

Annual Report 2010-2011

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Letter from the Chairman



José Lopez

Executive Vice President, Operations & GLOBE, Nestlé
and Chairman, GS1

For the past several years, GS1 has made great progress in moving from vision to action. Our growth is easy to explain: we have both the global reach and the cross-sector legitimacy needed to create and implement standards that really work in today's increasingly borderless economies, and we have a proven track record of moving complex sectors and multinational organisations from using fragmented multiple standards to using a single, global, neutral standard.

However, user companies are not only impressed by what GS1 has achieved in the past, but in the compelling vision that GS1 has for the future.

A clear vision

At GS1, our vision is a world where things and related information move efficiently and securely for the benefit of businesses and improvement of people's lives, everyday, everywhere.

A plan to make our vision a reality

Our priority actions for the year ahead will bring us closer to that vision. We will continue strengthening the GS1 System of standards, our core activity, so that we can keep providing excellent service to our users. We will strive to become a key player in the internet world by successfully entering the business-to-consumer (B2C) landscape and by re-chartering our EPCglobal activity to drive innovation in the digital e-commerce world and in high-priority business processes such as visibility. We will engage with new sectors, such as automotive and financial services. We will enhance awareness and build equity in the GS1 brand with a new brand architecture and communication programme. And of course, we will continue to develop our interdependent organisation.

The strength of our people

It is the people of GS1 who work to make our vision a reality. Their dedication and their commitment are untiring and rarely matched. I thank each and every one of them for the many success stories that have resulted from their hard work.

A partner you can trust

Of course, GS1 does not work alone – in fact, quite the contrary. Our focus on collaboration has led us to further strengthen our strategic alliances, such as those we have with The Consumer Goods Forum, the Asia-Pacific Economic Cooperation, the World Customs Organisation, the European Central Bank and a wide range of major international healthcare organisations. Additionally, GS1 has been granted special consultative status by the United Nations as a Non-Government Organisation (NGO). This gives GS1 the opportunity to be directly represented in United Nations events, conferences and activities related to standards.

The key theme I take away from looking at the past year is this: GS1 is a partner that you can trust. It has been an honour to chair this organisation. I look forward to the year ahead.

Letter from the Vice-Chairman and Chairman Emeritus



Tim Smucker

Chairman of the Board, The J.M. Smucker Company
and Vice-Chairman & Chairman Emeritus, GS1

For years, GS1 has been committed to Seeing One Vision, Speaking with One Voice and Acting as One Organisation. These are important principles in any company, but they are absolutely vital to an organisation like GS1 that is active in such a large number of very distinct industry sectors, in every part of the globe.

See One Vision – Culture

Culture is an essential ingredient in successful strategy implementation. It exemplifies an atmosphere in which everyone makes a difference. At GS1, we have found success in embracing our diversity, challenging ourselves to understand one another and then seeking common ground. At the core of our culture are our foundational beliefs:

- We are a not-for-profit organisation
- We are neutral from business partners
- We are user-driven and user-governed
- We serve all companies, both multinationals and SMEs
- We are a platform for collaborative agreements between business partners
- We believe that our people are our most important asset

Speak with One Voice – Core Competencies

Fundamental capabilities that set us apart and enable us to uniquely serve our constituents include:

- Our expertise in the development of global standards
- Our global reach within the GS1 community
- Our strength to connect and communicate cross culturally
- Our ability to identify, capture and share information throughout the value chain

Act as One Organisation – How Can We Help?

Our united actions strengthen our core competencies and help us find the unity in our diversity. There is richness in the success stories from around the world and from the multiple sectors that we serve.

At GS1 we aren't just providing bar code numbers, we are:

- Helping businesses work more efficiently
- Providing better visibility throughout the supply chain
- Improving patient safety and care
- Combating counterfeiting
- Ensuring food safety
- And so much more!

The passion of the GS1 community is found in the delivery of results, innovation, teamwork and trust.

Letter from the President and Chief Executive Officer



Miguel A. Lopera

President & Chief Executive Officer, GS1

It has been another excellent year for GS1. Our work on the development and adoption of global standards is justifiably a great source of pride for our global teams, meaning that we can meet the evolving needs of our users.

Key achievements last year

We saw progress and results in key areas including fresh foods and the interoperability of bar codes and EPC/RFID. More and more companies are deploying order-to-cash processes built upon our standards. Our Global Data Synchronisation Network (GDSN) has continued to expand – its Global Registry now contains 7 million registered items – and we also pursued our efforts to enable data quality. GS1 EPCglobal has also grown: the UHF Gen 2 tag standard is now pervasive globally, item-level tagging is exploding in the apparel sector, and the EPCIS network for customs is taking off in Asia. We also worked on a business-to-consumer (B2C) framework to help brand owners share their product data with consumers via mobile and web “apps”.

Our multi-sector approach continues to help us provide targeted business benefits. Accomplishments in the retail and consumer goods sector include the deployment of a global traceability programme and work to build standards that will enhance sustainability efforts. We have also seen the increasing adoption of Electronic Article Surveillance (EAS) and advancements in ways to make product recalls more timely and reliable.

Standards development work continues for the healthcare sector, as organisations implement the major set of global standards that have been ratified. The fact that 22 of Gartner's top 25 healthcare companies take part in GS1 Healthcare user groups is a sure sign that we are on the right track.

GS1's work with the transportation and logistics sector made great progress in defining the global strategy to adopt. GS1 also signed a Memorandum of Understanding with the Universal Postal Union (UPU).

We're also engaged in new strategic sectors: automotive and finance. These complex and challenging projects, led respectively by GS1 Germany and GS1 US, involve strong collaboration from the whole GS1 community and show our strengths. The potential is enormous and success would transform GS1's role in decades to come.

Key priorities for next year

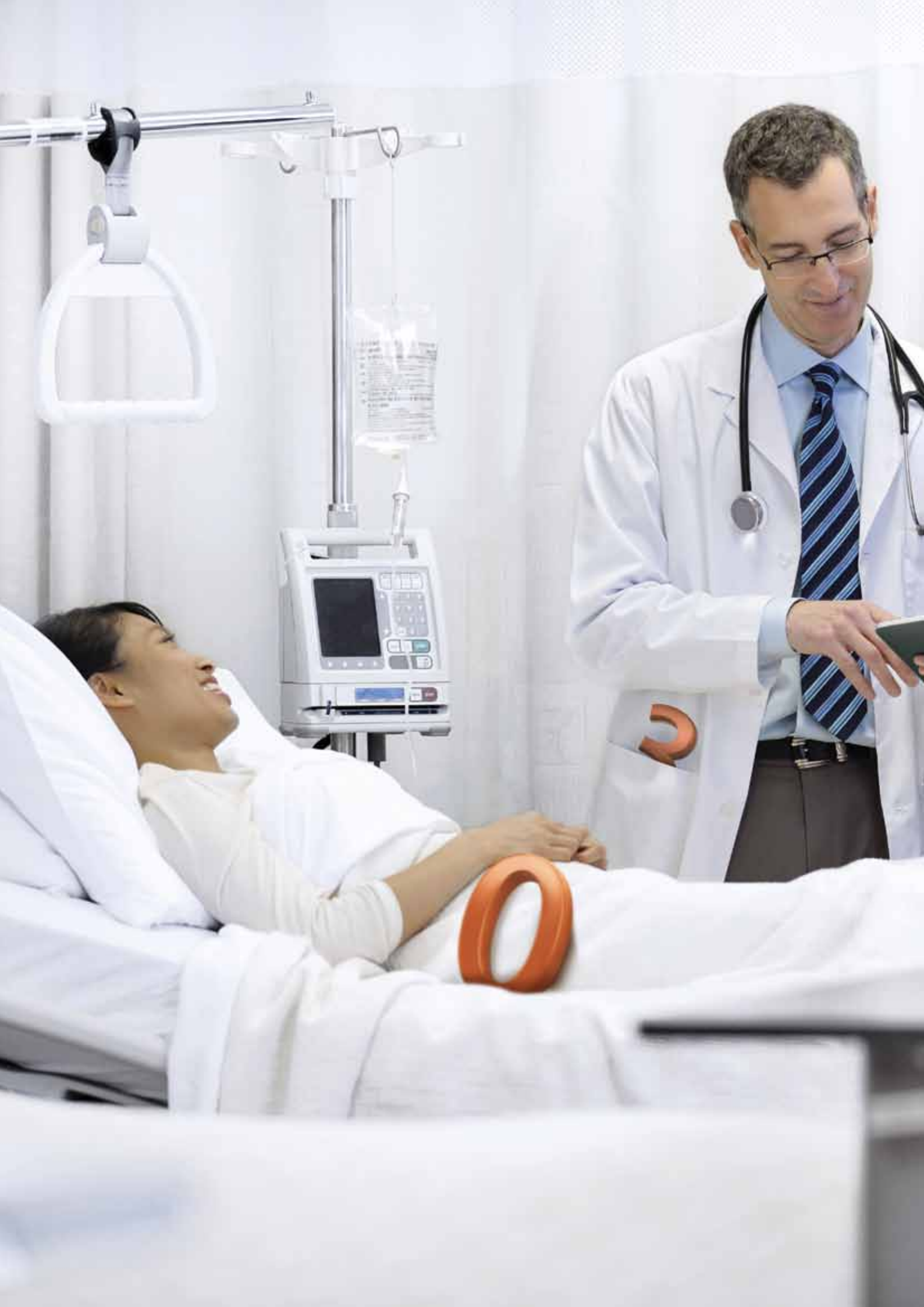
Our key priorities for next year are clear. We must:

- Continue strengthening our core activities
- Become a key player in the internet world by successfully entering the business-to-consumer (B2C) landscape and re-chartering EPCglobal to champion visibility-enabled processes
- Engage and win in new strategic sectors
- Generate a step-change in awareness of the GS1 brand
- Continue developing a world-class, interdependent organisation

Thanks to all

I would like to thank everyone who has been involved in the progress made over the past year. In particular, my thanks to our users, GS1 Member Organisations and the staff of our Global Office: their dedication to standards brings value every day.

