

Five regions, five stories. Apparel industry + GS1 standards



- Mon 30 Nov
Europe
Latin America

- Tues 1 Dec
Asia Pacific

- Wed 2 Dec
Middle East and Africa
North America



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

Be present

Presenters turn on video
Avoid multitasking

Be considerate

Mute microphone
Keep comments concise

Be collaborative

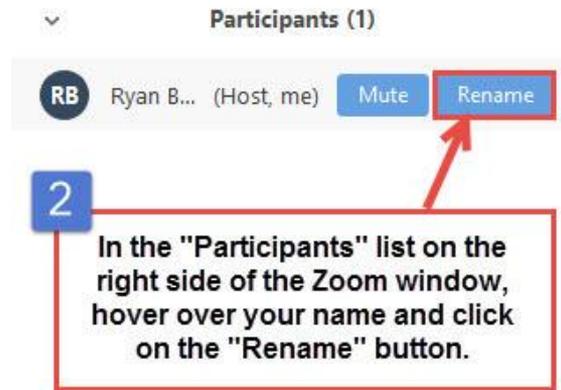
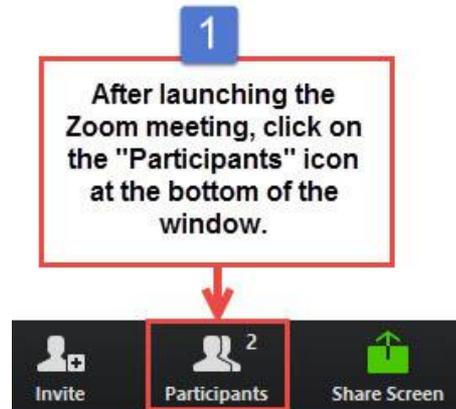
Ask questions
Be open to other views

Be professional

Speak on company's behalf

Please clearly identify yourself in Zoom: Full name and company name

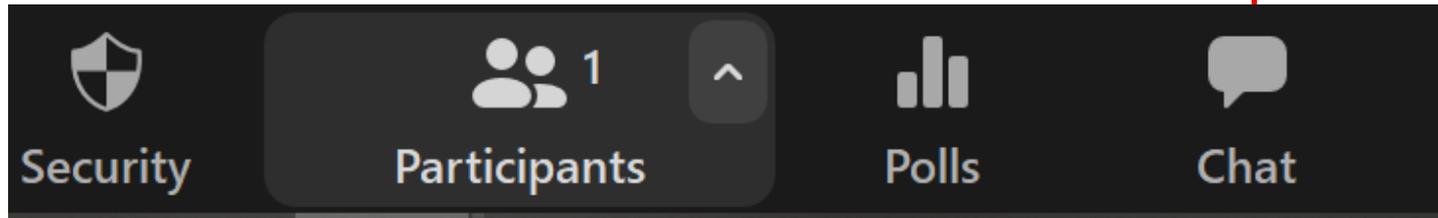
How to change your screen name:



Use the chat to comment or ask a question

**Click the bar at the bottom of your screen
the chat window will open**

Click here





The Global Language of Business

Australian Apparel Industry 2020

Five Regions – one story from Asia Pacific

Ann Tindale – Senior Account Manager & RFID Coalition Lead
December 2020

Introduction



GS1 standards makes it possible for apparel and general merchandise companies to follow their products from the source to the consumer — ensuring that the right product is in the right place at the right time regardless of the channel or path to purchase.

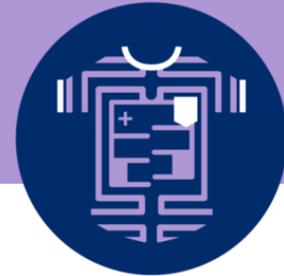
This was the understanding of all retailers but the events of 2020 has changed their priorities and consequently, how they look at selling, tracking and identifying their products. Store closures, plus the surge in online selling means RFID tracking is now a much stronger value proposition. The one thing that has not changed.....

is GS1 standards and how this helps retailers to achieve their objectives.

Sydney Opera House



Australian overview:
Retail in general
Online through Covid
RFID status



Australian Overview



Australia has a population of 25,649 million people

Average weekly earnings of a full time adult is \$1,713 pw AUD

The apparel market is valued at approximately:

- Market Size: \$16bn AUD
- Number of Businesses: 24,330
- Industry Employment: 91,483



(Australian Bureau of Statistics Nov 2020)

Retailers in Apparel



The four biggest retailers in Australia:

Woolworths Holdings Limited (South Africa)

David Jones, Country Road, Witchery, Trenery, Mimco and Politix

Mosaic Brands Ltd

Millers, Rockmans, Noni B, Rivers, Katies, Autograph, W Lane, Crossroads and Beme

Premier Investments (The Just Group)

Just Jeans, Smiggle, Peter Alexander, Dotti, Jay Jays, Portmans and Jaquie E

Cotton On Clothing

611 stores in Australia (7 brands, 20 countries, 1,400+ stores internationally)

The two largest Australian independent companies:

Billabong & Rip Curl (With a combined revenue of \$1.5bn AUD)

Melbourne – Yarra River



2020 Retail in general Opportunities for GS1 Standards



Retailing in Australia in 2020



As COVID19 hit, Australian stores were told to close in April 2020

In May stores started closing on a permanent basis.

