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ECRA Annual Supplier and Retailer Convention 2011: Rising to the challenge of a new retail landscape

The Third Annual ECRA Supplier and Retailer Convention was held at the Amora Jamison Hotel in Sydney on 27-28 October 2011. Over 160 delegates took the opportunity to view presentations from local and international fast moving consumer goods (FMCG) industry experts and to network with colleagues, peers and business partners.

The title of the convention *Rising to the Challenge of a New Retail Landscape* encapsulated the key theme over the two days – recognising that the next decade in FMCG/Retail will look very different to the previous, and considering the issues and opportunities this will bring from both a global and local perspective, and from both the retailer and supplier points of view.

The Board of ECRA expresses it's thanks to all speakers and particularly to the delegates for making this year's convention a success. ECRA looks forward to continuing to fulfill its role as the only industry body that brings together suppliers, retailers and wholesalers to promote industry-wide initiatives in the value chain that deliver benefits to the industry and the shopper.





2012 ECRA Annual Supplier & Retailer Convention

SAVE THIS DATE

18-19 October 2012
Grand Hyatt Melbourne

www.ecraustralasia.org.au

ECRA Launches Strategic Plan



ECRA Board has been busy over the last twelve months refining the Strategic Framework and Business Plan. Positioning ECRA as the meeting place for Australian and New Zealand retailers and suppliers focusing on value chain efficiency. The Strategic Framework represents the cornerstone of our business plan, it represents the work we can do at an industry level, the work you can do with your trading partners, and the work that happens within the four walls of your business. ECRA will continue to provide a centre of excellence where retailers, wholesalers, manufacturers and suppliers can work together to deliver innovation, thought leadership and strategy on non-competitive issues. The Strategic Framework and Business Plan will be available shortly.

Updated and Refined Retail Ready Packaging Toolkit Launched

The Annual ECRA Supplier and Retailer Convention saw the re-launch of a more streamlined Retail Ready Packaging Toolkit.

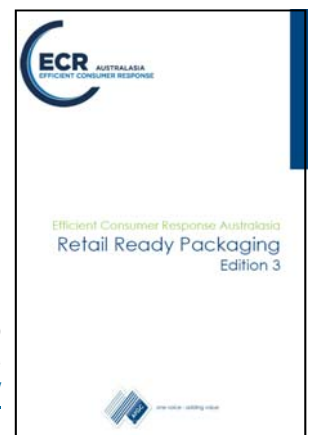
Shelf friendly packaging remains a contentious industry issue. There is a significant focus at Coles, a renewed drive at Woolworths, Metcash remain committed and New Zealand retailers are carefully watching events in Australia.

In an industry first Matt Swindells (General Manager Supply Chain Transformation, Coles) and Rod Evenden (General Manager Strategy, Woolworths) joined forces to co-present the importance of shelf friendly packaging to their respective businesses and where they have been able to collectively reach agreement on certain key principles with the objective of making it easier for the supplier community to make the transition to shelf friendly packaging.

Central to the joint presentation was a theme of retail alignment for the critical aspects of:

- Designing packaging to meet rate of sale
- Best in class design of two order multiples deep, high or adjacent
- Commitment to 'Five Easies'
- Focus on product identification for improved product recognition at back of store room and on-shelf
- Delivering excellent in store execution

Within both retail organisations shelf friendly packaging is an essential requirement, with the transition being managed by Category Managers and Buyers. Within Woolworths Paul Downie and within Coles Matt Swindells are additional resource to assist in the process of solution and execution. The updated ECRA Toolkit can be downloaded free of charge using the following link <http://www.ecraustralasia.org.au/toolkits>



ECRA OSA Industry Pulse

The ECRA OSA Industry Pulse is a quarterly bulletin that tracks performance against one of the key indicators to on-shelf availability, outbound service level (OBSL).

OBSL is the rate at which retailers are able to supply stores against the volumes of cartons of product the stores have requested for deliveries. Weekly OBSL data is submitted by Metcash, Woolworths and Coles and consolidated to provide a non-confidential industry summary. This summary is presented for: ambient grocery; perishable products; and, total business. The data is captured in weekly buckets and will be charted each quarter as a snapshot of industry performance.

If you wish to receive the Pulse each quarter, please contact Kim Riggans at kim.riggans@afgc.org.au

Winning in January

Improving availability through the supply chain in January represents a great opportunity to increase sales for suppliers and their retail trading partners, and ultimately to provide better service to shoppers.