We are thrilled about the year that lies ahead. We want to continue delivering better services to our users. We want to win in the internet world. We want to expand to serve new strategic sectors. I know we can meet these goals together, fuelled by the leadership and passion of our users and teams.





Sectors



GS1 is committed to ensuring that everything we do provides concrete answers to real business needs. Our engagement with specific industry sectors is an excellent example of this. We provide global user communities the opportunity to voluntarily come together to improve the GS1 System, drive efficiencies in their supply chains and strengthen their collaborations.

Paul Voordeckers

President, GS1 Industry Engagement and EPCglobal Inc.



Retail & Consumer Goods

Enabling a more efficient, safe and sustainable supply chain

Every year, both time and money are lost due to inefficiencies in the supply chain. Retailers and manufacturers of consumer goods have a range of issues, including inaccurate inventory, out of stocks, human errors on manual paperwork, fresh food that goes bad on the shelf and more.

With globalisation and the multiplication of trading partners in this sector, supply chain efficiency is becoming more challenging than ever. In addition, product safety and sustainability are growing concerns, with increasing regulatory pressure adding to the complexity. And with smartphones in their pockets, consumers themselves are changing their shopping habits and expecting immediate access to more information about products before they buy.

In order to better face these new challenges, GS1 is working to enable collaboration between trading partners in the retail value chain to better develop visibility and to build a trusted connection with consumers.

GS1 brings together many stakeholders in the supply chain: manufacturers, retailers, distributors, transporters, customs organisations, service providers, software developers, local and international regulatory authorities and more. Thanks to our facilitation, these companies and organisations, which may in fact have conflicting business interests, are able to work together to agree upon standards that make their supply chain faster, more effective, less complex and less costly.

GS1 also leads a number of innovative initiatives. With our business-to-consumer activities, we are striving to ensure a trusted source of data. Initiatives in traceability and product recall are focused on making sure the food that consumers buy is safe. Work on sustainability aims to protect the planet and its resources. All of our work is about building an efficient, safe and sustainable supply chain.

Standards treat pain points and bring measurable results

Companies implementing GS1 standards achieve a **43%** reduction in distribution costs compared to companies that use standards in a limited manner, as shown by the Consumer Goods Forum's 2010 Global Scorecard.

EPC/RFID brings the apparel industry tremendous improvement in inventory management, with over **95%** accuracy compared to an industry average of 65%, according to a January 2011

report from the University of Arkansas' Information Technology Research Institute.

More consumers are using third-party bar code scanning apps on their smartphones than ever before, yet recent research revealed **91%** of mobile bar code scans returned incomplete or incorrect product descriptions. GS1 is working to help ensure consumers always have access to accurate data on their smartphones.

Stay up to date: Subscribe to the GS1 Retail & Consumer Goods Newsletter at www.gs1.org/retail



Key initiatives of 2010-2011

- Increased adoption of EPC/RFID in the retail sector, driven by success stories of EPC/RFID item-level tagging in textiles
- Increased eCom Electronic Data Interchange penetration, especially in order-to-cash processes
- Expansion of GS1 Global Data Synchronisation Network in consumer goods & retail, now reaching over 130 countries
- Food safety initiatives underway: GS1 Global Traceability Programme under deployment in 25 countries, product recall standard in development
- Collaboration with The Consumer Goods Forum to support projects such as the Global Packaging Project on common sustainability metrics for packaging
- Ongoing efforts to understand the need for authentic product information and establishing a "trusted source of data"



Healthcare

Transforming the healthcare supply chain to improve patient safety

■ ■ ■ ■ To help improve patient safety, hospitals, pharmacies, wholesalers, distributors, pharmaceutical companies, device manufacturers, solution providers and other healthcare sector organisations work every day to move medical products accurately and efficiently through the supply chain. This helps prevent medication errors, saves costs, fights counterfeiting, facilitates electronic health records and enables effective and efficient product recalls and adverse event reporting.

It is now widely recognised that healthcare supply chains cross borders, that a global framework is needed, and that stakeholders must adopt a common set of data standards to meet their goals. That is where GS1 Healthcare comes in.

GS1 Healthcare is a global community of healthcare supply chain stakeholders advancing global standards to transform the supply chain, improve patient safety and increase efficiency. Twenty-two of Gartner's Top 25 Healthcare Supply Chain Organisations participate in GS1 Healthcare. Beyond the global group, twenty-seven

local GS1 Healthcare user groups led by GS1 Member Organisations help drive adoption in their countries.

GS1 Healthcare has also joined forces with other healthcare organisations to combine expertise and maximise outreach. In 2010-2011, we launched collaborative efforts with the International Health Terminology Standards Development Organisation, the European Association of Hospital Pharmacists and the European Alliance for Access to Safe Medicines. GS1 was also invited to join the Joint Initiative Council, a global initiative of the six leading healthcare standards development organisations working to ensure interoperability.

After several years spent developing a major set of global standards, we are now in an implementation phase. We have a vision of a healthcare supply chain with unimpeachable pharmaceutical security and unique device identification.

Demonstrable success that the use of standards enhances patient safety

A number of pilot projects and live implementations are demonstrating the measurable benefits that GS1 standards can offer.

A cost/benefit analysis in Canada showed savings of more than **CA\$900 million** (€657 million) over 20 years by implementing GS1 bar codes on vaccines.

Several German hospitals now scan the bar codes on materials used for each

patient. One hospital logged a total savings of **472 working hours** over a year.

A hospital in the Netherlands found that bar codes can **improve efficiency** of the electronic tracking of implantable medical devices, **reduce inventory** by enabling prompt re-ordering, and **provide documentation** about which devices were being used for which patients – knowledge that can benefit **patient safety**.

See details on the examples here as well as many others in the latest **GS1 Healthcare Reference Book**. Download it and read more about GS1 Healthcare initiatives and accomplishments at www.gs1.org/healthcare



Key initiatives of 2010-2011

- Published Implementation Guide for Phase 1 AIDC Application Standards
- Published Implementation Guide for Bar Coding Plasma Derivatives, co-developed by GS1 and ICCBBA
- Launched GDSN Healthcare extension and associated Trade Item Implementation Guide to support implementation of GDSN in healthcare
- Published Healthcare Supply Chain Traceability White Paper
- Launched Healthcare Provider Advisory Council (HPAC): thought leaders and early adopters from global clinical provider environment working to support adoption of GS1 Standards in healthcare institutions and retail pharmacies
- Continued work by Public Policy Work Group to monitor regulatory and industry developments and provide neutral input to (inter-)governmental bodies on global harmonisation of supply chain data and processes



Transport & Logistics

Fast, efficient and optimised transport and logistics activities

■ ■ ■ ■ Although the day-to-day activities of third- and fourth-party logistics operators, transport and freight forwarding firms and national customs organisations are quite different, many of their basic businesses concerns are the same.

Whatever their size, transport and logistics companies and the retailers and manufacturers they work with all need to manage requests with greater productivity and fewer errors than ever before. Clearer visibility over delivery statuses and more consistent levels of customer service are needed, as are labels that enable traceability and have meaning from one end of the supply chain to the other, without needing to re-label along the way.

GS1 can help. Deploying GS1 standards in the transport and logistics sector has been shown to enhance collaboration, efficiency, visibility and security, as well as generate measurable cost savings. Adopting GS1 standards also presents a boost to sustainability efforts, since improved efficiency and full trucks mean optimised CO₂ use.

GS1's offer for transport and logistics is built upon a global framework, because the globalisation of today's supply chain requires an equally global consistency in the standards used to identify shipments. As for all business sectors, our offer for transport and logistics is technology-neutral. We have success stories for use cases that build on bar codes, on RFID tags, on the EPC Information System (EPCIS) network or on various combinations thereof.

At the 2011 GS1 General Assembly, an ambitious new strategic plan for this sector was approved. The year ahead will see increased focus and attention on driving adoption of existing GS1 logistics and visibility standards, and on developing and implementing new standards that respond to this sector's changing needs.

Live deployments demonstrate business benefits

Almacénar–Almagran, a Colombian transport company using EPC/RFID as part of its fleet management system, found measurable benefits, such as a **50%** savings in time across the transportation process.

Earnward Warehouse Ltd in Hong Kong deployed a GS1 standards-based management system and eliminated human error from procedures, achieving **100% accuracy** in shipments and **full visibility** of inventory.

U.S. government agencies screen **millions** of product imports each year. In December 2010, the US International Trade Data System (ITDS) released a report proposing the voluntary use of GS1 and UN standards. They expect the use of standards to result in **increased efficiencies** for government agencies, suppliers and importers.

See details on the examples here as well as many others in the 2011 edition of **GS1 Standards in Transport, Logistics & Customs:**
www.gs1.org/tl



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Key initiatives of 2010-2011

- Pursued development of Logistics Interoperability Model (LIM) eCom standard; work is on target for timely completion
- Signed Memorandum of Understanding with the Universal Postal Union
- Successfully supported a range of regional projects including CASSANDRA, eFreight, APEC Supply Chain Visibility
- Boosted awareness by participating in industry events such as Innotrans and WCO Conference
- Obtained approval of ambitious new strategic plan at General Assembly 2011



New Sectors: Automotive & Finance

Expanding to serve the needs of new users

■ ■ ■ ■ GS1 aims to be the most widely used global standard in the world, with a footprint covering multiple business sectors across the global supply chain. In the past year, GS1 has identified two new business sectors where our system of standards could play a useful role.

The automotive industry is one. Modern vehicle manufacturing methods involve many components suppliers whose products must often be delivered from all over the world at precise dates in specific quantities. The GS1 System could be used for identifying shipments and indeed even individual items via a globally unique serialised GS1 identification key. The potential benefits to efficiency, cost savings and traceability are significant. A Mission Specific Working Group has been chartered to engage the GS1 GSMP in the creation of a suitable new GS1 standard that will benefit many industries with similar needs, including construction, rail transport and aeronautics.

