

INSIDE **PRIVATE BRANDS**

SPRING 2019



Unique products take center stage



As the post-holiday sales results filter through, it's clear internet retail performed well, although not everywhere as well as forecast.

Here's something else that's very clear: those retailers with exclusive brands and branded exclusives out-performed the market.

There's an essential lesson in that result. More so than ever, the product is key. If it is a product I can get anywhere, I will have zero loyalty and will buy from the most convenient or cheapest online store.

Therefore, in grocery retail, the importance of successful private brand products is greater than ever, because this represents a large part of what differentiates a retailer.

Often this is about value, but it's also about brand promise, such as provenance or free-from.

Consumer insight is key to success, and this issue of Inside Private Brands helps illuminate that topic.

- Josie Burt takes a deep dive into the plastics topic by leveraging insights from Packaging Development Manager Nikki Grainge of Waitrose and Partners. As Nikki observes, it isn't always as simple as removing the 'devil' that is plastic. It is important that brand owners invest in not just understanding the issues, but also education to bring customers on the journey of what each brand stands for and why.

- Alex Fitchett discusses the need for less of a focus on generic 'business intelligence' but instead the importance of intelligent KPI reporting.

- Kelly Cookson looks ahead to 2019 and the need for brands to add great depth and breadth to their sustainability and ethical sourcing commitments. This is an important part of what can make private brands different and successful.

Consumer insight dovetails with the second theme for this issue, which is supplier engagement. Whether it is to roll out a new specification system or to implement a brand transition program, the successful growth of private brands will increasingly rely on efficient collaboration between retailers and suppliers to focus on winning products for consumers.

We're seeing a steady shift to brand loyalty over store loyalty. This is driven by the global trends toward convenience and online. Retailers will need to continue to produce differentiated private brand products that resonate with customers.

James Butcher, CEO

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NAVIGATING THE 2019 SUSTAINABILITY LANDSCAPE

Building supplier engagement from day one

Having spent a large part of the last ten years working within FMCG retail in the U.S., I am seeing the tide finally turning in and around private brands.

The switch within retailers from a 'me too' lower cost alternative, to the emphasis on building and taking true ownership of their private brands is now becoming the norm rather than the exception.

In building true brands, finding and developing products that can differentiate the brand owner is now the focus. The race is now on to find and maintain great supplier partner relations with a joint commitment to the retailer's private brand.

Increasing numbers of U.S. retailers are recognizing the need to take ownership and improve direct relationships, and to re-invent their relationships with brokers and agents. What many are not recognizing is that these brokers have played a critical role in supplier management on behalf of the retailer. In removing this, the retailer can risk taking a backward step in supplier relations.

To assist in this new world, technology and related service advances have rushed to provide an environment where it is easier for the initial contact between prospective suppliers and eager private brand retail buyers to take place.

This evolving trading climate will increasingly mean that the best suppliers have choice over who they work with. As the power balance shifts, the retailers that don't adapt will be left with the usual suspects providing the generic copies of questionable 'me too' quality.

To move from the 'buying' approach (focusing on the national brand equivalent), there is this need to have a more collaborative relationship to build unique private brand products. This requires engagement, a new approach for most.

Supplier engagement is ultimately changing the dynamics of the relationship, from single dimension to true

partnership, and helping to support the goal of brand development.

So what needs to happen to make that change? As with all relationships, the initial contact plays a highly significant part in setting the tone and the chance of success.

Great supplier engagement demonstrates to the vendor that the relationship is going to be built on a platform of true partnership, with the retailer trying to do everything in its power to make things work.

This is not just about one single meeting or event, but an ongoing, built-in process.

To be successful right from the beginning, the internal private brand team needs to be more efficient than old broker networks, focused on value-add by using appropriate engagement tools to empower suppliers. It needs to boost performance through excellent communications, superb support structures, and clear and transparent expectations.

This all promotes a win-win for the private brand team and suppliers.

