



FUTURE OF RETAIL

Insights from retail & CPG experts



EDITORIAL

What separates successful retail and consumer packaged goods brands from those that struggle in today's highly interconnected, fast-paced, and data-driven world?

What are the winners doing differently?

Retail success involves a careful balance of multiple dimensions. Providing value to customers at the right time and in the right place helps build lasting loyalty. Reducing friction and increasing engagement, both in store and online, have also emerged as key contributors to brand growth and profitability.

It's tricky work. But investing in modern technologies and establishing strategic partnerships can make all the difference. As the scale, scope and demand for solutions continues to grow, industry experts and brand leaders offer unique insights on what the road ahead looks like for retail and CPG brands.

In the spirit of "one plus one sometimes equals three," industry experts share what retailers and customers stand to gain from strong technology partnerships. Major brand leaders discuss sustainability in retail, the explosive growth of quick commerce, supply chain resiliency and why personalisation matters so much to the customer experience. Innovative approaches to fraud detection and loss prevention round out the view of the industry's future through a technology-enriched lens.

Underlining all these initiatives is the need for an agile, data-driven mindset in any retail or CPG brand that hopes to flourish.

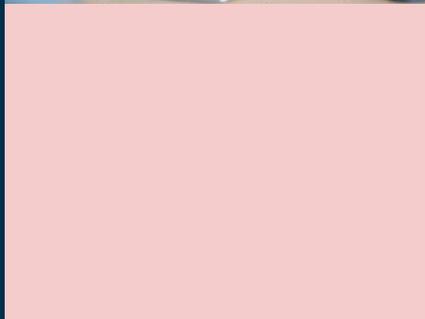
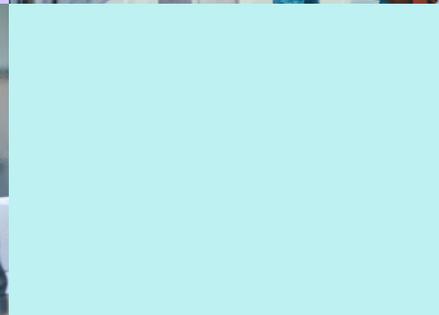
It's an exciting and dynamic time in the industry. We're glad you're along for the ride.



Patrick Dittli
Global Retail & CPG Executive
SAS

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Jean-François Gomez
Industry Advisory Retail/
Consumer Market
Microsoft

Retailers must invest in their foundations to shape the way customers value them

In 2022, what key challenges is retail facing as an industry?

The two biggest challenges are the inflation and staff recruitment. These two economic uncertainties are part of a much longer-term problem that requires a fundamental reflection on positioning and organization and needed investments.

Where do you see retail going in the next 10 years?

Today, consumer relationship is everything. If retailers want to be part of the value chain and want consumers to go meet them, they must be clear about their positioning, their business model and exemplary in execution.

The consumer's attention gets fragmented many times during any given day. Building brand recognition and meeting the shopper where they are becomes key.

We are moving from a linear society, where the consumer is passive, towards a graph society, in perpetual change, where each player is a platform, including the client.

Is technology shaping the future of retail? If so, in what ways?

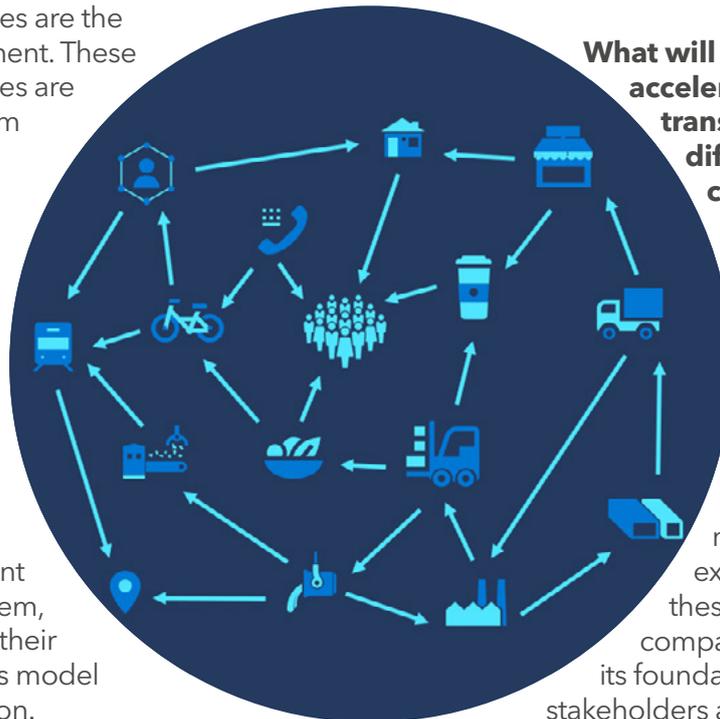
Technology, human in all its Humanity and search for meaning and creativity, and Environmental, social, and governance requirements are levers for the redesign of retail.

