



Shaping
Industry Outcomes

GLOBAL CPR OVERVIEW

Jan 2024



GUIDELINES FOR USING THIS DECK

1. This deck is **NOT** for leaving with the client in whole as some sections have sensitive info (e.g. Client logos)
2. This purpose of the deck is for the Capgemini person hosting a client visit or preparing for a client presentation and looking for an overview of the Global CPR sector. For him/her to understand the current extent of work being carried out in Capgemini that you can use and/or refer to
3. This deck should be used as a **reference** and slides may be extracted to build your story based on the client context and agenda
4. Presenters are encouraged to explore the URLs mentioned in the slides/notes and access the more detailed content.

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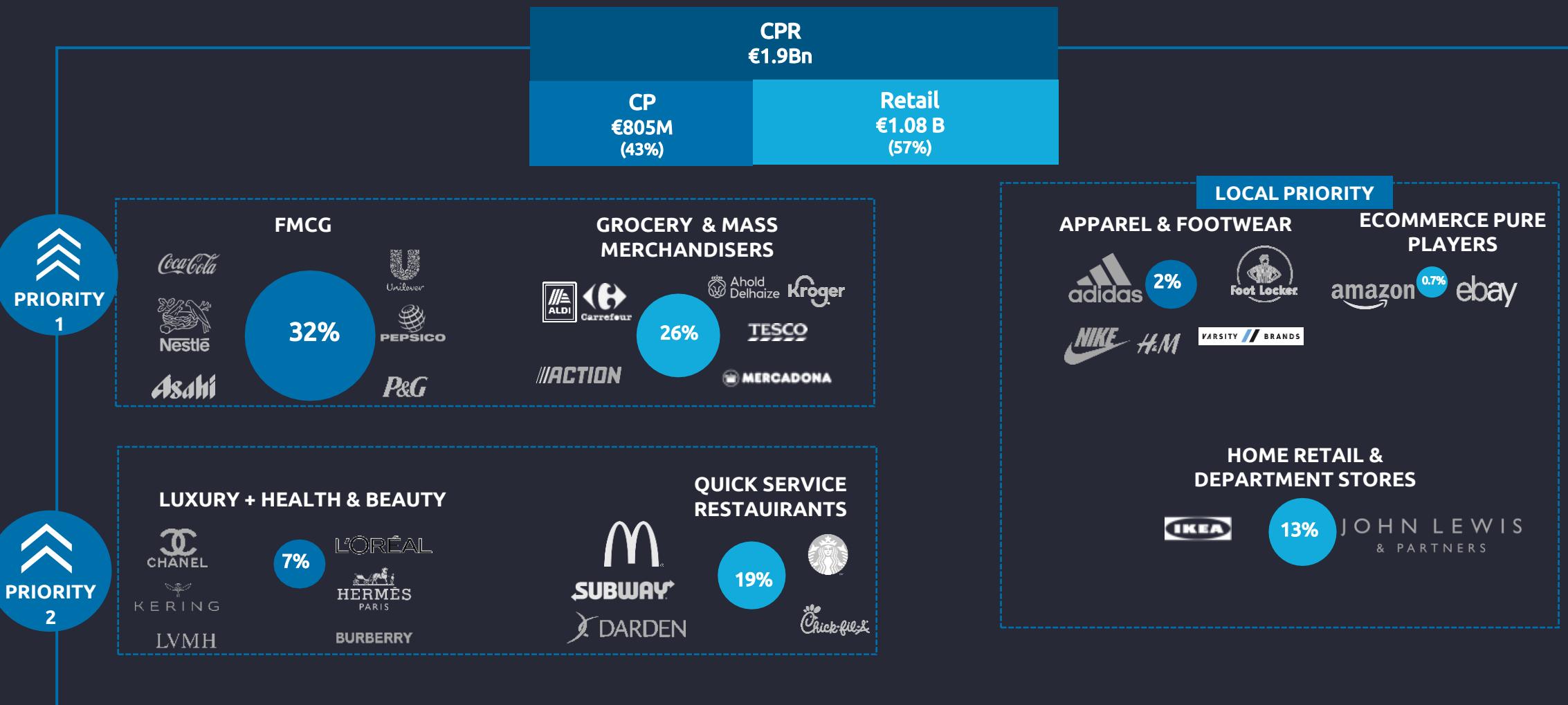


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CAPGEMINI INDUSTRY OVERVIEW



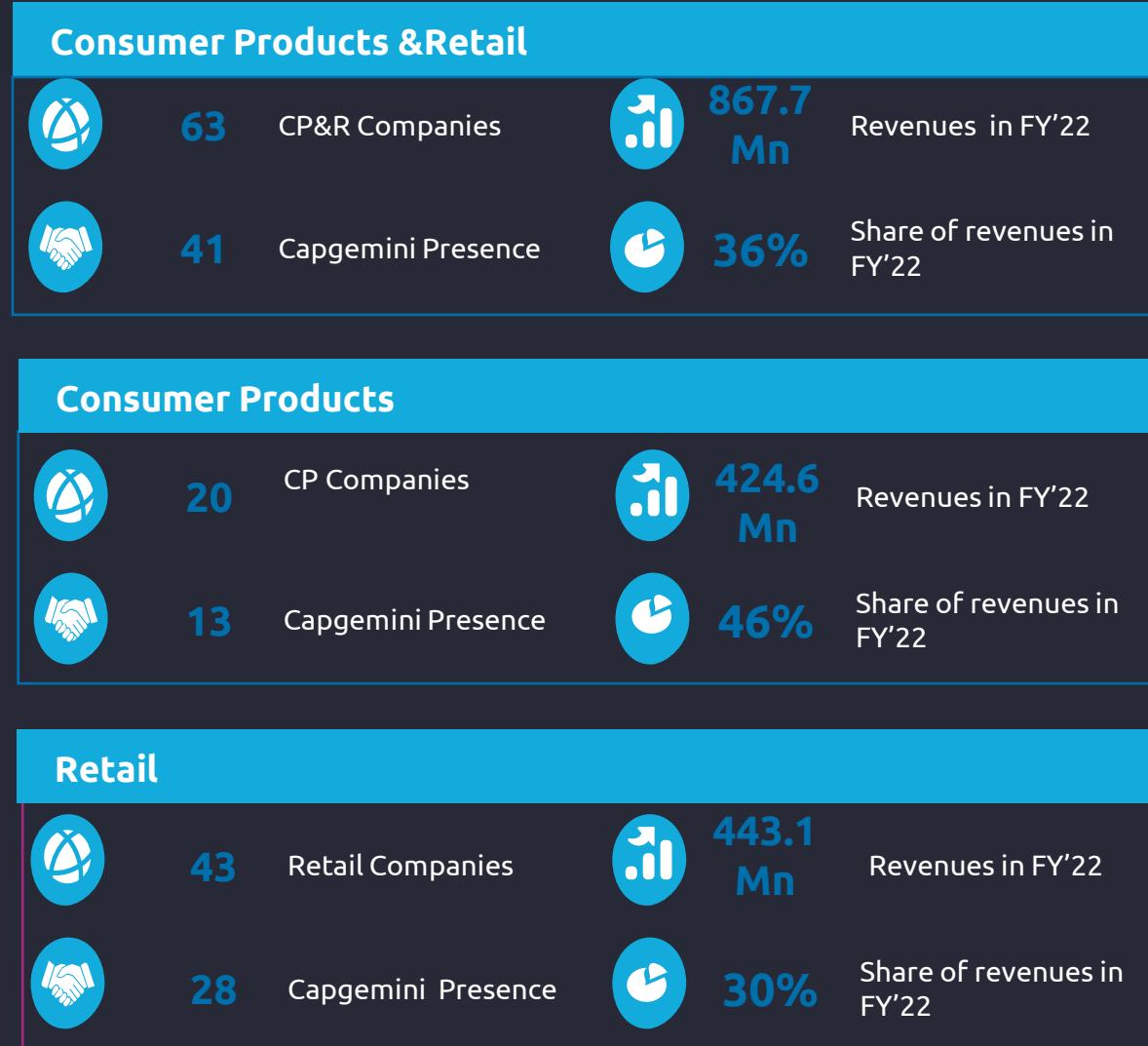
SUBSEGMENT REVENUES YTD Q3'23





GLOBAL CP&R WITHIN THE FORTUNE 500

Fortune 500



Region/ Country	#Fortune 500 Accounts HQ	# Fortune 500 CG Accounts	2022 F500 Accounts	2022 Region Revenue	% Share
USA	32	22	244.9	952.9	26%
France	5	9	108.4	283.3	38%
Sweden, Finland	-	5	196.9	296.4	66%
UK	4	8	128.4	266.3	48%
Netherlands	4	8	10.6	112.4	9%
Germany	2	5	1.2	90.7	1%
Spain	2	11	47.1	60.6	78%
Italy	-	10	3.4	69.8	5%
Australia, Singapore, Malaysia, Thailand, Indonesia, Philippines	8	16	34.1	93.4	37%
Brazil, South Korea, Mexico, Venezuela, Argentina	1	5	31.4	62.7	50%
Switzerland	3	3.0	12.6	33.5	38%
Belgium	1	7.0	13.0	19.0	68%

24 Global 500 accounts with revenues from multiple regions

17 out of **18** Work with target accounts in priority 1 subsegments FMCG, Grocery/MassMerch/Pharmacy



GLOBAL FORTUNE 500 BY REVENUE

CAPGEMINI REVENUES



Tier 1 & 2 accounts constituted for 9% of the Global F500 in 2022

ANALYST ACCOLADES

Capgemini has been positioned as a LEADER:



Gartner Magic Quadrant for
Finance And Accounting
Business Process Outsourcing
(Nov 2023)



in the Everest Group: **Supply**
Chain Management Business
Process Services Matrix®
(July 2023)



MarketScape: **ESG**
Sustainability Strategy
Consulting Services
(April 2023)



Leader' In Customer
Experience Strategy, 2022
(Mar 2023)

in the Zinnov Zones **ER&D**
Ratings 2022 (Jan 2023)



in the IDC MarketScape:
Worldwide ESG/Sustainability
Strategy Consulting Services
2023
(Jan 2023) (8)



in the Everest Group: **Software**
Product Engineering Services
PEAK Matrix®
(Dec 2022) (10)



in the Forrester Wave™:
Customer Experience
Strategy Consulting Practices,
Q4 2022
(Dec 2022) (12)



in the Everest Group: **Industry**
4.0 Services PEAK Matrix®
(Sep 2022) (7)

THOUGHT LEADERSHIP & PoV

Capgemini CPR Delivers Resources, Research and Revenue Across the World

Capgemini Research Institute ranked **#1** six years in a row for the quality of its research by Source Global Research

Customer Experience



Intelligent Industry



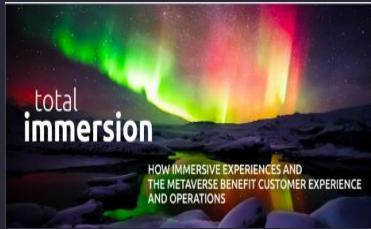
Customer First



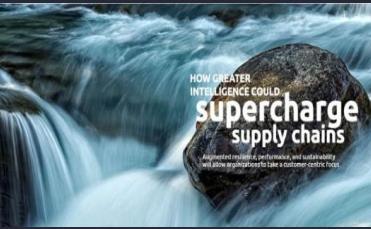
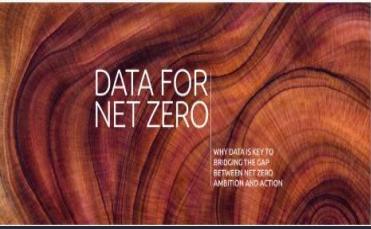
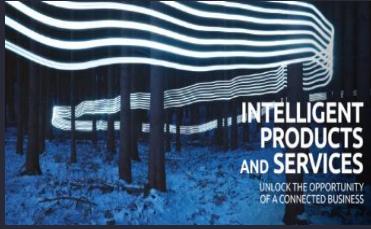
Sustainability



Innovation



Artificial Intelligence



SUMMARY : GOALS & AMBITIONS FOR 2024



Accounts

- Increase / obtain presence in **Tier 1 & 2 F500 accounts globally**
- Measure & Support Priority 1 subsegment performance



Offers

- Increase awareness about offers to directly impact win rates
- Differentiate offers based on value vs volume play and set expectations with the geographies.



Marketing

Improve Marketing/PR to drive brand and knowledge



Partners

- Increase involvement to jointly develop offers
- Enable partnerships for target accounts



Talent Development

- Certify BDEs, CPs and Delivery teams in Industry certification
- Create a pool of certified experts across L3/L4



Global Enablement

- Enable KM to support Global Offer launches for both internal and external
- Create reusable assets for all subsegments
- Launch FMCG, Luxury, QSR Communities



Source:- [Link](#)



Key actions for 2024

GLOBAL CPR MARKET STRATEGY



ACCOUNTS

Grow / establish presence into group supported and industry target accounts



TALENT DEVELOPMENT

Enable community to take up Industry Certification as per level of expertise



OFFERS

Develop and support adoption of global offers

Key actions for 2024



PARTNERS

Collaborate in offer development and joint solutioning in identified subsegments



MARKETING

Increase activities focussed on brand promotion



GLOBAL ENABLEMENT

Boost trans-national collaboration, launch sub - segment community & develop reusable assets

STRATEGIC PARTNERSHIP PROGRESSION



INDUSTRY SOLUTIONS THROUGH STRATEGIC PARTNERSHIPS

Google

SAP

Microsoft



Amplifying both the Connected Commerce and Generative A.I capabilities – Retail & Grocery

Digital Core for – Retail (Grocery and CP (FMCG) , Leverage the RISE for HANA

Alignment on Intelligent Industry and Co-Development opportunities in Intelligent with special emphasis on A.I & Gen A.I



CLIENTS WE SERVE

FMCG



MASS MERCHANTISERS & GROCERY/DRUG STORES



LUXURY + HEALTH & BEAUTY



QSR



SPECIALTY & HOME RETAIL



APPAREL & FOOTWEAR



ONLINE DELIVERY/ ECOMMERCE



OUR GLOBAL ALLIANCE PARTNERS

We partner with a large, global network of providers to uniquely innovate in focus industries as well as working with top venture capital firms and academic institutions like Stanford, Berkeley, MIT

Cloud Partners	Consumer Experience and Analytics Partners			Integration Partners	Field Service Partners
       	    	    	    	       	         
CUSTOMER FIRST  	 	 	INTELLIGENT INDUSTRY  	 	  



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GLOBAL CPR TRENDS & GTM STRATEGY

CAPGEMINI CRI REPORT :- WHAT MATTERS TO TODAY'S CONSUMER: 2024 CONSUMER BEHAVIOR TRACKER FOR THE CONSUMER PRODUCT AND RETAIL INDUSTRIES



CAPGEMINI RESEARCH INSTITUTE

WHAT MATTERS TO TODAY'S CONSUMER: 2024
CONSUMER BEHAVIOR TRACKER FOR THE
CONSUMER PRODUCT AND RETAIL INDUSTRIES



Chat between Lindsey Mazza & Martin Newman



KEY ACTIONS FOR BRANDS AND RETAILERS

Consumer's Perspective

- Consumer are spending less
- 2/3 of consumers will cut back on on - essentials
- Over 70% of consumers expect further discounts on essentials
- 80% of retailers say that generative AI can improve operations and enhance facility maintenance

Use Cases



WALMART IoT
Sensors in
refrigerators and
air-conditioning
systems



P&G AI
Store layout &
Product
placement



UPS GEN AI
Route
optimization



Consumer's Perspective

- Consumers are becoming more aware of generative AI With 20% using GenAI to shop
- Consumers are using social media platforms to shop- Nearly 50% of Gen Z consumers and 35% of millennials have already bought products via social media
- Influencers impact search and purchasing decisions -50% of consumers shopping via social media seek advice from influencers.