The retailer is setting up a truly 'One Team' approach to the private brand that the partners can share. This demonstration of retailer commitment makes a difference to suppliers.

Retailers that excel in this gain a competitive advantage. Given the numbers of suppliers involved, the big return on investment is easy to grasp and measure.

Our clients across the world have seen the benefits as suppliers spend more time and care in addressing consumer complaints, accelerating product development, and enhancing ideation.

For those looking for double digit levels of private brand penetration, the transformation from classic supplier relations to true engagement is essential.



Jan Fura
| Consultant | S4RB

Kroger partners with Alibaba: selling private brands into new markets

Alibaba is one of the largest and most valuable ecommerce companies in the world. I've watched with interest as this Chinese-based giant has expanded its operations and increased its delivery footprint.

Then back in August something occurred that really caught my attention. Kroger announced that it was going to partner with Alibaba to sell its Simple Truth natural and organic products in China via the Tmail platform, Alibaba's global B2C platform.

The reason this stood out for me wasn't just because Kroger was venturing into the Chinese market; we've already seen Walmart do this by partnering with JD.com. Rather, it was the fact that Kroger is seemingly taking a low-risk path into a new market with the opportunity for great reward. When you consider that Walmart reportedly invested approximately \$500 million in JD.com and \$16 billion in the acquisition of Flipkart, Kroger's deal in comparison is the equivalent of dipping its toe in the water.

I personally think this is a very interesting strategy to watch. Kroger has taken one of its leading private brands -- Simple Truth is said to have generated around \$2 billion last year -- and made it available in a new market. No bricks and mortar store, no high investments and no acquisitions.

Kroger believes in its brand and has made it available on Tmail. This is an amazing example of promoting private brand! Consumers in China probably wouldn't be excited about a Kroger store opening up in the neighborhood just now, but by concentrating on selling private brand, Kroger is providing something unique to a new customer base. I would expect to see more Kroger brands made available in 2019.

It's not just me watching what is going on here. One month after Kroger's announcement, Walgreens Boots Alliance

confirmed it will be selling Boots U.K. and U.S. beauty brands, including No7, Soap & Glory and Boots Cucumber, through Alibaba.

Forbes has often referred to Alibaba as 'the gateway to China', and it seems like retailers are looking to use their private brands to venture through the gates. Private brands show new customers and new markets what an organization believes in, be it quality, value, niche offerings, or whatever it is that makes a brand different from its competitors.

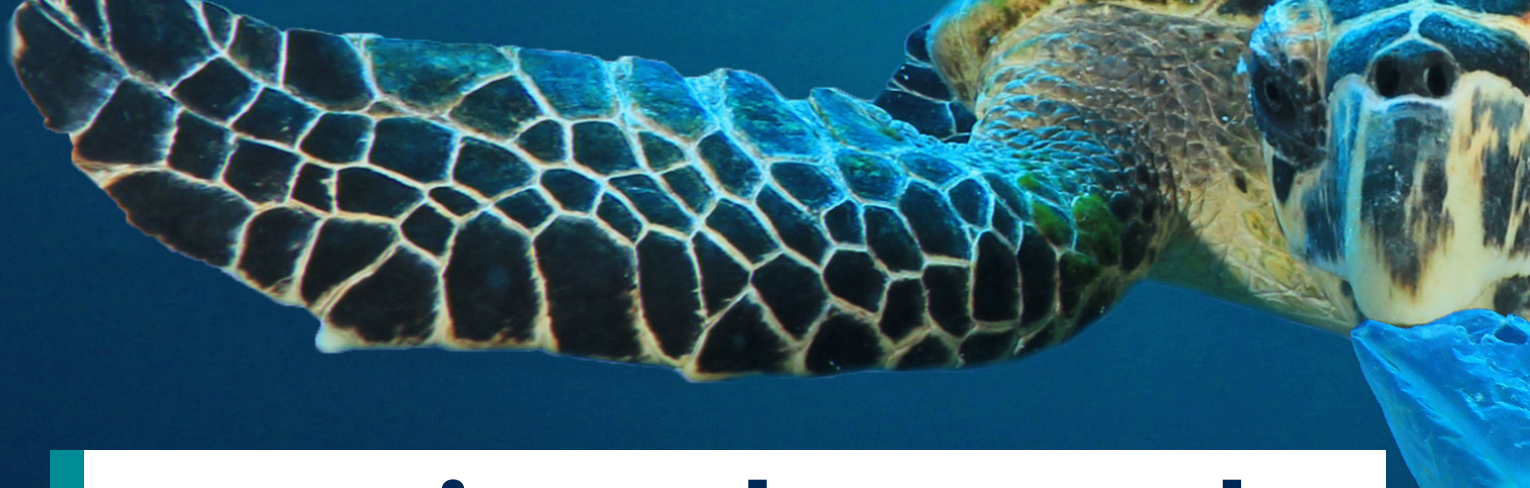
Tmail has a customer base of over half a billion Chinese consumers, with expectations that may be vastly different from those of U.S. consumers. I can't help but wonder what data a 'remote' retailer is planning to capture in China, without a store presence, feedback will be solely via social media, email or call center - all perfect for capturing and analyzing.