Within our market there is a major focus on planning and operational execution throughout December and over the Christmas period, however January has suffered by comparison. Historically and repeatedly we have seen a significant decline in product availability, reflected in a decline in service levels to retail distribution centres and stores of approximately 4 to 5% across the industry.

Over the last two years the industry has come together to understand specific pressure points particular to January, consider root causes, establish joint improvement opportunities and collectively work towards improving service levels. Many tools have been developed and are freely available to the industry.



Now, as retailers and their suppliers look towards the fast approaching Christmas and summer period, it is work taking a moment to reflect upon January 2011.

Performance for January 2011 exceeded 2009, but gave up around half of the gain experienced in 2010. ECRA published an industry report earlier this year which provides key results for: whole of business; ambient grocery; perishables; and general merchandise, as well as selected category specific service levels. In addition the January 2011 report contains a series of case studies from leading brand manufacturers and retailers, providing insight into what matters for their businesses.

The insight contained in the report is well worth reviewing as trading partners commence discussions regarding January 2012. It will help businesses plan for success and avoid pitfalls of previous years, particularly if used in a collaborative fashion. To view the report use the following link <http://ecra.squarespace.com/winning-in-january/>

ECR Europe Launches OSA Re-Loaded - A Self Assessment Tool



OSA has been on the agenda of ECR Europe and the local ECR in Europe for many years and there are numerous best practice guides, methodologies and tools to implement OSA programs in companies.

However, average out-of-stock rates across the industry have not improved over these last years. The 2008 global study by Gruen and Corsten shows that the current average out of stock rate is still 8.3%, with, of course, notable exceptions in markets where local ECR initiatives or companies have taken the lead in making a difference.

ECR Europe has worked collaboratively to identify and tackle the last remaining hurdles to deliver better shopper availability. Use the following link <http://ecr-all.org/bluebooks/bluebook.ECR+Europe/> to access this new tool from ECR Europe.

ECRA Information Pack

ECRA have developed a concise information pack for your reference. The pack provides useful information about ECRA: the benefits; principles; membership; structure; participation; and much more.

To learn more download your copy www.ecraustralasia.org.au.



About ECRA

Efficient Consumer Response Australasia (ECRA) is the only industry body that brings together suppliers and retailers/wholesalers to promote industry-wide initiatives in the value chain that deliver benefits to the industry and the shopper.



Shrinkage and Loss Prevention



The ECRA Loss Prevention Group continues to meet regularly with the aim of progressing collaborative approaches to reducing shrinkage, using the principles of the ECR Shrinkage Reduction Road Map as guidance.

The group is currently scoping a potential project to survey key store staff in order to increase levels of understanding around the impacts of the various loss prevention initiatives employed in stores, for example, CCTV cameras, EAS tags and gates, theft resistant packaging, etc.

Stay tuned for more information, and in the meantime why not browse the vast amount of information and tools the group has developed and loaded to the ECRA website free of charge! Use the following link <http://www.ecraustralasia.org.au/loss-prevention/> to access detail.

Successful GS1 Recallnet Launch

GS1 Australia, AFGC and ECRA recently launched a national product recall service to remove potentially harmful grocery, food, liquor and other products from the supply chain.

The service, GS1 Recallnet, was launched in Sydney on 18 August by Catherine King, Parliamentary Secretary to the Minister for Health, with Maria Palazzolo, CEO of GS1 Australia and Kate Carnell, CEO of the Australian Food and Grocery Council (AFGC). Coles, Woolworths, Metcash and Costco as well as Food Standards Australia New Zealand (FSANZ) and the Australian Competition and Consumer Commission (ACCC) have registered with the service and are ready to receive notifications.

Australia's food and grocery industry has an excellent food safety record and Recallnet provides a world class tool for manufacturers to ensure we maintain this record. Product recalls pose a significant challenge to Australian manufacturers and the portal will enable the effective and efficient management recall notifications.

GS1 Australia has worked with the AFGC, ECRA, the Liquor Merchants' Association (LMAA) and Food Standards Australia New Zealand (FSANZ) and leading Australian retailers and manufacturers to establish GS1 Recallnet, initially to be used by the Australian grocery and liquor sector.

With GS1 Recallnet, companies are able to:

- Manage recall and withdrawal notifications online, safely and securely
- Follow an easy and intuitive workflow that makes the process of issuing notifications simpler
- Reach customers across Australia instantly and without duplication of effort
- Communicate with FSANZ
- Receive immediate feedback from customers on the progress of the recall or withdrawal
- Easily capture the data needed to complete progress reports to regulators
- Significantly reduce risk in the event of a recall
- Lower their risk profile with insurers and lower insurance costs
- Contribute to the improved wellbeing of all Australians

Food and consumer products organisations can use the service to reduce errors, decrease the amount of time it takes to respond to a recall and mitigate the costs associated with managing the recall process.