Use Cases



STANLEY 1913
Women selling to
Women



SEPHORA
SQUAD
Influencers
Program



YETI
STORIES
Experiential
selling

Consumer's Perspective

- Consumers demand greater transparency from retailers on sustainability
- Consumers want brands to play an active role in educating them
- Consumers expect brands to do more - 61% of consumers felt brands, stores, and supermarkets should do more to reduce waste

Use Cases



Carrefour sells
more and
wastes less
with dynamic
pricing



EcoBeautyScore
consortium
More informed
and sustainable
decision making

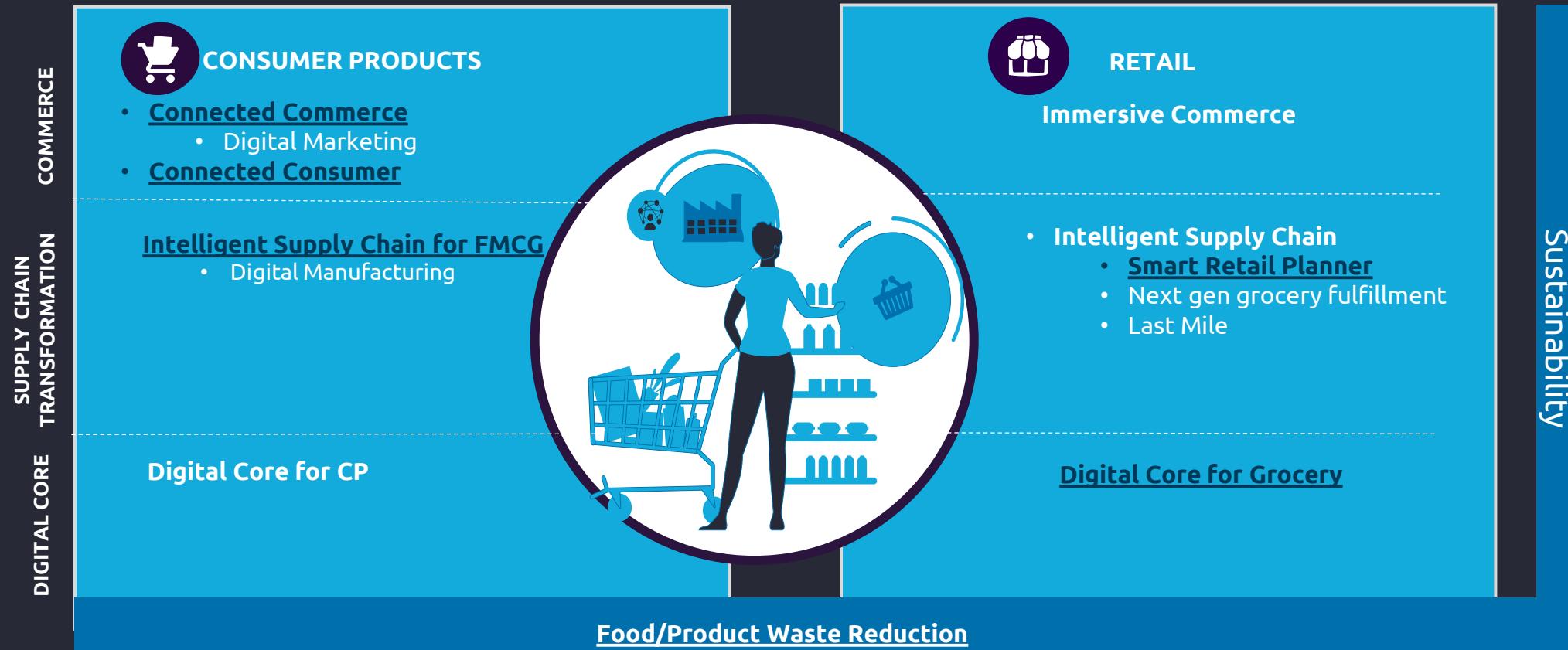


2

GLOBAL OFFERS/CAPABILITIES



OUR OFFERS RESPOND TO MARKET AND CONSUMER DISRUPTIONS AND ANSWER INDUSTRY NEEDS

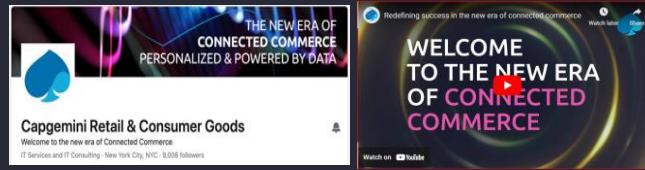


CP offers are well defined globally across digital commerce and supply chain transformation while Retail is strengthened by local offers



CAPABILITY/OFFERS SUCCESSES, 2023

We launched industry focussed offers supported by Thought leaderships & PoVs from our experts



Intelligent Supply
Chain For CP

Connected
Commerce

Intelligent Supply
Chain For Retail

Digital Core for
Grocery



Food/Product
Waste Reduction





ADDITIONAL CPR OFFERS

Include offers from PLAYING FIELD/ABLS/GBLS

Industry Offers	Playing Field/ABLs/GBLs
<u>ICO for Consumer Products & Retail</u>	Customer First BsV
<u>Intelligent Products & Solution Engineering (CPR)</u>	Intelligent Industry
<u>Intelligent Supply Chain for Consumer Products and Luxury</u>	Intelligent Industry
<u>Intelligent Supply Chain for Manufacturing & Retail</u>	Intelligent Industry
<u>Cloud for Consumer Products and Retail (CP&R)</u>	Cloud
<u>Digital Continuity for Food & Beverage</u>	Engineering, Research and Development (ER&D)
<u>Optimized Product Innovation & System Engineering</u>	Engineering, Research and Development (ER&D)
<u>Smart Factory & Assets (Advanced Manufacturing Services – OT Security)</u>	Engineering, Research and Development (ER&D)
<u>5G & private network for industries (Advanced Manufacturing Services – Edge Over Industrial Networks)</u>	Engineering, Research and Development (ER&D)
<u>AI for R&D, Engineering, Manufacturing and Operations (Advanced Manufacturing Services – Operations Insight as a Service)</u>	Engineering, Research and Development (ER&D)
<u>Intelligent Products & Solution Engineering</u>	Engineering, Research and Development (ER&D)
<u>Advanced Manufacturing Services - Sustainable Operations</u>	Engineering, Research and Development (ER&D)
<u>Advanced Manufacturing Services - Smart Factory</u>	Engineering, Research and Development (ER&D)
<u>Inventive Shopping</u>	Invent
<u>New ways to engage customers</u>	Invent
<u>New ways to build customer loyalty</u>	Invent
<u>New ways to shop</u>	Invent
<u>Business APIs for CPR</u>	Cloud & Custom Application (CCA)



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**Connected
Commerce**
Owen McCabe

**Intelligent Supply
Chain for CP**
Mayank Sharma

Food Waste Reduction
Kees Jacobs

**Digital Core for
Grocery**
John Waymire



CONNECTED COMMERCE

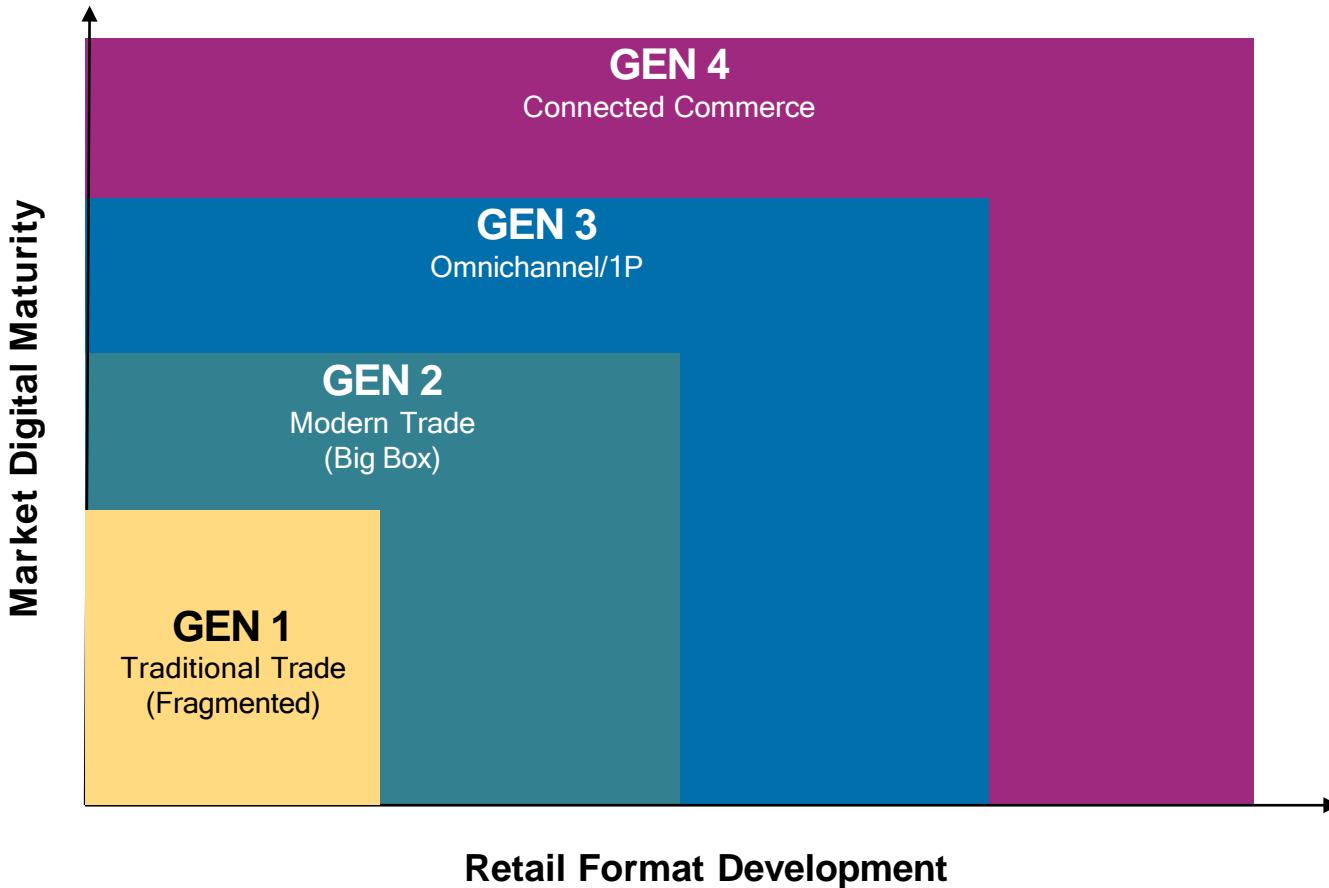


Owen McCabe

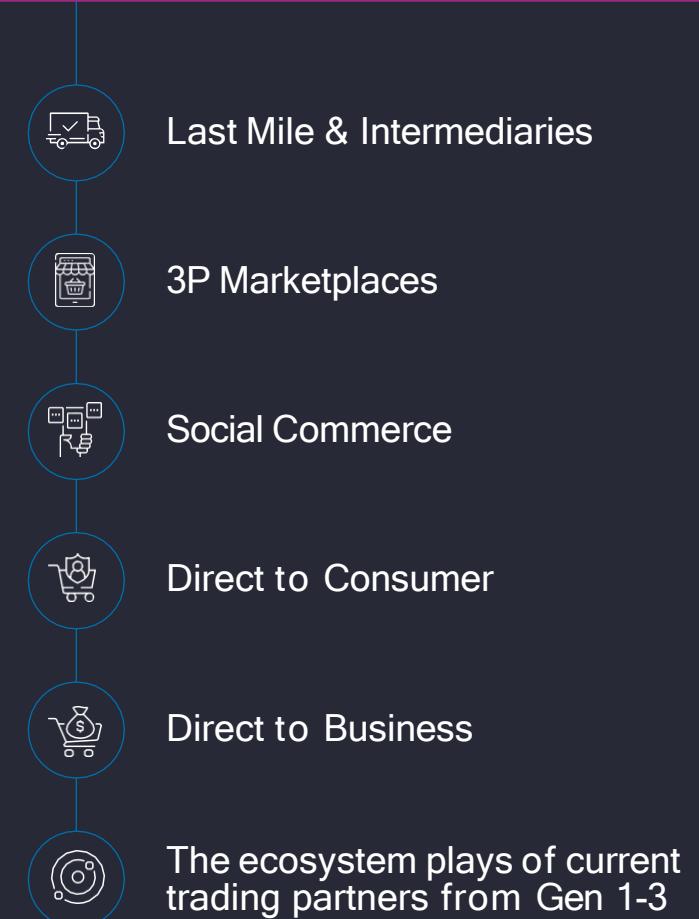


THE CPR LANDSCAPE IS BEING RESHAPED BY CONNECTED COMMERCE MODELS

Ecosystem-led sales platforms are blurring the line between sales channels and media channels



CONNECTED COMMERCE MODELS...



