

Digital as a pivotal force in business transformation
and untapped potential for Supply Chain Technology
in the GCC

How supply chains are evolving

Supply Chain Evolution in the GCC

New technologies are disrupting and delivering benefits



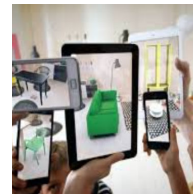
Robotics are driving efficiencies in warehousing and stores



Artificial Intelligence and Machine Learning will change how retailers plan, execute and engage



Internet of Things is providing a rich source of real-time data



Customers will be provided with enhanced experiences and information with **Augmented Reality**



Virtual Reality is providing new immersive experiences in-store and online



3D printing will move many retailers from selling products to selling specifications



Decentralized databases with proof of validity will drive the use of **blockchain** in areas like traceability



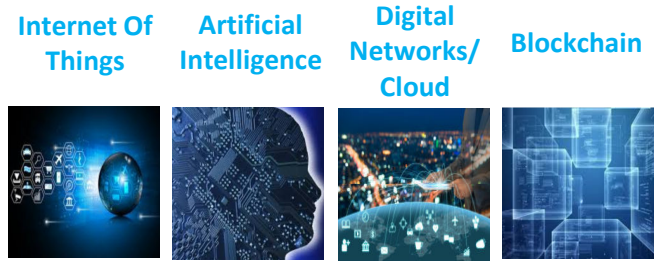
Customer will receive quicker or timed deliveries with **drones**

Trends

Technology Disruption

Key Capabilities

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- > AI/ML will enable the shift from react, to predict, prescribe and self-learn
- > AI is key to better 'mine' Retailer's vast amounts of Data, in particular Grocery where customer data is available and significant
- > AI/ML will be the driver behind hyper personalization
- > IOT will enable real time visibility of everything including on-shelf availability, linked to faster replenishment
- > Traceability through Blockchain will improve food safety and Supply Chain integrity

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- > AR/VR will drive customer experience
- > Voice, push button etc., will drive on-demand replenishment, leading to opportunities such as subscription
- > Image recognition robots will ensure POG/promo compliance
- > The proliferation of IOT devices along with structured and unstructured data will require fast secure resilient networks

It all STARTS and ENDS with VISIBILITY and CONTROL

Digital Control Tower

Real-time visibility across the extended supply chain

What is it?

- Cloud based SaaS application
- Alerts from **internal and external** digital signals
- **Collaboration** across multiple enterprises
- **Cognitive insights** across Retail Planning and Execution
- **Machine-learning** based issue resolution
- Foundation for **self-learning supply chains**

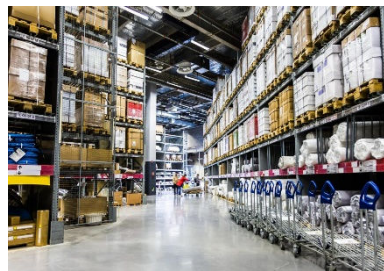


Business Value

- Visibility into **future supply chain disruptions**
- **Intelligent** scenario planning
- **Profitable response** across extended enterprise
- Improved customer service, lower costs
- Increase revenues

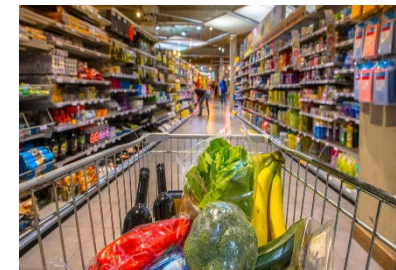
Digital Control Tower - Use case examples

An electronics retailer is able to predict short supply for a popular mobile phone through visibility to screen supply constraints and shape demand over to an alternate phone through a new offer.



A big box retailer is able to see a predicted delay in patio furniture coming from the far east due to weather and port congestion and is able to shift to a constrained supply allocation strategy with existing inventory across the stores to bridge the gap until the predicted arrival date avoiding lost sales.

A grocer is leveraging real-time information to optimize distribution of promotion stock during the promotion period.



A grocery retailer would like to keep track of supply in order to execute effectively on recalls.

Conclusion

- It is extremely important to have a solid foundation in place:
 - Clear Short and Long Term Strategy
 - Processes and Policies
 - Integrated (connected) Systems
- This is a multi-year journey, there is no short term here
- The biggest challenges are:
 - Willingness to commit
 - Change Management
 - People Capabilities
 - ROI

Thank You

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Obrigado

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谢谢您

ありがとうございました

Thank You

धन्यवाद

Merci