June, most States lifted the lockdown and stores started to reopen.

In Victoria, with a population of 5.6 million people it was a different story.....

The April lockdown was lifted for three weeks only in June, then COVID hit with a vengeance. All of Victoria was put back into tight lockdown, released in late October 2020. The longest and hardest lockdown of all

GS1 Australia Head Office remains closed, GS1 staff work from home

What were the results of store closures



When retailing closed, online shopping boomed!

Fashion & Apparel represented 35.9% of all online sales
(2020 eCommerce Industry Report)

When online shopping boomed, retailers had to think quickly, consumer demand means accurate data, retailers need unique identification of products, master data information, location information, real time inventory accuracy, transactional data and supply chain co-operation.

GS1 Australia is working from home, calls to members become essential, staying in touch and doing everything we can to support them

Everyone is working from home!



Research with 10 corporate GS1 members



Did you know that GS1 has the following?

National Product Catalogue (GDSN)	6/10 No
Smart Media (Images & restricted data)	8/10 No
Recall (online platform)	7/10 No
EDI Support	6/10 No
Consulting	2/10 No
Barcode Check	1/10 No
Product Photography	7/10 No

Highlights opportunities for GS1 Services

Research with 10 corporate GS1 members



Do you use your GLN for EDI ordering?	4/10 yes
Do you use SSCC for your distribution?	6/10 yes
Would you like training for you staff?	2/10 yes
Do you keep a record of all barcode numbers?	1/10 yes
Do you have RFID for products in your organisation?	1/10 yes

Opportunities to work with members, highlighted by a simple set of questions, enable closer working relationships with major customers. Setting up meetings for 2021 to discuss all of the above, expanding GS1 standards within existing member accounts

Research results for GS1 Standards



When existing GS1 members use the GTIN for product identification, additional GS1 standards can be implemented:

GLN	Locations, inventory control, EDI order to cash etc
SSCC	Delivery tracking, EDI order identification
RFID	Traceability and event monitoring, product authenticity (EPC)
GDSN	Accurate data for retailers and consumers
Recall	Consumer safety, HACCP certified
BVR	Barcode check, ensuring GS1 standards on all packaging
EDI	Consulting support to ensure global standards are met

(This excludes any other opportunities such as asset management)

Growth in Online

and

How to engage Stakeholders going online

Pooja Sengupta

Account Director – Retail

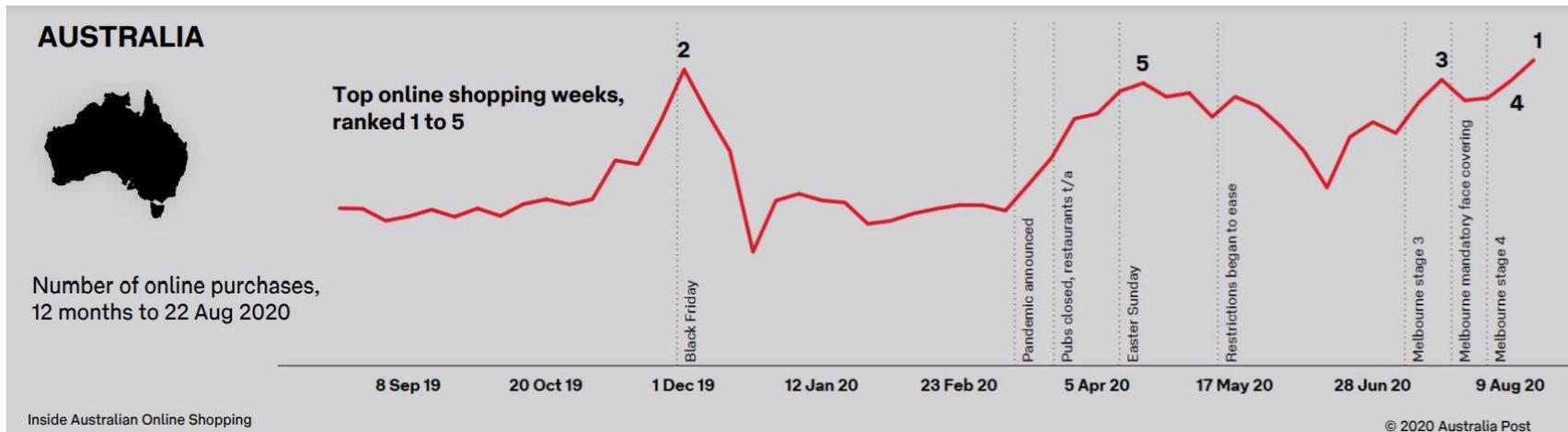


Shift to Online & Covid19



Online sales skyrocketed following the March closures of brick-and-mortar stores in Australia, with a **73%** year-on-year (YOY) increase of sales through online channels by the end of April as in-store purchases plummeted, according to data from Australia Post Ecommerce Insights report.