WINNING BRAND OWNERS AND RETAILERS ARE EVOLVING TO OFFER CONSUMERS THEIR OWN CONNECTED COMMERCE ECOSYSTEMS

Now every digital touchpoint is a potential point of sale and every physical one is a potential point of fulfillment

GEN 2 Chain Concentration



You go to the store/mall

- Focus = Manage from Shelf back

GEN 3 Omnichannel



The store offers you new ways to buy/fulfil

- Manage from Point of Fulfilment back

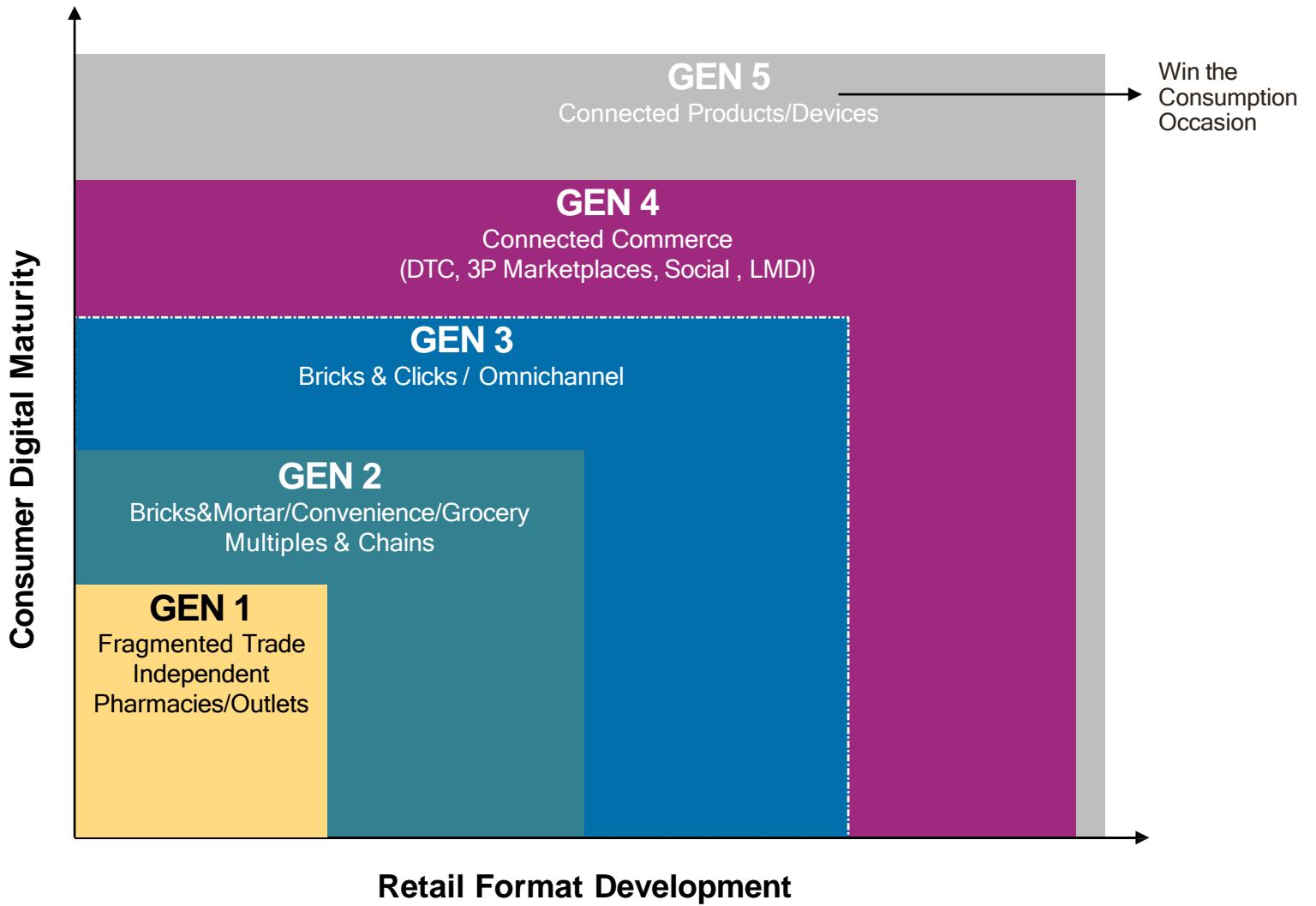
GEN 4 Connected Commerce Models



The store/mall comes to you

- Manage from Point of Engagement back

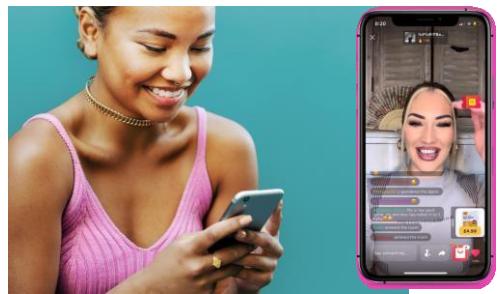
CONNECTED COMMERCE INCLUDES CONNECTED PRODUCTS & EXPERIENCES TOO



Future of Replenishment



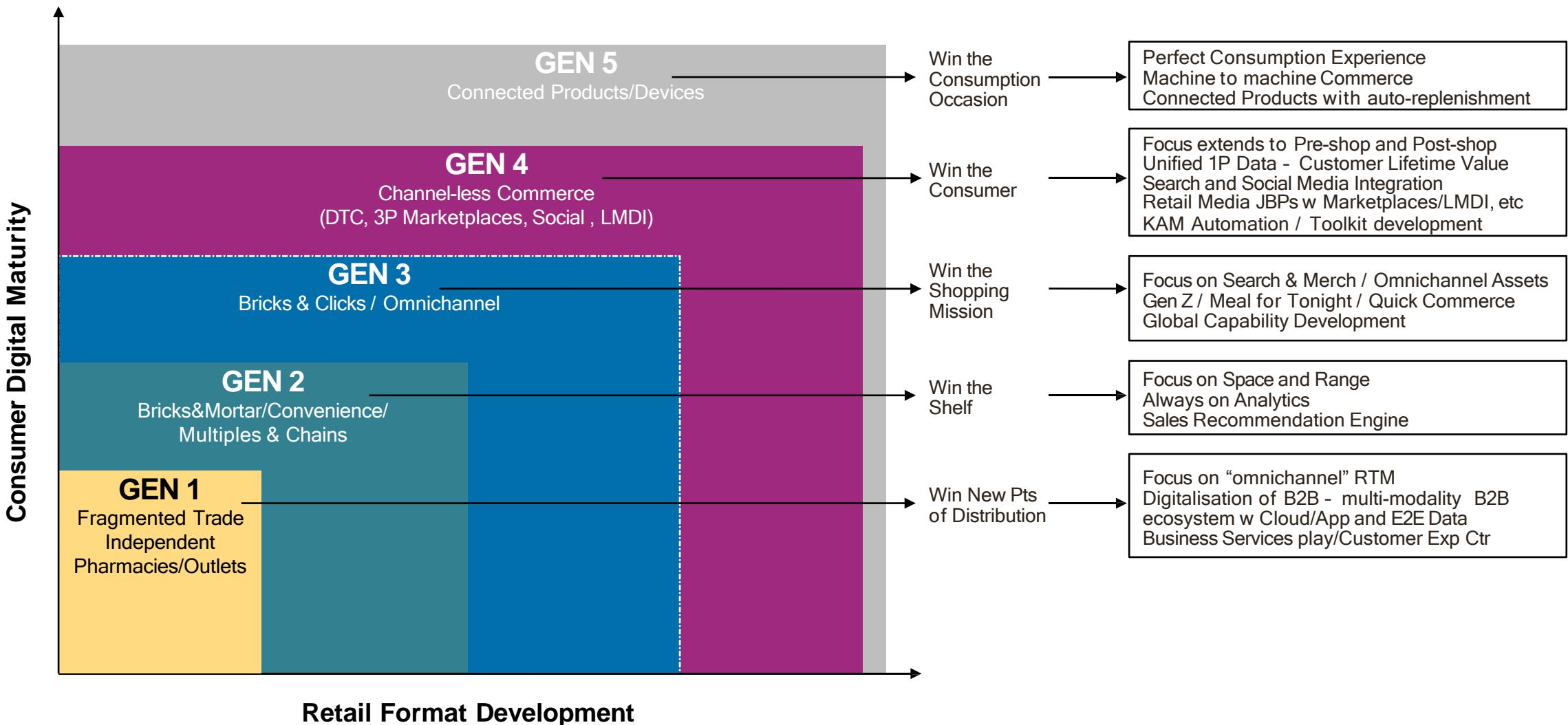
Conversational Commerce



Immersive Commerce



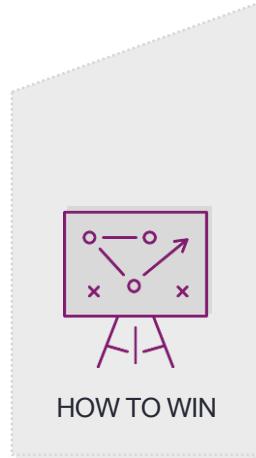
OUR CLIENTS NEED SERIOUS UPGRADES TO COMPETE AND WIN IN THIS NEW CONNECTED COMMERCE WORLD



OUR CONNECTED COMMERCE CAPABILITY PROVIDES A REFERENCE MODEL FOR WHERE TO PLAY, HOW TO WIN, & HOW TO SCALE IN THE NEW RETAIL LANDSCAPE



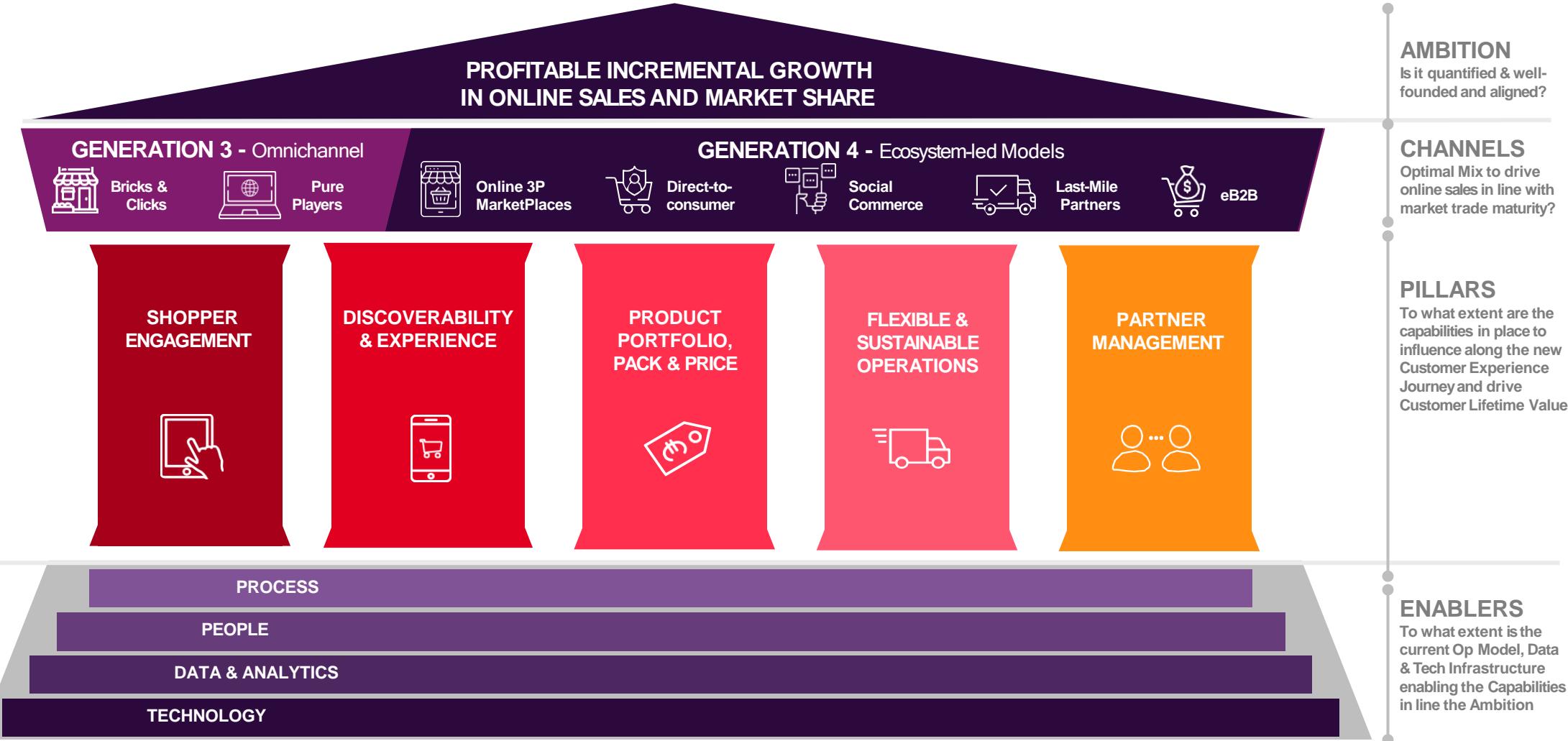
WHERE TO PLAY



HOW TO WIN



HOW TO SCALE



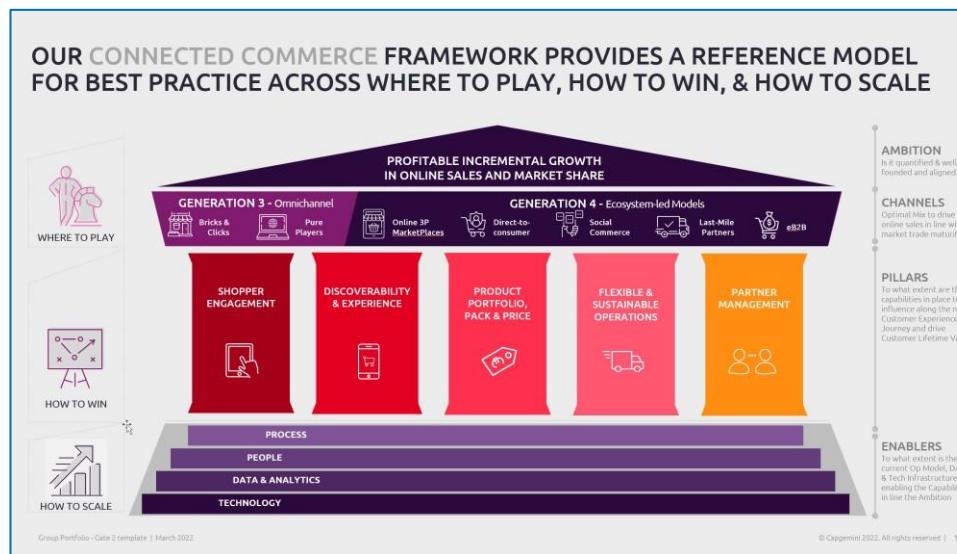
AMBITION
Is it quantified & well-founded and aligned?

CHANNELS
Optimal Mix to drive online sales in line with market trade maturity?

