



The Global Language of Business

GS1 Industry & Standards Event 2017
09-13 October 2017 – Brussels, Belgium
Transforming business together

Fresh Foods- Achieving faster, fresher supply chains with GS1 standards

Time: 11.15 – 12.30 Tuesday 10 October, 2017

Who may attend: Everyone

Speaker(s): Elena Tomanovich, GS1



Welcome!



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>.

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

GS1 Standards Event App – How to get it

- 1 Get the App by searching your App store for "**GS1 Global Events**" (If you already have the Global App due to attendance at the Global Forum or Standards Event, you do not need to do this)
- 2 Once you have the Global App on your mobile device, type **GS1IS17** in the search box. Please click the **orange (+)** to activate the event within your application.
- 3 Login with the email address you used to register for the event:

Username: (**your registered email**)

Password: **2017**



WiFi internet access

- Select “Crowne-Plaza-Free-Internet” and connect
- Password: 2017

Agenda

- GS1 Anti-trust caution, session administration and welcome
- Meetings this week at the GS1 Industry & Standards Event
- GS1 standards for faster, fresher supply chains
- Use of GS1 standards in Fresh Foods around the world
- Cross-Border Agri-Food Trade - Update from Asia-Pacific Perspective
- Group discussion
 - Deployment of Global Traceability Standard version 2 (GTS2)
- Meeting close

GS1 Industry & Standards Event

Fresh Foods meetings and discussions

Fresh Foods – Tuesday & Wednesday

Tuesday

- This meeting 😊
- **Global Standards in Maritime and Ports: Improving the Customer Experience** - Over 80% of all intercontinental trade is transported over the oceans of the world.

Wednesday

- **GSMP Global Traceability Standard version 2** - Discussions to improve the format for Global GS1 Implementation Guidelines
- **GSMP Global Product Classification (GPC) Standards Maintenance Group**
- **Barcode Identification Futures**
 - Presentation by GS1 Belgium & Luxembourg on local working group discussion of variable measure items at POS Pilots with three retailers on 2D barcodes

Fresh Foods – Thursday

- **GSMP Traceability Event Sharing Standards Maintenance Group**
 - Topics include: GS1 Foundation for Fish, Seafood and Aquaculture Traceability Implementation Guideline - Discuss Work Request 17-131 to enhance data sharing capabilities for reporting to regulatory agencies (Sweden & EU)
- **The Growing Importance of International Food Trade and the Role GS1 can Play**

Fresh Foods Overview

Why a discussion on faster, fresher supply chains

Fresh Foods

- The Fresh Foods sector is growing, driven by product demand from increasing numbers of health-conscious consumers and improved access to safe, fresh products through global trade.
- Longer and increasingly complex supply chains have increased the need to focus on speed and efficiency, as well as improve visibility and communications.

Global sector growth and increasing cross-border trade

- By 2020, the global cold chain is projected to be 238.9 billion Euro/ \$271.9 billion.
 - The global cold chain market is expected to grow at a compound annual growth rate compound annual growth rate (CAGR) of 13.9% between 2015 and 2020.
- Global trade in food products continues to expand – it has grown almost three times in value terms over the past decade.

Unique challenges of Fresh Foods

- “Freshness” matters
 - Products must be consumed or used much more quickly than highly processed or shelf-stable goods.
- Cold chain management
 - An added layer of complexity for trading partners and supply chain stakeholders to “maintain temperature” as product moves across the supply chain.
- Sources of supply that are seasonal and geographically diverse
 - Products come from locations that have distinct “growing” seasons that vary by time of year

GS1 standards

GS1 standards are the global language of business—a language for **identifying, capturing** and **sharing** information automatically and accurately, so that anyone who receives that information can understand it, no matter who or where they are.

A common, global language of business does much more than just keep communication simple, clear and reliable. GS1 standards:

- Transform how businesses share information with each other
- Help keep “doing business” simple - saving time and money
- Meet the needs of increasingly complex supply chains
- Help ensure the right products get to the consumer at the right time



GS1 standards in Fresh Foods

GS1 global standards offer a common foundation for identification, data capture and information sharing about products that flow seamlessly between trading partners and to the consumer.