The same trend has been seen across the globe to varying degrees.



Online Sales Australia – Fashion & Apparel



Consumers are more open to purchasing non-essentials & treat yourself items



Foot Traffic becomes Web Traffic



Between March 2020 and August 2020 over 8.1 million households shopped online in Australia, an increase of 16% year on year

Over the same period more than 900,000 new households shopped online for the first time, that's 35.4% year on year

More than 44% of Australian households purchased from a online fashion retailer

Australian Retail: Looking Ahead



*Australian consumers place the most value on small businesses from a community, culture and economic perspective, compared with their global counterparts.**



*study conducted by Forrester Consulting on behalf of Xero

How to engage Stakeholders going Online



- Digital Touchpoints are vital
- Online-to-offline (O2O) commerce
- Inventory Accuracy and Supply Chain Visibility

GS1 MOs can provide support to retailers across

- Product Identification
- Product Data
- Supply Chain basics
- Product Safety
- GS1 Web Vocabulary

GS1 Australia & The RFID Coalition



Where is your product – Uluru?





GS1 supports Australian retailers by hosting The RFID Coalition

These are a group of likeminded retailers, suppliers, solution providers and associations who have come together to collaborate and ensure that Australian retail remains competitive on a global scale.

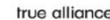
RFID technology is rapidly evolving and the ability to leverage its benefits are increasing.

Working together in a non-competitive and neutral environment, they share projects, experiences, solutions and case studies to benefit the industry.

Please request access to the RFID website if you wish to follow this group

www.rfidcoalition.org

The RFID Coalition Group (Some of our retailers)



RFID & GS1 Australia



Number of members in the Coalition:	126 from 62 companies
Followers of The RFID Coalition (Linkedin):	246 (closed group)
Download of RFID guidelines:	150+
Companies on the Leadership Team:	8 plus GS1
Cotton On, Country Road, City Beach, General Pants, Hanes, Kmart, Retail Apparel Group, Myer and GS1 Australia	
Co-Chairs are Kmart and Myer	

The RFID Coalition video



The RFID Coalition working group



https://www.youtube.com/watch?v=VKD9_abTH2I



Kookai – the RFID story so far....

As a global company with operations in France, Kookai are already using GS1 standards. This was extended to use in all other global operations.

After stops and starts, due to critical dependencies, the RFID project got underway with full support in 2019 driven by the need for much higher levels of inventory accuracy across the chain.

It became clear that the use of GS1 Standards (GTINs) would become important and help support future growth into other markets and retailers.

Avery Dennison and Sensormatic Solutions supported Kookai throughout the recent RFID pilot. Considerable work is happening at factory level to enable GTIN encoding into printed fabric labels.

This is achieved through the use of RFID printers and specialised label stock supplied by Avery Dennison.

In 2021 Kookai will move to full deployment once all key use case metrics have been met.



Challenge

Needed more accurate inventory and stock counts through the supply chain to minimise out-of-stocks and maximise sales. BAKU also wanted to increase online sales as part of their omni-channel strategy.

Solution

Implemented RFID at the same time as moving to a new POS system by Retail Express. RAMP integrates with a range of leading POS systems to provide a powerful and easy-to-use inventory management system. Working closely together, RAMP and Retail Express have helped BAKU optimise inventory and purchase replenishment to maximise sales.

Benefits

 <p>Ready for omni-channel retail and expectation to double online sales within 18 months</p>	<p>Real-time, accurate knowledge of all products</p>	 <p>Easily find stock across network = increased sales and customer satisfaction</p>
<p>Faster replenishment of high-selling products</p>	 <p>Fully integrated with new POS system</p>	<p>Increased accuracy in stock counts, less human errors</p>
<p>Potential to reduce retail floor space with optimised stock levels</p>	 <p>Easy customisation and deployment</p>	 <p>Increased stocktakes from warehouse to retail</p>

Coalition Advantages



- Brings GS1 members and non members together
- Gives GS1 access to new member opportunities
- Advocate that retailers adhere to GS1 standards
- Highlights the benefits of traceability
- Gives retailers and others the chance to see what GS1 offers
- Broadens RFID industry wide knowledge
- Enhanced networking for all concerned
- Educates people on the importance of GS1 global standards

Anti-Counterfeiting in the supply chain



In today's retail marketplace where the consumer can buy a product through a host of different channels, it's more important than ever for brands to protect product authenticity by implementing proactive anti-counterfeiting strategies.

GS1 Standards help reduce the proliferation of counterfeit goods by tracking products across the supply chain and tracing their journey from factory to consumer, making it much easier to verify product authenticity and give consumers confidence.

GS1 Standards generate supply chain visibility, efficiency, safety, and collaboration.

<https://www.gs1au.org/search/?q=source+to+consumer>

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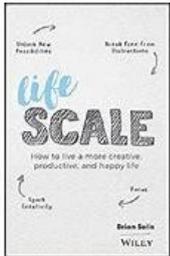
Questions?





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Complete an event survey to receive Brian Solis's new eBook **Lifescale: How to live a more creative, productive & happy life**

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