PILLARS
To what extent are the capabilities in place to influence along the new Customer Experience Journey and drive Customer Lifetime Value

ENABLERS
To what extent is the current Op Model, Data & Tech Infrastructure enabling the Capabilities in line the Ambition

NESTLE HAS BEEN OUR VANGUARD CLIENT FOR CONNECTED COMMERCE:



2022: WE DEVELOPED THEIR STRATEGY FOR WHERE TO PLAY AND HOW TO WIN IN CONNECTED COMMERCE



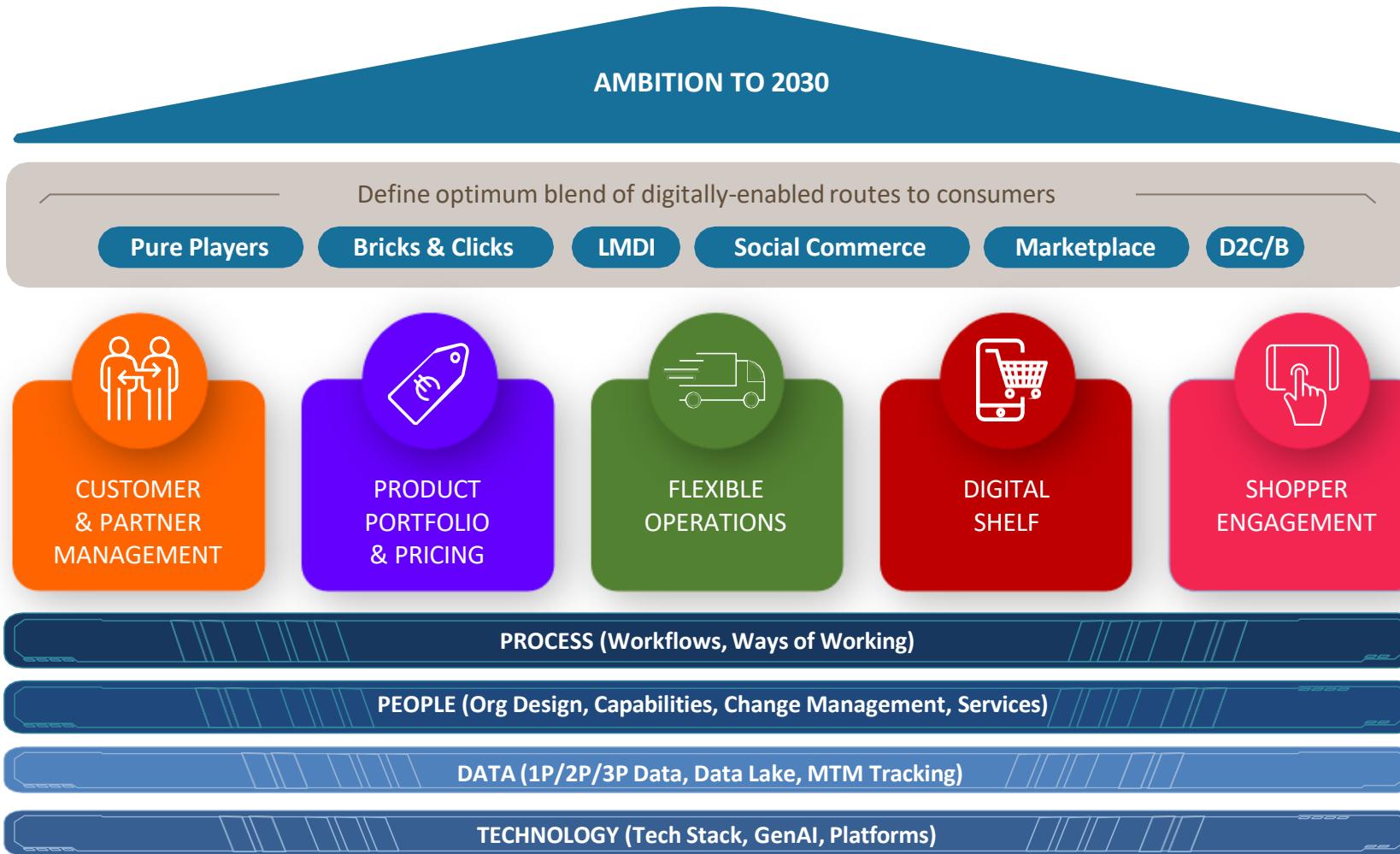
WHERE TO PLAY



HOW TO WIN



HOW TO SCALE

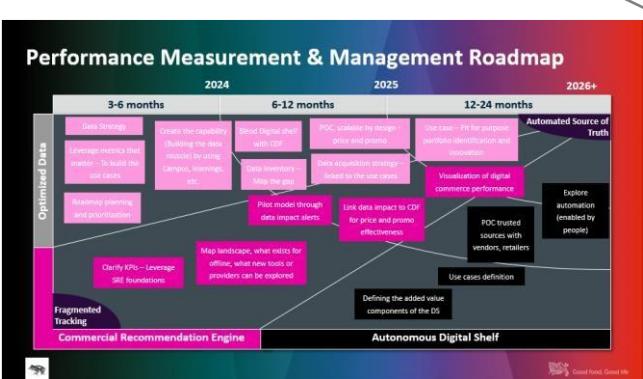


2023: WE DEVELOPED THEIR DATA & TECH STRATEGY FOR HOW TO SCALE IN CONNECTED COMMERCE



WORKSHOP OUTPUT: 4 ROADMAPS

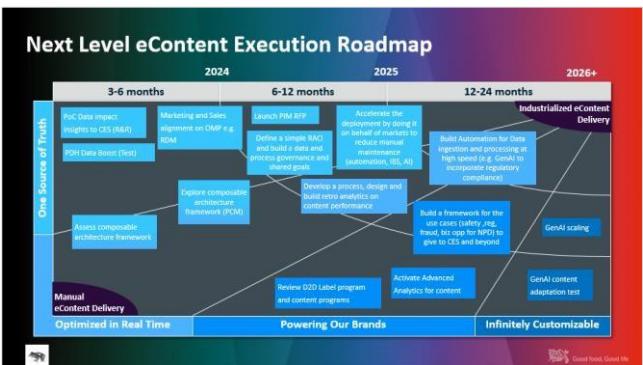
Optimization through analytics



Performance
Measurement and
Management

Full Funnel
Traffic
Generation

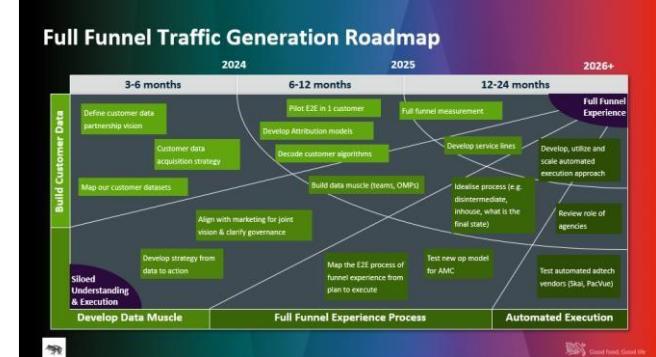
Tailor and Publish at Scale at Speed



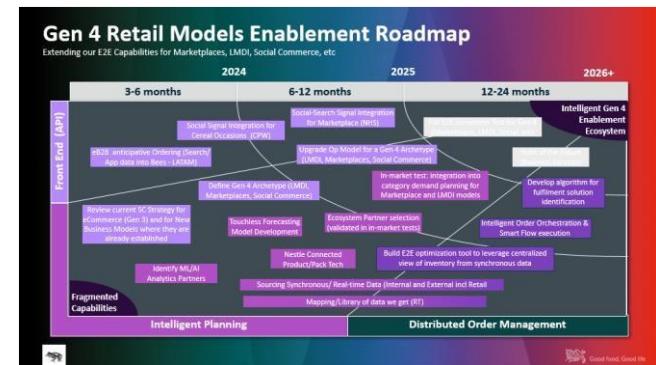
Next Level
eContent
Execution

Gen 4 Retail
Model
Enablement

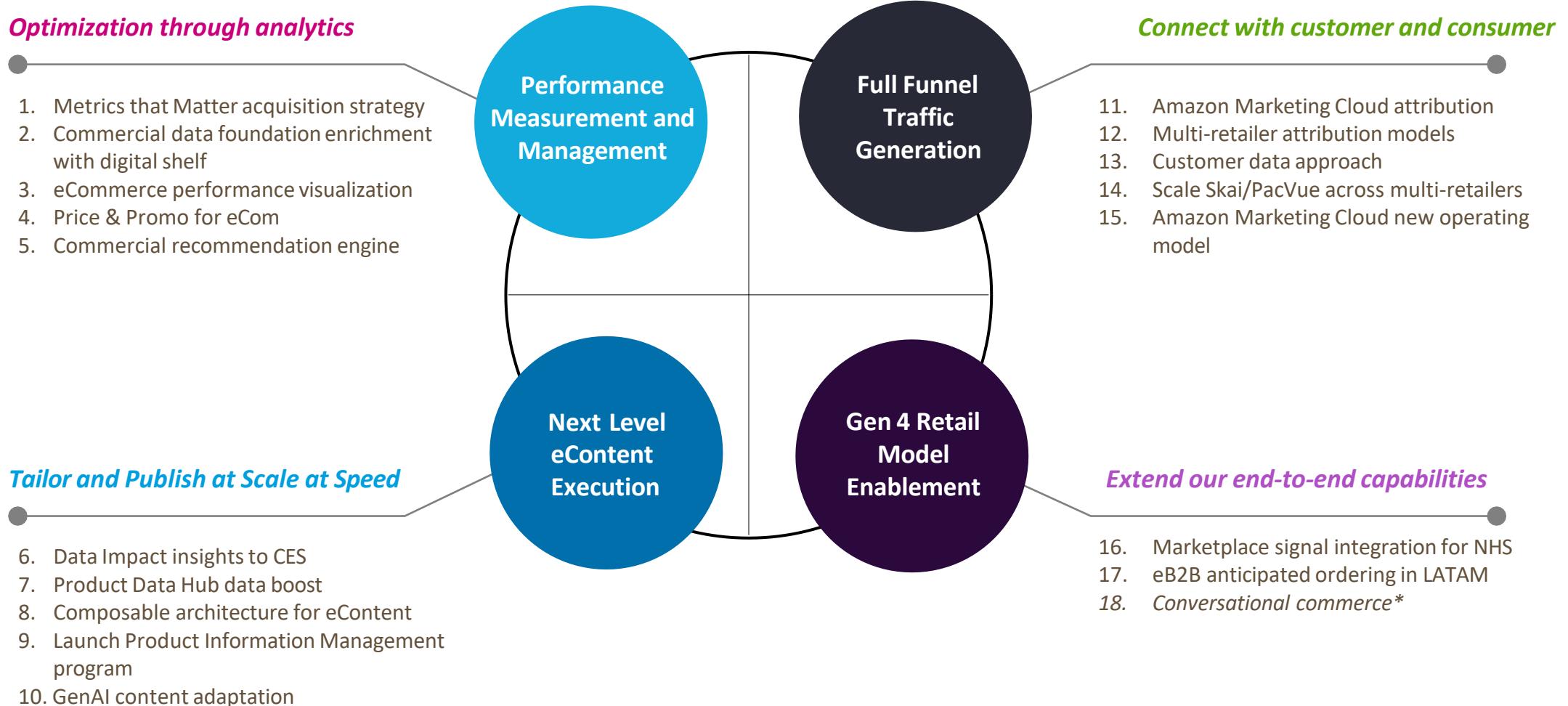
Connect with customer and consumer



Extend our end-to-end capabilities



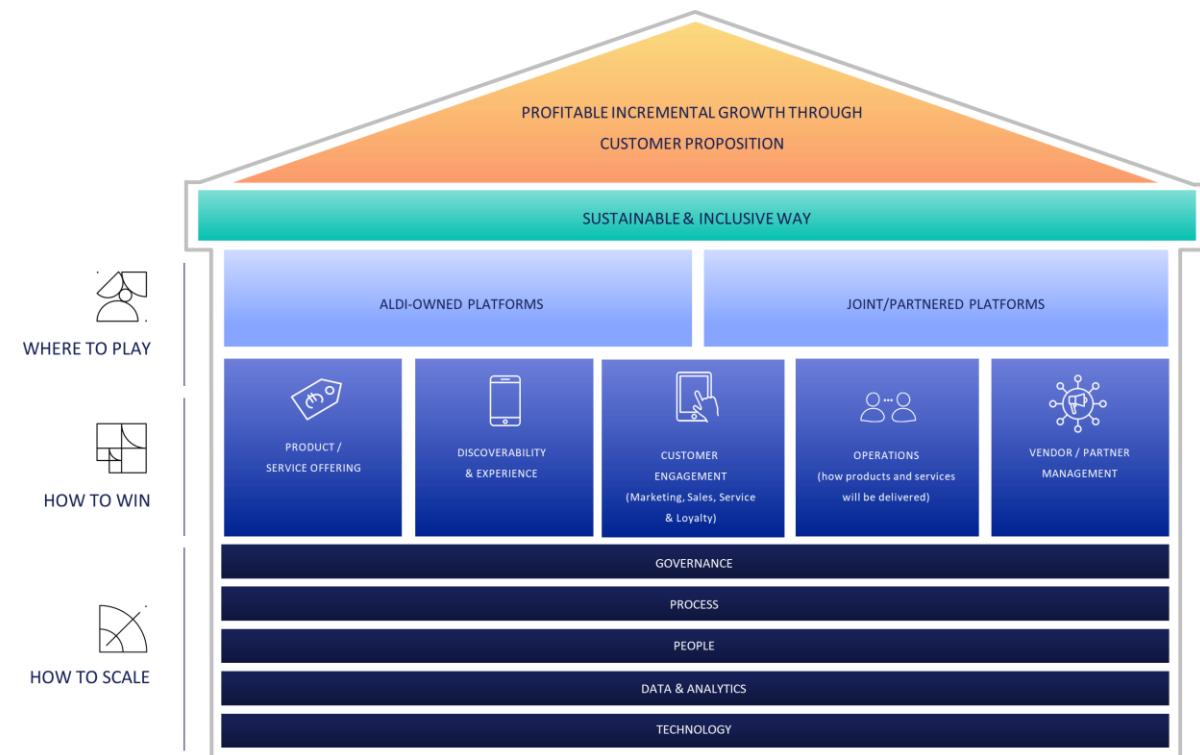
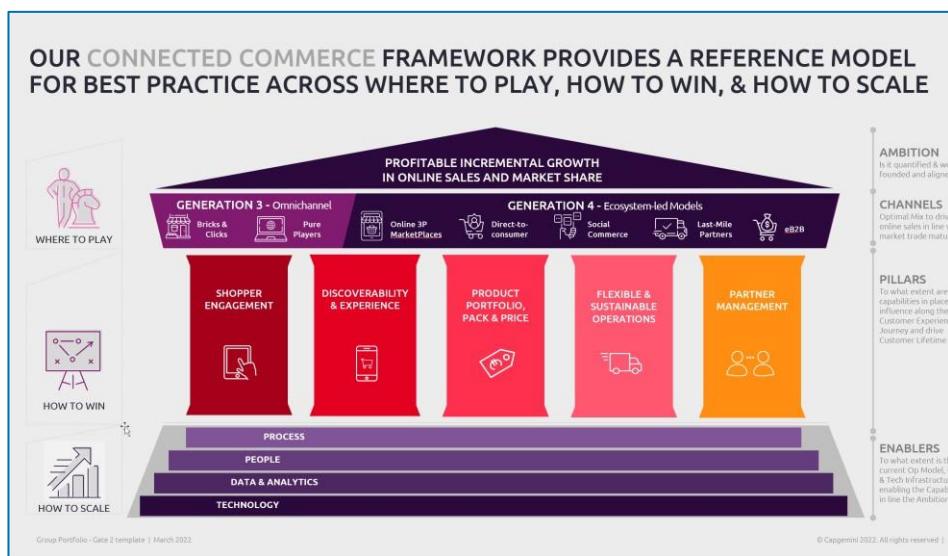
...AND 18 POCS FOR 2024



POP QUIZ: Which Retailer is this? (Hint; fastest growing US Grocer)