- A GTIN can be combined with other data, such as batch or lot information, and used with a GLN to identify trading partners and locations.
- Accurate and complete product information can then be used to create efficiency in B2B and B2C business processes:
 - new item introduction, on-line (B2C) order fulfilment
- Also, it can help improve speed to market for products sourced from—or shipped to—multiple countries.
 - Master data for products, event and transactional data for shipments
 - Expedite cross-border trade – with product/shipment/transport documents that match the physical product and electronic information about that product and shipment

GS1 around the world

A few – of many - examples

GS1 Discovery App for **Fresh Foods**

10 local versions

- GS1 Global -English
- GS1 Azerbaijan-Azerbaijani
- GS1 Brazil-Portuguese
- GS1 Hungary-Hungarian
- GS1 Macedonia-Macedonian
- GS1 Mexico-Spanish
- GS1 Panama-Spanish
- GS1 Spain-Spanish
- GS1 UK-English
- GS1 US-English

New/Soon to be complete

- GS1 Croatia-Croatian
- GS1 Hungary-Hungarian
- GS1 Russia-Russian



GS1 Chile – traceability of Chilean apples for the Parisian consumer

- An article by Mr. José Luis San Juan, GS1 Chile discusses transition to GS1 DataBar (Fresh Foods examples)
- See page 90 http://www.revistalogistec.com/ediciones_pdf/edicion_99_lgt.pdf



GS1

NUEVAS EXIGENCIAS EN TRAZABILIDAD – NUEVAS SIMBOLOGÍAS ESTANDAR

La necesidad de información es una necesidad en todos los ámbitos de la actividad humana, en especial en la actividad comercial y industrial. En el mundo de los productos de consumo masivo, la información es un elemento clave para el consumidor, ya que le permite tomar decisiones de compra más conscientes y responsables. En este contexto, la trazabilidad se convierte en una herramienta esencial para garantizar la calidad, la seguridad y la sostenibilidad de los productos.

En este sentido, GS1 Chile ha desarrollado nuevas simbologías estandarizadas para facilitar la trazabilidad de los productos. Estas nuevas simbologías permiten a los consumidores acceder a información detallada sobre el origen, la producción y la distribución de los productos, lo que contribuye a aumentar la transparencia y la confianza en el mercado.

La implementación de estas nuevas simbologías es un desafío para las empresas, pero también una oportunidad para mejorar la gestión de la cadena de suministro y garantizar la satisfacción del consumidor. GS1 Chile ofrece apoyo y asesoramiento a las empresas para facilitar esta transición y maximizar los beneficios de la trazabilidad.

GS1



GS1 Iran – Indian Merchantaaha peppers that Iranian consumers want most

- The story a Merchantaaha red pepper performed by colleagues Mr. Mohsen Packniat, Mr. Mohammed Mahdi Saleh Doost and Mr. Hossein Bageri
 - Grown in India – it is “ready for retailers to sell” in Tehran with the use of GS1 standards for identification and barcodes!



GS1 Denmark –where does your steak come from?



Case Study: Traceability is on the menu at Kødgrossisten

"Our customers range from canteens and hotel kitchens to ferries and retail. One of our most important tasks is to ensure that customers can rely on product quality as well as information about, for example, the country of origin and the date of slaughter that we give them," explains Anette Frølund, Quality Manager of the Kødgrossisten, which is part of FoodService Danmark

<https://www.gs1.dk/hvem-er-vi/nyheder/hvor-kommer-din-boef-fra-sporbarhed-er-paa-menuen-hos-koedgrossisten-som-er-del-af-foodservice-danmark/>



Case study: Beaver Street Fisheries Outswims the Big Fish

“Taking a deep dive into solid data governance with GS1 Standards and best practices”

<https://www.gs1us.org/industries/retail-grocery/solidatagovernance>

Beaver Street Fisheries Benefits From Data Governance Based on GS1 Standards

Improved time-to-market or time-to-shelf

Average time reduced from **90** hours to as little as **30** minutes, a **99.4%** improvement

Cross-Border Agri-Food Trade - Update from Asia-Pacific Perspective

Patrik Jonasson, GS1



The Global Language of Business

Cross-Border Agri-Food Trade

Update from Asia-Pacific Perspective

Patrik Jonasson
Tuesday, 10 October 2017



Business is booming...