S4RB's Affinity™ platform allows retailers to not only capture this data from multiple channels, but also to share it directly with suppliers. Kroger manufactures more of its private brand products than most retailers, but a large percentage is still through private brand suppliers who need to understand the feedback from this market, as does Kroger's in-house team. It is also unclear how much will be supplied through new suppliers in the region, so the right collaborative tools will enable Kroger to manage this in the most efficient ways.

The journey into a new market does not have to be taken alone. Retailers and suppliers must work as One Team to learn and react to new market requirements. By sharing data with suppliers, private brand retailers are able to drive product improvements specific for new markets without the responsibility lying solely on their shoulders.



Robert Neill
| Solutions Consultant | S4RB



Busting the myths around plastic

On the 10th of December 2017, the final episode of the hit TV series Blue Planet II aired, hosted by Sir David Attenborough. It has helped fuel a movement around the reduction of waste so unprecedented that we are seeing social and political reform not only across the UK, but the globe.

How does that connect to retail? Britain's leading supermarkets are among the main plastic pollution culprits, creating more than 8 million metric tons of plastic packaging waste every year, according to a report by The Guardian.

In order to understand more about what is being done to address this issue, I spoke with **Nikki Grainge, Packaging Development Manager at the UK's Waitrose and Partners.**

I met with Nikki at the Waitrose head office. Guiltily trying to hide my plastic bottle as Nikki took her seat across from me, I gathered my notes and prepared myself for an onslaught of plans for new and innovative products that are going to replace plastic. But Nikki surprised me, as she began our conversation by simply stating:

“Plastic is convenient and good at what it does.”

It has quickly become apparent that plastic is a victim of its own success. It's a relatively cheap product that does the job well. Here's why:

- 1) It helps extend shelf life, therefore minimizing food waste.
- 2) The printable area allows retailers to put essential information on it (nutritional information, allergens etc.) making it easier to track products, and for consumers to shop.

Unconvinced, I asked the most obvious question, why not just use paper packaging instead? Here's what Nikki explained:

“Something not everyone might be aware of is something called life-cycle analysis. It's literally a analysis of different packaging from creation to disposal. It is a misconception that paper bags are better for the environment than plastic bags.”

She elaborated that when you complete a one-on-one comparison of all the steps in creating a wood product – such as a paper bag – versus the creation of a plastic bag, it takes five times more energy and three times more resource.

This doesn't mean that paper isn't a viable option to be used for packaging - some things can be put into paper -- but if paper use is to increase, more trees need to be planted!

“Even if we swapped everything out of plastic tomorrow, there is not enough paper in this world to swap everything into paper,” Nikki said. “There probably isn't enough immediately available for the UK requirement, let alone globally.”