ADAPTING THE CONNECTED COMMERCE FRAMEWORK AS A REFERENCE MODEL FOR BENCHMARKING ALDI'S CUSTOMER INTERACTION STRATEGY



USING CONNECTED COMMERCE TO BOOST “OWNED” CUSTOMER INTERACTION AND DRIVE FOOTFALL TO ALDI’S US STORES



Winning the Pre-Shop



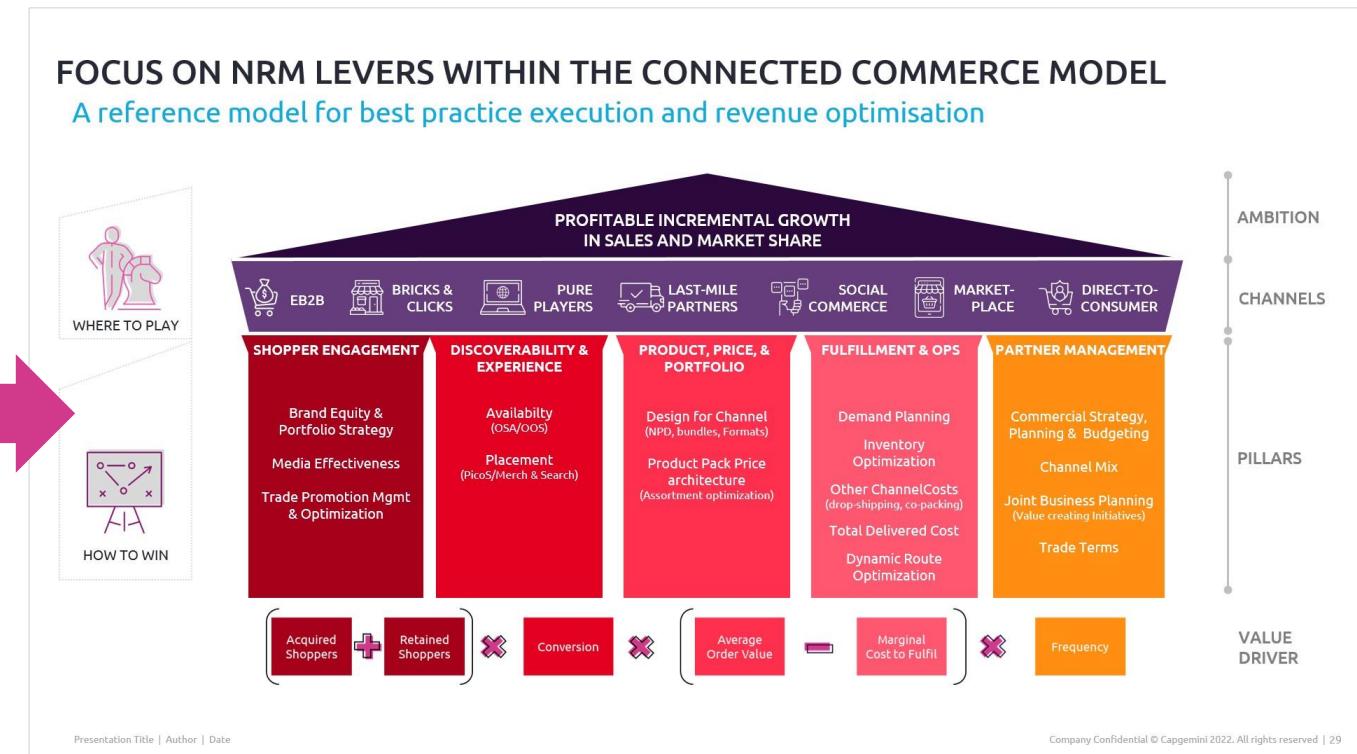
Converting the Pre-shop



NEXT: CONNECTED COMMERCE FOR NRM/RGM DISCUSSIONS: WHERE THE TOP-LINE MEETS THE BOTTOM LINE

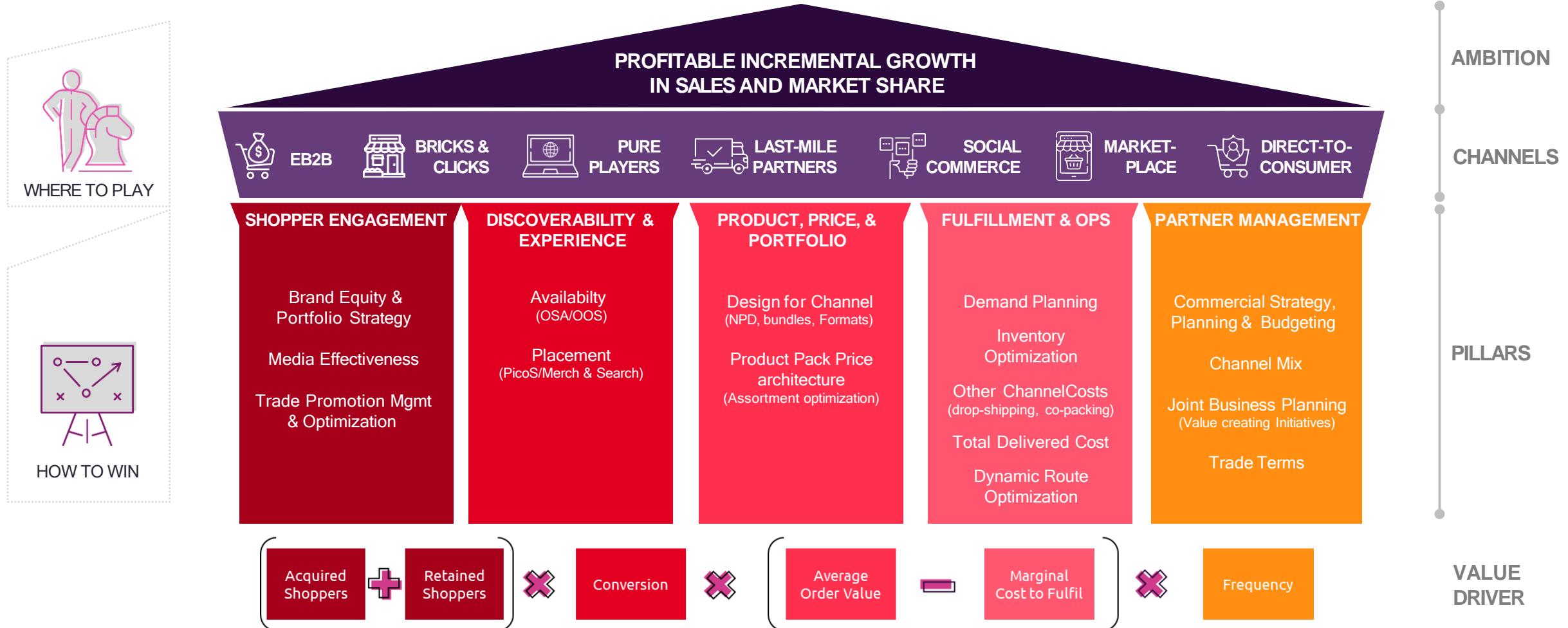


ADAPTING THE CONNECTED COMMERCE FRAMEWORK AS A REFERENCE MODEL FOR BENCHMARKING ALDI'S CUSTOMER INTERACTION STRATEGY



FOCUS ON NRM LEVERS WITHIN THE CONNECTED COMMERCE MODEL

A reference model for best practice execution and revenue optimisation



OUR AMBITION IS TO LEVERAGE CONNECTED COMMERCE TO BECOME A CREDIBLE COMMERCIAL STRATEGY PARTNER FOR CPR CLIENTS

3-Year Growth ambition



€250M total revenue

€50m Strategy leading to
€200m Solutions/Operations

What we have today

1. World-class Connected Commerce Enablement Credentials/Capability

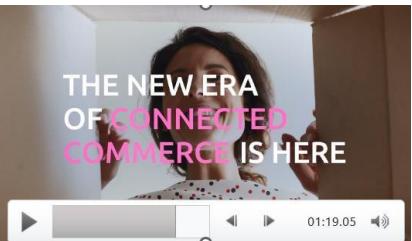
- A Flagship Endorsement/Case (Nestle) now in public domain
- Great credentials/case studies (UL, L'Oreal) that we need to shout about more

1. Strong Story that works with CxOs

- High convert-to-meet interest from Commercial CxOs on shift to Connected Commerce models

2. Marketing Collateral

- Videos, Podcasts, Thought leadership



What we are currently working on

1. Certification/Training

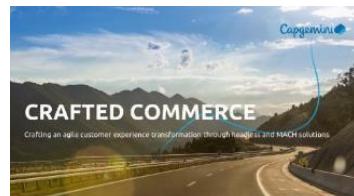
- Certification and training on platforms, pillars and enablers (Manish Agrawal)

2. RGM/NRM Connected Commerce

- Proposition with Databricks (Jason Fisher, Nishant Pandya)

3. Links to existing/emerging offers

- Dovetails with Frog and DCX top of funnel offers - Creative Commerce, Immersive Commerce, Data-driven CX
- Directly links to DCX platform offers - Crafted Commerce, Direct to Consumer, and eB2B marketplace and owned platforms



Key Enablers to Success

1. Augment our Commerce Talent

(Invent/frog, DCX, I&D)

- Upskill through Certification and training
- Seed through Tactical SME hires with commercial CPR sector experience

2. Build our Partnerships for Connected Commerce

- Good templates with SF and MS for eB2B, Databricks for NRM/RGM, and AWS for DTC and Martech, Google for Retail
- Other opportunities to explore/qualify in 2024

3. Track Connected Commerce Sales

- Show pull-through to Apps and Business Services (Sharmila Senthilraja)

4. Build our Internal/External Pride & Profile for Connected Commerce



Shaping
Industry Outcomes

INTELLIGENT SUPPLY CHAIN

Re-inventing supply chains to drive
profitable, sustainable growth

MAYANK SHARMA
Global Supply Chain Lead
mayank.q.sharma@capgemini.com





KEY GLOBAL TRENDS AND EVER-CHANGING CONSUMER TRENDS ARE DRIVING THE NEED FOR RE-INVENTION OF SUPPLY CHAINS TO DELIVER CHALLENGING OUTCOMES



GLOBAL TRENDS



CONSUMER TRENDS



GLOBAL CRISIS AND DISRUPTIONS

INFLATION AND MACRO-ECONOMIC FACTORS

PERSONALISATION

SEAMLESS CHANNEL SELECTION AND FULFILMENT

UNINTERRUPTED SERVICE DESPITE DISRUPTION

AFFORDABLE SUSTAINABILITY & WELL-BEING

HOWEVER, ONLY 1 IN 5 ARE PREPARED TO RESPOND TO AND ADDRESS THESE TRENDS



EVEN TODAY, MOST COMPANIES APPLY 'TRADITIONAL' FUNCTIONAL AND PROCESS THINKING TO ADDRESS THESE CHALLENGES, WHICH OFTEN LEADS TO SUB-OPTIMAL OUTCOMES

Develop

Source

Make

Plan

Store

Deliver

Returns and Recycle



STRATEGY AND OPERATING MODEL

- Fragmented strategy, misaligned metrics; lack of suitable mechanisms to deploy strategy and align with set of integrated metrics and outcomes



PROCUREMENT

- Manual processes, Low collaboration
- High turnaround time for innovation.



DEMAND AND SUPPLY PLANNING

- Vulnerable to Disruptions, Inaccurate Forecasts, Sub Optimal planning decisions



ORDER MANAGEMENT & WAREHOUSING

- Outdated Order management systems for todays customer.
- Inefficient warehousing operations



LOGISTICS & TRANSPORTATION

- Low focus on Emissions and transportation optimization and Sustainability



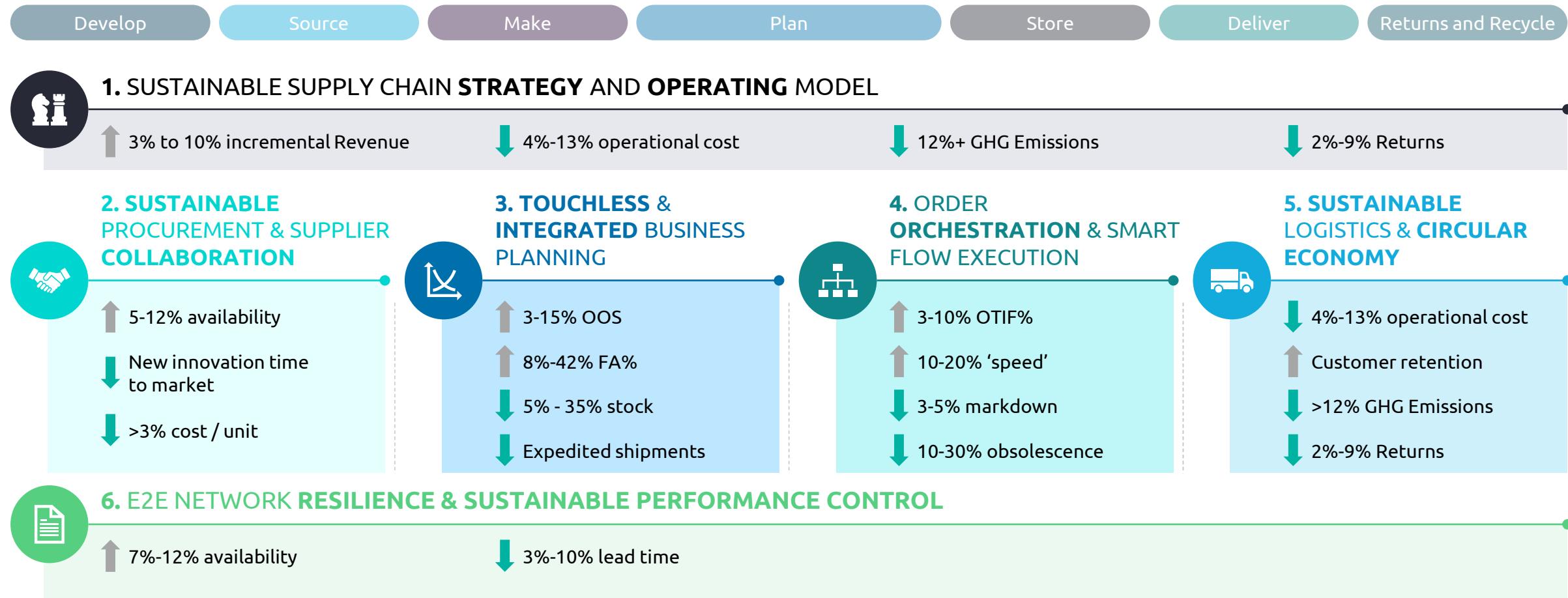
REPORTING AND PERFORMANCE MANAGEMENT

- Manual / Semi-Automated reporting, functional performance management instead of E2E network performance.
- Heterogenous systems, not enabled for automated reporting, data analytics and Insights for Optimization of business.