China Dairy Imports Grew by 21.4% in 2016

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Takehome:

- The total volume of dairy products imported in China increased by 21.4% in 2016. The import volume of yogurt and liquid milk experienced the most significant growth.



But business challenges are also growing

This is the new reality our members are operating in

Australian Dairy Industry Suffers Significant Setback After CNCA Hands Down 2 Suspensions

11 JUL 2017 | GIACOMO COLACI CIRILLO | [in](#) [twitter](#) [g+](#) [f](#) [email](#) [print](#) | 1504 | 0

Australian dairy exports to China suffered a significant setback with the suspension of the registration of "Camperdown Powder Pty" and "Parmalat Australia Pty Ltd" by CNCA.

Camperdown Powder Proprietary Limited

Camperdown Powder Pty Ltd is an Australian company based in Braeside, Melbourne



Increasing compliance costs hurt... uncertainty and time delays cripple

- Operating in a slim-margin industry with long product cycles and perishable products, **agriculture and food enterprises are extremely sensitive** to even the smallest increases in cost
- Time delays, inconsistencies in procedures, **lack of predictability**, raise business risks to levels that effectively block trade
- Burdensome **trade barriers drive the cost, time, and uncertainty of compliance** beyond what is necessary to fulfill a legitimate objective, ultimately distorting and blocking trade flows

Average tariff rates across APEC have and continue to fall but...

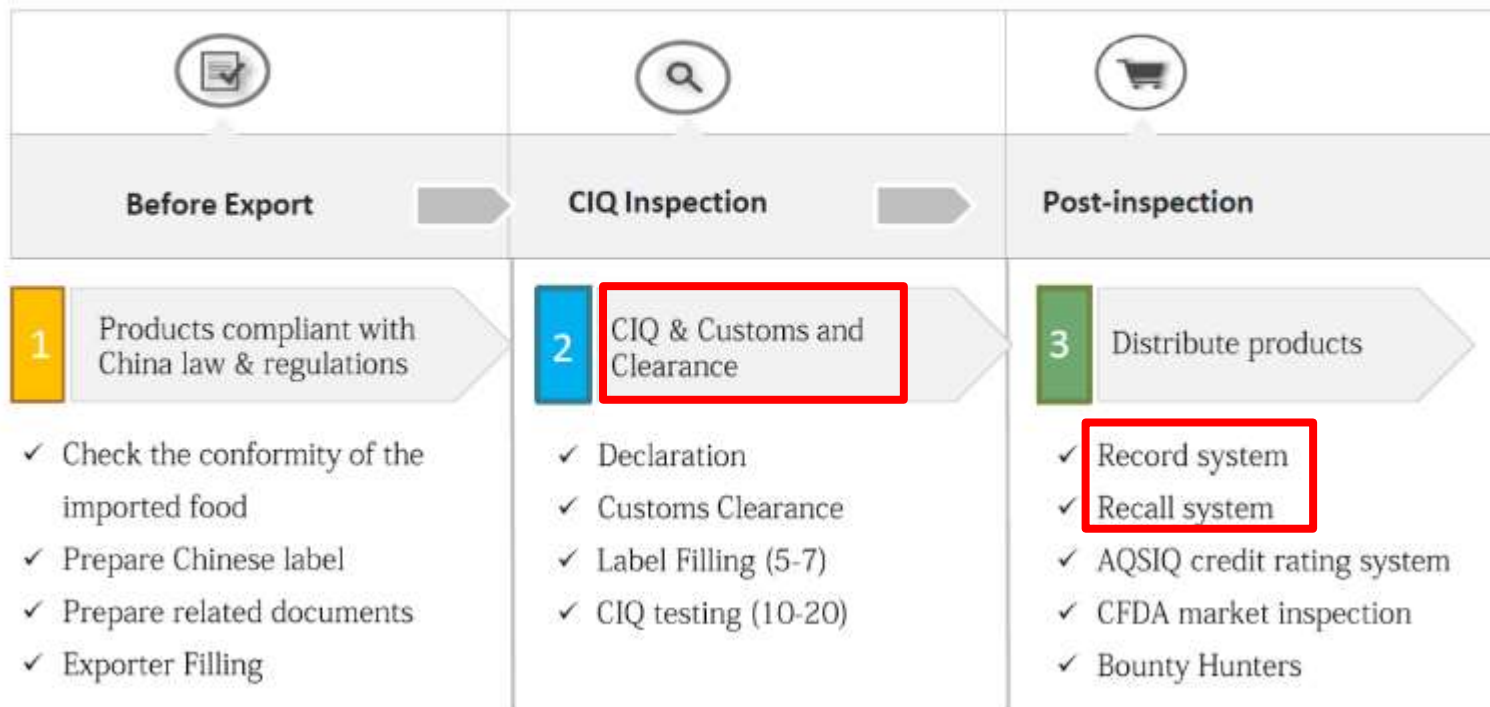
Non-Tariff Measures in agriculture and food trade have and continue to increase