The technology improves our ability to predict and to be agile, two fundamentals.

Three major areas of development:

- Give consumers what they want, before they've even asked
- Optimize your supply chain by anticipating demand

- Remind store associates that they're the most valuable asset you have



What will retailers need to accelerate their digital transformation to create differentiation in their customer centric approach?

Proximity to their customers will help generate healthy margins. It is key that a company is recognized for the clarity of its mission, the value of its economic model and for its perfect execution. To execute these three elements, the company must be solid on its foundations so that all the stakeholders are drivers of opportunity

for the company. Then, the architecture of the economic model must be perfectly synchronous with the information system in respect of security, compliance, interoperability and openness. Public interfaces and a shareable and open data model are mandatory to leverage ecosystem, the proximity.

*Data is our fuel,
business model
our engine.*

What will be the role of collaboration between the different trading levers of an organization within the end-to-end process of the product lifecycle?

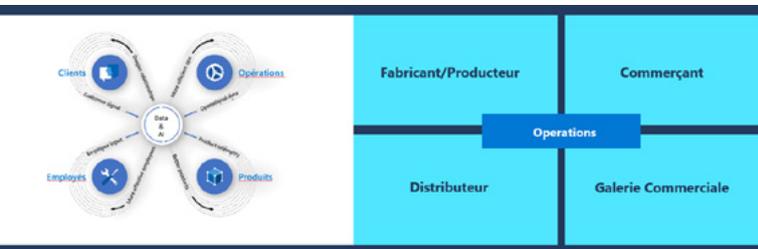
Performance will not come from plans, processes, and power relations but from taking the initiative in creating new collaborations with confidence and in sharing flows. Here again, this illustrates a real break with the models of the past. Customers must have a seat within the company's decision-makers in the same way the company's actors must have a customer headquarters.

Humans, customers, or employees, by commitment, and often by using the digital lever, are value creators.

THE NEW REALITY IN RETAIL

Will real time be a key player in the different decisioning making steps of the Retail process?

We are in a real-time economy and the balance of the company is the result of a continuous flow through value chains that they can evaluate and improve over time. Different suppliers, different ways of delivering, different customer interaction channels, the recomposing is permanent, chosen by the customer or driven by constraints. The flow of the economy is real time and is non-stop, probably related to the 6th sense that appeared a few years ago, the smartphone, the tools of consumer emancipation.



What will be the mandatory steps to leverage a proper data driven strategy for retailers?

Data is the fuel of the economy. This fuel brings tremendous power but also important responsibilities.

The four main projects for data in retail are:

- Elevate the shopping experience
- Build a real-time, sustainable supply chain
- Empower the store associate
- Maximize the value of your data

How are Microsoft and SAS partnering towards helping retailers create their future?



In resonance with our dynamic vision of the information system based on an open and shared data model, SAS provides a highly automated, fully integrated supply and demand planning solution that breaks down traditional barriers between planning steps, transforming planning into a continuous, flexible process.

Some capabilities to sense and shape demand are fully integrated in the Microsoft Cloud for Retail, for a better predictability/resilience and a better agility to growth at the recovery business speed!

SAS point of view



Andrew Fowkes
Director CPG
& Retail Practise, SAS

What key challenges is retail facing as an industry?