For further information visit <https://recallnet.gs1au.org/>



GS1 Recallnet - Webinars

Following the successful launch of GS1Recallnet in August GS1 are providing free webinars to the industry. The webinars are held on every Thursday at 2pm and offer participants the opportunity to understand in detail how Recallnet functions. The webinars are suitable for key staff and managers within your organisation responsible for the management and execution of product withdrawals and recalls within the food, grocery and liquor sector.

GS1 Recallnet is a standardised, industry-driven communication tool enabling organisations of any size including manufacturers, wholesalers, retailers and importers to share real-time product recall and withdrawal notifications with their trading partners and regulators in a secure and efficient manner. GS1 Recallnet is supported by key retailers including Coles, Metcash, Woolworths and Costco, with others coming on board FSANZ and ACCC also receive recall notifications from GS1 Recallnet.



To register use the following link

http://www.gs1au.org/events/events_db/events_intro.asp?EventNamesSelected=62

GS1Works ushers in new, interactive supply chain management training



GS1 Australia has introduced a new GS1Works tour into its award winning Supply Chain Knowledge Centre. GS1Works is a new, interactive supply chain training module using touch-screen technology and videos. GS1Works is situated in the GS1 Australia Supply Chain Knowledge Centre and its offering is focused squarely on the supply chain challenges facing businesses of all sizes today and how the GS1 standards can be used to solve these issues.

The Supply Chain Knowledge Centre is a life-size model of the supply chain, demonstrating the GS1 standards in action from the receipt of raw materials, through the production process into warehousing and distribution and through to the back of retail store and Point of Sale.

Access to the centre is free as part of a GS1 Australia membership although prospective members are also welcome to attend. GS1Works brings to life the business solutions offered by the use of GS1 standards including unique identification, barcoding, eMessaging and data synchronisation and also highlights emerging technologies such as EPC/RFID. A GS1Works tour will complement GS1 Australia's in-depth training series of Learn, Knowledge and Masterclass classroom options.

While the centre has been designed to meet the needs of multiple industry sectors, the training modules are flexible so content can be tailored to meet specific industry or individual company needs.

GS1 Australia expects to open GS1Works in Sydney in late 2011.

For more information about GS1Works call 1300 366 033 to speak to a member of the GS1 Australia Training Services team.

ECR Extra

ECR Extra is a free newsletter emailed to participants and stakeholders to the Australian and New Zealand food and grocery retail industry on a quarterly basis. If you would like to subscribe/unsubscribe, please contact ECRA.

Know how we can improve the ECR Extra - we'd love to hear your feedback!

Contact kim.riggans@afgc.org.au.

How to join the AFGC

AFGC, NZFGC members and participating retailers members can avail themselves free of charge of the output of ECRA activities.



To join the AFGC please contact David Hall on 02 6273 1466 or david.hall@afgc.org.au.

ECRA Announces New Industry Award

The Board of ECRA are pleased to announce that in 2012 we will be joining forces with Joe Berry Australian Retail Industry Executive program to award an ECRA FMCG/Retail Award as part of the program. The prize will include attendance at the Institute of Food and Grocery Management's Food and Grocery Executive Program run annually at Mt Eliza Centre for Executive Education.

The Food and Grocery Executive Program is for present and next generation leaders from through out the food, grocery, beverage, foodservice and FMCG industry. The course provides a unique opportunity for managers across all industry segments to network and address current issues with an informed international faculty, recognised industry leader and other participants from the retail FMCG industry. For further information visit www.ifgm.com.au.

Joe Berry 'Australian Retail Industry Executive' Award 2012



The Joe Berry Award for 2012 has opened and already almost 100 registrations for entry to the award have been received. At this rate a record year for both registrations of interest and final entries is expected.

The eventual award winner will receive a 23 day Guided Study Tour of the global retail industry and be exposed to the future that the industry can provide. The 2011 winner, Steve Bean, has just returned from his tour and he will provide a rundown at the 2012 ECRA Convention. Steve has an exciting career ahead of him.



The Joe Berry Award for 2012 is pleased to have teamed up with the ECRA in these awards. One of the topic selections for 2012 is an ECR question that has been designed to spread awareness of the effects of ECR within the industry.

Once entries close on 28th February 2012 we will judge the essays on ECR with the view to presenting a special ECRA Award. A great addition to this premier award program.

All information on the Joe Berry Award is available at www.joeberryaward.com.au or through the ASMCA enquiries@asmca.com.

