaborative approach is really the only way to manage customer feedback and generate real value from the incoming comments.

There are many tools, platforms and methods available to collect customer feedback and analyse and distribute it around your organisation. Large scale ERP platforms from the big boys at Oracle and Salesforce offer all manner of workflows, queues and functions - if you’ve got the budget. At the other end of the scale, the newer, more agile kids on the block such as Slack and Asana offer lightweight, but just as effective, ways to disseminate information around the business and organise joint working.

But...these tools have one thing in common: they are designed solely for collaboration between colleagues; they are built for employee engagement and organisational efficiency. But what about external stakeholders? It is no less important to collaborate with external partners across the supply chain all the way back to the manufacturer, but far too often, critical items are delayed or lost in multiple email chains and reply-to-all loops because the tools built for this purpose stop at the front door.

When it comes to own brands, suppliers and manufacturers are just as important as internal colleagues - perhaps even more so. This begs the question: why are they left out in the cold when it comes to collaboration? Our research has found that, when internal and external stakeholders have access to the same information in the same systems as their retail team colleagues and are actively encouraged to collaborate around the same shared goals, quality issues are resolved up to 30% quicker than when using traditional methods like email and the simple act of ‘more eyes’ typically reduces complaints by 15% to 20%.

New product development is another area where collaboration can yield significant benefits in time to market. One client saw own brand products launch 10% quicker when using Affinity™ to provide increased visibility, on-boarding and support around their PLM system.

The reasons for such striking benefits are pretty clear. For the same reasons we now expect employees and colleagues to work as one team and move out of their silos, external stakeholders should be enabled to be part of the extended team. The benefits of scale, group-thinking and diversity extend far beyond the front door of head office.

S4RB’s Affinity platform is built with supplier collaboration and engagement first. Our Conversations tool is the central place to manage joint activities, easily share critical information and have focussed discussion around clearly defined issues, projects and corrective actions.

Because we are supplier-first, segmenting the right data and information is standard and carries far less information security risks than inviting suppliers into your internal systems.

Jay Ramsay
Product Director | S4RB
As a legal academic at the University of Nottingham, I am currently working with colleagues to explore how the data we gather about food can be presented to consumers in an (with apologies for the pun) appetising way. When consumers are presented with information on a label this information is often challenging to understand and doesn’t necessarily provide the detailed picture that a consumer wants or needs. It is important to ask ourselves how the information that we collect about the food we produce, and from those in our supply chain, might be best deployed and how technology can assist us in doing this.

Our research is particularly focusing on product quality, and how consumers can be supplied with information about products they are buying. Research has shown that consumers are interested in three types of information about the things that they buy. They want to know the price, they want to know the terms on which they are making the purchase (for example, can I return the goods?) and they want to know about the quality of the products.

Quality is a broad concept, with consumers wanting to know information about a wide variety of characteristics, ranging from safety to health and nutrition, from authenticity to sustainability and ethics. However, it is clear from lots of research that consumers find it much easier to assess the relative prices of products than to assess the relative quality. An economist called George Akerlof won the Nobel prize for identifying that used car sales were driven almost solely by price, and therefore there was little incentive for salespeople to compete with each other on the basis of quality.

Fortunately, the market for food isn’t like the market for used cars. Consumers do make qualitative judgements about food products and factor these into their purchasing decisions. However, these decisions might not be as good as they could be.

As the amount of data that we gather about our food product increases, we should be open to using that data to support consumer decision-making.

This is particularly important for own brands, because research suggests that consumers use brands as a proxy for quality in branded products, but require more detailed information when making decisions about the quality of own brand products. Therefore, everyone in the own brand supply chain has an incentive to ensure that they work together to provide data that can assist the consumer to make qualitative judgements.