OUR RESPONSE FRAMEWORK: TO ADDRESS THE CHALLENGES, CPG & RETAIL COMPANIES NEED TO MOVE TOWARDS 'INTELLIGENT' SUPPLY CHAINS

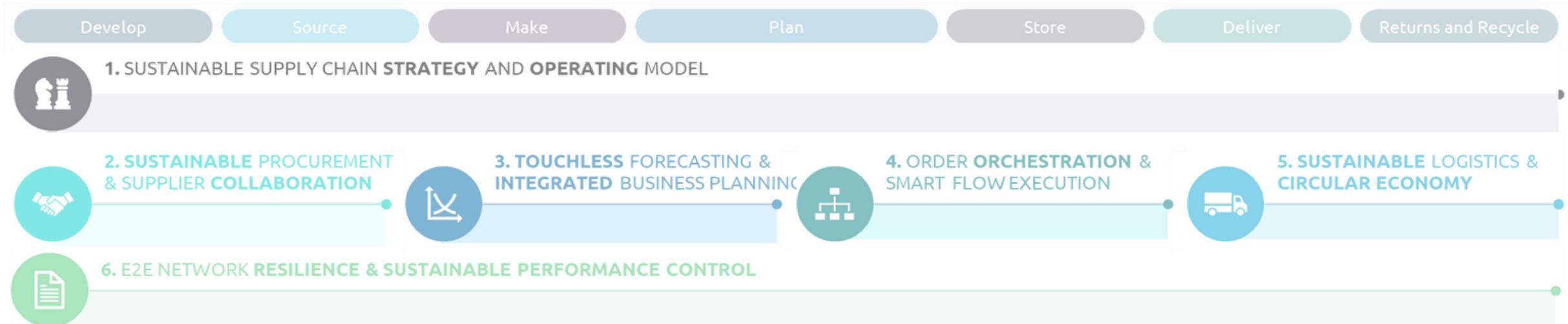
This proven Intelligent E2E supply chain framework drives successful outcomes, which can often be connected across capabilities



Deliver resilient, customer-centric and sustainable growth through better, autonomous decision-making



WE UNDERPIN DELIVERY OF OUTCOMES ACROSS THE E2E SUPPLY CHAIN FRAMEWORK WITH 3 STRENGTHS



Operational Expertise



CONNECTED BUSINESS OPERATIONS

Dedicated offer to operate your E2E Operations, integrating key processes to enable frictionless operations, ranging from order-to-cash to plan-to-fulfil to procure-to-pay



E2E PROCESS TRANSFORMATION

Significant expertise of redesigning process, decisions, metrics, technology, governance, organization structure through Operating Model Transformation

Tech Enablers



BIG TECH AND SMALL TECH

Leverage 'big tech' expertise to scale at pace, and utilise 'small tech' solutions to accelerate speed to value



HYPER-AUTOMATION

Use of advanced analytics, RPA, Decision-making tools, AI/ML, Gen AI, etc. to deliver productivity and quality of decision-making benefits

Data Foundations



COMPOSABLE ARCHITECTURE

From ERP + some siloed solutions ... to an end-to-end, integrated and agile customer centric architecture, supported by cloud-based platforms



DATA-DRIVEN INSIGHTS

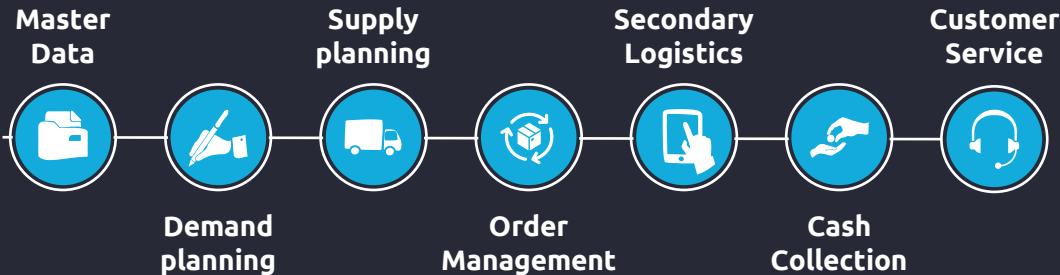
Exploiting data potential through an evolutionary journey from nascent to data-driven supply chain ecosystems at scale



SUCCESS STORY: TRANSFORM AND RUN SUPPLY SERVICES OPERATIONS

Our global network delivers value from supply chain services at scale

SCOPE



COVERAGE



VALUE

- \$100m+ Overheads saving
- \$250m+ Value unlocks (service, waste, speed)

SCALE OF SERVICES

- Managing 71k SKUs
- 53k Suppliers
- 250k+ Customers
- 30 Markets



8 countries

in RUN Mode + 2 in EXPANSION Mode

Demand, Supply, Material planning, Impo/Expo



115 Planning
experts
Mexico (90%) India
(10%)



20% workload
reduction because
of SAP ECC



24 active RPAs



80% touchless
plans: NTPO



7 months to adopt
SAP ECC/APO



~ 1,500 Monthly
Planned finished goods
for 3rd parties



+5,000 Monthly Import/export Sku's

LATAM HUB PLANNING AS A SERVICE



BUSINESS PAIN POINTS

FRAGMENTED PLANNING

- Inexistent process standardization across markets
- Fragmented process in DP, RCCP, SP & DRP
- Duplicated structures across markets



DISPERSED OPERATIONS

- Unoptimized or non-existing tech tools
- Mail based communication, with no central repository of information



MANUAL PROCESSES AND REPETITIVE SKS

- High demand and short time of resolution
- Orders with multiple touches
- Errors triggered by manual intervention
- Human dependency



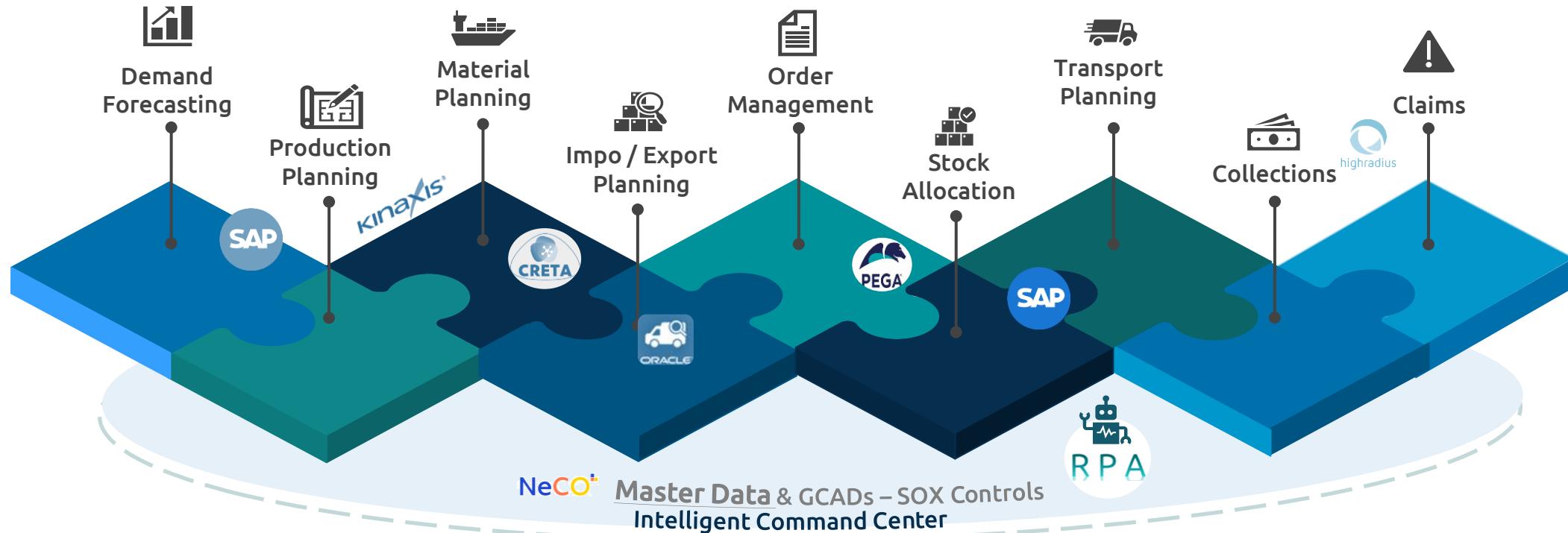
LACK OF RIGOR & DISCIPLINE

- Constant deviations of processes and business rules
- Very low adoption of systems (APO < 40%)
- Lack of policies and decision authority thresholds.

PEOPLE- SKILLS CONSISTENCY GAP

- Planning efficiency = Individual skills
- Every planner has own approach
- >30% planning team change every year

WHERE WE ARE NOW – TOP TIER E2E SUPPLY CHAIN SERVICE



DEMAND FORECASTING	PRODUCTION PLANNING	MATERIAL PLANNING	IMPO/EXPORT PLANNING	FREQUENT ORDER GENERATION PROCESS	OPTIMIZED STOCK ALLOCATION TO SHIPMENT	TRANSPORT PLANNING	TOUCHLESS CASH APPLICATION	AUTOMATED CUSTOMER COLLECTIONS
Machine learning forecasting Monthly forecast accuracy and forecast bias root cost analysis	20% workload reduction because of SAP ECC	80% touchless plans: NTPO 7,184 Monthly planned materials	3,130 Monthly Import Finished Goods 1,564 Monthly Export Finished Goods	Elimination of rework by 15% by increasing the non touch orders. Reducing operation waste	(Automated Customer Deliver Interactions, Track and Trace Real Time Order Visibility) Improved truck profile : 11%	Logistics truck utilization improvement in 15%	Gross overdue reduction in PPU decreased from 35.92% to 7.06%	41% Improved speed of open claims resolution



LEADING WITH TRANSFORMATION PATHS: HOW TO POSITION THE OFFER TO YOUR CUSTOMERS AND ACCELERATE VALUE UNLOCK

These POVs will be updated regularly and be used as conversation starters with operational leaders to earn the right to be strategic advisors, elevating our role beyond technology and system integrators

Develop

Source

Make

Plan

Store

Deliver

Returns and Recycle



1. SUSTAINABLE SUPPLY CHAIN STRATEGY AND OPERATING MODEL

HUBS OF THE FUTURE



2. SUSTAINABLE PROCUREMENT & SUPPLIER COLLABORATION

COGNITIVE PROCUREMENT



3. TOUCHLESS FORECASTING & INTEGRATED BUSINESS PLANNING

INTELLIGENT PLANNING



4. ORDER ORCHESTRATION & SMART FLOW EXECUTION

DISTRIBUTED ORDER MANAGEMENT



5. SUSTAINABLE LOGISTICS & CIRCULAR ECONOMY

REVERSE LOGISTICS



6. E2E NETWORK RESILIENCE & SUSTAINABLE PERFORMANCE CONTROL

BUSINESS RISK AND RESILIENT SUPPLY CHAIN DATA FOR NET ZERO

CAPGEMINI IS UNIQUELY PLACED TO DRIVE YOUR JOURNEY TOWARDS INTELLIGENT SUPPLY CHAIN

We have **strong foundations** to deliver Transformations ...



END-TO-END SUPPLY CHAIN EXPERTISE

A global supply chain practice, with 12,000+ Supply Chain SMEs, including ex-Practitioners, with 500+ consultants focusing on Strategy to Execution



SYSTEM INTEGRATION TRACK-RECORD

+500 end-to-end supply chain ERP and integration projects done



CLOUD & AI

Strategic partnerships with cloud hyperscalers –with **+5,000 certifications** Azure, AWS, GCP – and in-depth knowledge of supply chain platforms; partnerships with Microsoft and Google on Generative AI and AI/ML use cases in operations

... and **differentiate** ourselves through our ability to Innovate and Operate



SCALE AND OPERATE

Supply chain-as-a-service for 20+ Global organisations with practitioners owning key operational outcomes and decisions for leading Global companies, including Gartner Supply Chain Masters; ability to scale deployment and operate



OPERATIONS INNOVATION

Engineers and scientists to drive innovation across E2E operations from facility flow automation to bio-chemical analyses for products; and development of prototypes for personalization of FMCG products



DATA

Global leader across industries and processes in data, Advanced Analytics and AI.



SUCCESS STORIES: LEADING WITH STRATEGIC THINKING AND DELIVERING OUTCOMES

Hub of the Future



Delivering **autonomous processes and decision-making** to drive productivity and value unlock

1. Trade Claims: Gen AI to improve claims validation (by 80%) and release €100m+ in cash

2. Intelligent Document Processing: Use hyper-automation tools to improve productivity by 60%-80%

Intelligent Planning



Delivering **improved outcomes and strong capabilities in E2E planning** across LATAM, Middle East and South Africa

1. Planning: ML-forecasting, with 80%+ No-touch material planning with 3-5% service improvement

2. Truckload Optimisation: Segmentation and optimization to deliver €1.4m savings

Distributed Order Management



Delivering **flexible, optimized and intelligent** order orchestration

1. Optimised labour planning: €5m+ targeted through automated fulfilment planning

2. Revenue and service: 7% improvement through optimized order fulfilment

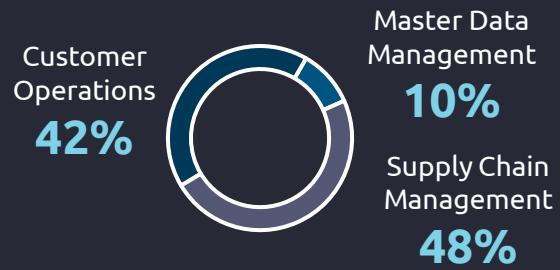
3. Shipping Costs: 6-8% through rule-based optimization



TRANSFORMED AND RUN SUPPLY SERVICES OPERATIONS

Our global network delivers value from supply chain services at scale

SCOPE



COVERAGE



VALUE

- \$100m+ Overheads saving
- \$250m+ Value unlocks (service, waste, speed)

SCALE OF SERVICES

- Managing 71k SKUs
- 53k Suppliers
- 250k+ Customers
- 30 Markets



8 countries

in RUN Mode + 2 in EXPANSION Mode

Demand, Supply, Material planning, Impo/Expo



115 Planning
experts
Mexico (90%) India
(10%)



20% workload
reduction because
of SAP ECC



24 active RPAs



80% touchless
plans: NTPO



7 months to adopt
SAP ECC/APO



~ 1,500 Monthly
Planned finished goods
for 3rd parties



+5,000 Monthly Import/export Sku's

LATAM HUB PLANNING AS A SERVICE



BUSINESS PAIN POINTS

FRAGMENTED PLANNING

- Inexistent process standardization across markets
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- Duplicated structures across markets



SUB OPTIMAL DEMAND FORECASTING

- Ineffective management of short, mid and long-term planning horizons
- Rework across supply chain operations



DISPERSED OPERATIONS

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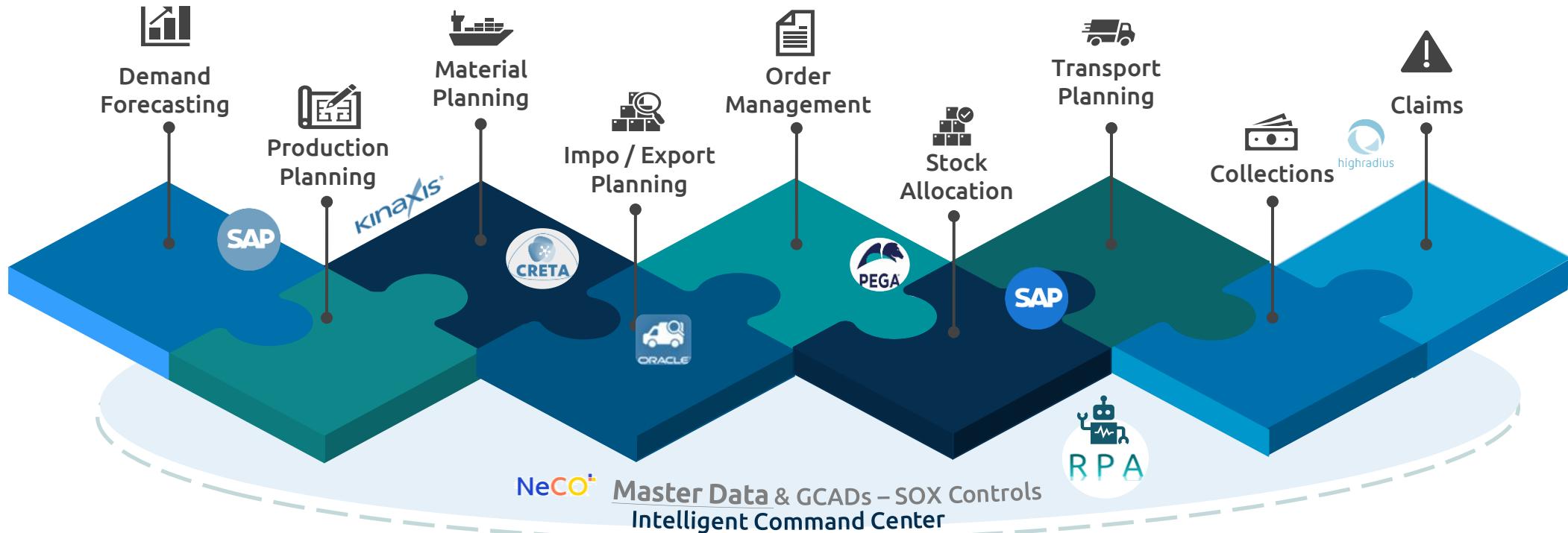
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Food Waste Reduction Solutions for Retail

Less Waste, More Value

CPRD Sector & Group Portfolio Offer
January 2024





1/3 of all food gets wasted: this is everybody's problem!