Of course, paper isn't the only alternative, and most retailers are investigating new and innovative types of packaging. But as history has taught us, this is a lengthy process which should not be rushed.



INTERVIEW WITH: NIKKI GRAINGE PACKAGING DEVELOPMENT MANAGER

WAITROSE
& PARTNERS

Polylactic Acid (PLA), a plastic alternative derived from renewable resources like corn starch or potato starch, was introduced commercially onto the market in the 1980s. It then enjoyed a lengthy spell as plastic's successor, but due to the absence of research and rushing the product to market, retailers and consumers at the time didn't know the unintended consequences of PLA.

"People didn't realise what effects PLA would have in that it looks like plastic and acts like plastic – but the trouble was the consumer thought that as well and just threw them away like plastic. When you recycle PLA products with PET products, PLA has a totally different breakdown characteristic, which goes gluey and tacky, and it actually damages equipment," she said. "Processing sites would then have to shut down their whole line to do a total clean-up. It's a 24 to 48 hour job."

The key message retailers should take from this is to ensure that the proper due diligence is carried out on any new packaging solution.

The crux of the matter is this: any new packaging solution will need to be recyclable.

Is it possible that we're wasting our time looking at alternative products when many of the materials we use today can be recycled, including plastic?

"Everything is technically recyclable... but investment is needed in the proper machinery or the proper infrastructure to recycle," Nikki answered. "That's why it's so important that we properly evaluate what why we're on the good plastics versus bad plastics campaign."

"Where we can absolutely make sure we're recycling for [a product's] end of life we should. In fact, we need to think of all packaging as having a next life, she added, noting that, "In the UK we're under our recycling rates that both the government and the EU have set."

There is confusion in the media and the public on 'good' and 'bad' plastics.

Picking up my plastic single-use water bottle, Nikki informed me that it was made of a plastic called Polyethylene Terephthalate (PET). She said clear PET is one of the easiest and most efficient things to recycle, and afterwards has a high monetary value. That could generate revenue that could be re-invested in the recycling processes.

"...It's of such value you shouldn't be calling it waste," she said. "The right plastic isn't a waste product – it has a real value ..."

If more retailers start to use easily recycled plastics, this would make recycling simpler for the consumer, supporting a circular economy of less waste and more profitable materials being used.

One of the most demonized products is the humble plastic bag. Nikki informed me that even plastic bags are very much recyclable substances, and the recycling infrastructure for this already exists. What retailers and consumers need to ensure is responsible disposal of the bags.

Recycled plastic bags have many uses, such as for roads, clothing and even park benches.

Looking at the big picture, there are a few things consumers can do to help with the battle:

- 1) Don't make uninformed assumptions.** Don't believe everything you read. There's always two sides to every story.
- 2) Understand and appreciate that not all plastics are bad.** Banning plastic would actually be a bad thing to do.
- 3) Be more responsible.** For example, stop littering. Litter that becomes waterborne ends up in the ocean.



Josie Burt
| Solutions Consultant | S4RB

Parallels between supplier engagement and associate engagement

When we consult with private brand retailers, we often have a discussion about the importance of supplier engagement. During this discussion, the easiest analogy to draw upon is associate engagement.

For ‘me too’ store brands, it is often a buying exercise, to get an existing national brand equivalent (NBE) at the right price.

But customers now want more than a low-cost NBE, and meeting this demand is essential to grow private brand penetration. With this goal, the retailer/supplier relationship needs to move beyond buying to a more collaborative approach. That means working with the right suppliers, in the right way, to deliver innovation. Don’t get me wrong, innovation may still be in price, but it could also be in format, nutrition, convenience, free-from ingredients, or whatever else your brand stands for.

Let’s consider the associate analogy further. Gone are the days (for most companies) when people clock in, clock out, and are time-managed and thus tied to their workstations. The world has recognised that good associate engagement gives your team the tools to empower them to achieve more.