Once such data is assembled, it is necessary to consider how it can be presented to ensure that consumers can understand and use it. Whilst some of the data will be presented on packaging (either because it is mandatory under the Food Information for Consumers Regulation or because it is thought to be a valuable piece of information to include voluntarily), it may be presented in such a way that consumers either do not or cannot use it to make a decision about the quality of the product. Therefore, alternative mechanisms for presenting the data need to be explored.

This is where technology can help. Data visualisation and exploration has become easier and quicker with developments in technology. Imagine a package that allows you to identify how your product was produced, or provides real time safety data, or can help you to identify the products that pair well with it. All of these are possible, some using information that can appear on a phone screen; others which perhaps are best presented in a virtual reality environment which places you within the manufacturer of a food product, or even inside that product so that you can understand its structure.

Also, this technology could enable deeper engagement with consumers. By allowing them to provide accounts of their eating experiences, and rendering them accessible to other consumers, a clearer picture of the quality of a product could emerge. Similarly, imagine the possibility of adding personalised digital content to a gift, which might endure long after the gift has been consumed.

In order to enable this, collaboration between all members of the supply chain, and between technologists and data experts, product developers, technical staff, marketing professionals, managers and (dare I say it) lawyers, is necessary to ensure that the huge potential of using data to inform consumer decision-making about quality is realised.

We know that consumers don’t necessarily spend a large amount of time examining products to ensure that they take in all the available information before making decisions about quality. They are generally what have been called ‘passive glancers,’ focusing on a few bits of information to make their decision. This may lead to decisions that are less than optimal, with judgements about quality influenced by irrelevant considerations.

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with Richard Hyde
Associate Professor, University of Nottingham

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Solving the plastic packaging problem

Justin Kempson, Director of Sales and Innovation at Charpak Ltd, discusses the challenges retailers face when addressing sustainable product packaging.

We see the positive actions retailers are taking with trying to address plastic use in their products and packaging. The questions being asked by the packaging technologists, NPD teams, sales and marketing, and commercial teams within retailers and manufacturers has increased exponentially over the last two years.

As plastic packaging designers and converters we experience first-hand the ever-changing conversation and welcome the intelligent debate to find the right solutions rather than simply demonising plastic. Black plastic is under the spotlight at the moment in the UK but is the extinction of black plastic the correct answer? At Charpak we don’t believe it is and certainly not before due consideration of the range of solutions, some of which we have in development as part of our circular economy NPD and investment programme.

**Product life cycle analysis starts with the packaging professionals**

In our experience, the most successful retailers at addressing environmental concerns with their packaging are those who involve the packaging professionals at the early stage of the product packaging and overall NPD process. At Charpak, we ensure clients consider everything from design, to recyclability to technical material functionality and more. We encourage retailers to actively engage and consult with the academics, polymer scientists, UK packaging experts, overseas markets, and alternative industries to collaborate on the solutions.

Retailers and brands are increasingly asking the right questions about full life cycle and impact. We all recognise this is a huge area and ‘Life Cycle Analysis’ can be interpreted in multiple ways.

**It must be assessed independently rather than presented with an angle that has an economic or commercial advantage. In this guise, WRAP, Recycle Now, Love Food Hate Waste and The UK Plastics Pact (of which Charpak are founding members) are making great strides forward.**

**Plastic is only one piece of the sustainability puzzle**

Retailers are now considering the weight of packaging, number of lorries on the road and therefore carbon emissions, the atmospheric invisible micro-fibres from tyres, air pollution, the continued challenge to minimise food waste, protect water resource and shortage, and de-forestation as well as plastic packaging. The issue is complex, with climate change being such an emotive and global issue.

Retailers and suppliers must collaborate to solve the plastic packaging problem

In our experience, the optimum solutions to the plastic problem are delivered when retailers and suppliers work together in a true collaborative partnership.

Packaging specialists are the materials experts, so it is best to consult with them and choose the most appropriate solution. Materials experts can clearly present the science, evidence and facts as to which solution is environmentally, ethically and economically viable.