The financial services sector could also benefit from GS1 standards. Today, business entities and financial instruments are listed in data systems using multiple identifiers: in short, any one company may be listed globally under dozens of different names. The resulting mapping and matching failures create problems with integration, aggregation and payment, ultimately leading to higher risks and a problematic lack of transparency. Various central banks and national regulators are considering establishing a universal, unique, unambiguous identification system; the U.S. is calling it a “legal entity identifier”. GS1 standards are extremely suited to this task. Our teams are leading a discovery process with global industry representatives to confirm their interest and see how best to move forward.



Key initiatives of 2010-2011

- GS1 Advisory Council approved expanding our work to the automotive sector
- A discovery phase led by GS1 Germany identified business requirements for the automotive supply chain
- An automotive technical task force has been assembled to launch work
- GS1 Advisory Council stated their support for studying the suitability of the GS1 System to the needs of the financial services sector
- A discovery phase for financial services is being led by GS1 US







Solutions



Because they are built upon the GS1 System of global, neutral standards, our solutions enable true interoperability across supply chains, across industries and across borders. Deploying GS1-driven solutions helps reduce costs and complexity. They are always business-focused and not technology-focused.

Malcolm Bowden

President, GS1 Global Solutions



Business-to-Consumer (B2C)

GS1, the trusted source of data to share digital product information for consumers

■ ■ ■ ■ Consumers' lives are changing due to the new technologies they are using at home, at work, in stores and on the go, and so is their behaviour when shopping.

As stated in the recent 2020 Future Value Chain report published by The Consumer Goods Forum and Capgemini, the industry has a responsibility to help consumers make informed choices – but this requires providing consumers with trustworthy information in the first place.

However, the data consumers receive from many third-party “apps” available for sale or download is often inaccurate, incomplete or missing entirely. In consumer research recently conducted by GS1 UK and the Cranfield School of Management, 91% of mobile bar code scans returned incomplete or incorrect product descriptions and 75% returned no data at all.

We believe a window of opportunity exists to improve consumer confidence in digital product information while also further addressing the growing focus among

consumers and regulators on health and wellness. To address the topic, in the past year we started a project to improve access to authentic product information provided by brand owners to retailers, application providers and government for industry and consumers alike through a “trusted source of data.”

The goals of this initiative support all key stakeholders by:

- Protecting the brand
- Improving the shopping experience and helping shoppers make informed decisions
- Raising consumer confidence that the product information they access is accurate and authentic, no matter how or where they shop – in store, online or with their smartphones
- Increasing sales – put simply, better product information means better sales

Real-world pilot projects are currently being carried out to test technical frameworks, with a focus on sharing nutritional data.

Consumers want trustworthy information

In March 2010, GS1 carried out consumer research in Canada, France, Germany, Spain, the US and the UK to check consumers' attitudes toward digital product information. The results revealed the need for good quality information.

74% of consumers consider it important that product information is trustworthy

69% of consumers are interested in receiving nutritional information

38% would not purchase the product if they did not trust the product information displayed about it on their smartphone

35% would never use an app again if it contained incorrect product information

Download the GS1/Capgemini strategic report **Beyond the Label: Providing Digital Information Consumers Can Trust** at www.gs1.org/b2c



Key initiatives of 2010-2011

- Published GS1/CapGemini "Beyond the Label: Providing Digital Information Consumers Can Trust" strategic report. Download it at www.gs1.org/b2c
- Established successful proof-of-concept for system to communicate authentic product data between brand owners and internet application providers
- Deployed industry engagement initiatives in over 20 countries
- Organised GS1 MobileCom/B2C Day 2011: see slides and recordings at www.gs1.org/mobilecomday2011



Traceability

Reduce safety risks and increase visibility

■ ■ ■ ■ The June 2011 *E. coli* outbreak in Europe took lives and cost millions. The healthcare sector is increasingly focused on preventing counterfeit drugs and medical equipment from entering the legitimate supply chain. Consumers are growing more interested in knowing the origin of the food they buy.

There are also regulatory aspects bringing about changes. As of 2011, the U.S. Food Safety Modernization Act requires traceability in imported food; the European Union is increasing its attention on traceability for non-food consumer products. Similarly, some 60 countries around the world either have or are developing regulations for pharmaceuticals and medical devices, from product authentication to full supply chain traceability.

All of these situations illustrate the need for a reliable global traceability system. If food is contaminated, a good traceability system can help identify the source of the outbreak and ensure rapid recall. If every box of medicine is trackable throughout the supply chain, authenticity can be increased. With traceability guidelines in fruits and

vegetables, the strawberries in your dessert can be traced back to the seeds used to grow them.

GS1 standards can help build reliable traceability systems. The GS1 Global Traceability Standard promotes the automated capture and exchange of information necessary for traceability. It leverages GS1 standards already being used in the supply chain, and works for both bar codes and RFID. Unlike proprietary traceability systems, it improves interoperability between all trading partners, providing upstream and downstream visibility.

This year, GS1 continued the deployment of the GS1 Global Traceability Programme. This programme prepares professionals to perform on-site food traceability assessments allowing companies to obtain insight into their system's compliance with major business and regulatory requirements, helping them to implement GS1 standards.

In emergencies or in everyday use, traceability builds trust

An Aberdeen study revealed that **61%** of food and beverage companies are currently building compliance and traceability systems into their production processes.

The *E. coli* outbreak caused over **40** deaths as of June 2011 and more than **4000** reported cases of illness. Many post-crisis analyses implicated the absence of a reliable traceability system as the main cause of the inability to quickly locate the outbreak's origin.

By ensuring interoperability within and between organisations, across national borders, upstream and downstream, GS1-enabled traceability systems build **trust and transparency** between manufacturers and consumers.

Read more about how GS1 traceability supports safety in the supply chain at

www.gs1.org/traceability



Key initiatives of 2010-2011

- 23 auditors fully accredited by the GS1 Global Traceability Programme
- 52 additional people trained within the Programme, on their way to becoming fully accredited auditors capable of performing audits in 40 countries
- More than 100 GS1 Global Traceability Programme assessments performed in companies around the world
- GS1 EPCglobal standards reviewed and to be further developed, so as to ultimately enable the full, end to end, actionable visibility of finished pharmaceuticals and medical devices in healthcare globally, from point of production to point of use
- Boosted awareness of GS1 solutions for food safety through participation at the 2011 Global Food Safety Conference



Sustainability

A more responsible supply chain

■ ■ ■ ■ In the last few years, concerns about the planet's resources, its energy reserves and its greenhouse gas emissions have changed from being the affair of individuals to being business issues. Facing pressure from regulators, trading partners, consumers and their own employees, companies both large and small have made sustainability a key priority.

In all sectors and across all points of the supply chain, businesses are increasingly focusing on finding sustainable ways to improve their operations and optimise their processes. Such corporate social responsibility initiatives are also providing companies with a real competitive positioning towards their consumers and key stakeholders.

Key to developing a more sustainable supply chain is to start measuring where the problems are – and to agree on a set of metrics to do so. In the past year, industry representatives have worked with The Consumer Goods Forum to define the Global Protocol on Packaging Sustainability, a common language and measurement

tool that will enable companies to reduce the environmental impact of their packaging.

GS1 will support the project by creating the standards for the automated exchange of these sustainability metrics, leveraging the GS1 Global Data Synchronisation Network, so that all stakeholders measure and share sustainability indicators in the same way.

GS1 standards can also be a key element in efforts to enhance sustainability by reducing inefficiencies in the supply chain. GS1 can help automate the order, dispatch and invoicing processes to eliminate unnecessary paperwork, minimise costly errors in business processes, clarify and streamline communication between global business partners, avoid food spoilage and much more.

Sustainability is a key strategic priority

The Consumer Goods Forum 2010 Top of Mind Survey noted that corporate social responsibility, including sustainability, is one of the **top three priorities** for executives in the consumer goods industry.

Aberdeen's "The Sustainable Supply Chain" report revealed that **76%** of companies have already incorporated sustainability criteria into some or all of their supply chain management processes.

GS1 France helped its members automate their order-to-cash process, eliminating an estimated **140 million pages** of orders, dispatch advices and invoices in one year, equivalent to **700 tons** of paper or **21,000 trees**.

For more information on how GS1 standards and services can help with sustainability initiatives, visit www.gs1.org/sustainability



Key initiatives of 2010-2011

- Validation by members of The Consumer Goods Forum Global Packaging Project of a plan to have GS1 develop standards to enable the exchange of metrics for the Global Protocol on Packaging Sustainability (GPPS)
- Collaboration with The Consumer Goods Forum to prepare the launch of GS1 standardisation group
- Facilitation by GS1 Member Organisations of local initiatives around the sustainable supply chain, in response to growing demand from companies



Visibility

Bringing tangible benefits to many supply chain business applications

■ ■ ■ ■ Supply chain management is growing in complexity, in great part because manufacturers and retailers must now manage trading partners scattered across the world. Globalisation is making it more difficult to have the end-to-end visibility necessary to achieve efficiency and meet customer demands.

Visibility means knowing where things are now, why they are there, and where they were before. It is a capability that allows a company to make informed decisions based on accurate information about the actual conditions of its supply chain at any moment in time.

There is no single solution for visibility. In fact, a range of technologies and stakeholders can be used to provide full supply chain visibility. GS1 is key no matter what solution is adopted: our standards and solutions can be used to identify, capture and share data about the movement of an item across the extended supply chain. This data is then used to enhance business intelligence and facilitate decision-making.

Visibility brings different benefits to different sectors. GS1 standards are already helping retailers and manufacturers in consumer goods get an accurate view of their inventory, allowing them to optimise ordering processes and production planning. Fresh food and livestock producers and the retail stores that sell their output can trace and if necessary recall items thanks to GS1 DataBar or EPC/RFID. The healthcare sector is looking to establish the authenticity of pharmaceuticals and track the chain of custody thanks to GS1 standards. Transport and logistics companies are using the GS1 EPC Information System (EPCIS) network to know exactly where shipments are and what is in them.

Visibility has been identified as one of the strategic pillars of GS1 that will be the focus of our work in the coming years, and a marketing initiative is underway to demonstrate how GS1 can enable full supply chain visibility.

Visibility can help companies achieve business goals

A Capgemini study assessing views of global supply chain executives revealed that improving visibility is their **most important goal**.