Firstly, online, and digital are the fastest growing channels. Secondly, supply chain resiliency will be critical because transparency up the supply chain is vital to model outcomes to serve customers. Third is customer experience - the expectation of instant gratification is beyond the younger generation to tech savvy older ones. It's becoming more difficult to grow sales and stay profitable, especially when the world is seeing high inflation.

Where do you see retail going in the next 10 years?

Shifting to an ecosystem approach, where retailers will carry more competitive brands and sell them through their platform to dominate the market and customer interest. Purpose and sustainability will increase because we're thinking carefully about what and when we buy, plus how we receive it with an eye on the environmental impact. We will also see a shift in more direct to consumer models.

How is technology shaping the future of retail?

Technology plays a major role in the acceleration of retail change. It will stay at the center of the future interactions that retailers have with their customer. The value of automation and modeling with artificial intelligence will increase. The potential of the cloud means more data points can be considered to bring us faster to better decisions.

What will retailers need to do to differentiate themselves in their customer centric approach?

Retailer outbound messages need to be better in considering when customers are likely to need a product, where they're likely to need it from, what complementary products they may need and even personalized pricing.

What will be the role of collaboration between the different trading levers of an organization within the end-to-end process of the product lifecycle?

Many retailers are structured in a siloed way where decisions around what to market, what assortment to carry, what prices to charge and where to source from are all handled independently. We're seeing a great potential to bring richness of data across the organization.

Will real time be a key player in the different decisioning steps of the Retail process?

We are seeing great value from real time analytics and decisioning - richer information about service or similar products presented to customers while they are in their shopping journey - it improves conversion.

What will be the mandatory steps to leverage a proper data driven strategy for retailers?

Most retailers will need richer data than they have had in their enterprise systems so far. Many of our customers are focusing on customer data first, however we can help enrich that with relevant product attribute data, relevant location data, distribution data. All of these are required to digitally transform.

How are Microsoft and SAS partnering towards helping retailers create their future?

We have just announced SAS is a key partner in the 'Microsoft cloud for retail solution'. Our industry expertise and technical development program with Microsoft Azure cloud brings great potential for our customers.



Régis Koenig
Directeur Offre Services
et Durabilité Fnac-Darty

Citizen consumers believe that brands can have more impact than governments

How do you see the evolution of eco-responsibility issues in retail?

The subject of environmental impact is becoming more and more central to business models. Retailers are trying to integrate this issue into their value proposition, but not without asking questions. Often, 90% of a retailer's environmental impact comes from the making and use of manufactured products. The race for volume, lowering prices, "selling more and more", all these ideas that have fueled retail over the last 30 years are coming to an end. We need to invent new models that allow us to create value and new ways of working.



Does this mean that retailers should encourage consumers to deconsume?

The question is not how I consume, but how I maintain a level of comfort while adopting more responsible consumer behaviour. With 'de-consumption', the idea is to have less impact on the planet.

New generations are very aware of the ecological issues. How can we address the new expectations of these consumers?

This is not a recent phenomenon, but environmental awareness in the purchasing decision is real. For the same price, a product with a lower environmental impact is likely to be chosen. Consumers are choosing brands that act for the planet. They are increasingly integrating this ecological impact criteria into their purchasing motivation. There is, however, something new. The confidence barometer has highlighted a distrust of greenwashing. Whatever the brand

of a distributor or manufacturer, if there is no tangible proof of what is being said, there is a counter-productive effect. Consumers are increasingly separating the true from the false. We are dealing with citizen consumers who believe that brands can have more impact than governments. Interestingly, there is both a distrust of brands and an awareness that this change may have to come first from businesses.

What is the main ecological challenge for retail, and can it be turned into an opportunity?

One of the solutions is to produce more locally, especially in manufactured goods. The challenge in this case is pricing. Consumers have become used to low prices, which are themselves made up of multiple components (raw materials that are not paid for at the price of their scarcity, outsourced cheap labor manufacturing, etc.). It's great to relocate, but there is a cost attached. There is a need to educate consumers about it. Inflation is the current worry, but consumers are ready to pay the price for product longevity. The perfect example is a luxury handbag that will stay in your dressing room much longer than a low-end bag. It is durable because it is expensive. And that has an impact on the production. There is a real tension between the desire to consume and inflation. How are we going to manage this challenge? As far as logistics are concerned, a retailer's costs are integrated into its volumes, whereas its profitability is indexed on the margin. There is a real challenge for citizens to follow retailers in their steps.