Supplier engagement should follow along similar lines. Suppliers need the right tools. You wouldn’t expect your colleague in the quality department to manage quality without access to the facts. But many retailers expect manufacturers to be responsible for quality without sharing consumer feedback with them.

S4RB’s Affinity™ platform allows suppliers to access information about their products in near real-time, allowing them to be proactive rather than reactive, and helping them provide advice back to the retailer. Just like a good associate!

You wouldn’t expect an associate to execute instructions without a clear understanding of the ‘why’ and the ‘how’. So why so often is there just a cold instruction to suppliers “Do this...”?

Affinity’s supplier self-help tool allows retailers to communicate the why, and provide the tools for the how. This includes policies, standards, how-to videos and, most important of all, those FAQs that consume so much of a retailer’s time to answer by email.

There are a lot of parallels between supplier engagement and associate engagement. I’m not advocating that all organizations mimic Google in providing highly generous (and expensive) perks to employees, from free food to massage credits. However, I am saying it’s important to treat suppliers more like you treat associates. A bit more massaging of the retailer-supplier relationship will go a long way in relieving pain and building engagement.



James Butcher
| CEO | S4RB

Launching private brands in Latin America

No doubt there is a global private label revolution underway. Central to this is the development of differentiated private brand products and solutions as retailers build and market their own products to meet changing consumer needs. We see the impact of this revolution on the food industry across the globe, especially in North America and Europe.

According to AC Nielsen's 2018 report - The Rise and Rise Again of Private Label - information across more than 60 countries shows that private label products continue to gain share across all major geographies. Relentless expansion by retailers (bricks and mortar as well as ecommerce) over the past decade has given shoppers more access to private brands. Private brands continue to provide many avenues for future growth around the globe. Latin America is certainly becoming one of these new opportunities, despite past performance.

In Latin America, the market for private brands is small in terms of value share. According to AC Nielsen, the challenging economic situation in Latin America may help private label become a good alternative for Latinos looking for value. Penetration and adoption should also increase as consumers are increasingly exposed to private label offerings through retail expansion by global (Walmart and Carrefour) and local (Cencosud, Falabella, and Bodega Commercial) retailers. Today, private brands in Latin America represent less than a 5% share of volume for most retailers, but this is growing and should continue on this upward trajectory because of the link with the growth of the economy.

Here are my thoughts on how Latin American retailers can win with their private brands.

Sourcing reinvented

Sourcing products plays a large role in explaining why private brand market share and volume is low in Latin America. One of the limitations is the productive capacity of each country. It's difficult for retailers to find supplier partners to produce private label products, especially in smaller countries. In many cases, capacity exists with brand manufacturers but there is the dilemma 'to produce or not to produce' for a private brand competitor in their respective category. Having the right tools and solutions to develop new, small, or local sources of supply will be key to production. It's not just a matter of demand, but of supply as well. Improving strategic sourcing will facilitate success for private brands and could threaten the existence

of major national brands in these developing countries. As trends change it is important that private brands offer differentiation. It can be price (as it has been historically) but consumers now look for more.

Local or provenance. Ethical sourcing. Authenticity.

And strategic sourcing can be an important part of how retailers achieve this private brand differentiation.

Reinvented brands for reinvented shoppers

Latin American shoppers have become skilled 'omni-shoppers' who will visit the cash and carry to stock up on home and personal care items and use convenience stores for perishable goods. Shoppers are now thinking and spending differently in their quest to get the most from their grocery budgets. Understanding this change and having a clear strategy for offering the right products is the best approach to keep shoppers within the retailer's own environment.

Latin American retailers should invest now in their private brands and seek ways to differentiate themselves to meet consumer needs and therefore gain attractive margins. When expanding the private brand offering, it's crucial to be aware of and build brand and product integrity. Brand and product quality is an uncompromising obligation that retailers must meet. By offering a quality product and being transparent, retailers can build the crucial link between the customer and the brands they own and manage.