A Swedish Transport Administration project tagging rail transport wagons with EPC/RFID provides freight transporters with visibility about **where their wagons of goods** are.

GS1 bar codes provide visibility on the location of haemophilia medication at Dublin's National Centre for Hereditary Coagulation Disorders, and **100%**

of any batch can be found within 10 minutes in the event of a recall.

Vineyards in Italy are tracking the shipment of their wines to the warehouses of Hong Kong's leading wine cellar with temperature-sensor EPC/RFID tags. With the EPC Information System network, the retailer has gained visibility on where the wines are, can perform real-time quality monitoring and now achieves close to **100%** accurate inventory.

Read white papers from GS1 US detailing the positive impact visibility data can have on business processes:
www.gs1.org/visibility







Standards & Services



Transforming business needs into globally agreed standards is one of the foundations of GS1. To ensure a single integrated design resulting in a robust and stable output, GS1 develops its standards and its system through the unique forum of the Global Standards Management Process.

Sally Herbert

President, GS1 Standards & System Development and GS1 GDSN Inc.



Automatic Identification & Data Capture

Progress and results in fresh foods, healthcare, mobile commerce and more

■ ■ ■ ■ In order for a bar code to be useful at a cash register, a nursing station or a warehouse, the information it encodes must be meaningful and shareable. The same goes for an RFID tag when it passes near a tag reader.

The means used to provide unique identification that can be accessed and shared within as well as amongst companies and organisations are collectively known as automatic identification and data capture, or AIDC. With over 5 billion scans/reads per day, the benefits of using GS1 Standards for AIDC no longer need to be demonstrated. For more than three decades, GS1 has been helping businesses around the world work better, faster, more accurately and more efficiently. Our identify-and capture-enabling solutions and services benefit consumers in stores, patients in healthcare facilities, and just about every sort of company, everywhere in the world.

In 2010-2011, GS1's AIDC teams continued to work with industry representatives to pursue new and better ways

of meeting needs and solving problems. For example, GS1 sponsors the Ohio University AIDC Test Lab, a state-of-the-art bar code testing facility. The results from the Test Lab have been used to set standards for the healthcare sector and predict the impact of mobile devices.

Use of GS1 DataBar for fresh foods and coupons has continued to be a focus area for the Test Lab and for GS1 as a whole. With consumer safety so important to brands and retailers, GS1 DataBar can help provide services such as automatic markdowns and expiration date management which can reduce waste and spoilage of fresh foods in supermarkets and enable food chain traceability.

In the year ahead, we will be developing a GS1-wide recommendation on how to make suitable AIDC technology investments, and work to clarify to user companies what is and is not feasible for managing variable data such as sell-by dates and batch or serial numbers.

Reduce waste caused by fresh food spoilage

Managing “sell-by” dates for fresh food has always been a challenge for retailers and suppliers: when food expires on the supermarket shelf, it must be thrown out.

A study commissioned by the U.N. Food & Agricultural Organisation revealed that **one third** of the food produced in the world for human consumption every year gets lost or wasted.

IBM data puts the value of fresh food lost to spoilage at **\$458 billion (€334 billion)** a year.

To reduce waste caused by fresh food spoilage, GS1 DataBar symbols are being used to facilitate price markdowns when expiration dates grow near and to prevent expired food from being sold.

Download the AIDC Implementation Guide for Fresh Food Sold at Point-of-Sale at www.gs1.org/AIDCfreshfood



Key initiatives of 2010-2011

- Application Standards for Fresh Food Trade Items Scanned at Point-of-Sale using GTIN launched
- GTIN Allocation Rules for Fresh Food Trade Items Scanned at Point-of-Sale released
- GS1 AIDC Implementation Guide for Fresh Food Sold at Point-of-Sale published
- GS1 Human Readable Interpretation (HRI) Implementation Guide published
- A range of pilots and deployment in fresh foods around the world



GS1 eCom for Electronic Data Interchange

Save time, save money, eliminate errors

■ ■ ■ ■ Most companies emit orders, deliver products or services, and receive and pay invoices. But many of them do so using manual, paper-based methods that are unnecessarily time-consuming and error-prone. Thanks to the ubiquity of the internet, many business tasks, including the entire “order to cash” process, can now be automated. This is known as Electronic Data Interchange, or EDI.

As opposed to closed or proprietary EDI systems, GS1 eCom standards for EDI provide a neutral, global way to manage the electronic exchange of business data efficiently and accurately. GS1 eCom helps organisations save money and adds tangible value for all partners.

GS1 EANCOM and GS1 XML eCom standards were created and are maintained by the industry for the industry. They can easily be combined with other GS1 Standards (such as GS1 bar codes) to smoothly cover all aspects of business process management.

In fact, the GS1 System provides a foundational framework that can allow the entire supply chain to eliminate errors and dramatically speed things up – even when crossing geographical borders or linking completely different industry sectors.

For retailers, suppliers and wholesalers around the world, GS1 eCom has already demonstrated its ability to measurably lower processing costs, increase data accuracy, shorten delivery times and even – by greatly reducing the need for paper – help meet sustainable development goals.

In short, GS1 eCom standards are today tested and proven in a wide range of industry sectors, giving the companies using them a real competitive advantage by making their administrative processes quicker, smoother, more accurate and less expensive.

Measureable benefits from around the world

A 2010 global survey revealed that deploying EDI can lead to a **5%** reduction in out of stock situations and a 5% reduction in distribution costs.

French companies saw savings of **€14 to €18** for orders, dispatch advices and invoices; in Germany, companies realised savings of **€12 to €16**; in Italy, where the study included data archiving, the figures were **€25 to €65**.

Companies in Sweden realised savings of approximately **SEK 500-600 million (€50-60 million)** per year.

Spanish retailers saved **€3.52** on every invoice.

Japanese wholesalers reduced the number of different computer programmes needed to meet individual retailers' requirements by **80%**.

For information, case studies, survey results and more, visit www.gs1.org/ecom



Key initiatives of 2010-2011

- Worked on major new 3.0 release of all GS1 XML standards which will include messaging standards for transport & logistics sector and improved XML architecture
- Facilitated many new live implementations around the world, especially for order-to-cash measures
- Became a provider and partner of eGov interoperable solutions to the SEMIC.EU project devoted to promoting harmonisation in eGov solutions within Europe
- Published GS1 profiles of UN/CEFACT XML, to complement current GS1 XML standards
- Collaborated with CEN, the European Committee for Standardisation, including active participation in groups devoted to eCatalogues (ePPS), Public Procurement (BII) and Electronic Invoicing (elnv)



GS1 Global Data Synchronisation Network

Efficiency and cost savings with synchronised, high quality data

■ ■ ■ ■ Errors in orders, mistakes on invoices, empty shelves, inefficiencies across the supply chain... beyond the challenges these situations can cause, they also result in reduced profitability and unmet expectations of consumers and trading partners. In today's increasingly competitive business world, this is unacceptable.

GS1 helps by enabling trading partners to exchange accurate, detailed and up-to-date product information. The GS1 Global Data Synchronisation Network (GDSN®) allows companies who buy from or sell to each other to have the same information in their administrative systems. Any changes made by one company are automatically and immediately available to all of the other companies who do business with them.

The result? Brand owners can get new products out to the market faster and more smoothly. Retailers have fewer forms to fill out and fewer mistakes in orders and shipments. Supermarket shoppers are able to buy the products they want, instead of seeing an empty shelf.

Healthcare providers have on hand the medical devices and pharmaceuticals they need. And what's more, the GS1 Global Data Synchronisation Network drives unnecessary costs out of the supply chain, too.

In 2011, the GS1 Global Registry—the GDSN's network facilitator and information directory—achieved a record seven million registered items, a clear testimony of both the regional expansion and the new-sector growth that our network is seeing as it continues to serve the needs of a global community of users.

For years GS1 has been insisting that there is no point in data synchronisation without data quality. Our ongoing efforts to promote data quality programmes are designed to help ensure that companies have the most robust data quality management systems possible.

The year ahead will see our teams work to take the proven benefits of GDSN and bring them to more countries and more types of businesses.

Quantifiable risks and losses from inaccurate master data

GS1 Australia's 2011 Data Crunch Report indicated that on average **80%** of retail product data is inconsistent. It is estimated that this will cost the industry at least **AU\$350 million (€252 million)** in profit erosion and **AU\$675 million (€486 million)** in lost sales.

The total cost of bad data in the Australian grocery supply chain will be **AU\$1.035 billion (€745 million)** over five years.

The same report showed that retailers and suppliers using data synchronisation show significantly **better data quality results** than those who did not (fully) adopt data synchronisation.

A similar data accuracy study made by GS1 India estimated the financial loss to the Indian retail industry due to product data-related inefficiencies to be between **INR 7.9 - 10.2 billion (€126 - €163 million)**.

Learn more about data synchronisation, data quality, and product classification at www.gs1.org/gdsn



Key initiatives of 2010-2011

- Released Data Quality Framework 3.0: made by the industry for the industry to deliver more value and user-friendly tools to improve data quality
- Have 28 GDSN-Certified data pools now supporting activity in 132 countries
- Introduced new functionalities into the network
- Introduced new healthcare extension into the network: GDSN adoption in healthcare continues to grow with data now published to 50 countries
- Introduced new attributes into the network to support expansion into new sectors such as TV & marketing, software, wine, cheese, dangerous substances
- Created new Global Product Classification bricks for healthcare, consumer electronics, fresh foods, alcoholic beverages, tobacco and home care



Sally Herbert,

President, GS1 Standards & System Development and GS1 GDSN Inc.



GS1 EPCglobal

With RFID taking off, GS1 EPCglobal standards are in the spotlight

■ ■ ■ ■ 2011 is shaping up to be the year when Radio Frequency Identification (RFID) tags and labels using the GS1 Electronic Product Code™ (EPC) really take off. The proven business benefits are driving adoption in many different sectors.

Apparel and general merchandise manufacturers and retailers are finding that EPC/RFID item-level tagging is taking away their inventory management headaches and helping them fight shoplifting.