“ 90% of a retailer's environmental impact comes from the making and use of products.”

Citizens are willing to try, but shouldn't the retail sector also be willing to cut its margins to make sustainable products accessible?

The model based solely on products must evolve by adding services. With our Darty Max subscription,

we sell a service that extends the life of the product, and in that respect, it is quite virtuous. Many people are prepared to pay this subscription because they know that we will be there to repair their product.



This builds loyalty and at the same time creates a revenue stream that helps to compensate for a possible drop in sales of products that last longer. But everything remains to be invented.

All the retailers that have helped create the consumer market, that have built on it, know that in 30 to 40 years the models will be very different. The IPCC report is clear on this subject. It is for 2050. And 2050 is tomorrow. In a world where

raw materials are going to be scarce and energy increasingly expensive, it is

hard to know today what tomorrow's models will be. We need to test, experiment and measure. We need to diversify the models where in the past we have tended to copy and rationalize.

At Fnac Darty, how do you approach this subject and what are the results to date?

This subject is at the heart of our strategic plan called "Everyday" launched in 2021 and which includes 3 pillars.

1. Playing to the full the complementarity between digital and shops, by putting the human element at the center of the system (particularly our expert sales staff) to offer a complete customer experience. We are asserting our leadership and improving.
2. Developing a sustainable offer. We are constantly asking ourselves the question: what can I do with my suppliers and my customers to make the products available in our stores more sustainable and how can we measure this progress?
3. Developing new services. We are the leading repairer in France. How can we turn this asset into an economic model to meet customers' expectations for product repairs? How can we have an economic model that complements our historical distribution model, based on subscriptions? That is the ambition of this strategy.

When you go to our Fnac or Darty sites, a selection of certified sustainable products made by our technicians is proposed. 500,000 people have subscribed to Darty Max, and this covers 4 million appliances. Omni-channel remains our strong point and we continue to capitalize on it.

SAS point of view

Today, consumers are expecting from their stores and brands that they invest significant efforts to lower their carbon footprint and improve sustainability. Retailers can walk two distinct ways to reach this objective. The first and most heard of, is to **reduce** the use of carbonized energy in manufacturing and logistical processes, for example by using electric trucks powered by solar energy or buying at local suppliers rather than buying overseas. While it is an obvious path to follow, it often meets obstacles (need for investments, higher costs) that go against other business targets.

The second way to improve sustainability, which does not have this drawback, is to improve the **efficiency** of the manufacturing and supply chain processes. Supply chains, even very efficient ones, generate quite some waste. Trucks are not filled to the maximum of their load capacity and don't always follow the shortest route. Store sales can be deceiving, or can receive too much supply, which results in expired products that need to be disposed of or even destroyed.

The advantage of tackling your manufacturing and supply chain efficiency is that it improves both sustainability and profitability.

In order to do so, **data** and **analytics** are key capabilities, as "retail is detail" and only analytics can cope with the complexity of retail. We can divide analytics into two areas: forecast and process optimization. High quality **forecast** capabilities allow not only for a better outlook of store sales, but also for anticipation of potential supply disruptions. The better the retailer's vision on what he is going to sell and what supply he will have, the better he can anticipate and take the right decisions.

Process **optimization** is even more powerful. By analyzing the end-to-end process, optimization algorithms can analyze all potential process parameters and determine which one is optimal. It will find out that it would for example be more efficient to reduce supply frequency, use trucks with different capacities, increase or decrease stock policies... and all this at a very granular level, typically product / store / day, whilst adapting the parameters regularly, depending on the context.

This becomes even more obvious when we consider that data is the fuel needed for analytics, and retailers possess enormous quantities of very relevant and detailed data, thanks to loyalty cards, cashier data, store data and logistical and supplier data. From an analytical perspective, retailers are sitting on a gold mine of data waiting to be exploited, and they are becoming increasingly aware of this, even if they are generally only at the beginning.

