



The Global Language of Business

Apparel Industry Session

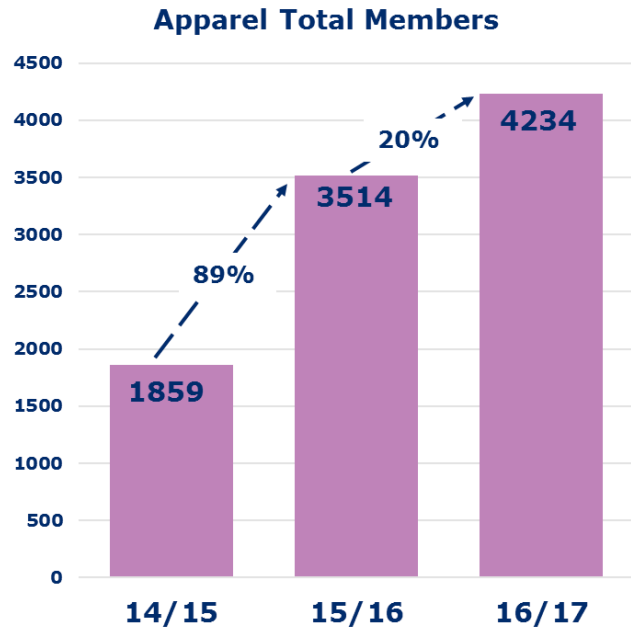
UK Data Vision Slides



GS1 UK membership of Apparel Retailers & Brands



Membership Growth



Advisory Board





What our members told us...

We held a workshop with the 5 major UK Department Stores to discuss their common issues and opportunities for collaboration. This was then followed up with brands.

Retailer perspective

- Supplier compliance is a key challenge however demanding compliance can impact relationships

"We need a more mutually beneficial approach to trading relationships"

Brand perspective

- Managing varied requirements from multiple customers drives up the Cost of Goods Sold

"We have 15 major customers and 11 different ways we need to prepare product for delivery"



Building a case for change...

We followed the end to end process of a product moving from a brand's supply chain into a retailer's

Discovery participants

Harrods

KURT GEIGER

John Lewis

End to end process review



Product set up



Ordering



Wholesale despatch



Retail inbound

The common issue: product data



The **key issues** stopping product from moving efficiently through the supply chain and being made available to sell, related to the **management of master product data**



Quality

Data that is accurate and complete

Timing

Data that is available when needed for processes

Quantity

Data with value-adding product attribution



What is the industry doing about it?

Retailers and brands are investing in proprietary portals and solutions that push the challenge back to brands to comply



- More products, more attributes.
- From more sources and suppliers
- And, more competition!

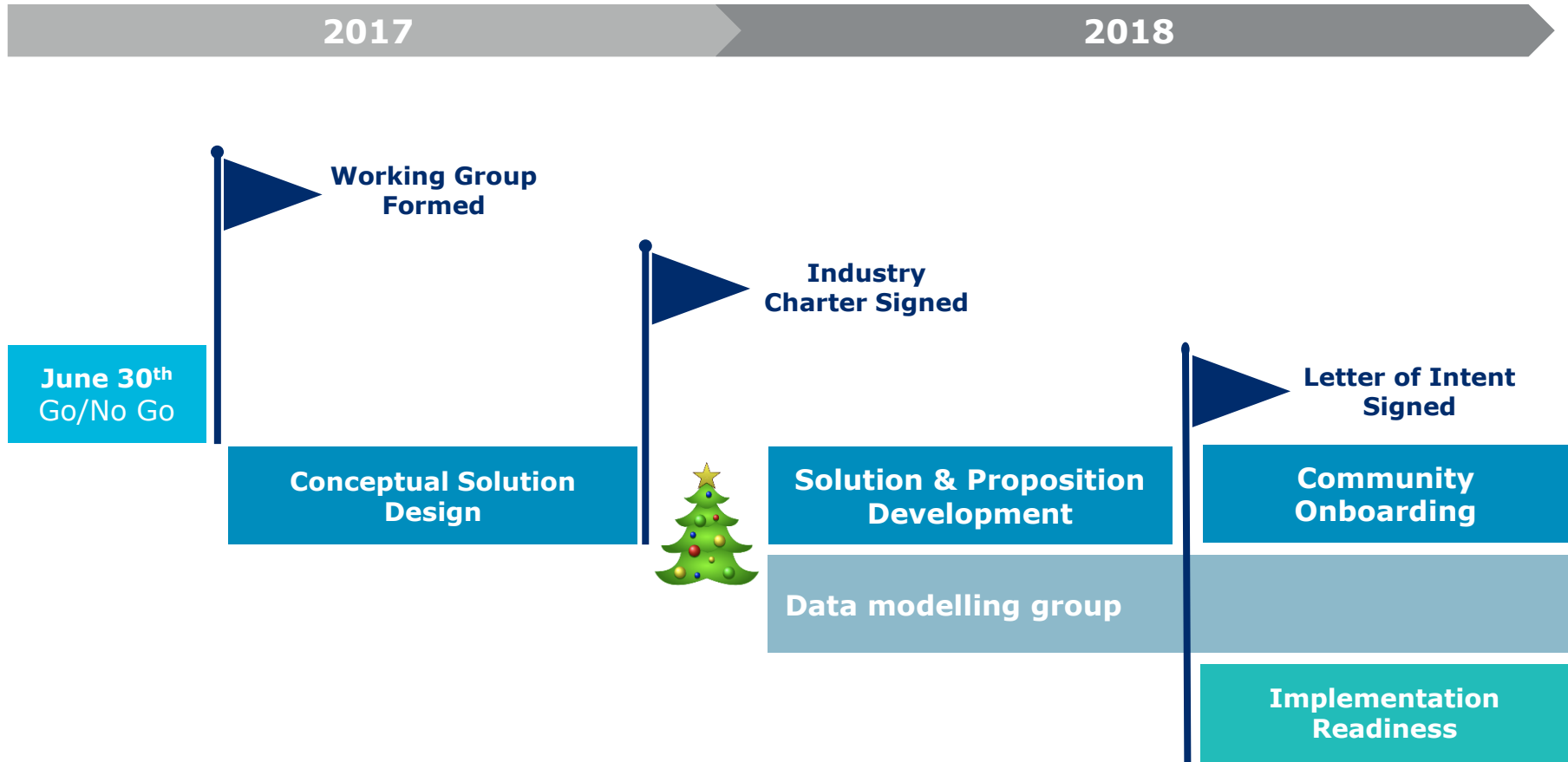
What does industry need?

- A standard model for sharing master product data
- A shared means for sending and receiving data
- An industry governed approach



What are GS1 UK doing about it?

(Illustrative plan only)



There are 3 key components to an industry solution



We see the data model as critical first step towards industry collaboration

Data Model

**Industry
Catalogue**

Service

**Core Product
Attributes**

**Retailer
specific
Attributes**

**Extended
Attributes**

**Price Ticket
& Care Label**

**B2C Data
(Inc.
Images)**

**Transactional
Data**



What are the challenges?

Grocery industries around the world have adopted standard data models and implemented GDS solutions – why has apparel not done so to the same extent?

- **Market Fragmentation** (retailer market share, supplier market share)
- **International Trade** (low % of suppliers operating domestically)
- **Private Label** (high proportion of the market has less need)
- **Is Master data enough?** (how to manage transactional data?)
- **Facilitating collaboration** (traditionally non-co-operative approach)