With EPC/RFID on cases and pallets and even directly on livestock, fresh food producers and consumer goods or electronics manufacturers are managing their operations and their warehouses more efficiently, tracking goods from one end of the supply chain to the other.

Luxury brands and wine & spirits are exploring EPC/RFID's anti-counterfeiting and authentication possibilities, as are pharmaceutical companies and medical equipment manufacturers.

The visibility and tracking possibilities provided by the GS1 EPC Information System (EPCIS) are also benefiting cross-border container shipping companies, rail transport enterprises and the Customs organisations with which they interact, as well as postal services. There is also a growing use of EPC/RFID for tracking assets from computers to routers to rental trucks.

In our efforts to ensure EPC/RFID is deployed responsibly, GS1 led industry stakeholders in the creation of a Privacy Impact Assessment (PIA) Framework for RFID Applications that was signed by the European Commission. Combined with the GS1 PIA Template, it offers companies a useful tool for evaluating EPC/RFID applications from a consumer privacy perspective.

In a wide range of real-world applications, EPC/RFID and EPCIS are providing a real competitive advantage to companies using them. Today, RFID technology and the GS1 standards that support it are entering a new phase, moving from trials and pilots to full-scale launches and deployments.

Providing solutions to business concerns in many sectors

The University of Arkansas' Information Technology Research Institute has found **60 unique business cases** for the use of item-level RFID in the apparel supply chain, following pilots with apparel suppliers and retailers.

More than **10 million** people have been caught shoplifting in the U.S. in the last five years. In the U.K., data indicates that shoplifting costs stores **£4.4 billion (€5.1 billion)** in 2010. EPC/RFID with Electronic Article Surveillance

can be part of a store's programme to fight shoplifting and save money.

Every year, **1.2 million** containers are stored at Taiwan's Port of Kaohsiung, and up to **50,000** of them must be inspected. A system built on EPC/RFID standards led to improvements in efficiency, saving over **USD \$3 million (€2.2 million)** and **48,000 hours** per year in inspection time.

Learn more about the business benefits of EPC/RFID and EPCIS at www.gs1.org/epcglobal



Key initiatives of 2010-2011

- Launched Core Business Vocabulary (1.0) and new HF Air Interface Standard
- Updated Low-Level Reader Protocol (1.1), Tag Data Standard (1.6) and Tag Data Translation (1.6) standards with new header for aerospace and defense
- Signed MoU with Universal Postal Union: work will enhance use of EPC
- Saw growing adoption of EPC/RFID in apparel, led by Walmart, Gerry Weber and other industry initiatives in many countries and supported by EPCglobal's Electronic Article Surveillance Guidelines
- Facilitated many EPCIS pilots in cross-border shipping & transport
- Privacy Impact Assessment (PIA) Framework for RFID Applications signed by the European Commission



Paul Voordeckers,

President, GS1 Industry Engagement and EPCglobal, Inc.



Global Standards Management Process

Great progress in a year of great change

■ ■ ■ ■ The GS1 Global Standards Management Process (GSMP) is a unique collaborative forum where GS1 standards are developed via a four-step process that engages industry users and builds upon recognised business needs.

In April 2010, a "new" GSMP was created out of the former GSMP and the former EPCglobal Standards Development Process. In the months since then, the GSMP has been transitioning into one single standards development process, with all activities harmonised, consistent, simplified and integrated under one roof. The completion of this migration in August 2011 has resulted in an organisation that is stronger and yet more flexible and agile.

In order to properly support this new organisation, and more importantly to ensure that existing and future challenges of global supply chains are addressed, a new governance was created with a Board Committee for Standards supported by a Central Operations team, an Architecture Group and a Process Oversight Committee.

These three groups are responsible for ensuring work flows correctly, priorities are appropriate and conflicts are resolved promptly. Communications, project reporting and project management teams will be put in place in the months to come.

One of the more visible achievements was the publication of version 11 of the GS1 General Specifications, the core document describing how GS1 standards should be used. This new version includes significant new standards benefiting healthcare, retail, fresh foods, customs and many other industry sectors.

The work being done by the hundreds of individuals who are active in the GS1 Global Standards Management Process benefits a million companies around the world who use GS1 standards every day. It is incredibly important and valuable, and GS1 is grateful for the energy and passion all of the experts who contribute.

Supporting efficient and consistent delivery of standards

In 2010, **30%** of GSMP participants represented manufacturers, **30%** were GS1 Member Organisation staff representing their local users, **14%** were solutions providers, **11%** retailers and the rest were participants from data pools, industry associations, governmental bodies, distributors, hospitals and logistics providers.

Standards are becoming a business priority: 2010 saw a **36%** increase in work requests submitted to the GSMP as compared to 2009 and the trend continues in 2011.

In a recent user survey, **89%** of GSMP participants surveyed rated the service of GSMP staff as "good to excellent."

Stay informed! Read our weekly updates and quarterly newsletters in the "News & Events" section at www.gs1.org/gsmg



Key initiatives of 2010-2011

- Published GS1 General Specifications version 11, featuring refined GS1 Standards for the healthcare sector, definition of physical location to enhance overall supply chain visibility and more
- Launched Core Business Vocabulary (1.0) and new HF Air Interface Standard, updated Low-Level Reader Protocol (1.1), Tag Data Standard (1.6) and Tag Data Translation Standard (1.6) with new header for aerospace and defense
- Released Global Product Classification (GPC) June 2011 Publication
- Published Implementation Guidelines for AIDC in Healthcare, Bar Coding Plasma Derivatives, GDSN Trade Items and more
- The complete list of all 2010-2011 deliveries and accomplishments of the GSMP is available at www.gs1.org/gsmg

GEPIR gives access to basic contact details for over **one million** companies that use GS1's numbering system in more than **100** countries



GEPIR

A web-based source of information about companies using GS1 standards

■ ■ ■ ■ GEPIR, the Global Electronic Party Information Registry, is an internet-based service that gives access to basic contact details for over one million companies that use GS1's globally unique numbering system in more than 100 countries. By simply typing a product bar code number, a physical location number or a shipment number into GEPIR, anyone can find the number owner's contact information, which is provided by GS1 Member Organisations (MOs).

GEPIR is used by consumers looking for company contact information, buyers for supermarket chains looking to source new products, application providers confirming who owns a bar code number, and more.

A number of organisations, including GS1 MOs, have developed mobile apps that interface with the GEPIR network.

In March 2011, an updated version of GEPIR was released. Work has already begun on GEPIR version 4.0, which will further align GEPIR with other existing services such as the GS1 Global Data Dictionary. The new version will provide GS1 Member Organisations with a more standardised way to offer even more value-added services that draw on GEPIR.

Key initiatives of 2010-2011

- Deployed version 3.2 into the GEPIR Network
- Added capacity to include a consumer hotline number and the web address of a mobile commerce site in company details
- 100 GS1 Member Organisations active in the GEPIR Network
- Hosted GEPIR Data for over 50 GS1 MOs with our GS1 Global Office hosting services
- Began work on GEPIR version 4.0, first major release in over 5 years
- Developed animation to explain GEPIR in a simple way: View it at www.gs1.org/GEPIRanim

Download the GEPIR Fact Sheet: www.gs1.org/GEPIR_Factsheet
Test GEPIR at <http://gepir.gs1.org>





GS1 MOs in Action

The GS1 Global Office oversees the development of the GS1 System, but the real day-to-day action takes place at our 111 Member Organisations around the globe, where almost 2,000 GS1 team members work to help organisations get the most out of our standards. There are thousands of success stories every year: these next pages share just a few of them.

Users have noted a **50%** savings in time across the transportation process, as well as a **67%** reduction in the cost of mobile phone communications.



GS1 Colombia

Providing visibility into the transportation process

■ ■ ■ ■ ■ Around the world, transport and logistics companies are trying to provide the best service at the lowest costs. This was certainly the case in Colombia, where the transportation of goods represents more than 37% of the total logistics costs of the supply chain.

An analysis performed by GS1 Colombia revealed that the main problem was a lack of timely and reliable information between customers, third-party logistics providers and the drivers of delivery vehicles.

After considering a variety of ways to treat information related to the different transport processes, GS1 Colombia implemented an integrated platform that uses automatic global positioning systems for vehicles, PCs and other devices as well as other internet-based solutions.

It also uses EPC/RFID-generated EPC Information System "Events" to interact with the GS1 Colombia's Global Data Synchronisation Network-certified Data Pool known as CABASnet, where trusted information about cargo can be matched with trusted information about vehicles.

By automatically sending e-mails or text messages to operators and drivers, the platform allows its users to more easily access the sort of detailed and accurate information that is needed to make useful decisions.

A multi-company pilot project resulted in measurable benefits, such as a 50% savings in time across the transportation process, as well as a 67% reduction in the cost of communications related to the use of mobile phones. Manual data input was reduced, smoothing processes and reducing errors. Performance indicators are now calculated automatically.

Searching for vehicles and assigning drivers is much more efficient. And perhaps most importantly, there is now visibility and traceability over the entire end-to-end process.

Download the full case study to learn more:

www.gs1.org/colombia2011

For more information about GS1 Colombia: www.gs1co.org





GS1 Croatia helps its members show proof of **conformance to international food safety requirements** via its traceability auditing service.

GS1 Croatia

Traceability brings global recognition

■ ■ ■ ■ To successfully penetrate global markets, many companies wish to ensure international buyers that they meet global food safety requirements. This was the case for Koestlin, one of Croatia's leading food manufacturing companies, with a 100-year history in flour-based confectionary products such as wafers and biscuits.

Koestlin first began implementing GS1 standards into their business processes over 10 years ago and remains an active member of GS1 Croatia today. The many years of collaboration between Koestlin and GS1 Croatia have led to impressive results. For example, thanks to GS1 standards, Koestlin has a reliable and robust traceability system and efficient and effective control over raw materials and packaging. The distribution of products is also being managed more smoothly.

In November 2010, GS1 Croatia introduced GS1 Traceability Auditing as a basic service for all of its member companies, and only a few months later, Koestlin was the first Croatian business to benefit from just such an audit. Unsurprisingly, they demonstrated full compliance with all the criteria.