For the sake of process optimization, customer satisfaction, cost reduction and sustainability.

*Ronald Breedveld,
Senior EMEA Retail & CPG director, SAS*



Pierre Guionin
MD France
Gorillas

The revolution for essential commerce

Challenges and opportunities of a retail model which meets the core expectations of the urban consumer

How do you see the quick commerce model increasing in the retail market?

Quick commerce is a highly dynamic market which developed in the spring of 2020 amidst an unfolding pandemic; at the same time, Gorillas was developing as a business. Today Gorillas is present in 9 countries with 200 shops in 60 cities.

Consumers are also more aware of environmental and sustainability themes - between 15 and 30% of products purchased are thrown away every week. Consumers want to contribute to the reduction of this waste by being more selective about their selection of products, brands, and services. They want to consume more responsibly, instantly and with quality, but without having to travel to a destination to buy - this is a perfect context for quick commerce.



What challenges and opportunities are tied to the quick commerce model?

Operating in the heart of cities while maintaining an average product availability rate of 95 to 99% is a real challenge, however, we have provided ourselves with the means to succeed. Firstly, with 300 to 400 square meters of shop space to stock goods, orders are placed in the best environment and conditions for our teams, and 100% of our delivery staff are inside our shops, not outside.

Last mile logistics is the second most important issue after implementation and storage. Our delivery staff are employed and work in excellent conditions, this is important to our



In addition to the retailer's job, data is key for Gorillas

values; they are our ambassadors. To build customer loyalty, the relationship must be exemplary, and this is achieved through the delivery person's behavior, their dialogue, and their smile.

In addition to the retailer's job, data is key for Gorillas - it provides us with the knowledge to understand our customers much more intelligently, e.g., to analyze their shopping baskets or the words they use in search engines. Real time data provides a key enabler for us to deliver an effective service to our customers in the time frames that we promise within our service proposition. This use of data allows us to create offers that are as close as possible to what the customer wants, to meet their very specific needs for each geographical area; for example, we provide dedicated ranges for each shop so that we have the most appropriate offering to meet the local demand.

Technology is a way of listening to our customers better and more comprehensively - it amplifies their voice tenfold compared to traditional methods utilized in retail; it is a fantastic virtuous tool to better serve the customer.

How are you developing in France? Could you talk about your partnership with Casino Group / Monoprix?

France is a core market for Gorillas - we have 22 shops in 5 cities with more than 1,200 employees. To succeed, we must focus on the geographical coverage and the quality of the offers we provide as a business. To fulfil

QUICK COMMERCE

consumer's needs at any time we work with the best partners: Casino group has a 30% market share in urban areas. The Monoprix and Monoprix Gourmet brands are highly popular and have an efficient supply chain network in place what makes this the perfect alliance for Gorillas. We also operate their quick commerce on the Monop'op and Franprix apps: we take care of preparation, delivery, and communication with the shopper until the order is delivered.

Acquisition of Frichti and what it means in terms of ambitions and vision?

The idea is to combine our strengths with Frichti, which is the historic player in French quick commerce. They have developed a niche that complements ours; this is the delivery of prepared meals and top-of-the-range products.

Our goal is to have an assortment of national brands on the Gorillas application, so that customers can avoid going to the supermarket and have products delivered at any time of the day.

“ *Is Gorillas intending to replace the supermarket? YES! But not as a substitute for the local shopkeeper!* ”

Is Gorillas intending to replace the supermarket? YES! But not as a substitute for the local shopkeeper! With Frichti, there's a real plus, they bring content through recipes and accompanying kits. The idea is to combine the best of our two worlds - they have a community, a tone of voice, and we have our speed. The first clients are already interested in these synergies.

SAS point of view

Not so long ago, the store was expected to disappear in favor of e-commerce, and now Quick commerce is developing in an urban market that reconciles e-commerce customers for its time-saving benefits and those who prefer the shop for its wide range of products available on the spot.

