Fast-Moving Consumer Goods:

Adaptations for a Customer-Centric Strategy

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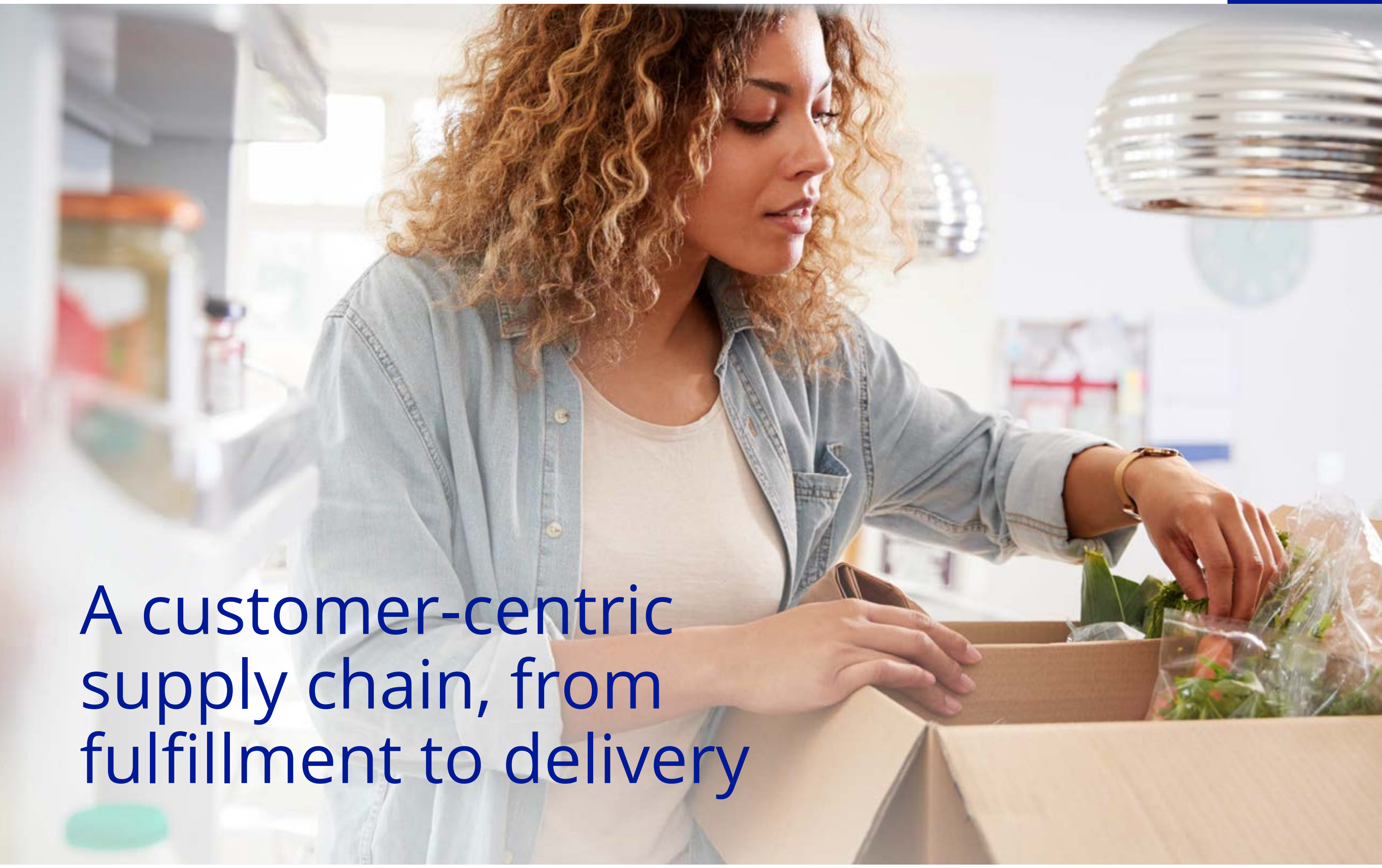


A customer-centric supply chain, from fulfillment to delivery

The fast-moving consumer goods (FMCG) industry has followed a traditional supply chain model for decades. Goods were generally purchased in-store as part of a weekly grocery run, or on an ad-hoc basis. Unlike clothing or electronics, FMCGs were not products that consumers would buy online and wait days or weeks for delivery.