Publications

ECR Australasia publications are freely available to all AFGC, NZFGC, ECRA Board member companies and participating organisations. Some of the available publications are listed below.

- Winning with Promotions Industry Report
- Getting the Best out of Pallet Labels
- Winning in January 2010 - Improving Product Availability Toolkit
- Retail Ready Packaging Toolkits
- The On-Shelf Availability Improvement Road Map 2008-2009
- The On-Shelf Availability Challenge 2007-2008



For a full list of all ECRA publications please visit www.ecraustralasia.org.au and complete the on-line order form (<http://ecra.squarespace.com/publication-order-form/>) to receive your ECRA publication now! Whilst at the website, why not check out the wealth of information and helpful tools the group has made available for industry!

ECR Europe - Progressive Management Program - Rebranded

At the ECR Europe Executive Board meeting last month, the decision was made to continue with the Progressive Management Program.

In summary, the ratified decisions from the Executive Board were:

1. To go ahead with a new version of the Programme, starting in 2012 and running a Programme every year.
2. To reduce the length of the Programme from 4 modules to 2 (one-week) modules. For 2012, plans are to run Module 1 in early July and Module 2 in November.
3. For one module to run in Europe and one to run in Asia; ideally working with the same Business School for both Modules.
4. To improve the quality of the Programme content by:
 - Maintaining/improving the balance of Industry-delivered sessions and Academic sessions.
 - Exploring 2 types of Industry-speaker sessions: CEO speakers, sharing their personal views on the Consumer Goods Business and their roles within it; plus, Collaborative initiatives taking place between trading partners, with updates on ECR projects and Consumer Goods Forum developments.
 - Ensuring that the Academic content is very relevant to the Consumer Goods Business and that it is at a high level of sophistication, reflecting the seniority of the Programme delegates.
 - Continue with the Field Trips in the 2 locations, improving the briefings/de-briefings to maximise the experience for the Programme delegates.
5. Changing the price of the Programme to €15,000 per delegate.
6. Changing the name of the Programme to '**ECR LAB: Leading Across Boundaries**'.

For further information please use the following link <http://www.ecr-institute.org/education-and-events/executive-development/the-progressive-management-programme-pmp-2011>

ECR Europe Conference and Marketplace: The Next Generation



Tweets, blogs, podcasts, Facebook... we communicate with each other in our everyday lives in ways we never dreamed of a few years ago.

But how do our customers communicate with us? Or to be precise, how would they like to? And what are we in our businesses doing about it?

At our ECR Europe conference next May we will examine how the digital age is shaping our industry now and how we can take advantage of it. And we are not just talking about clicks and bricks. How is the latest technology and thinking impacting on all kinds of core business issues from marketing to data privacy and the supply chain? Find out next May when we consider... ECR: The next generation.

For further information use the following <http://194.183.228.17/ecrfolder/index.cfm>.

ECR Europe Blue Books

A broad range of ECR Europe 'blue books' are available for free download. Use the following link, <http://ecr-all.org/bluebooks/bluebook,ECR+Europe/> to access material on matters such as:

- The Consumer and Shopper Journey Framework
- Packaging Design for Shrinkage Prevention
- Packaging in the Sustainability agenda: a guide for corporate decision makers
- The ECR Europe sustainable transport roadmap & self assessment tool
- Jointly Agreed Growth



ECR Asia-Pacific Awards 2012



13TH ECR ASIA PACIFIC CONFERENCE & EXHIBITION

"Touching Lives, Improving Value" 16 - 17 May 2012

Background

The purpose of ECR activities is to enhance the ability of all to compete more efficiently and effectively to provide better value to the consumer. ECR activity almost always involves the cooperation of competitors. However, ECR members' could still collaborate on projects help to realize benefits and contribute to the development of ECR. This award is to recognize this spirit of collaboration to drive the FMCG industry forward.

Submission Criteria

The ECR Asia-Pacific Asia Council invites companies to submit cases for consideration under the ECR Asia-Pacific Awards programme.

1. The case should be written up in the form of a presentation file of no more than 20 pages.
2. The topic should be within the remit of Efficient Consumer Response, i.e. working together to meet consumer wishes better, faster and at less cost.
3. The case should involve at least one retailer and at least one supplier.
4. The case should demonstrate how consumers have benefitted from the initiative.
5. Cases with quantified benefits for the consumer, the retailer and the supplier are more likely to be successful.

Deadline for Submission

The deadline for submission to the ECR Asia Council will be **5.00 pm, Tuesday, 28 February 2012.**

For further details please use the following link http://ecr-all.org/upload/blogfiles/7b1/13_ECR_Brochure.pdf.