Koestlin is confident that the audit results will be hugely beneficial in helping them achieve their objective of becoming a globally-recognised food producer, with quality products known and enjoyed in many markets across the world.

Download the full case study to learn more:

www.gs1.org/croatia2011

For more information about GS1 Croatia: www.gs1.hr.org



A key export company noted that the EPCglobal Network is more than **capable of meeting proof-of-origin demands** of customers and consumers in international markets.



GS1 New Zealand

Enabling pasture-to-plate traceability

In New Zealand, industry and government representatives have been working on RFID tag and standard questions since 2004. Starting in 2007, GS1 New Zealand led a consortium of key players through a series of “in the field” trials which demonstrated that EPC/RFID tags using GS1 standards could be effectively used on all species of livestock, no matter what the conditions.

Their efforts began in 2007–2008 with the development of prototype UHF Gen-2 animal tags, followed by an in-field assessment and comparison of these UHF tags versus low frequency (LF) tags on sheep, deer and cattle.

In 2009, the consortium ran an extended trial of commercially-available UHF tags using a variety of antennas and tag/chip sets on animals moving rapidly both in single file and in groups.

Finally, in 2010 came a full, end-to-end EPC and EPC Information System (EPCIS) proof-of-concept for tracking animals from a farm to the meat processor, through the chill chain and into retail butchery.

The movement of each individual animal was tracked from the farm all the way to the suburban retail outlet with EPC/RFID tags; and thanks to the EPCIS network, each animal's EPC number could be looked up to see where it had been and where it was now.

The trials demonstrated comprehensively that UHF EPC tags could be effectively read on all species, with read distances up to 4m, even in wet conditions. The price of even “first generation” EPC animal tags were comparable to low frequency tags, and the EPC antenna/reader systems were potentially cheaper.

The partners saw that GS1 standards for item identification, consignments, and locations and the EPCIS Network could enable pasture-to-plate traceability and smooth exchange of data between trading partners in this sector.

Download the full case study to learn more:

www.gs1.org/nz2011

For more information about GS1 New Zealand: www.gs1nz.org





Enmon has seen greatly **improved accuracy** and order processing time has been **cut in half**.

Orly Shoes has had **no errors** since using Data Driver and they are releasing new styles in **record time**.

GS1 US

Big benefits for small businesses

Small and mid-sized businesses must make the most of their resources to drive growth and thrive in fiercely competitive markets. For American firms Enmon Accessories and Orly Shoes, strong customer relationships are the key to success. As suppliers of premier products, both focus on ways of doing business easier, faster and better. Yet, when allocating and managing bar codes, both companies were using multiple spreadsheets and manual processes. This required extra time and created the risk for errors.

Both have turned to the GS1 US™ Data Driver® for a solution. Data Driver is an online tool that allows users to quickly and accurately create, manage, and print GS1 bar codes.

Enmon Accessories provides high-quality leather gifts and accessories to over 2,500 retailers. They were alerted to the problems that could be caused by human error when, in an isolated incident, new bar code numbers were given to items which already had bar codes. After researching multiple systems, Enmon chose Data Driver to manage their 17,000 unique items and sets up 500 to 1,000 new items each quarter. Using the tool's clone feature, Enmon saves significant time during new item set up.

Orly Shoes has been in the footwear business for 30 years. In its highly competitive industry, Orly Shoes understands the need for speed. Every quarter, they launch at least fifteen new styles, three colours and sizes from 5 to 11 – this can add up to significant time when allocating bar codes for each combination. With Data Driver, this takes one-third the time it used to take.

With Data Driver, both Enmon and Orly Shoes keep retailers satisfied and relationships strong with fast order processing, accurate point-of-sale scanning, and vital product information that helps them with transportation, logistics and space planning.

Download the full case study to learn more:

www.gs1.org/us2011

For more information about

GS1 US: www.gs1us.org







Names & Numbers



In the next pages, you will find our 2010–2011 financial statements, information about our governance, and contact details for our GS1 Member Organisations around the world.

Philippe Wéry

Chief Financial and Administration Officer, GS1



Financial Statements

Key Financial Statistics: Global Revenues

GS1 Member Organisations (MOs) around the world are funded by their local members through annual membership fees and sales of services. Consolidated in Euros, the total revenues of GS1 MOs in 2010 was 12.0% higher than the previous year. Excluding the impact of currency rates, the year-over-year growth stands at 4.2%, compared to 2.5% the year before. Regionally, all regions have grown at a very similar rate of around 4% (excluding currency impact), but there were some strong differences within regions, with extremely high growth in Argentina, India, Italy and South Africa; strong growth in China, Colombia, Korea and Portugal; but declines in Japan, Mexico, New Zealand, Norway, Turkey and the UK.

GS1 Global Office – Fee Evolution

In 2010–11, we went through a stable phase in terms of the evolution of our fees. With the implementation of an organisational effectiveness project and a new sustainable funding model, we expect fees to continue to decrease slightly or remain essentially stable for the next several years. In 2010–11, the GS1 Global Office's revenues amounted to €24.7M, a slight increase of €0.2M or 0.8% versus the year before. Because of the strong growth in global revenues and despite the new GDSN funding model, our budget 2011–12 calls for an increase in Global Office fees of €0.7M to reach €25.4M.

Income Statement and Headcount

Our revenues were very stable at €24.7M as compared to €24.5M in 2009–10 while our operating expenses decreased by 2.4% to €22.4M versus €22.9M the year before. Our consolidated income statement shows a positive result of €2.2M for the fiscal year ending June 2011. We continued to build reserves, to cover current and future investments in new technologies and applications, but also to have the necessary financial resources in case of adverse currency fluctuations. In the last eight years, we have built accounting reserves of €10.4M. Both our base business (managed from the GS1 Central Office) and GDSN contributed positively to the final result.

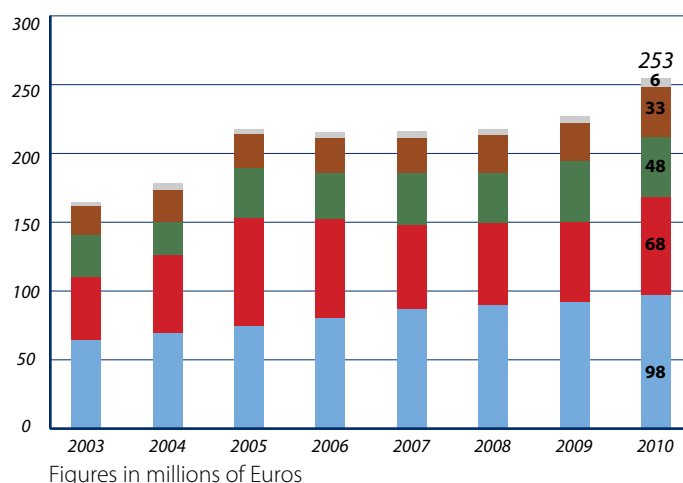
On a cash basis, we increased our reserves by €2.2M to reach €7.7M at the end of June 2011.

In terms of types of expenses, our main investment remains our people, with 72 staff members at the end of June 2011, a reduction of 2 full-time employees compared to last year. Discretionary spending, which includes travel, consulting, marketing and large user meetings/ events (Global Forum, Industry Engagement & Standards Development events, General Assembly) was essentially unchanged versus the prior year, while our fixed expenses and payroll expenses went down.

GS1 Member Organisation Revenue: Growth by Region

	Growth 2010/2009 % w/o FX	
Middle East/ Mediterranean/Africa	11.2%	3.5%
Latin America	15.6%	4.0%
Asia Pacific	19.2%	4.2%
North America	13.0%	3.8%
Europe	7.2%	4.5%
TOTAL	12.0%	4.2%

GS1 Member Organisation Revenue: Historical Perspective



GS1 Global Office Revenue: Historical Perspective

Figures in millions of Euros	03/04 Actuals	04/05 Actuals	05/06 Actuals	06/07 Actuals	07/08 Actuals	08/09 Actuals	09/10 Actuals	10/11 Actuals	11/12 Budget
GS1 Central Office	7.2	11.6	13.8	16.4	16.7	16.9	22.5	22.7	23.4
EPCglobal Inc.	3.2	5.4	7.2	7.8	6.7	6.2	-	-	-
GS1 GDSN Inc.	-	0.6	3.2	2.5	2.2	1.8	2.0	2.0	2.0
Total GS1 Global Office	10.4	17.6	24.2	26.6	25.6	24.9	24.5	24.7	25.4
Staff	35	58	76	79	79	82	74	72	83
Cumulative Reserves *	1.6	2.0	3.2	4.6	6.3	6.9	8.1	10.4	10.5

* where Reserves are defined as accumulated net results; could be invested in cash, fixed assets or receivables

GS1 Global Office Consolidated Results 2010/11

Figures in millions of Euros	Consolidated	GS1 Central Office	GDSN Inc.
Revenue	24.7	22.7	2.0
Operating Expenses	22.4	21.0	1.4
<i>Fixed/Recurring Expenses</i>	2.8	2.5	0.3
<i>Discretionary Expenses</i>	7.3	6.6	0.7
<i>Payroll Expenses</i>	12.3	11.9	0.4
Operating Result	2.3	1.7	0.6
Other Revenue / (Expenses)	(0.1)	(0.1)	(0.0)
Result for the period	2.2	1.6	0.6

Consolidation based on budget rate (1.30 USD/EUR). Fiscal year 2010/11 ended 30/06/11