NTMs are more than market access barriers... they impact and **compound along the entire supply chain**, raising transaction costs and distorting trade *before-the-border, at-the-border, and behind -the-border*

Compared to other sectors the **negative impact** of NTMs is greater for many **agriculture and food products**

We can have a role to play here and add value for industry

General import procedures



The case of the kiwi and the Kiwis



New Zealand Kiwi Exports

Zespri is the sole global exporter of New Zealand grown kiwifruit and the world's largest marketer of kiwifruit managing 30% of global volume

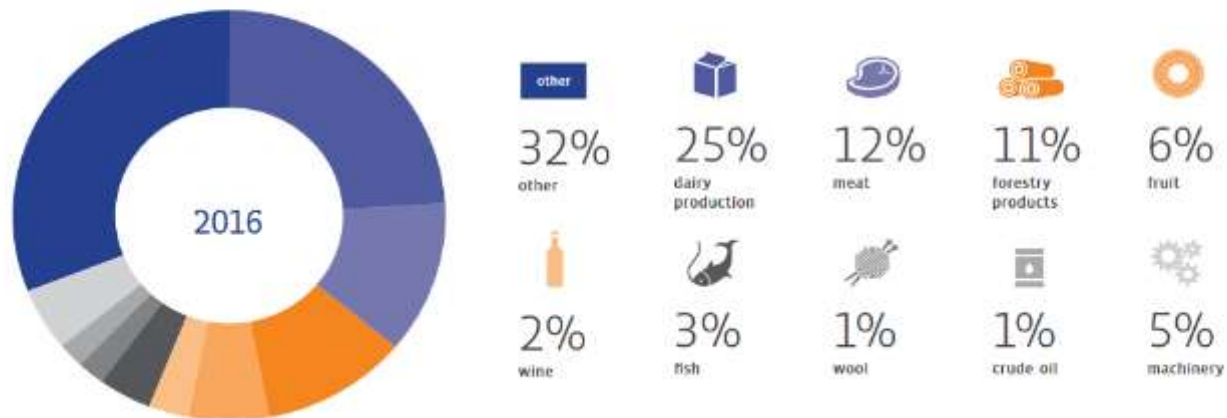
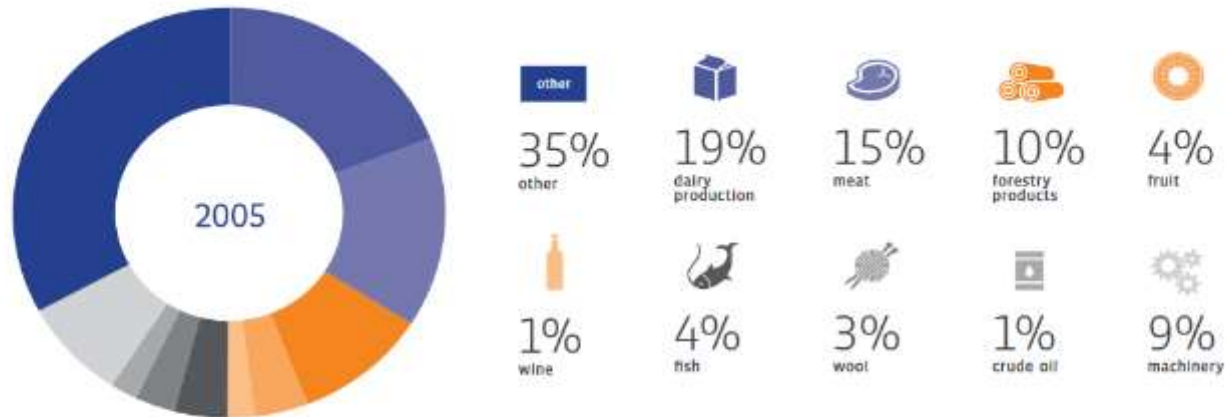
- Zespri sold \$2.26 billion of Kiwifruit in 2016/17, to 50+ markets
- Kiwifruit represents 29% of New Zealand's horticultural export revenue
- New Zealand kiwifruit export growth has been double digit lately
- In four to five years when the present growth cycle of production matures, exports are expected to be 550,000MT per annum, 18-20% above the current level of exports