Retailers face a once-in-a-generation opportunity to transform their food value chains, reduce food waste and unlock business potential.

Here's how you can:

- improve business performance
- meet your customers' changing needs
- contribute to a better world





This waste brings substantial seen and unseen consequences



Economic impact

\$ 1 trillion is lost due to food waste

Environmental impact

8-10% of global GHG emissions

Biodiversity is threatened

Resources are depleted

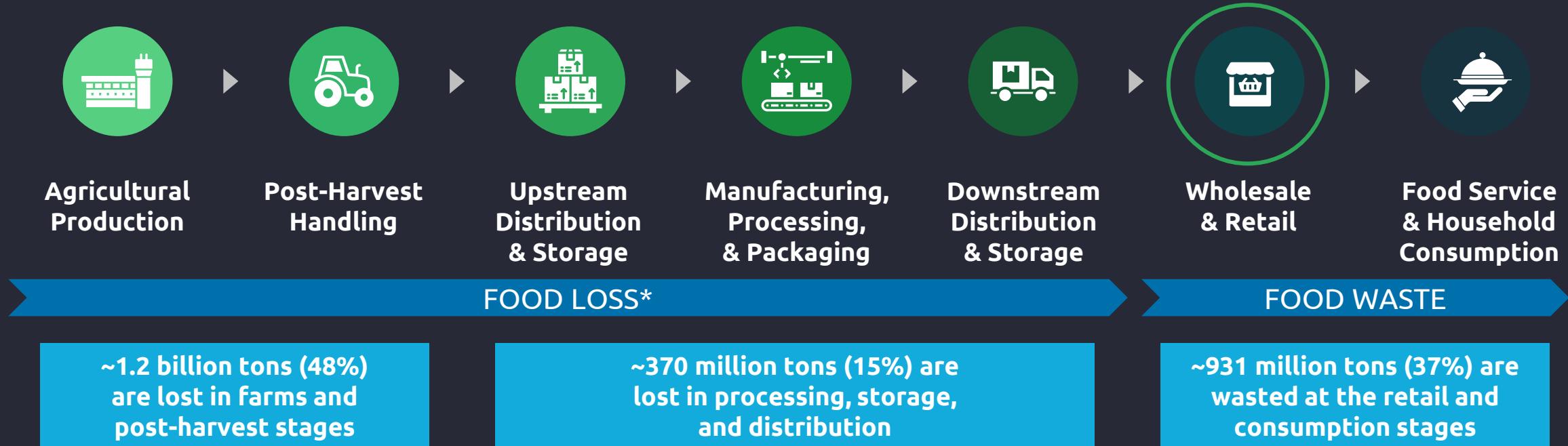
- Up to 21% of freshwater, 19% of fertilisers, 18% cropland, and 21% of landfill volume is devoted to food that no one will ever eat.

Social impact

Saving 50% of the food currently lost or wasted could end world hunger



Food is wasted throughout the value chain



**We've been using the term "waste" to include waste and loss. Technically, food is lost during the production supply chain, and wasted after it has become a consumer product.*



Now is the time for retailers to lead, across the value chain.

Governments and retail companies Have committed to SDG target



Consumers want change

61%

feel “upset at the brand”
when food is wasted

Retailers unlock business potential

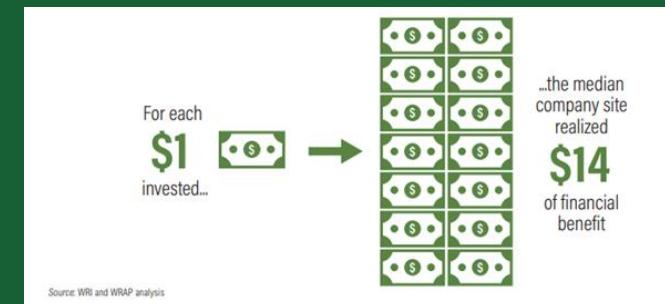
Lowering:

- Cost of goods sold
- Operational costs
- Scope 1 and scope 3 emissions

Raising:

- customer loyalty.

And achieve significant ROI





Retailers play a pivotal role in addressing the root causes...

Sub-optimal production, products and packaging

Retailers enforcing food specs that lead to upstream waste

Packaging sizes are often not in line with consumer needs

Too much packaging is wasted (plastics especially)

Disconnected supply chains

Inaccurate forecasting and ordering due to lack of transparency

Inefficient logistics that increase spoilage

Lack of (real-time) data collaboration between value chain partners

Insufficient rescue and re-use of food waste

No re-purposing of unsold food

Little upfront anticipation to rescue waste

Lack of customer cooperation

Food-wasting buying and consumption patterns

Consumers **not effectively stimulated** to buy food before it gets wasted

Retailers stimulating excessive purchasing **through non-sustainable promotions**

Consumers **not rewarded** for their food-waste reduction behaviours



Agricultural Production



Post-Harvest Handling



Upstream Distribution & Storage



Manufacturing, Processing, & Packaging



Downstream Distribution & Storage



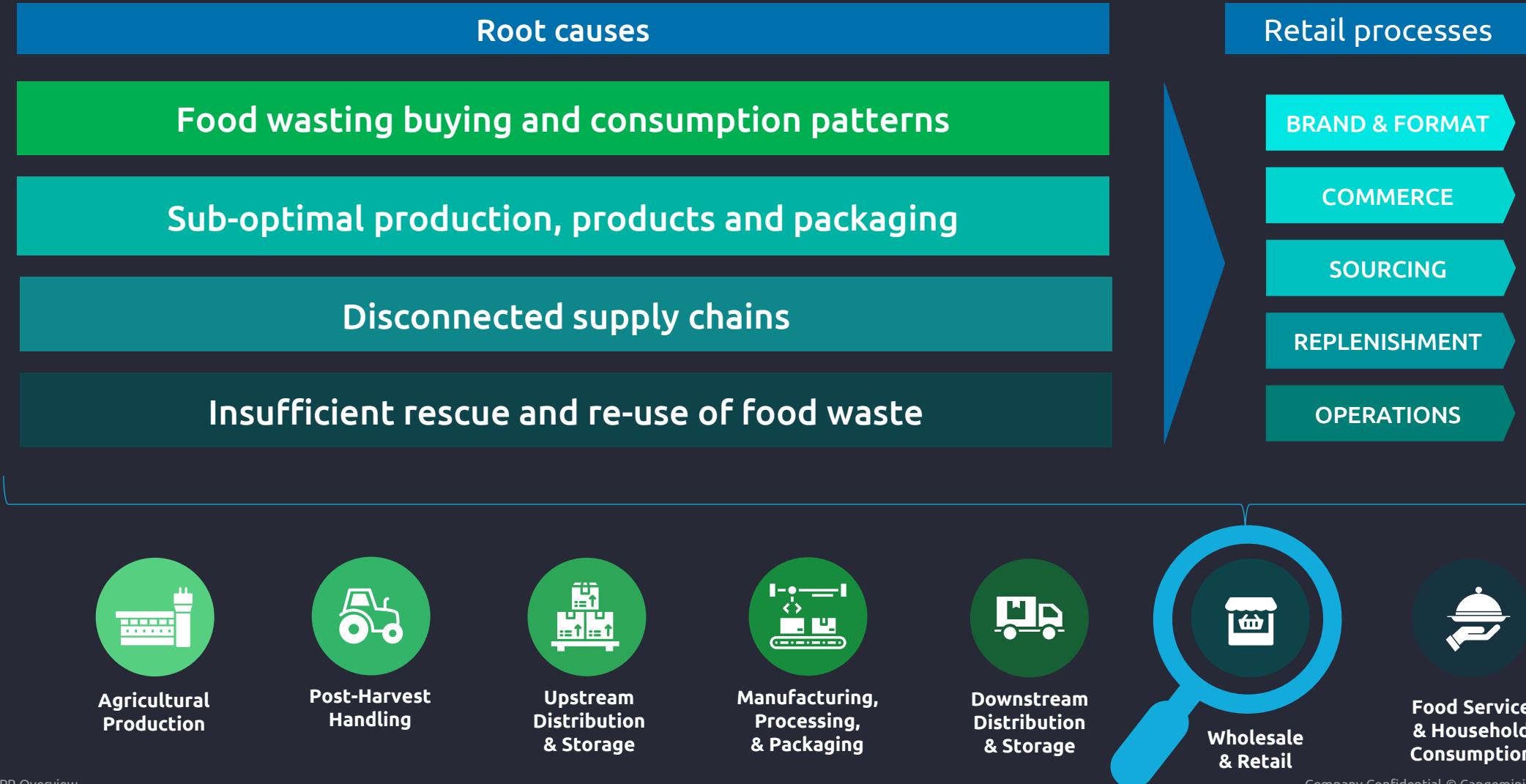
Wholesale & Retail



Food Service & Household Consumption



...which are currently embedded in the *core retail processes*





From vision to reality: key changes with massive leverage

1

Optimize products and packaging

Realign food specs to reflect the natural, normal variation in fruits and vegetables

Resize packaging in line with consumer needs

Design circular product packaging



2

Connect supply chains

Improve traceability and transparency of food products

Streamline logistics to decrease the chances of spoilage

Enable real-time communication and data sharing between stakeholders



3

Rescue and reuse waste

Rescue food throughout the supply chain

Re-purpose unsold food

Educating consumers on why and how to avoid food waste



4

Reshape consumer behavior

Use dynamic pricing to sell food before it gets wasted

Plan promotions to reduce food waste

Encourage sustainable purchasing with loyalty programs





1. Optimize products and packaging

Solutions

1. Realign food specs

Today, “natural,” “unique” and “diverse” are strong selling points. Work with stakeholders to redefine food specs.

2. Resize packaging

Use data science to learn consumers’ actual consumption patterns, and design packaging that meets their needs.

3. Circular packaging

Switch to circular packaging using LCA, sustainable packaging design criteria and data analytics

Processes impacted:

SOURCING

COMMERCE

Example: client success story

REWE



Thought leadership

Sustainable product design



Offerings & Partners

- Sustainable product design
- Life cycle assessment methodology
- Design to value



ER&D,
Invent

1. Client success story: sustainable packaging strategy **REWE**



Client problem statement

REWE, a German supermarket chain, wanted to redesign their packaging to reducing waste.

Their objectives were to:

- Minimize plastic and maximize recyclability
- Focus on private label products, as these are directly tied to the corporate brand
- Restructure their earlier pilot projects launched in 2018
- Increase their sustainable packaging toolset



Approach

- Together we defined a clear ambition and roadmap
- We analyzed their complete private label assortment
- We helped prioritize sustainable suppliers
- We supported the development of prerequisites for strategy implementation, including definition of KPIs, concept monitoring & reporting, systemic integration, empowerment of employees
- We implemented necessary tools, templates and guidelines



Results

- Definition of a clear strategic ambition:
 1. 100% recyclable plastic private label packaging by the end of 2025
 2. -20% plastic by 2025 for private label packaging
 3. 100% certified paper private label packaging by 2025
- Potential plastic savings of 240 tons per year
- New tools, processes and ideas for further IT developments



2. Connect supply chains

Solutions

1. Traceable and transparent supply chains:

Increase transparency, enabling quick waste identification

2. Efficient Logistics

Optimize logistics to minimize transit times and storage, reducing waste and increasing freshness.

3. Foster real-time data sharing

Establish real-time communication channels among stakeholders to facilitate swift responses to changes, preventing delays and minimizing waste.

Processes impacted:

SOURCING

REPLENISHMENT

OPERATIONS

Client success story



Albert Heijn

Thought leadership

Intelligent supply chains

Illuminating
the path
BUILDING RESILIENT AND EFFICIENT
SUPPLY CHAINS IN THE CONSUMER
PRODUCTS AND RETAIL INDUSTRY

Offerings & Partners

- Intelligent Supply Chain (incl partner eco-system)
- Data for Net Zero / Sustainability Data Hub
- 'New ways of Data Sharing' with Google and CGF

Google



Invent,
I&D

2. Client success story: next-gen replenishment



Client problem statement

In 2005, a leading Dutch supermarket implemented a state-of-the-art central replenishment system.

By 2017 the market had changed, and our client came to us with a set of new goals:

1. Grow online revenue.
2. Increase online assortment.
3. More focus on quality and freshness of assortment.
4. Customer promise of 100% availability.



Approach

We set up and ran a strategic program to upgrade their replenishment solution.

The approach included:

- Analyses of existing replenishment algorithms
- Developing and testing new algorithms by combining data analytics, AI and deep retail sector knowledge for smart ordering, forecasting.
- Improving data sharing with company and with partners
- Scaling and learning
- Capgemini delivered an improved self-learning forecast model for 'number of customer per store per day'.



Results

Supply chain efficiency:

- Higher-density truck loads
- Lower transportation costs
- More responsive supply chain
- Self-learning forecast model realizing increased accuracy
- Increased freshness of products instore

Sustainability:

- Lower food waste and increasingly fresh assortment
- Reduced fossil fuel consumption
- Contributed to reaching the client's food waste reduction target
- Projected carbon saving of 6,600 tCO2e pa



3. Rescue and re-use

Solutions

1. Re-purpose unsold food

- Analyze food waste data from waste collectors to upcycle the waste streams. Use data-driven solutions to connect with downstream (local) parties to re-purpose the food.

2. Rescue to avoid waste

- Collaborate with suppliers to identify potential sources of waste in the supply chain

3. Educate and support consumers

- Develop eco-consciousness of consumers with too-good-to-waste and repackaging initiatives

Processes impacted:

COMMERCE

SOURCING

OPERATIONS

Client success story

Global CP company

We built a data-driven solution that identified where and how to intervene to prevent waste. This resulted in automated visibility of waste risks, 50% reductions of food waste (40% of actions were taken early enough to avoid third party selling) and plastic savings of 240 tons per year.

Thought leadership



The rise of circularity

Offerings & Partners

- 'Food Waste Intelligence' solution with Microsoft
- Design to value
- Circularity in Food retail
- Food Waste repurposing



Invent,
I&D



3. Client success story: reducing food waste

Global CP company



Client problem statement

- Millions of Euros of expired food disposed of each year
- No effective risk visibility of when products would go to waste until it was too late.
- the client's main means of recovering COGS was heavy discounting to specialist partners
- No visibility of historical waste or waste mitigation actions



Waste Reduction Process



Approach

- Understanding the current process for waste management and data and identifying where value was destroyed
- Designing and building a custom web application to identify where to intervene to reduce or avoid waste, and prescribing the best actions to take for each waste risk
- Tracking waste interventions over time to break the waste cycle
- Live testing the solution to prove value and blueprint for scaling to different regions and product categories.