Thanks to an array of choice and convenience online, consumer demand has shifted and FMCG brands are adapting to a customer-centric strategy. Interestingly though, traditional FMCG companies haven't been the ones adapting at speed. New entrants in the FMCG space are leveraging e-commerce, adapting to an omni-channel supply chain and providing consumers with untapped niche offerings, not found in-store.

In 2020, the pandemic outbreak of COVID-19 caused many industry trends to drive faster change. In Canada and around the globe, huge spikes in demand for FMCG products such as canned foods and personal care items caused chaotic bulk buying, resulting in some businesses using price gouging tactics before it became a heavily finable offence in Canada.[1] Supply chains faltered under pressure for a brief moment, then provided reassurance with aggressive replenishment as the panic buying subsided. And online sales for FMCGs stole the limelight as some physical stores were forced to close while the stores that remained open lacked a reliable supply. In the interest of public safety and product availability, shoppers want to understand the supply chain more than ever – from farm to factory to distribution.

For traditional players to remain competitive, they should adapt to today's customer-centric supply chain. In this report, we'll discuss:

- The online alternatives to in-store FMCG products.
  - D2C start-up opportunities
  - Hyper-targeted small and local alternatives
- The supply chain adaptations necessary for new distribution methods.
  - Using IoT for omni-channel inventory accuracy
  - Automation in the warehouse for speed and efficiency
- Four key takeaways for 2020 FMCG supply chain adaptations.

What are Fast Moving Consumer Goods (FMCG)?

Fast-moving consumer goods are also known as consumer packaged goods (CPG), depending on where you live around the world.

Items that fall into this category are frequently (and routinely) purchased by customers of all demographics. They're generally low in price and don't require much decision making. From a supply chain viewpoint, FMCGs are highly distributed in large quantities, with a high turnover.

Some examples are:

- Food
- Beverages
- Cosmetics
- Cleaning products

Where are consumers buying? The demand for online alternatives to the traditional FMCG model.