Yes, the packaging industry can lead the retailers with their expertise, and innovate with change, as Charpak do, but retailers’ supply chains must be responsible.
Solving the plastic packaging problem

It is key that retailers choose to work with knowledgeable, credible and trustworthy suppliers to ensure the right material is chosen for their product. The starting point is the correct material > fit for purpose > designed for the 3Rs: reduce > reuse > recycle from an environmental impact.

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With ever tighter margins to manage RRP, retailers must also meet consumer environmental expectations at the same time as continuing to protect products. Ultimately, sales and revenue in a market sector that has low overall margins and high operating costs is a fine balance.

Packaging is key to brand differentiation

In brand representation, colour is a key identifier and differentiator and the impact of this on retail sales at the point of consumer decision-making and purchase cannot be underestimated. Coloured plastics is used as a category differentiator with additional features signalling 'premium'. Removing black plastic presents a dilemma as it is the destination for recyclable coloured plastic.

Choosing the wrong packaging can have a negative impact on sales, of which we are all only too aware. Retailers, brands and design agencies have built success as much on the packaging as they have on the products themselves.

Luxury products, premiumisation and upgrading is a continued consumer trend and with the growing competition from home delivery of fresh, from-scratch cooking (such as Hello Fresh and Gousto for example) retention of retailer sales is supported by packaging.

If we, as a collaborative supply chain, make the wrong product or packaging decision and it negatively impacts on sales then consumer perception vs sales reality becomes an economic problem.

Best practice for sustainable packaging

We recommend:
1. Adopting the On-Pack Recycling Label (OPRL).
2. Mandatory use of plastic resin codes.
4. Commitment by all to meet (and strive to exceed) WRAP’s UK Plastics Pact targets.

Ultimately investment in time, resource and budget collaborating across the supply chain and with other industries can, and will, address the solutions to the packaging problem.

Some thoughts to leave you with:
We defer to Einstein and Gandhi for our ethos and inspiration:

“The world as we have created it is a process of our thinking. It cannot be changed without changing our thinking.” - Albert Einstein

And never forget in our diverse industry:

“You must be the change you wish to see in the world” “The future depends on what you do today” - Mahatma Gandhi

For more details on Charpak Ltd, visit: www.charpak.co.uk enquiries@charpak.co.uk | 01480 434 434
Last summer, a BBC News article identified that there is a "retail revolution" underway when it comes to own brand products. It’s a revolution that is presenting quite a challenge for the likes of Nestle and Unilever, which manage many of the world’s leading consumer brands.

Grocery retailers in the UK aren't slowing down this rate of innovation and continue to adapt their own brand initiatives and products to meet these evolving consumer needs and to promote brand loyalty.

Own brand sets retailers apart
According to The Grocer, UK supermarkets are using own brand to differentiate themselves from one another – which is harder to do with manufacturer brands. Their elaborate own brand architectures also mean they can develop sophisticated and diverse portfolios that are much harder for manufacturer brands to develop, particularly on the fresh and chilled side.

In the past few years, there has been a big shift by UK retailers, both large and small, towards buying from small, innovative manufacturers, as they understand that entrepreneurs bring innovation and freshness to their shelves.

Getting small suppliers introduced to big retailers
According to Entrepreneur Handbook LTD, most UK supermarkets and high street retailers now have a structured route to bring them into contact with new, small suppliers. Tesco, for example, holds regional roadshows for small food producers, where the manufacturers can meet the supermarket’s senior buyers face to face. Argos occasionally holds open days for inventors and small suppliers to meet the buying team.

In addition to Tesco, Sainsbury’s has a program called Supply Something New, to make it easier for small businesses to supply the retailer by providing free training days, technical support and supplier certification. Waitrose’s locally and regionally produced initiative now includes around 1,200 product lines from small suppliers.

What does this mean for US retailers and their own brands?
US own brand sales are projected to grow to capture 25% of dollar share in the next decade. Retailers also earn 25–35% higher gross margins on own brand compared to manufacturer brands. Finding innovative, reliable and committed suppliers is key to developing strong, compelling own brand products and beating the competition.