GS1 Management Board

2011-2012

José Lopez	Executive Vice President, Operations & GLOBE Chairman, GS1	Nestlé
Timothy Smucker	Chairman of the Board Vice-Chairman & Chairman Emeritus, GS1	The J. M. Smucker Company
Zong-nan Wang	Chairman Vice-Chairman, GS1	Bright Food (Group) Company
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Rakesh Biyani	Director & Chief Executive Officer of Retail	Future Group
Pierre Bouchut	Chief Financial Officer	Carrefour
David Calleja Urry	Chairman & Chief Executive Officer	GS1 Malta
Robert (Bob) Carpenter	President & Chief Executive Officer	GS1 US
David Ching	Senior Vice President	Safeway Stores
Kevin M. Dougherty	Group VP & Chief Supply Chain Officer	The Kroger Company
Bruce Edwards	Chief Executive Officer	DHL Exel Supply Chain
Michel Eeckhout	Executive Vice President	Delhaize Group
Rollin L. Ford	Executive Vice President & Chief Information Officer	Wal-Mart Stores
Werner Geissler	Vice Chairman Global Operations	The Procter & Gamble Company
Pierre Georget	Chief Executive Officer	GS1 France
Carlos Mario Giraldo	President of Retail Business Operations	Almacenes Éxito
Sonny King	Chief Executive Officer	Advantage Sales & Marketing
Miguel Lopera	President & Chief Executive Officer	GS1 Global Office
Meinrad Lugan	Member of the Board of Management	B. Braun Melsungen
Silvester Macho	Chief Information Officer	METRO Group
Rodney McMullen	President & Chief Operating Officer	The Kroger Company
Mike McNamara	Operations Development & IT Director	Tesco
Maria Palazzolo	Chief Executive Officer	GS1 Australia
Miguel Ángel Peralta	Chief Executive Officer	GS1 Mexico
Joseph Phi	Global President Logistics	Li & Fung
Jörg Pretzel	Chief Executive Officer	GS1 Germany
Dave Rogers	Executive Vice President	Daymon Worldwide
Ajit Shetty	Corporate Vice President Enterprise Supply Chain	Johnson & Johnson
Pier-Luigi Sigismondi	Chief Supply Chain Officer	Unilever
N. Arthur Smith	President & Chief Executive Officer	GS1 Canada
Joseph Spagnoletti	Senior Vice President & Chief Information Officer	The Campbell Soup Company
Hiromu Ueno	Chief Executive Officer & Senior Executive Director	GS1 Japan
Jerry S. Wilson	Senior Vice President & Chief Customer and Commercial Officer	The Coca-Cola Company

The information on these pages was correct when we went to press.
For the most up-to-date details, please visit www.gs1.org/governance



GS1 GDSN Inc. Board of Directors

2011-2012

Milan Turk, Jr.	Managing Director, Global Customer eCollaboration <i>Chairman, GS1 GDSN Inc.</i>	The Procter & Gamble Company
Nihat Arkan	Chief Executive Officer	SA2 WorldSync
José María Bonmatí Perez	Chief Executive Officer	GS1 Spain
Julian Burnett	Chief Technology Officer	Sainsbury's Supermarkets
Roman Coba	Global Chief Information Officer	McCain Foods
Ghislain Esquerre	Supply Chain Solutions & Services Center Director	Carrefour
Rafael Florez	Chief Executive Officer	GS1 Colombia
Rob Fusillo	Vice President Information Systems	Wal-Mart Stores
Sally Herbert	President, GS1 Standards & System Development and GS1 GDSN Inc.	GS1 Global Office
Antonius Kromwijk	Assistant Vice President GLOBE Program Office Management	Nestlé
Gary Lynch	Chief Executive Officer	GS1 UK
Kirby McBride	President & Chief Executive Officer	FSE
Maria Palazzolo	Chief Executive Officer	GS1 Australia
John Phillips	Senior Vice President Customer Supply Chain & Logistics	PepsiCo
Pat. Salmonese	Vice President & General Manager, Product Master Data Management Business Unit	GXS
Antonio Salto	Director, Global Information Systems/B2B Master Data	Kraft Foods
Michel van der Heijden	President	GHX Europe
Bill Voltmer	President	1SYNC
Tom Werthwine	Global Process Owner Auto ID Technology and Data Standards	Johnson & Johnson Health Care Systems
Dr. Gerd Wolfram	Managing Director	METRO Systems



EPCglobal Inc. Board of Governors

2011-2012



Richard Cantwell	Vice President & Global Head, Retail, CPG, Transportation & Hospitality, Internet Business Solutions Group <i>Chairman, EPCglobal Inc.</i>	Cisco Systems
Robert (Bob) Carpenter	President & Chief Executive Officer	GS1 US
Didier Chenneveau	President Asia Pacific	CEVA
Alan Estevez	Principal Deputy Assistant Secretary of Defense (Logistics & Materiel Readiness)	US Office of the Secretary of Defense
Meg Greenhouse	Vice President Strategy, Innovation & Communications	Wal-Mart Stores
Louis Kratz	Vice President Corporate Logistics & Sustainment	Lockheed Martin
Antonio Mazzariello	Head IT PSC & MDG TechOps	Novartis
Frank Peters	Head of Global Enterprise Architecture	Daimler
Jörg Pretzel	Chief Executive Officer	GS1 Germany
Michael P. Rose	Vice President Supply Chain Visibility	Johnson & Johnson
Dr. Sanjay E. Sarma	Professor, Mechanical Engineering	Massachusetts Institute of Technology
Milan Turk, Jr.	Managing Director, Global Customer eCollaboration	The Procter & Gamble Company
Hiromu Ueno	Chief Executive Officer & Senior Executive Director	GS1 Japan
Keith Ulrich	Vice President Head of Research & Innovation Management	DHL
Paul Voordeckers	President GS1 Industry Engagement and EPCglobal, Inc.	GS1 Global Office
Dr. Gerd Wolfram	Managing Director	METRO Systems



GS1 Extended Leadership Team, May 2011

GS1 Leadership

The GS1 Global Office Leadership Team is composed of the following people:

Miguel A. Lopera, President and CEO

Malcolm Bowden, President, Global Solutions

Sally Herbert, President, Standards & System Development and President GS1 GDSN Inc.

Patrick Vanlombeek, Chief Marketing Officer

Paul Voordeckers, President, Industry Engagement and EPCglobal, Inc.

Philippe Wéry, Chief Financial and Administration Officer

The GS1 Extended Leadership Team is composed of the following people (as shown in the photo above)

Seated, left to right: **Malcolm Bowden, Valérie Depoortere, Kerry Angelo, Monica Walsh, Henri Barthel, Patricia Alhadeff**

Standing, left to right: **Peter Alvarez, Sally Herbert, Paul Voordeckers, Miguel Lopera, Scott Gray, Regenald Kramer, Ian Robertson, Nicholas Fergusson, Massimiliano Minisci, Susie McIntosh-Hinson, Patrick Vanlombeek, Elizabeth Board, Diane Taillard, Ulrike Kreysa, Robert Bersani, Gwen Lurie, David Buckley, Andrew Hearn, John Keogh, Philippe Wéry, Christine Cecil**



GS1 Member Organisations

The following information was correct when we went to press.
For the most up-to-date information, please visit www.gs1.org/contact