Technology Stack: Python Web Application, Microsoft Azure Cloud



Results

- Automated visibility of waste risks and data-driven interventions
- Up to 50% reduction of waste (excl. quality issues and raw materials)
- Up to 40% of actions were taken early enough to avoid selling to specialist discount partners
- Potential to unlock €37M over 3 years for European region, saving 5,900T of finished goods food waste (equivalent to 14,750T CO₂)
- Project fees ~ 500K EUR on fixed price

4. Re-shape consumer behavior



Solutions

- **Dynamic Pricing**
 - *Data-driven and machine learning-based approach to continuously improve fresh food sales – reducing food waste with optimal mark downs*
- **Sustainable promotions**
 - *Optimized promotion approach that stimulates and enables shoppers to responsibly buy and consume foods that meet their needs and leave no waste*
- **Loyalty-rewards**
 - *Reward consumers for their waste-reduction behaviors via data-driven, personalized loyalty-programs*

Processes impacted:

BRAND & FORMAT

COMMERCE

Client success story

Carrefour The Carrefour logo, featuring the brand name in blue lowercase letters next to a red and blue double arrow symbol.

Thought leadership

Consumer insights 2023



Offerings & Partners

- Partner-collaboration with Wasteless for dynamic pricing
- Data-driven CX (incl loyalty)
- Digital Core for Retail (incl. Promotion mgt)



Frog,
DCX,
I&D

4. Client success story: Dynamic Pricing



Client problem statement

For every €10B of fresh food revenues* the client was losing:

- €250-€400M in food waste
- €150-€250M in markdowns

Carrefour wanted to cut that in half

Markdowns for fresh food needed to be optimized to achieve their full revenue potential

* Based on European Average



Approach

A data-driven and machine-learning based solution that optimizes markdowns and reduces food waste to continuously improve fresh food sales

Stage 1

- Business Case, solution and data-preparation

Stage 2: Pilots (H2 2023)

- 4 pilot stores and 3 control stores
- Covering the meat category (high waste & value, 600 SKU's)
- 2 weeks to launch first store
- 4 month pilots with measured results

Stage 3: Full-scale deployment (Jan 2024 onwards)

- Starting first with 200 stores
- Expanding to more SKU's and categories
- End-to-end automations (towards automated shelf management, including 2D barcodes, full POS integration and electronic shelf labeling)



Results

- Pilot store insights show strong performance of the pricing engine, increasing margins by +68% and reducing markdown costs by 40%, while reducing waste
- Full deployment is focused on achieving:
 - More profit
 - Less waste
 - Less store operation
 - More Customer Value



You gain a full portfolio of solutions...

1 Optimize products and packaging



2 Connect supply chains



3 Rescue and re-use waste



4 Reshape consumer behavior



... tailored to each food category...

...for lasting results.

Bread and baked goods

Fresh meat and fish

Fruit and vegetables

Dairy

Ready meals

and more...

Discover

Solve

Solve

Solve

Scale & accelerate

Food waste: - 50%

Lower costs / Higher margin

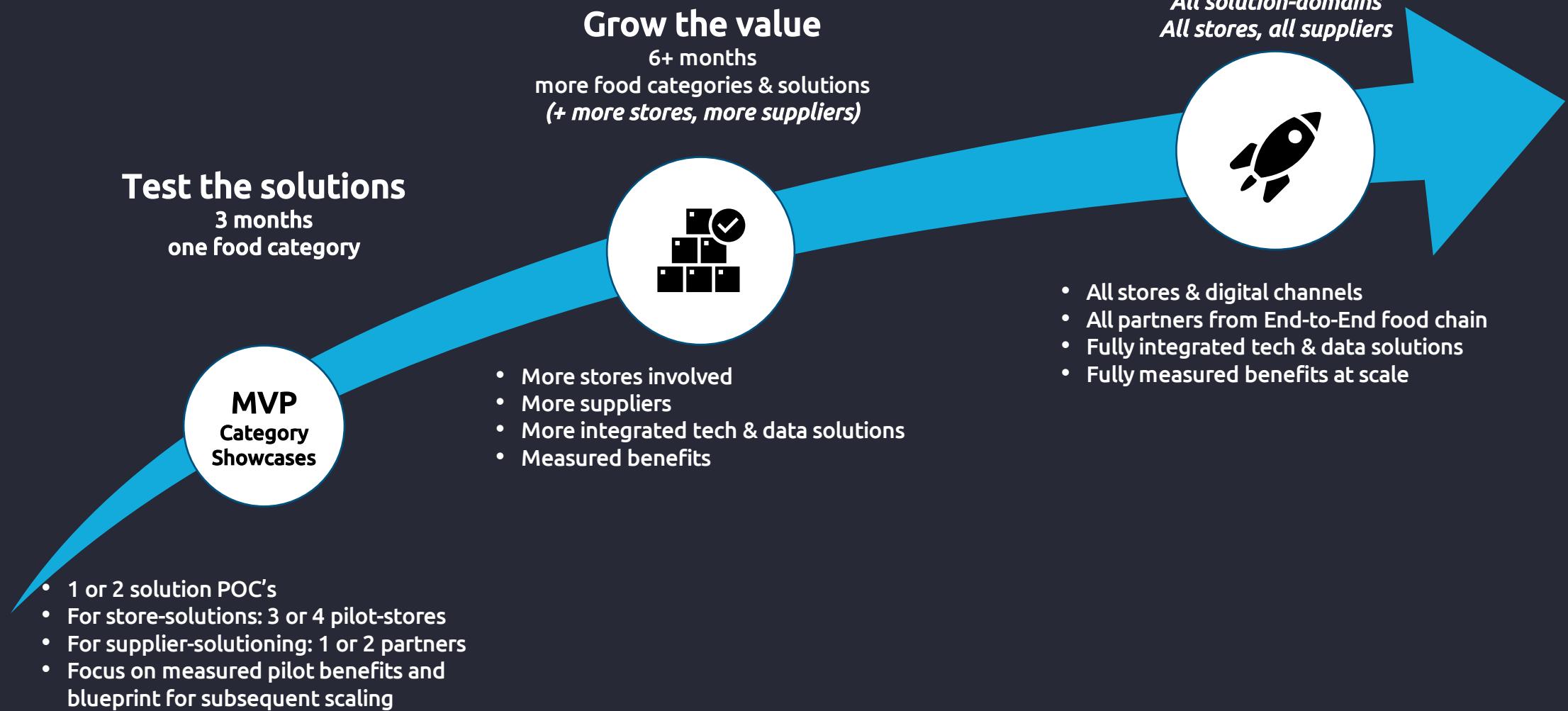
Lower CO2 emissions

Increased Customer loyalty

Top five food waste categories (As % of purchase volume retailer)



We can help orchestrate the transformational journey to reduce food waste at scale





What are the critical success factors ?

As Retailers have not yet embedded food waste reduction *as a priority* within their organisations and value chains...

... they need more ...

FOCUS ON FOOD WASTE

Though retailers have already had many small successes, they've had trouble scaling to all food assortments, stores and suppliers, so...

... they need to go beyond pilots to ...

IMPACT AT SCALE

As retailers are lacking the data and technology foundations and tools to measure and improve their food waste efforts...

... they need to apply ...

NEW DATA & TECH

Retailers tend to focus on what's nearby, but the major breakthroughs will come from collaboration with upstream trading partners, so ...

... they need new approaches to ...

VALUE CHAIN COLLABORATION



Capgemini is your perfect partner in this journey



The value that Capgemini brings

- We help manage the change (processes, ways of working, waste-mindsets, KPI measurement)
- We enable and accelerate your initiatives by building and leveraging fit-for-purpose data, AI and technology capabilities
- We partner with you end-to-end to drive innovations across your enterprise. We're with you from your initial pilots, all the way to reducing food waste at scale, measuring those reductions, and continuously improving your performance
- As independent player across the value chain, we help shape improved trading partner collaborations to jointly take responsibility in reducing food waste



How Capgemini is different

- Our business transformation capabilities are based on our deep understanding and extensive experience (and thought leadership) within the grocery business
- We are masters in data, AI and technology, with a strong track-record in leveraging those skills to achieve business goals
- We are an end-to-end partner with the full set of capabilities you need to reach your goals. We support you from initial strategy and POC's to full-scale, enterprise-wide transformation
- We are deeply connected with key players across the whole food value chain (Agri, CP, distribution, Retail), and have extensive experience in facilitating and accelerating value chain collaborations



Act now! Choose one category...Let's demonstrate how we can start incrementally reducing waste.



DISCOVERY ASE Session

- Specific product group
- One day with subject matter experts from all the value chain partners
- Preparation done by subject matter experts, guided by Capgemini
- **Outcome: High level waste heat map and solution directions.**

One day, excluding preparation



Discovery Waste assessment

- Specific product group
- Assessment of waste data from value chain partners.
- Interviews with subject matter experts with value chain partners
- **Outcome: Waste heat map and hypothesis of causes.**

Two week period



Our food waste experts – no time to waste



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DIGITAL CORE FOR GROCERY



John Waymire



Link to X-Port

Digital Core for Grocery :-

<https://x-port.capgemini.com/sector-offer/digital-core-for-grocery/>



5

PUBLISHED SUCCESS
STORIES ACROSS THE
GROUP



Published Success Stories across the Group

Consumer Product

Nestlé

Connecting with a New Target by Extending an Existing Brand

[READ CLIENT STORY](#)

* A Frog Client Story

Coca Cola

Launching a Revolutionary New Beverage Fountain Experience

[READ CLIENT STORY](#)

* A Frog Client Story

DIAGEO

Applying Multiple Prototyping Methods to Explore and Refine New Concepts

[READ CLIENT STORY](#)

* A Frog Client Story

Retail

Buffalo Wild Wings

Re-inventing the Urban Neighborhood Sports and Entertainment Experience

[READ CLIENT STORY](#)

* A Frog Client Story

NIKE

Synapse collaborated with Nike and their partners to develop electromechanical architecture options for the Nike+ FuelBand, which were investigated via non-form factor test vehicles in parallel with the development of the form-factor assembly.

[READ CLIENT STORY](#)

* A Synapse Client Story

Dunkin' Donuts

Frog designed an omnichannel store experience and end-to-end customer journey blueprint that separates on-premise from on-the-go journeys and provides customers with full choice of how they engage—from low-tech + high-service to high-tech + low-service.

[READ CLIENT STORY](#)

* A Frog Client Story



Published Success Stories North America (1/2)

CONA SERVICES SUPPORTS COCA-COLA BOTTLERS

CONA services migrate to SAP HANA on Microsoft Azure, working closely with Capgemini, SAP, and Microsoft to complete one of the biggest migration of its kind.

[READ CLIENT STORY](#)

JOHNSON & JOHNSON

Johnson & Johnson engaged Capgemini to establish a partnership based on its experience with global transformation projects and data science expertise.

[READ CLIENT STORY](#)

Consumer Product

A large, independent beverage bottler

Maximizing business growth, profitability, and future it transformation and digital evolution

[READ CLIENT STORY](#)



Published Success Stories North America (2/2)

Retail

Chilewich

Chilewich chose to work with the Digital Customer Experience (DCX) group at Capgemini to move to Magento (an Adobe company).

[READ CLIENT STORY](#)

Tarte Cosmetics

Capgemini designs a sleek and stylish solution for the cosmetics leader. Capgemini built and implemented the site on the Salesforce Commerce Cloud platform.

[READ CLIENT STORY](#)

HIBBETT SPORTS

Capgemini-developed Launch Calendar, store-finder, and buy-online-pickup-in-store functionality make the site a winning experience.

[READ CLIENT STORY](#)

Tommy Hilfiger Brazil

Working with Capgemini, Tommy Hilfiger Brazil takes luxury fashion to the metaverse for its national sales convention and upcoming designs

[READ CLIENT STORY](#)

L'ORÉAL

In collaboration with Capgemini, L'Oréal implements the Google Cloud to establish a system whereby products are labeled with scannable QR codes that connect to digital twins describing ingredients, potential applications, and step-by-step guides for use

[READ CLIENT STORY](#)

BARRY CALLEBAUT

One of the world's leading chocolate wholesalers, leveraged Google for Work, delivered by Capgemini, to increase collaboration in the workplace.

[READ CLIENT STORY](#)

Tropical Smoothie Cafe®

Capgemini's Agile Store solution delivered a single point of contact to call and a dedicated website to submit and track technology-related issues, so franchisees could concentrate on delivering a great guest experience.

[READ CLIENT STORY](#)

FILA

FILA worked with Capgemini to create a robust, innovative digital-shopping experience that achieved record-breaking sales at the height of a global pandemic, while continuing to partner with wholesalers and retailers.

[READ CLIENT STORY](#)

Riachuelo

Revolutionizing retail at Riachuelo with sap s/4hana digital transformation project drives customer experience and growth

[READ CLIENT STORY](#)



Published Success Stories Europe (1/2)

Consumer Product

Fluidra

The pool and wellness leader company engages Capgemini to implement Adobe Experience Manager as the basis for a new brand website

[READ CLIENT STORIES](#)

Stora Enso

In partnership with Sogeti, a part of the Capgemini Group, Stora Enso employed the Geo Satellite Intelligence system to combine satellite imaging and artificial intelligence to track bark beetle activity more accurately and quickly

[READ CLIENT STORY](#)



Published Success Stories Europe (2/2)

Retail

HEMA

Capgemini to elevate its customer experience to the next level with Salesforce Service Cloud and Social Studio

[READ CLIENT STORY](#)

TAG Heuer

Working with Capgemini, TAG Heuer develops and rolls out a new ecommerce ecosystem that drives improved online sales and sets the company apart from other luxury watchmakers

[READ CLIENT STORY](#)

European food retailer

Together with Capgemini Invent, the organization began the optimization of its private-label packaging to drive clean growth, satisfy new packaging laws and meet increasing consumer expectations

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CARREFOUR

Capgemini delivers an innovative, open and secure cloud-based platform, facilitating integration with the partner ecosystem, to improve customer experience in-store and online

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Action Service & Distributie B.V.

Cloud migration to Microsoft Azure offers Action optimal possibilities for growth and innovative power

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Action for Children

With Capgemini's Applied Innovation Exchange as its partner, Action for Children opened a pop-up shop as part of its Secret Santa campaign and introduced Elf.ai to help visitors select gifts that sparked emotional connections

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Salling Group A/S

Capgemini as an implementation partner has transformed the agility of the IT Service department with new ITSM implementation based on the ServiceNow technology

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Breitling

The luxury watchmaker partners with Capgemini and Salesforce to automate carbon emissions data management with the Salesforce net zero cloud solution

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HUNKEMÖLLER

One of the largest high-street lingerie brands in the Benelux and Germany, implements a system that consolidates all customer service agent activities into a single tool, seamlessly integrating the landscape

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Maxeda DIY Group

The leading DIY retailer collaborated with Capgemini to migrate its data infrastructure to the Google Cloud platform, which improved cost efficiency, and upgraded to SAP S/4HANA to ensure seamless integration with SAP's data and analytics portfolio.

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Consumer Products

MYNT

Partnering with Capgemini, Mynt deploys MuleSoft Anypoint Platform™ within the Amazon Web Services environment to better integrate its various systems, improve the time-to-market for new products, and improve the customer experience

BEGA

Optimised operations and enhanced performance (upward of 30%) were key outcomes for Bega Group post the large-scale integration of their legacy SAP environment to the AWS cloud.

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Icebreaker

Aggregating all services to a local strategic partner

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Retail



About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of over 360,000 team members more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2022 global revenues of €22 billion.



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