Trading partner collaboration is essential according to Doug Baker, VP Private Brands at the Food Marketing Institute. What’s going to either aide success or secure failure for some own brands, is how trading partners change the collaboration model to better meet the many metrics and demands facing own brands today.

In addition, US retailers must take a page out of the UK retailers’ book and create an environment where they can nurture potential, mitigate risk and harness the innovation and agility of smaller suppliers. UK retailers use a holistic approach that can reveal innovative ways to bring trends to life, reduce total costs and unlock hidden value with their suppliers. For US retailers, success will be about finding new innovative products, including local and regional items, that are truly unique, have an interesting heritage, and most importantly, taste great.

Retailers need to think of investment in a sourcing portal as being part of their investment in innovation and quality. A supplier’s size is generally irrelevant when it comes to supporting that goal.

The path to success lies in strategic collaboration with suppliers. Strategic collaboration requires a different mindset between retailer and supply partners as well as the process and capabilities that allow them to work more closely to identify consumer demand and react to it. It’s all about jointly focusing on innovation.
Once new technology has proven itself to thrive after being trialled in a small number of stores, it’s time to roll it out across the whole portfolio. While taking the next step is exciting, it’s important that suppliers and retailers establish clear KPIs to maximise the investment, explains Red McKay, European Managing Director and VP of Global Sales of Bossa Nova Robotics.

In the highly competitive grocery sector, retailers have long relied on technology to improve operational efficiency, cut unnecessary costs and wastage, and deliver excellence in customer experiences.

Anyone who has been involved in implementing new systems will know it doesn’t happen overnight but follows months, or sometimes years, of testing. Once decision makers at retailers understand the huge potential benefits of introducing new technology, they must first agree to a trial period in a handful of stores, to gauge usability, staff co-operation and of course, results.

The purpose of a trial is not only to find out whether the technology ‘works’ but to see how it performs against a defined set of KPIs, typically across 5-10 stores. It is also an opportunity to make improvements and understand potential challenges before investing further and undertaking a wider rollout.

It is a journey that Bossa Nova has already undertaken with retailers in the US to launch our fully autonomous, retail service robots in stores across the country. In a nutshell, Bossa Nova robots autonomously travel supermarket aisles, capturing high-resolution images and other identifiers of a product in real-time, which are analysed primarily to identify out of stocks. Store managers receive this information within 15 minutes so they can take immediate actions, maximising sales opportunities and reducing wastage.

The combination of cutting-edge robotics, computer vision, and artificial intelligence technology is undoubtedly taking retailers into uncharted territory and part of the process is to ensure retailers are utilising this wealth of comprehensive, real-time and actionable data.

The information gathered by the robots can be supplied to retailers and their brands - both own brand and independent. For own brand suppliers, it’s possible to monitor display accuracy and how well each item is performing. Own brands can also use that data to decide next steps to improve sales performance.

For suppliers, this data is incredibly useful for understanding what changes could be made to packaging and branding to improve displays. Data regarding stock levels and how well certain products are performing can also be supplied, so manufacturers can plan more strategically for longer-term changes in demand, as well as seasonal trends.

At an operational level, it’s also important for any new technology to work as well in any store environment as they do in a lab setting. When scaling up, at Bossa Nova we ensure that we account for deviations within individual stores, such as WiFi, floor material, layout and lighting and other environmental factors.

The tech can enable retailers to make smarter decisions, and it can also bring unknown operational inefficiencies to light. Remaining focused on the initial goals of the technology rollout is vital, as opposed to spreading resources too thinly and getting ‘caught up’ too early with what the technology can do. It’s our job to keep communication channels clear and open, ensuring the project remains on track and focused.

There is no question that scaling up requires strong communication between all stakeholders, including head office, store teams and external technology partners. Helping teams to interpret the data and individual store managers to implement the technology is crucial.