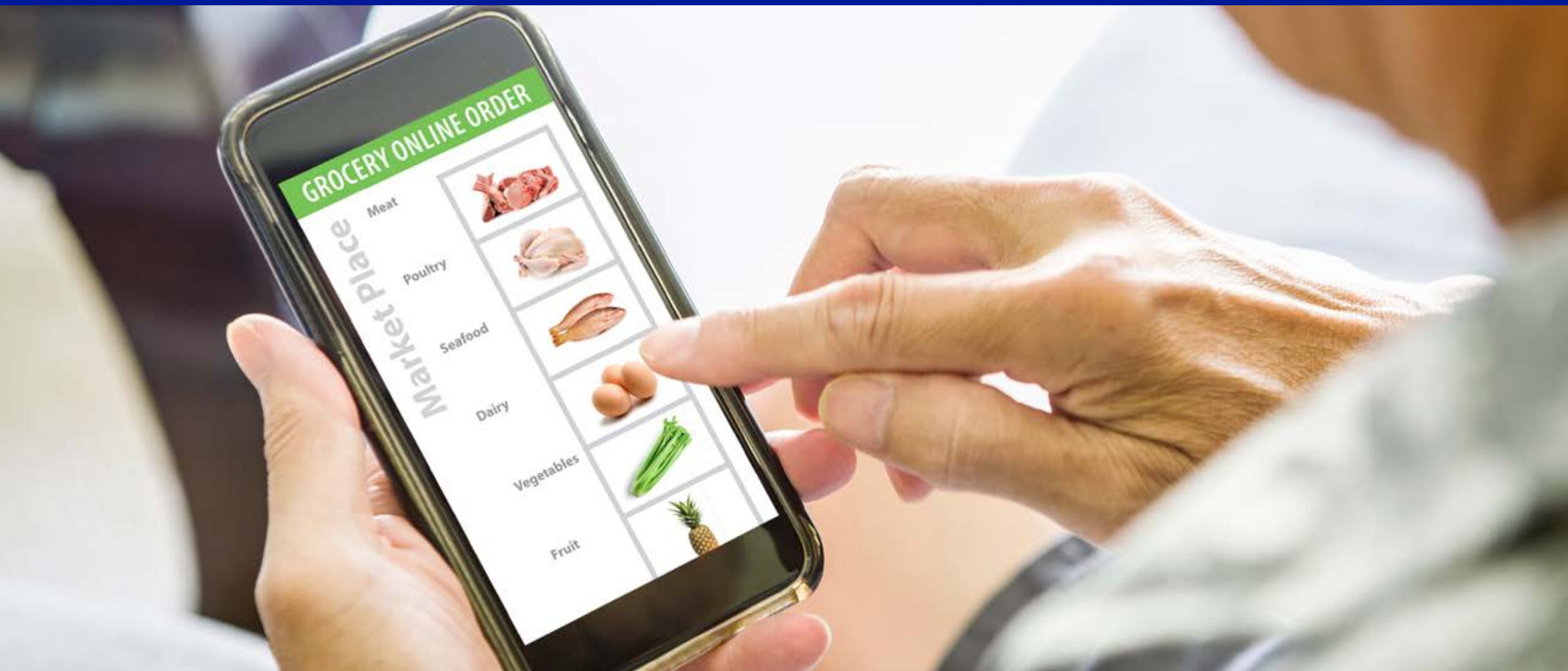
For many decades, we were accustomed to purchasing FMCGs routinely and frequently. The traditional FMCG model saw items bought in bulk as part of a weekly shop at a big box store, or individually and on-demand from a variety of local retailers. Due to a highly competitive market full of well-established companies, there was little thought behind the purchase other than the necessity to replenish. There was little room for smaller companies with modest revenues to gain shelf space, due to an oversaturated market full of some of the world's wealthiest companies.

In recent years though, the market has been given an opportunity to expand beyond those lucrative store shelves. Similar to retail, the e-commerce space has opened up an online opportunity for further competition to thrive within the FMCG industry. And while businesses using the traditional FMCG model were slow to adapt to change, emerging FMCG brands stepped in and advertised new concepts to benefit from an online marketspace.

Online sales propelled by a pandemic

In early 2020, preparation for the COVID-19 lockdowns saw a stark increase in FMCG e-commerce sales around the globe. People started to opt for safer, non-physical store locations to avoid both crowds and the uncertainty of product availability. In Canada, the Salesforce Q1 Shopping Index highlighted that e-commerce revenue grew 24% in the first quarter of 2020.[2] But after restrictions are eased, and customers are allowed to shop in-store again, will they simply return to their normal preference? It looks like maybe not – or at least not everyone will return to in-store shopping. A recent survey showed that 9% of Canadians plan on continuing to order groceries online regularly, compared to less than 2% before COVID-19.[3]

Trends around the world also show older age groups and less tech-inclined markets are also venturing online for FMCGs. For example, Europe has been relatively slower than North America to embrace online FMCG shopping – but since pandemic restrictions, many countries are now seeing notable spikes in e-commerce sales. And, according to Hema (Alibaba's Chinese online supermarket), their grocery orders from users born in the 60s was 4x higher than normal during Spring Festival, a time when China was the epicentre of the outbreak.[4]



Cutting out the middleman with direct-to-consumer start-ups

The online space has enabled a journey that's often faster and cheaper. Selling to the end customer directly means there's no need for the middleman (aka a retailer). Since over a decade ago, the big traditional players such as P&G, Unilever and Nestle have lost market share to alternatives, such as fast-moving, direct-to-consumer start-ups. One estimate found that smaller FMCG companies have obtained $18 billion worth of sales from the big traditional corporations from 2009-2015.[5]

Why have direct-to-consumer start-ups become so popular? The answer is likely attributed to the traditional FMCG supply chain model. A traditional FMCG model relies on countless retailers, outlets and channels to sell their products, with little control or data over consumer perception of that vendor's reputation. Meanwhile, there's the opportunity for online FMCG businesses to market their own brand values and create a strong, independent brand voice.

