GS1 Industry & Standards Event
12-16 October 2015 – Warsaw
Transforming Business Together

Session: Apparel Workshop
Date: Tuesday Oct. 13th, 2015
Time: 11:30 – 18:00

Who May Attend: Everyone
Host: Enzo Blonk – GS1 global office
Anti-Trust Caution

- GS1 operates under the GS1 anti-trust caution. Strict compliance with anti-trust laws is and always has been the policy of GS1.
- The best way to avoid problems is to remember that the purpose of the group is to enhance the ability of all industry members to compete more efficiently.
- This means:
  - **There shall be no discussion of prices, allocation of customers, or products, boycotts, refusals to deal, or market share**
  - If any participant believes the group is drifting toward impermissible discussion, the topic shall be tabled until the opinion of counsel can be obtained.
- The full anti-trust caution is available via the link below, if you would like to read it in its entirety: [http://www.gs1.org/gs1-anti-trust-caution](http://www.gs1.org/gs1-anti-trust-caution)
Statement & Reminder for Seeking Intellectual Property Information

• Relevant to the features of the specification that are being developed in this Work Group, if anyone has knowledge or information about intellectual property rights, such as, patents or patent applications; please promptly convey this information to the Work Group Facilitator.

• The intellectual property rights can either be in development or owned by persons, companies or third parties within this WG or outside this WG.

• We do this under the guidance of the IP Policy, so that GS1 can seek to avoid the uncertainty regarding intellectual property claims against the Specification.
Meeting Etiquette

• Meetings will begin promptly as scheduled
• Be present – avoid multi-tasking
  • Avoid distracting behaviour:
    - Place mobile devices on silent mode
    - Avoid sidebar conversations
• Be considerate
  • Avoid monologues
  • Keep comments concise
• Respect work group decisions
  • Avoid re-opening decisions unless there is a significant quality impact

• Collaborate in support of meeting objectives
  • Ask questions
  • Be open to alternatives
• Be representative
  • Avoid personal remarks
  • Do not speak for your company or community if you do not clearly understand their needs
  • Votes should reflect the needs of your company or community
In the case of Solution Provider presentations that have been scheduled during this workshop, please keep in mind that GS1 does not endorse one Solution or Service provider’s offer over another.

The purpose of their presentation today is to share their experience with implementation of GS1 standards or their vast expertise and understanding of a given topic.
WiFi Internet Access

• High Speed Wireless Internet: Complimentary
• Please only connect one device
• Connect to: GS1
• Password: GS1transformed
Your feedback drives our continual improvement

There are 2 types surveys:

1. **Individual Session Surveys** - Please complete the hard copy satisfaction survey at the end of each work group session. Your group leader will provide it to you.

2. **Overall Event Survey** – All attendees will receive an email on Friday to rate overall satisfaction of the event.
<table>
<thead>
<tr>
<th>Time</th>
<th>Title</th>
<th>Presenter</th>
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<tbody>
<tr>
<td>11:30 - 11:45</td>
<td>Welcome</td>
<td>GS1 GO (Enzo Blonk)</td>
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<tr>
<td>11:45 - 12:25</td>
<td>Why Social Compliance, Sustainability &amp; Traceability Matter</td>
<td>Worldwide Responsible Accredited Production - WRAP - (Clay Hickson, Senior Director, Strategy and Business Development)</td>
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<tr>
<td>12:25 - 13:00</td>
<td>On top of the pyramid: Omnichannel distribution management on the basis of extended master data</td>
<td>Modotex (Nicolas Kröger - Head of E-Commerce &amp; IT)</td>
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<td>13:00 - 14:00</td>
<td>Lunch break (60’)</td>
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<td>14:00 - 14:15</td>
<td>RFID at River Island – From Trial to roll out</td>
<td>River Island (John Wright - Head of Safety &amp; Loss)</td>
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<td>14:15 - 14:55</td>
<td>Moods of Norway picks low hanging fruits from RFID and prepares for the Omni future</td>
<td>Moods of Norway (Hans-Petter Hübert)</td>
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<td>14:55 - 15:45</td>
<td>RFID DECATHLON - Since 2013 ... and now</td>
<td>Decathlon (Jérôme Lemay)</td>
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<tr>
<td>15:45 - 16:15</td>
<td>Coffee break (30’)</td>
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<td>16:15 - 16:45</td>
<td>Stop buying, start selling - building a responsive supply chain</td>
<td>Profuomo / MicroFashion (Harry van der Zee)</td>
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<td>16:45 - 17:15</td>
<td>Rolling Inventory Reconciliation</td>
<td>Impinj (Goetz Pfeifferling)</td>
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<td>17:15 - 18:00</td>
<td>Panel discussion</td>
<td>Panel participants</td>
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<td>19:00 - 22:00</td>
<td>Dinner</td>
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<tr>
<td>TIPP - Tagged Item Performance Protocol Mission Specific Work Group (requirements to attend apply)</td>
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WHO FITS THE SHOE.....
Succeeding in tomorrow’s global Fashion market

McKinsey Report September 2014

- Base-line: **Fast-moving** nature of fashion → jump on trends
  (unique set of challenges)
- Additional dynamics:
  - Consumer wants entire **shopping experience**
  - World’s **most rapidly growing companies** in Apparel: smaller companies (offline and online) growing very fast
    (Zalando, Under Armor,...)

$1.8 \text{ TRILLION IN 2014}^1$
$2.0 \text{ TRILLION BY 2018}^1$
75 MILLION EMPLOYEES IN 2012^2

7 BILLION PEOPLE
Succeeding in tomorrow’s global Fashion market

McKinsey Report September 2014

- Size of global apparel business is growing: double digit growth by 2020.
  - Most of this coming from emerging markets (buying power of Asian consumers). Due increased travel sales generated both nationally and internationally
  - 55% of mid-market apparel sales will come from emerging markets in 2025, up from 4% in 2004
  - Younger fresh generation within Asian Fashion Empires (Li & Fung, TAL

In the luxury segment, 75% of all sales will be from Chinese consumers, with more than half of that being spent outside of China.
Succeeding in tomorrow’s global Fashion market

- McKinsey Report September 2014

Exhibit 6: Top 10 apparel growth cities between now and 2025

Emerging countries will move from being manufacturing countries to consuming countries.
Figure 1. Garment exports: % of economy’s total merchandise exports

Source: WTO, statistics 2014 / OECD
The simplified Garment supply chain

*Intermediaries operate throughout the supply chain.*

**Source:** OECD, 2014
Traceability
Why Social Compliance, Sustainability & Traceability Matter

Worldwide Responsible Accredited Production (WRAP)

Clay Hickson,
Senior Director, Strategy and Business Development
Traceability

On top of the pyramid: Omni-channel distribution management on the basis of extended master data

modotex GmbH
Nicolas Kröger
Head of E-Commerce & IT
EPC/RFID adoption
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River Island
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Moods of Norway
Hans-Petter Hübert
Retail Director
EPC/RFID adoption

RFID DECATHLON - Since 2013 ... and now

Decathlon
Jérôme Lemay
Product Manager / Buyer
Data Exchange
Stop buying, start selling - building a responsive supply chain

Profuomo / Micro Fashion
Sjoerd Wilmans,
Sales Manager
Data Exchange
Rolling Inventory Reconciliation

Impinj
Goetz Pfeifferling,
Senior Director of Business Development - Global Retail
Panel Discussion

Sjoerd Wilmans
Profuomo

Nicolas Kröger
modotex GmbH

Clay Hickson
WRAP
Save the Date!
GS1 Industry and Standards Event
11 – 15 April 2016
Jersey City, NJ, USA