Our AI-powered robots and data solution have captured the imagination of US retailers, consumers and the press alike, but the lessons we learned during testing can be applied to any new system. By setting KPIs, understanding the technologies capabilities and limitations, and communicating the challenges to all parties, the commercial returns can be enormous. As a retailer, to ensure you get the most out of the technology, this process should be seen as a journey with the tech partner.

For more details on Bossa Nova Robotics, visit www.bossanova.com
We at S4RB often promote the benefits of retailer-supplier engagement. But first, what do we define this engagement as? We are specifically referring to own brand retailers and the relationship with the manufacturers of the products that bear the retailer’s name. We define engagement as a true two-way collaboration between retailer and supplier.

Working with suppliers in this way builds trust which, in turn enables the retailer to extend its team by working together with suppliers to maximise all available resources.

Think your supplier portal generates engagement? Think again!

Many systems boast a supplier portal as a key feature, but this doesn’t mean that engagement is a given. A portal may give a supplier another point of contact for its interactions with a retailer, but unless there’s also an investment in the support and a change in belief towards real transparency, that’s all it is: another possible point of contact.

Sharing information such as performance KPIs down the chain to suppliers gives them a reason to both listen to and respond to the retailer. When criticism is removed and instead, progress is shared, suppliers look to improve.

All this points to supplier engagement being both the journey and the motivation. It is not a quick fix applied in the shape of an online portal or buzz words applied to supplier communications.

Turning to look at this from the negative perspective, what happens when retailers apply quick fixes rather than a real commitment to the collaboration journey with their suppliers? A major downside is that business-change projects - whether that’s implementing a new PLM, reducing single use plastics from products or rolling out SmartLabel® - all cost more, take longer and are less successful.

What is lack of engagement really costing your business?
The following examples are based on a typical mid-sized own brand retailer.

• **Lower productivity costs > £375,000 in resource lost**
  Reduced efficiency due to poor engagement, with supplier-facing colleagues operating at 5% to 20% lower productivity (depending on role).

• **Late payment of charges costs £7.5m annually**
  For a typical mid-size own brand retailer, a £7.5m negative impact on cashflow can be expected as a result of engaged suppliers paying charges relating to deliveries not meeting standards or recalls/withdrawals etc. on average 45 days sooner (based upon annual supplier charges of around £22.5m).

• **ROI is reduced by > £750,000 for supplier-facing initiatives**
  Based on our experience, we found that for a typical US own brand team, those without proper supplier engagement can estimate to see over £750,000 lower ROI for supplier-facing initiatives. This is based on a conservative estimate of results being lower and later than planned.

What does good supplier engagement look like?
We’ve seen first-hand, through our work with some major grocery retailers the financial impact of good supplier engagement. A common starting place is to take handling supplier enquiries and sharing policies and processes away from the retail team by building a supplier portal. One client saw suppliers accessing, on average, over 2,500 answers online per month – all taking time away from the internal retail team.

We’ve also seen plenty of success in the UK; a prime example being a retailer saving > £225,000 by using supplier engagement techniques to support compliance with food labelling changes for local and regional suppliers.

If saving money isn’t a compelling enough reason to adopt supplier engagement, let’s talk about some of the softer benefits.

Supplier engagement also helps retailers to launch more products, faster. The knock-on effect of a good working experience with a retailer is that suppliers choose them as their partner of choice, giving the retailer access to their latest ideas and innovations.

Meanwhile, customer service departments begin to empower continuous product and service improvement by involving suppliers in customer engagement activities, giving them visibility on large and small complaints alike. Successful engagement can often be the equivalent of an additional 5 FTE hours added to the own brand team. The result of this is employees are now free to focus their attention on true value-add activities, such as innovation!

Kelly Cookson
Marketing Manager | S4RB
South Africa rises

The need to better understand consumers, source strategically and engage with suppliers is critical for private brand retailers across the globe. A case in point is Africa.