GS1 Albania

Tirana

+ 355 4 232073
info@gs1al.org
www.gs1al.org



GS1 Algeria

Algiers

+ 213 21 34 10 46
info@gs1.dz
www.gs1.dz



GS1 Argentina

Buenos Aires

+ 54 11 4556 4700
info@gs1.org.ar
www.gs1.org.ar



GS1 Armenia

Yerevan

+ 374 10 272 622
gs1arm@gs1am.org
www.gs1am.org



GS1 Australia

Melbourne

+ 61 3 95589559
gs1aust@gs1au.org
www.gs1au.org



GS1 Austria

Vienna

+ 43 1 505 86 01
office@gs1.at
www.gs1.at



GS1 Azerbaijan

Baku

+ 994 12 4987405
ean@gs1az.org
www.gs1az.org



GS1 Bahrain

Manama

+ 973 17 456330
gs1@samahiji.com
www.gs1.org



GS1 Belarus

Minsk

+ 375 17 298 09 13
pav@gs1by.by
www.gs1by.by



GS1 Belgium & Luxembourg

Brussels

+ 32 2 229 18 80
info@gs1belu.org
www.gs1belu.org



GS1 Bolivia

Santa Cruz de la Sierra

+ 591 3 3334555
gs1.bolivia@cainco.org.bo
www.cainco.org.bo/GS1



GS1 Bosnia - Herzegovina

Sarajevo

+ 387 33 25 86 46
info@gs1bih.com
www.gs1bih.com



GS1 Brazil

São Paulo

+ 55 11 3068 6207
diretoria@gs1br.org
www.gs1br.org



GS1 Brunei Darussalam

Bandar Seri Begawan

+ 673 424 0069
milinmaidin@gmail.com
www.gs1.org



GS1 Bulgaria

Sofia

+ 359 2 988 3139
gs1bulgaria@gs1bg.org
www.gs1bg.org



GS1 Cambodia

Phnom Penh

+ 855 23 88 07 95
ppcc@camnet.com.kh
www.ccc.org.kh



GS1 Canada

Toronto

+ 1 416 510 8039
info@gs1ca.org
www.gs1ca.org



GS1 Chile

Santiago Centro

+ 56 2 365 4200
info@gs1chile.org
www.gs1chile.org



GS1 China

Beijing

+ 86 10 62024528
info@ancc.org.cn
www.gs1cn.org



GS1 Colombia

Bogota

+ 57 1 427 0999
web@gs1co.org
www.gs1co.org



GS1 Costa Rica

San José

+ 506 2224 3255
informacion@gs1cr.org
www.gs1cr.org



GS1 Member Organisations

GS1 Croatia

Zagreb

+ 385 1 48 95 000

info@gs1hr.org

www.gs1hr.org



GS1 Cuba

Havana

+ 537 830 4436

gs1cuba@camara.com.cu

www.camaracuba.cu



GS1 Cyprus

Nicosia

+ 357 22 889800

info@gs1cy.org

www.gs1cy.org



GS1 Czech Republic

Praha

+ 420 234 633145

info@gs1cz.org

www.gs1cz.org



GS1 Denmark

Copenhagen

+ 45 39 27 85 27

info@gs1.dk

www.gs1.dk



GS1 Dominican Republic

Santo Domingo

+ 1 809 683 4727

gs1rd@gs1rd.org.do

www.gs1rd.org.do



GS1 Ecuador

Quito

+ 593 2 2507 580

info@gs1ec.org

www.gs1ec.org



GS1 Egypt

Cairo

+2 (02)22627617- 24026623

info@gs1eg.org

www.gs1eg.org



GS1 El Salvador

El Salvador

+ 503 2205 1000

info@gs1sv.org

www.gs1sv.org



GS1 Estonia

Tallinn

+ 37 2 660 5535

info@gs1.ee

www.gs1.ee



GS1 Finland

Helsinki

+ 358 7 5756 3500

asiakaspalvelu@gs1.fi

www.gs1.fi



GS1 France

Paris

+ 33 1 40 95 54 10

infos@gs1fr.org

www.gs1.fr



GS1 Georgia

Tbilisi

+995 32 29 47 24

info@gs1ge.org

www.gs1ge.org



GS1 Germany

Cologne

+ 49 221 947 14 - 0

info@gs1-germany.de

www.gs1-germany.de



GS1 Ghana

Tema

+ 233 20 8184358

info@gs1ghana.com

www.gs1ghana.org



GS1 Greece

Argiroupoli

+ 30 210 9904260

info@gs1greece.org

www.gs1greece.org



GS1 Guatemala

Guatemala City

+ 502 2245 9595

gs1guatemala@gs1gt.org

www.gs1gt.org



GS1 Honduras

Tegucigalpa

+ 504 235 7792

diselco@gs1hn.org

www.gs1hn.org



GS1 Hong Kong

Hong Kong

+ 852 2861 2819

info@gs1hk.org

www.gs1hk.org



GS1 Hungary

Budapest

+ 36 1 412 3940

info@gs1hu.org

www.gs1hu.org



GS1 Iceland

Reykjavik

+ 354 511 3011

info@gs1.is

www.gs1.is



GS1 India

New Delhi

+ 91-11-2616 8720

info@gs1india.org

www.gs1india.org



GS1 Indonesia

Jakarta

+ 62 21 3916289

info@gs1.or.id

www.gs1.or.id



GS1 Iran

Tehran

+ 98 21 88935095

ahmad@gs1ir.org

www.gs1ir.org



GS1 Member Organisations

GS1 Ireland

Dublin

+ 353 1 208 0660
info@gs1ie.org
www.gs1ie.org



GS1 Israel

Tel Aviv

+ 972 3 519 87 14
info@gs1il.org
www.gs1il.org



GS1 Italy

Milan

+ 39 2 777 2121
info@indicod-ecr.it
www.indicod-ecr.it



GS1 Ivory Coast

Abidjan

+ 225 08 48 90 59
info@gs1ci.org
www.gs1ci.org



GS1 Japan

Tokyo

+ 81 3 5414 8520
jan@dsri.jp
www.gs1jp.org



GS1 Jordan

Amman

+ 962 6 56 200 38
info@gs1jo.org.jo
www.gs1jo.org.jo



GS1 Kazakhstan

Almaty

+ 7 727 394 88 53
info@gs1.kz
www.gs1.kz



GS1 Kenya

Nairobi

+254 20 20 238 5270
info@gs1kenya.org
www.gs1kenya.org



GS1 Korea

Seoul

+ 82 2 6050 1500
admin@gs1kr.org
www.gs1kr.org



GS1 Korea (DPR)

Pyongyang

+ 850 2 18111 (ext. 381 8989)
psjdc@co.chesin.com
www.gs1.org



GS1 Kuwait

Kuwait

+ 965 431 3129
gs1kuwait@yahoo.com
www.gs1.org



GS1 Kyrgyzstan

Bishkek

+996 312 51 08 25
info@gs1kg.org
www.gs1kg.org



GS1 Latvia

Riga

+371 67830 822
gs1@gs1.lv
www.gs1.lv



GS1 Lebanon

Beirut

+ 961 1 744 161
info@gs1lb.org
www.gs1lb.org



GS1 Libya

Tripoli

+ 218 21 444 4545
info@gs1ly.org
www.gs1ly.org



GS1 Lithuania

Vilnius

+ 370 5 2614532
gs1@gs1lt.org
www.gs1lt.org



GS1 Macau

Andar

+ 853 2878 2385
gs1macau@cpttm.org
www.gs1mo.org



GS1 Macedonia

Skopje

+ 389 2 32 54 250
gs1mk@gs1mk.org.mk
www.gs1mk.org.mk



GS1 Malaysia

Kuala Lumpur

+603 6286 7200
gs1malaysia@gs1my.org
www.gs1my.org



GS1 Malta

G'Mangia

+ 356 21 337 225
info@gs1mt.org
www.gs1mt.org



GS1 Mauritius

Port Louis

+ 230 208 3301
mcci@intnet.mu
www.mcci.org



GS1 Member Organisations

GS1 Mexico

Mexico City

+52 55 5249 5249

info@gs1mexico.org.mx

www.gs1mexico.org.mx



GS1 Moldova

Chisinau

+373 22 24 1669

info@gs1md.org

www.gs1md.org



GS1 Mongolia

Ulaanbaatar

+976 11 313 411

barcode@mongolchamber.mn

www.mongolchamber.mn



GS1 Montenegro

Podgorica

+382 20 658 277

office@gs1.me

www.gs1.me



GS1 Morocco

Casablanca

+212 522 39 19 13

info@gs1ma.org

www.gs1ma.org



GS1 Netherlands

Amsterdam

+31 20 511 3888

info@gs1.nl

www.gs1.nl



GS1 New Zealand

Wellington

+64 4 494 1050

info@gs1nz.org

www.gs1nz.org



GS1 Nicaragua

Managua

+505 266 2914

gs1ni@gs1ni.org

www.gs1ni.org



GS1 Nigeria

Lagos

+234 01 737997

enquiries@gs1-nigeria.org

www.gs1-nigeria.org



GS1 Norway

Oslo

+47 22 97 13 20

firmapost@gs1.no

www.gs1.no



GS1 Pakistan

Karachi

+92 21 2628213

info@gs1pk.org

www.gs1pk.org



GS1 Panama

Panama

+507 236 7907

info@gs1pa.org

www.gs1pa.org



GS1 Paraguay

Asunción

+595 21 202 518

info@gs1py.org

www.gs1py.org



GS1 Peru

Lima

+51 1 203 6100

gs1pe@gs1pe.org.pe

www.gs1pe.org



GS1 Philippines

Pasig City

+63 2 6370897

info@gs1ph.org

www.gs1ph.org



GS1 Poland

Poznan

+48 61 85 049 71

gs1pl@gs1pl.org

www.gs1pl.org



GS1 Portugal

Lisboa

+35 1 21 752 07 40

info@gs1pt.org

www.gs1pt.org



GS1 Romania

Bucharest

+40 21 3178031

office@gs1.ro

www.gs1.ro



GS1 Russia

Moscow

+7 495 989 26 88

mail@gs1ru.org

www.gs1ru.org



GS1 Saudi Arabia

Riyadh

+966 1 218 24 20

gs1@csc.org.sa

www.csc.org.sa/gs1



GS1 Senegal

Dakar

+221 820 99 82

gs1senegal@gs1senegal.org

www.gs1senegal.org



GS1 Member Organisations

GS1 Serbia

New Belgrade

+ 381 11 3132 312

office@gs1yu.org

www.gs1yu.org



GS1 Singapore

Singapore

+ 65 6826 3080

sanc2@gs1.org.sg

www.gs1.org.sg



GS1 Slovakia

Zilina

+ 421 41 565 11 85

info@gs1sk.org

www.gs1sk.org



GS1 Slovenia

Ljubljana

+ 386 1 5898320

info@gs1si.org

www.gs1si.org



GS1 South Africa

Johannesburg

+ 27 11 777 3300

services@cgcsa.co.za

www.gs1za.org



GS1 Spain

Barcelona

+ 34 93 252 39 00

info@aecoc.es

www.aecoc.es



GS1 Sri Lanka

Colombo

+ 94 1 2380156

gayathiri@chamber.lk

www.gs1lanka.lk



GS1 Sweden

Stockholm

+ 46 8 50 10 10 00

support@gs1.se

www.gs1.se



GS1 Switzerland

Bern

+ 41 (0)58 800 70 00

mail@gs1.ch

www.gs1.ch



GS1 Syria

Damascus

+ 963 11 54 27 909

gs1syria@mail.sy

www.gs1sy.org



GS1 Taiwan

Taipei

+ 886 2 2393 9145

eantwn@gs1tw.org

www.gs1tw.org



GS1 Tajikistan

Dushanbe

+ 992372 271167

gs1centre@mail.ru

www.gs1.org



GS1 Tanzania

Dar es Salaam

+ 255 22 2601913

gs1tz_org@yahoo.com

www.gs1.org



GS1 Thailand

Bangkok

+ 66 2 345 1194 8

info@gs1thailand.org

www.gs1thailand.org



GS1 Tunisia

Tunis

+ 216 71 948 660

info@gs1tn.org

www.gs1tn.org



GS1 Turkey

Ankara

+ 90 312 218 20 00

gs1turkey@tobb.org.tr

www.gs1tr.org



GS1 United Arab Emirates

Dubai

+971 4 221 40 10

info@gs1-uae.org

www.gs1-uae.org



GS1 UK

London

+ 44 20 7092 3500

info@gs1uk.org

www.gs1uk.org



GS1 Ukraine

Kiev

+ 380 44 482 05 21

info@gs1ua.org

www.gs1ua.org



GS1 Uruguay

Montevideo

+ 598 2 712 33 60

info@gs1uy.org

www.gs1uy.org



GS1 US

Lawrenceville, New Jersey

+ 1 609 620 0200

info@gs1us.org

www.gs1us.org



GS1 Uzbekistan

Tashkent

+ 998 371 252 6604

info@gs1uz.org

www.gs1uz.org



GS1 Venezuela

Caracas

+ 58 212 237 87 77

info@gs1ve.org

www.gs1ve.org



GS1 Vietnam

Hanoi

+ 84 4 3836 1463

info@gs1vn.org.vn

www.gs1vn.org.vn



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GS1 AISBL

Blue Tower
Avenue Louise 326, b10
B-1050 Brussels, Belgium
T +32 (0)2 788 78 00
F +32 (0)2 788 78 99
contactus@gs1.org

www.gs1.org