https://gain.fas.usda.gov/Recent%20GAIN%20Publications/Kiwifruit%20Sector%20Report%20-%202016_Wellington_New%20Zealand_3-24-2016.pdf

<http://nzkgi.org.nz/industry/>

New Zealand's goods exports by sector in 2005 and 2016



Core of the New Zealand Government Trade Agenda is reduction of tariffs and NTMs

Trade Agenda 2030

Securing our place in the world



NEW ZEALAND
FOREIGN AFFAIRS & TRADE

MANATŪ AORERE

FOUR SHIFTS IN TRADE AGENDA 2030

On the basis of these changes, some strategic orientations for New Zealand's trade policy in the period ahead are set out. These 'shifts' will necessarily be put into effect over time and remain flexible in their implementation:

2

As tariffs reduce, there is greater attention on non-tariff barriers. Tariffs are still important for some sectors (notably dairy) and higher tariffs on more processed products often still confront New Zealand exporters. Government will still look for ways to address these, but progress on tariffs allows increased focus on non-tariff measures such as subsidies, customs delays and technical barriers, which are holding businesses back;

What is the strategy forward for the Kiwis?

A core strategy for Zespri is to invest strongly in developing markets. For Zespri these are:

- **China**, it is thought that at least another 20-25,000MT of fruit could be absorbed by this market at current pricing
- Latin America, especially **Brazil**
- **South Korea**, the new FTA came in to force in December 2015 tariff on kiwifruit to be reduced from 45% to zero by 2020

Development of northern hemisphere grown supplies is another strategy for Zespri with branded kiwifruit grown to Zespri's standards. This would help maintain shelf space with Zespri branded fruit year round and for the Zespri brand to be kept top of mind when consumers think about kiwifruit.