Expanding private label into a market such as Latin America, where penetration is low, is not easily undertaken but offers great reward to those who make the leap. Positioning the brand carefully and partnering with the right suppliers are both key elements to success. New private brand teams will also need the right technical systems in place to be able to achieve this. As private brands develop, the challenge will involve greater complexities. There will be a need to manage more products and more suppliers. Tools that deliver the communication and support required to empower suppliers will provide the most cost-effective approaches. Tools will need to empower suppliers to act as 'One Team' with the internal team, and best leverage the expertise and skills from chosen supplier organizations to achieve mutual success.

Retailers that build their private brands on these principles will be the winners with the reinvented shopper.



Steven Howell
| Consultant | S4RB

Thinking differently about retail dashboards

In my role as a Senior Solutions Consultant, I see dozens of dashboards on a daily basis. Admittedly, often I go searching them out and so maybe I see more than most. Yes, I'm that guy who preaches to everyone about the latest data representation he's seen in the news, or what a genius Charles Minard was. But really, what is a dashboard?

Throw a few pie charts on a page, whether it be online or on a printout, and you've got a dashboard, right? If only it was that easy. What you have there is, at best, a collection of interesting charts. But is that really the purpose of a dashboard? You've got to question why you're interested in a dashboard in the first place.

Most likely it's to discover some kind of insight, something you couldn't find previously without trawling through data, data and more data. Didn't you go there hoping it would tell you what to do next? Isn't that the dream?

Well, in short, yes that is the ideal. Dashboards should be insightful and actionable. For a dashboard to meet both these criteria, a user must be able to get to a piece of information as quickly as possible, and that information needs to drive next steps. Nowhere is this truer than in the retail industry.

What's more, to close the loop and truly be One Team, not only should the retailer benefit from such dashboards, but so should the suppliers. Crucially, this allows a retailer and supplier to be aligned on next steps, knowing they are looking at the same data and therefore sharing 'One View' of performance. For example, if a retailer uses Complaints Per Million Units (CPMU) as a measure of quality, then it should also share this view with the supplier. Importantly, this should include a consistent definition of complaints and sales. In this example sales would be to the consumer, not the manufacturer's sales to the retailer -- a vital distinction. A benefit of doing this is that suppliers can identify and plan next action steps for themselves, releasing the retail team from hours of data analysis and supplier chasing.

We know the retail industry collects huge amounts of data -- about customers, products, complaints, sales, reviews, product tests, social media comments, and anything else you could possibly want to know. But what is the worth of this data if it never sees the light of day? Worse, it sits in a database, often never to be utilized because no one has the hundreds of hours to spare to trawl through it. And even if someone did discover the root cause of a group of complaints, or an inconsistency in a product specification,

how are they going to easily take action on this and set the wheels in motion for rectification?

Before you know it, Excel documents are being circulated, and adapted each time they are passed to the next person. This makes it extremely difficult for a retailer to share a consistent message to others, including suppliers.

Better dashboarding will lead to better reporting and more actionable insights around the right KPIs. It sounds easy, but, it's actually easier to produce a poor representation of data, and therefore not maximize the potential. Retailers are often very data heavy, and yet very insight 'lite'.

For this reason, we must think differently about dashboarding. Regardless of the tools used, data needs to be represented in a way that produces deep understanding and actionable insights. The user must be able to get to the granular detail if needed and a supplier needs to know exactly what rectifications need to happen and exactly what customers are saying about their products.

As mentioned earlier, a good real-world example of this would be a visualization of complaints per units sold. In itself this might not offer the actionable insights required by the retailer. However, the key is to enable access to a more granular analysis as needed so that a user can easily identify items that need attention.

Similarly, with customer reviews, a rating is an important KPI. However, just as important are verbatim comments, not only for issues, but also for constructive points, even for four-star-rated items. The input often reads like this: "It's great but...". What follows the 'but' can often hold the key to bridging the gap to turn a four-star item into a five-star product.