It’s clear that as the Africa Rising movement gains momentum, much of the continent, especially South Africa, is evolving in a uniquely African way. According to Trend Watching, African consumers, especially younger ones, are “aspiring to a new standard, that sets superior benchmarks and positively brands Africa on the global stage.” Rising consumer demand aligned with annual growth has created a turning point in food. There is tremendous opportunity for the African food culture to be adopted, adapted and commercialised.

South Africa presents an opportunity to seize

According to the Deloitte Consumer Review - Africa: A 21st Century View survey, South Africa is not suffering from a lack of demand, but sometimes from a lack of supply. Surveyed consumers aged between 15 and 24 attach more importance to the quality of products than price. The research shows that in some categories, such as food and drinks, local brands and products are preferred, which makes a great case for food retailers to seize this opportunity.

For retailers that create and manage their own brands, there are plenty of opportunities to innovate and capitalise on the potential for growth the continent offers; the business opportunities in Africa could far outweigh the risks.

Trend Watching has identified insights that should be on the radar of food retailers operating in Africa:

• **African Magic** - exceptional products, best-in-class that are unique to Africa.
• **Citizen Woke** - products and brands that are respectful, acknowledge African heritage and celebrate the cultural nuances of the markets being served.
• **Green Army** - products and brand initiatives that are focused on novel ways to reverse environmental damage by providing quintessentially African solutions to their challenges.
• **Manifest Empathy** - products that meet the needs of those consumers who may not be traditionally catered for due to their social status, economic stature or because they choose to live their lives on a less ‘respected’ path away from conservative social norms.
• **Smart Market** - Africans will expect products and brands to use more forward-looking technologies to put truly smart products and services into their pockets, homes and inboxes.

Dare to be different with your brand

By taking the time to truly understand and apply these trends to create compelling new innovations, you will delight your customers (and win new ones!), creating the new face of own brands in South Africa. South African retailers should dare to be different with their brands, embrace disruption, and solve problems. Here’s your opportunity!

With the challenge of finding the right source of supply in South Africa, food retailers have to reinvent the way they select, specify, source and manage their supply partners. We see the best of them around the globe doing this by using a holistic approach that can reveal innovative ways to bring these trends to life, reduce total costs and unlock hidden value with their suppliers.

Find the right suppliers for the right products

At S4RB we believe in the concept of strategic sourcing. This is all about finding the right suppliers for the right products at the right standard for your own brands and working together with these suppliers as one team.

Being able to work with reliable, local, high-quality suppliers can help your innovation grow at scale. By enabling this potential, you unlock the supplier’s ability to impact your sales and bottom line. Unreliable suppliers can create bottlenecks in your workflow and have a greater negative impact on clients and consumers than you probably realise.

Suppliers need development to succeed

Supplier development is the process of working with your suppliers to improve their performance and expand capabilities for the benefit of your brand over time. It’s about generating a new capability or competency in suppliers. This can manifest itself into new product innovations, a new streamlined process or the implementation of a new standard.

We see ‘Best in Class’ sourcing and supplier development as the ability to:

1. Identify and source new suppliers.
2. Source specific types of suppliers at events; embrace local.
3. Assess suppliers to reduce risk.
4. Develop and up-skill suppliers to your brand standards.
5. Support suppliers of choice; create advocates.

So, besides the obvious benefits, strategic sourcing allows the retailer’s own brand team to become a high-performing sourcing team. All with the ability to manage local and regional networks of suppliers, embrace new procurement models, improve speed to market and drive enterprise innovation.
ABOUT SOLUTIONS FOR RETAIL BRANDS

We are an own brand grocery retail specialist, providing consultancy and retail supplier engagement expertise. Via our Affinity™ platform, we help retailers evolve their own brand products, ensuring quality, consistency and competitiveness while improving the efficiency, accuracy and cost effectiveness of their interactions with suppliers.

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