>$17B

market share attributed to FMCG start-ups since 2013.[6]

90%

of all FMCG e-commerce growth is connected to start-ups.[6]

Thanks to the array of choice and visibility in competition online, consumers are more empowered than ever when making purchasing decisions. Because of this, 89% of companies say they now compete primarily on the basis of customer experience.[7] Direct-to-consumer (D2C) start-ups are able to align with a customer-centric model in two major ways. First, due to direct communication between the business and the consumer, D2C provides visibility into high-quality, customer-centric data, which can't be replicated easily by the various hand offs in a traditional FMCG model. Secondly, they have full control over the digital experience and can easily market their convenience to their target audience. Successful D2C start-up brands have been able to create customer-centric versions of pretty much everything. From personalized vitamin packets to monthly pet food subscriptions.

Like any business, D2C start-ups rely on third parties for some of the buyer journey. Who they partner with can be critical to their success. FMCG businesses online and offline must consider contributions from all stages of the supply chain to be customer-centric:

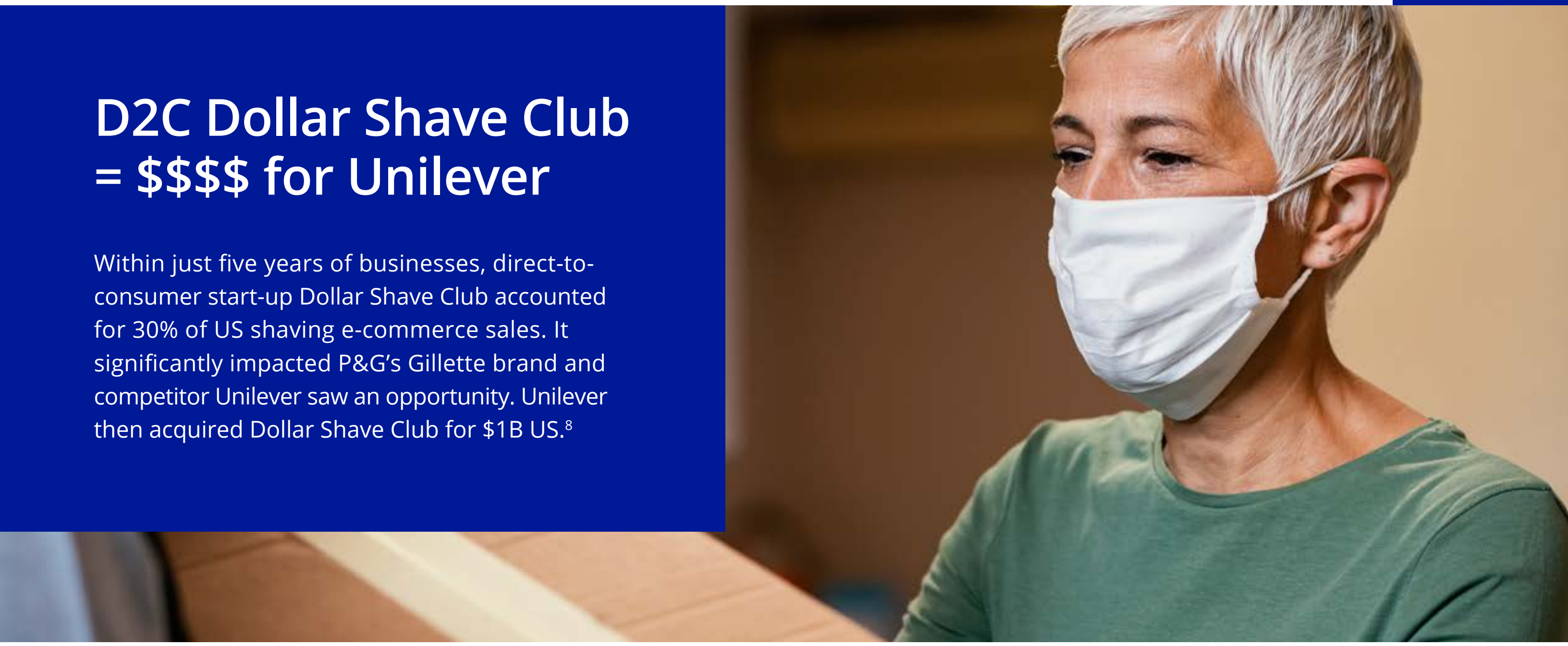
- Businesses must be able to live up to their marketed value proposition through their internal and external processes, such as reliable deliveries, generous return policies and exquisite customer service.
- Take time to research a delivery provider that aligns with your brand. For example, one that can offer a reliable last-mile to a store or residence, while acting as an extension of your own brand values.