Supporting Organisations

ECR Australasia would like to thank the following organisations for their ongoing support, along with all major Australian and New Zealand retailers and wholesalers.

Australian Food and Grocery Council

www.afgc.org.au



New Zealand Food and Grocery Council

www.fgc.org.nz

:FGC

NEW ZEALAND FOOD & GROCERY COUNCIL

Trade Group Issues Packaging Guidelines



PARIS — The Consumer Goods Forum here announced the release of the Global Protocol on Packaging Sustainability (GPPS) to enable the consumer goods industry to better assess the relative sustainability of packaging.

The aim of the GPPS is to help companies reduce the environmental impact of their packaging by providing a common language to address a range of business questions about packaging sustainability either within a company or between business partners.

The GPPS is part of the Consumer Goods Forum's "sustainability work stream," which is sponsored by two of its board members: Philip Clarke, CEO of Tesco, and Paul Polman, CEO of Unilever.

"Tesco is a responsible retailer and understands that packaging is important to its customers," said Clarke, in a statement. "We're working hard with our suppliers to minimize the impact of our packaging on the environment. Having a common language will allow us to have the right conversations with our diverse supply chain. We can then work with suppliers to reduce the environmental impact of packaging while making sure it still does the essential job it needs to do to protect the products we sell."

The GPPS was designed collectively by a diverse group of retailers and manufacturers, aided by packaging material suppliers and packaging manufacturers and led by a steering team that included representatives from Wal-Mart Stores, Target and Tesco, and Kraft Foods, Procter & Gamble, Nestlé and Unilever. It is based on earlier packaging sustainability guidelines developed by the European Organization for Packaging and the Environment (EUROPEN) with ECR Europe and similar work on metrics for packaging developed by GreenBlue's Sustainable Packaging Coalition (SPC).

Use of the GPPS is free of charge using the following link <http://globalpackaging.mycgforum.com/>.

Useful links to keep you globally connected!

ECR Europe Community
www.ecr-all.org

The Consumer Goods Forum
www.ciesnet.com

GS1 Australia
www.gs1au.org



Australian Food and Grocery Council
www.afgc.org.au

The Global Scorecard
www.globalscorecard.net



New Zealand Food and Grocery Council
www.fgc.org.nz

: FGC
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International Commerce Institute

International Commerce Institute (part of ECR Europe) is the link between global thought leaders in academia, retailing and consumer goods businesses. With a broad range of publications, best practice guides, education opportunities and events the ICI website provides a platform for investigating many of the programs and projects underway globally. To learn more visit www.ecr-institute.org. In this year's editions of Excreta we will be bringing you a series of exerts from articles published by ICI.

Simply Connect the Dots

By Daniel T. Jones

The packaged goods industry is currently wrestling with three distinct challenges:

- The need for profitable growth and reduced costs
- Intensifying pressure for sustainability
- An Internet age that is transforming information management and data flows

At first sight, these challenges seem very different. However, if we tackle them separately – treating each one as an isolated, stand-alone case – then we risk making things worse. In fact, this very approach of optimizing separate, isolated parts of a problem is symptomatic of the erroneous management mind-set that got us into this position in the first place.

We can rise to all three challenges of cost reduction, sustainability, and information-sharing relationships with consumers by addressing one unifying goal: creating compressed, customer-driven supply chains capable of precisely meeting exact consumer requirements.

To do so, however, managers must change the way they manage.

The whole article is available for download at the [ecr-institute.org](http://www.ecr-institute.org) website at: <http://www.ecr-institute.org/publications/international-commerce-review/archive/vol-8-no-2-4-winter-2009/simply-connect-the-dots/>

International
Commerce
Review

www.ecr-institute.org

ECR Australasia Board

The ECR Australasian Board comprises senior executive representatives from food and grocery retailers, wholesalers and suppliers. The full membership of the Board is:

Martin Drinkrow (Chair) Clorox Australia Pty Ltd

Gary Tempany Metcash Trading Ltd

Matthew Foster Procter & Gamble Australia Pty Ltd

Gijs Faber Foodstuffs Auckland Ltd

Mark Payne Coca Cola Amatil Ltd

Peter Elms Woolworths Ltd

Murray Johnston Progressive Enterprises Ltd

Andrew Blew General Mills Australia

Alastair de Raadt Cadbury NZ

Matt Swindells Coles Group

Rob Scoines Sanitarium Health Food Company

Katherine Rich NZ Food & Grocery Council

Alain Moffroid Unilever Australasia

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