However, its challenges are related to the development of a range of products that meet the needs of customers in a given location, the availability of these products and the quality of service up to the last kilometer. Geolocation data can be used to optimize the process from the offer definition to the delivery to the consumer. All this is facilitated today by computational algorithms, which, combined with AI models running in real time, help to manage decision-making for a highly complex consumer service, where each decision can instantly reinforce or damage the profitability.

*David-Alexandre Laurie,
Senior EMEA Retail & CPG director, SAS*





Jon Mayes
Trading Grocery
Dev Ops Manager
Waitrose

Visibility and integrated supply chain

The key to face disruptions and meet customer demand

Supply chain resiliency has been challenged at global and local level by unpredictable events. How have the latest events impacted your business?

We have seen massive impact on local stock, near shore, products coming from across the globe. We worked very hard to maintain the supplies level and variety that our customers expect to see within branches. The impact of local and global factors



has re-emphasized how interconnected supply chains are. A local factor in one area such as congestion deport can have rapidly spread into a global factor elsewhere. It's not just a case that you can look at your own closed loop supply chains. Organizations must be aware of actions and events that might be happening across the world in an area of supply chain and goods that is completely unrelated on paper but may have an impact on the result.

Retailers can reap the benefits of having good working relationships with suppliers and reliable networks within the supply chain. They can work around the challenging events and ensure to get the required stock into the branches and into customers baskets at the right time.

But at the peak of the pandemic, customers were reacting far faster than the global supply chain could react. Companies had to be one step ahead in terms of anticipating what might happen and providing alternatives to avoid gaps on shelves and satisfy customer needs.

This puts a whole different level of meaning around visibility: you need to be able to trace your goods and have a detailed view on your supply chain.

Absolutely, and it's not just visibility of what's inside your supply chain. It's understanding that visibility of what's inside your suppliers' supply chains. So, it's important to have the insight of what they are doing and what challenges they are facing. The retailers can't just plan for themselves but need to plan with their suppliers for their stock. Companies need to have integrated supply chains and visibility. If they don't have that visibility and information, they risk that goods will run out of stock.

What do you see as the next inside challenge for grocery and retailers in general going forward?

One of the challenges will be sustainability. When a consumer wants to calculate his shopping carbon footprint, it's virtually impossible right now. Customers will expect their retailers to provide them with customized information about the carbon footprint of what they are buying, and which alternative options would have a lower impact. The customer might decide to spend more money to have less carbon footprint. This is an area where we could see some dramatic changes. Going back to visibility, once retailers can share this information, consumers will be keen to consume it.

Key insights

In terms of forecasts and planning, 2/3 of executives agreed they are striving to be more outwardly focused, and most are aiming to be more forward-looking.

1/5 executives said their supply chain teams have full access to pricing, and less than half have significant access to market conditions and demand signals.

While most executives said they are harnessing more supplier data to improve supply and demand forecasting and planning today, nearly 50% plan to shift to field-led decision-making in 18 months.

Source: 'AI and analytics are powering a demand planning and customer experience revolution' Report, Forbes Insight survey, 2021.

Going beyond customer expectations.

Interview with a major electronic retailer in Europe.

How do you see personalization is increasing on the retail market, both online and in stores?

It's not new to say that personalized promotions convert much better and gives you a change to really stand out. But in terms of cost this is getting more and more important as well. CPC's are increasing, competition is more online than ever due to COVID so how are you going to stand out in the mass and be able to cover the costs? Finding that personal touch with what you offer and what your specific customer wants is key here.

What is the challenge / opportunity related to digital acceleration for the retail industry in general?

Both the biggest challenge and opportunity is data. Consumers are more and more protected, cookie consent is under pressure and the latest developments regarding analytics makes you wonder what will follow. At the same time companies are sitting on a goldmine of data and especially in the B2B market, historical sales data combined with branch information gives opportunities to stand out and act proactively.

How did your company address it and with what results?

The keyword for us here is retention keeping our customers. We value the relationship with our customers, so we need to surprise them and go beyond their expectations. Finding and acting on that personal touch really helps us stand out in today's competitive market.

SAS point of view

"Personalization" is the most vital relationship approach with customers looking for relevant, convenient and contextual experiences across channels. And it is a discipline that the smartest companies leverage to build trust and nurture loyalty.