Zespri System: GS1 supporting traceability



Tony Nowell ex-CEO of Zespri: A strong supporter of GS1 in APEC



Introducing APEC

21 Economies / 3 billion people / 57% of global GDP / 49% of global trade

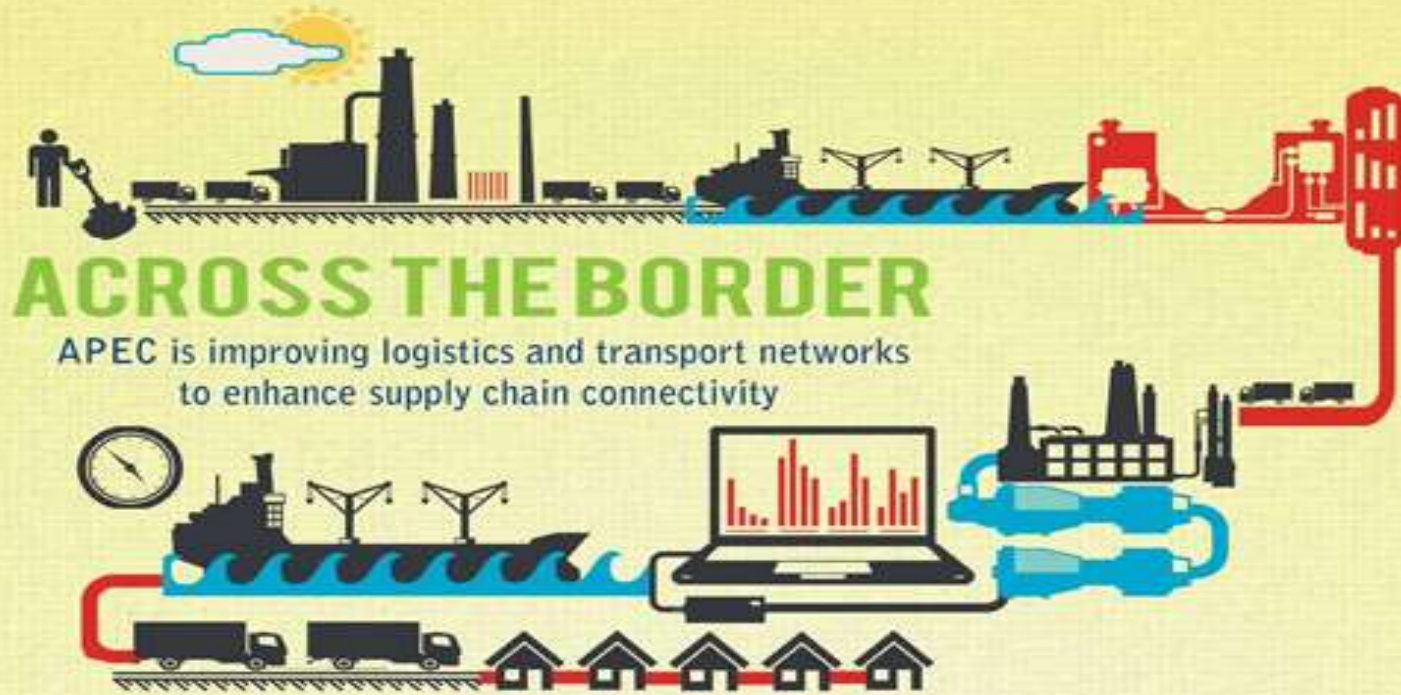


Reducing Cost

Supporting better connected supply chains



APEC IS HELPING REDUCE COSTS FOR IMPORTERS AND EXPORTERS



ACROSS THE BORDER

APEC is improving logistics and transport networks to enhance supply chain connectivity

Introduction

APEC Pilots 2016

Eight GS1 MOs and GO working with industry and government to implement



Boxed Beef
Australia-US

Wine
Australia-
Hong Kong

Tequila
Mexico-US

Asparagus
Peru -US

Durian
Malaysia-
China/
Hong Kong

Automation
saved 1,000
hours of
manual
work

Improved
tracking
achieving
100%
delivery in
full on time

100%
Supply
Chain
Visibility
Achieved

Logistics
Processing
time
Reduced
by 20%

Time Spent
on Tracking
Goods
Reduced by
98%

Peru – US Asparagus Pilot Project



“Study on the Application of Global Data Standards for APEC Supply Chain Connectivity” Asparagus Pilot in APEC’s Project



Stakeholders:

✓ Public Sector:

Ministry of Foreign Trade, Customs Authority, and National Quality Institute

✓ Private Sector:

GS1 Perú, Beta (Export), Frio Aéreo, Alpine Fresh (Import) and organizations of technology equipment

Outcomes:

- Reduction of time and logistic costs
- Improvement of products’ traceability
- Contribution to risk management of border agencies

Findings and next steps for Asparagus pilot: Government approach



Peru's proposal

Project applying GDS in the supply chain of product that use **maritime route**.