Another useful example is the ability to track a new product development process. Let's say you have 15 gates from concept to shelf, and you have certain expectations of each gate in terms of when it should be complete, and a different person responsible for each part, as well as someone responsible for the overall launch/period and dollar value. Doing this for thousands of products in a spreadsheet can be mind-boggling, or impossible. But ensuring your dashboards are both insightful and actionable makes this process easier for the retail team, and easier for sharing a consistent message with suppliers.

That's why it's important to think differently about dashboards.



Alex Fitchett
| Senior Solutions Consultant | S4RB

Navigating the 2019 sustainability landscape

In 2018, we saw consumers rally behind sustainability topics such as plastics, palm oil and reducing meat and dairy consumption. Many retailers subsequently made public pledges, responding to these demands by making changes to their own brand products.

The British supermarket chain Iceland is a great example of a retailer making a bold move with its private brand products, to both meet consumer demand and drive change in the industry.

It drew a tremendous amount of attention with a Christmas TV commercial that was banned from TV broadcast by regulatory authorities because it breached rules about political advertising. The commercial, initially produced by Greenpeace, focused on the plight of orangutans in Indonesia resulting from palm oil deforestation. The advertisement may have been banned from TV, but the retailer gained huge momentum from the incident in any case, and according to Iceland's website drew over 70 million views online.

Palm oil concerns have long been a sustainability focus of UK retailers, but this has sometimes fallen under the radar of consumers. Thanks to Iceland and campaigning by Greenpeace among others, palm oil has now entered mainstream consumer awareness.

In many other countries, palm oil does not yet face the same level of consumer scrutiny. Due to the many sub-types of palm oil, many suppliers may not actually know that their products contain palm oil. Retailers in the rest of the world therefore have a lot of catching up to do on the issue as consumer awareness grows.

The level of UK consumer outrage about deforestation shows the huge pressure that can be directed at retailers when consumers become more aware of issues. These situations often force retailers to respond and declare their positions, especially as it relates to private brand products.

Meanwhile, retailers actually have dozens of sustainability and CSR policies that they are adhering to and working towards meeting targets for.

For example, Tesco now has 20 or more sustainability policies, covering products from bananas to cotton and wild fish. It wasn't always this way. There used to be only a few hot topics that retailers would focus on.

Today's private brand retailers will want to communicate their positions on emerging sustainability issues as quickly

as possible, or else face accusations of avoiding the problems. In many cases they are likely working behind the scenes on issues, but the added pressure may push them to announce their plans publicly. That said, retailers must avoid always jumping on the latest sustainability bandwagons. Our advice is to take the time to find out what's happening with products before making any announcements.

The BBC series, Blue Planet II has had a huge influence on the public's revolt against plastic packaging, and black plastic in particular has come under fire as it is not currently recycled in the UK. Retailers have been applauded for unveiling their plans to eradicate plastic, including the black kind, from their shelves.

However, plastic packaging is a complex topic that the majority of consumers don't fully understand. There are implications for each decision, such as whether to continue using black plastics. It's crucial that retailers take the time to fully research the implications of any changes they make before they announce them, and to help educate consumers.

It's also imperative that suppliers join retailers on the journey to meet sustainability goals.

There are three simple steps to getting this right:

1) Communication. Send clear, well-presented messages about policies to suppliers, and make sure the right people see those messages. Of course, there should also be a way for suppliers to initiate contact. The communication is not just the 'what' needs to be done, but the 'why'; to ensure suppliers really can align with the brand objectives.

2) Support. Give suppliers the tools, information and help that they need to do their job well and make whatever changes requested of them.

3) Transparency. Share information with suppliers. Let them know that they are a valued part of the team and let them see how well they are performing against the goals set.

In simple terms, here's what suppliers want: "Tell me the objectives [communications], tell me how I am doing [transparency] and tell me how to get better [support]."



Find out how one UK retailer achieved a 99% response rate for a palm oil survey in under four weeks: info.s4rb.com/case-studies



Kelly Cookson
| Marketing Manager | S4RB



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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