It is not a surprise that 71% of customers expect a personalized approach from brands, and that fastest growing retailers generate > 40% of their revenue with it (McKinsey: Next in Personalization 2021 Report). As a result, many retailers are now looking deeper into the "CDP - Customer Data Platform" concept to create their own 360° AI-based view of customers, craft journeys, and deliver contextual personalization in a sustainable way. And SAS - with a long success story of real-time omnichannel personalization in multiple industries - is supporting most of them in this new fast, transformational path.

*Max Ardigò,
EMEA Retail Customer Experience Advisor, SAS*

Additional resources

Customer data platform: What it is and why it's important



Photo by jcomp



Katarina Garai
Head of Retail Loss Prevention, SAS

Retail Fraud is on the rise

What new types of fraud are retailers facing?

What are the recent trends you're perceiving in retail fraud?

The returns fraud is getting more sophisticated and is facilitated by the instructions available on the Dark web. This combined with the sophistication of tools used by organized fraud rings poses a major threat to the retail industry. The false refunds are also increasing, specifically "fraud as a service": a fraudster manages the return process while the customer gets to keep both the merchandise and the refund, in return for a percentage of this value. We are detecting different schemes of internal collusions with external personas and even organized crime groups. The e-commerce also sees a rise of synthetic fraud: the duplication of a real consumer after collecting data about him. Finally, the omni-channel retailing is bringing new threats, such as BNPL (buy now, pay later) program, which tends to get misused significantly.



What would you recommend to any retailer struggling to address their fraud vulnerabilities nowadays?

Combining machine learning models and business rules has proven to be much more effective than using business rules alone. When we use combinations of machine learning methods, the models become highly accurate.

This approach is referred to as the hybrid detection.

The power of AI/ML for fraud detection and fraud prevention lies in their continuous usage. The more you use the system and train it with valuable feedback resulting from investigations, the better it becomes. One of the dangers

I am perceiving on today's market is the misconception many companies have, that AI/ML bring an immediate "silver bullet" solution to all fraud threats, by just loading the data and pressing the button. Implementation of a hybrid fraud detection system is a challenging path through the analytics lifecycle, but one with rewards well-worth the effort.

What approach do you recommend mitigating the fraud risks and even anticipate it?

Identification of genuine transactions and minimizing false positives is a vital part of a successful business. By using effective machine learning strategies, companies can manage fraud and risk without alienating good customers. AI/ML models can analyze previous cases, predict potential misuse, and isolate the suspicious behavior patterns, where traditional rules-based approaches are unadopted to today's digital challenges.

Do you foresee any technology becoming more important than others to fight retail fraud in the near future?

Key Figures

16%

of annual revenue, is the returns cost for retailers

10.3%

of those returns are the result of fraudulent activity

€17 million

are lost by retailers on fraudulent returns, for every €1 billion of annual revenue earned

70%

of retailers report a shrink rate of more than 1%, and on average, losses from shrinkage equate to 1.6% of the bottom line

Source: Customer Returns in the Retail Industry (nrf.com)



CONCLUSION

If there is one word that can sum up the spirit that dominates the 5 major retail trends for 2022 that we have just seen in this e-Book, it is "resilience". Perhaps is it even the 6th sense of retail?

This mixture of perseverance and resistance in the face of the violent, unexpected crises that have shaken the sector since 2020, with Covid 19 and its aftermath, the disruption of supply

chains, and now international tensions based on the Ukrainian conflict, which are reshuffling the cards of food and industrial geopolitics.

Retail resilience also comes with a large dose of agility and hope.

Agility to overcome obstacles and rethink models, to react in real time thanks to innovation and data. Hope to navigate firmly towards a more sus-

tainable world and invent a production tool that can reconcile the financial with the ecological.

This may be why the retail sector, so closely connected to people's daily lives, can act as a barometer of society.

Michel Koch
CEO of Diamart Connect

ABOUT



SAS is the leader in analytics since 1976. Through innovative software and services, SAS empowers and inspires customers to transform data into intelligence. Organizations in 146 countries and nearly 82,000 locations use SAS solutions - including 1,200 retail customers.

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