Peru's next steps

1. To share the results of the APEC pilots with trade associations, logistic operators, public sector and other stakeholders and to promote the best practices on the application of GDS.
2. To coordinate at inter sectorial level the scope of project in the application of GDS.
 - Definition of participating and product used for the project.
 - Definition of stakeholders from public and private sector involved in origin and destination economies.
 - Selection of the logistic corridor
3. To evaluate the incorporation a visibility tool into the Foreign Trade Single Window
4. To consider the use of electronic seals in the Project, along the supply chain.

What is next for GS1?

We need to generate real value...

GDS 2.0 strategy aims to achieve the broad **recognition of GS1 standards at the border by Government agencies**

This can be achieved by **matching GS1 members' business needs to regulatory requirements**



Proposed bilateral trade routes and products for GDS 2.0

1. Australia - China



2. Thailand – Hong Kong



3. New Zealand - China



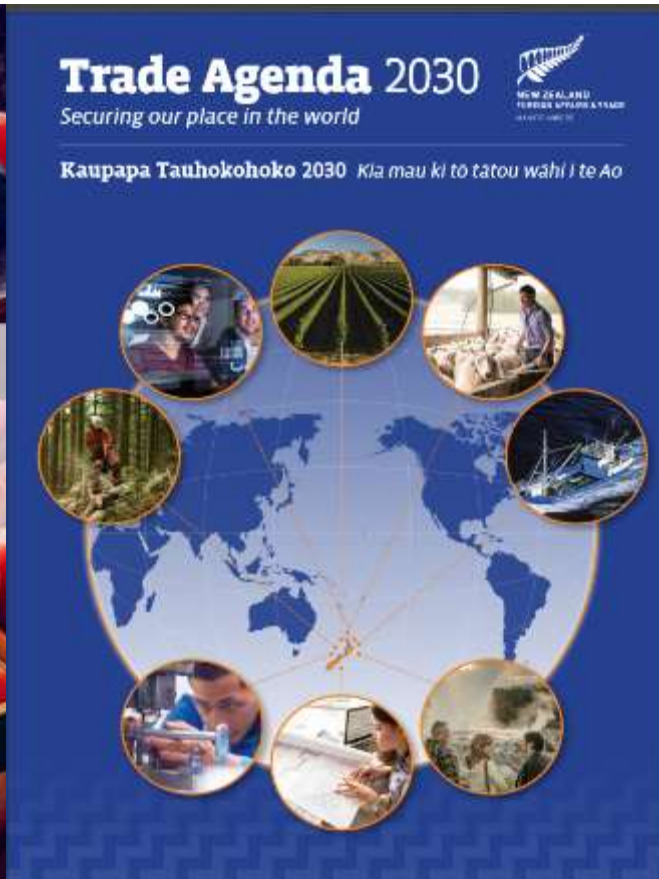
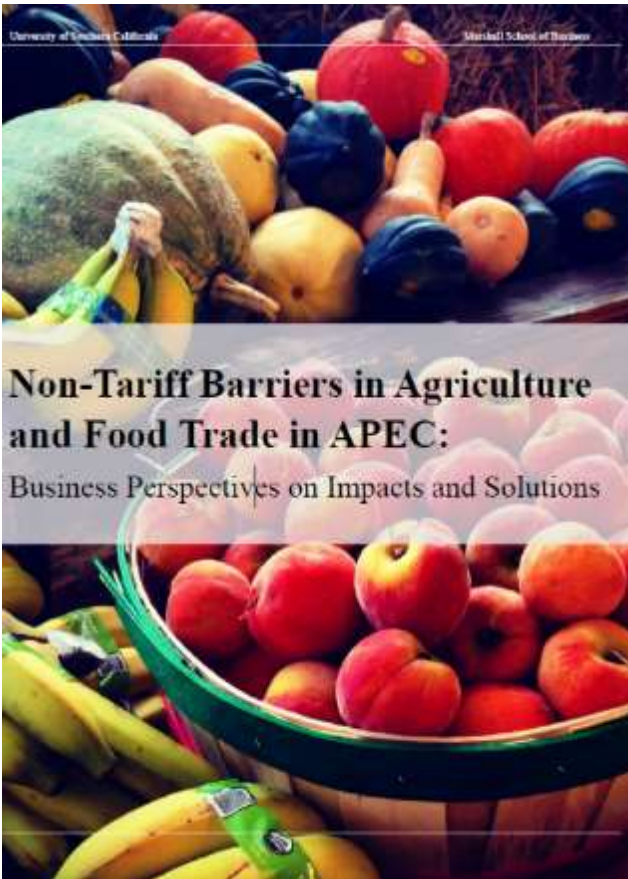
4. New Zealand - Malaysia



Share Nature. Share Life.



Further Reading



Patrik Jonasson

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Group discussion

Your input to improve deployment of Global Traceability Standard version 2 (“GTS2”)

Global Traceability Standard version 2 (GTS2)

- Developing standards is a significant investment of industry's time.
- Across GS1, we want to improve how we globally deploy standards so that current users know how to leverage their investment in GS1 standards - in new or deeper ways.
- GTS2 is an opportunity to “refresh” – improve - how we engage with companies and talk about how GS1 standards solve business challenges related to traceability.

Today, we would like to discuss and validate the use cases with you

1. Provide product information – “freshness”, **best-before date**, **expiry date** across the physical and digital shelves
2. Provide product information – enable unique, persistent product information including **ingredients** (what, source) **and potential allergens** across the physical and digital shelves
3. Recall – locate **where unsafe product may be** in the supply chain
4. Recall – support **activities** (communicate- internally and across companies, locate, return/ destroy) **to remove unsafe product** from the supply chain including post-purchase
5. Comply with regulation
6. Comply with regulations – demonstrate/ validate “doing business” meets requirements of regulations
7. Anti-counterfeit – product authentication
8. Anti-counterfeit - brand protection
9. Supply chain – vision to sources of supply, information about the supplier(s)
10. Supply chain – visibility to the physical flow and the information flow of a product or shipment
11. Supply chain – cold chain integrity (e.g. food storage, temperature control)
12. Supply chain – expedite cross-border trade (customs, product/shipment/transport documents match physical product and electronic information, v
13. Comply with trading partner requirements – demonstrate/ validate “doing business” meets requirements
14. other?

THANK YOU!!

Please give feedback on this session in the Event App!

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GS1 Xchange: Where collaboration meets community

GS1 Xchange is your new home for a variety of existing and future GS1 user communities.

This new meeting space includes established communities such as the *GS1 Community Room* and *GS1 WeShare* portals, as well as new communities like the *GS1 Daily Scan*- your fresh source for up-to-date recent GS1 news and industry information.

User benefits include:

- Single sign-on
- Easy navigation between different communities
- Improved experience

Join today!

[Xchange.gs1.org](https://xchange.gs1.org)



The Daily Scan: News you can use

Did you know? The **Daily Scan** is the new welcome page on the GS1 Xchange platform, providing you with up-to-date GS1 news and information.

Join us! Experience this modern approach to news, with cutting-edge features such as:

- Timely retail & standards' news for GS1 members
- Quick access to your GS1 portals
- News sorted & tagged by category
- Shareable & downloadable content through social media
- Translation function
- Weekly digest...and more!



Xchange.gs1.org