89%

of companies compete primarily on the basis of customer experience.[7]

D2C Dollar Shave Club = $$$$ for Unilever

Within just five years of businesses, direct-to-consumer start-up Dollar Shave Club accounted for 30% of US shaving e-commerce sales. It significantly impacted P&G's Gillette brand and competitor Unilever saw an opportunity. Unilever then acquired Dollar Shave Club for $1B US.[8]



Researching online to find hyper-targeted local brands and sustainable alternatives

Not long ago, the FMCG landscape was defined by scale – innovative concepts weren't a priority among product offerings. The large global names have been around longer than any of us (P&G was founded in 1832, for reference!). Their tenure and global reach allowed them to build up a vast customer base for mass-market traditions and product preferences that were then passed on through generations. But their decades-old focus on longevity and consistency didn't work alongside the growth of the empowered consumer. In fact, FMCG mass marketing helped to expose niche spots and underserved demographics in a time when consumers were starting to look for more unique and local alternatives.

A strong brand image built by today's society is becoming the main requirement for success. Research by McKinsey states that Millennials are almost four times more likely than Baby Boomers to avoid buying products from "the big food companies."[9] Why? Our uber-connected online world allows consumers to be more research-driven about FMCG purchases, rather than making spontaneous or habitual decisions. Younger generations (and anyone else who wants it) have exposure to many local hyper-targeted brands that provide a customer-centric experience. The range of hyper-targeted brands allows the mass market to find products that almost feel tailored to each individual. Oftentimes, online products come with detailed product information and reviews, genuine examples of customer experience, a wide range of related products and (should they buy) convenient delivery options. From all of this data, consumers are building real-time brand trust from external sources rather than direct marketing from brands.

Beyond the rise in local and hyper-targeted players, one of the other driving forces for alternatives is the holistic sustainability of a company. In 2018, sustainable products grew four times as fast as products without a sustainability commitment.[10] In fact, 51% of research-driven millennials say they check product information for sustainability claims before buying a new product.[11] While large players have faced criticism from climate change activists and have stepped up their efforts, they have one major downfall in the eyes of consumers. The sheer size of their supply chains means they'll never be able to measure up to the environmental benefits of local, smaller FMCG businesses.

Here are some of the ways FMCG businesses of all sizes can apply learnings from smaller, local brands and sustainable alternatives:

- Provide a variety of locally available and niche product offerings, rather than just nationally available products. Accept the increased complexity by working with a delivery provider that can offer cross-country coverage to infiltrate different regions.
- Improve the customer-centric strategy by teaming up with regional distributors in each targeted region that understand the local market better.
- Work with a delivery provider that actively works towards reducing carbon emissions and integrates sustainable practices into all areas of business.

The benefits of local: Prioritizing sustainability in the supply of FMCG

Amidst the ongoing COVID-19 crisis, anxieties around origins of products and ingredients have fuelled a demand for more transparent supply chains, and an increased demand for local supplies. Beyond the pandemic issues, a survey shows there's more reason for brands to support locally sustainable products – Generation Z. 41% of the Gen Z respondents cited global warming as the most important issue facing the world – the top fear for their generation.[12] Currently representing around 40% of all shoppers, Gen Z are shaping the landscape by choosing to shop with brands based on their environmental impact:[13]

- **Traceable ingredients.** 75% would switch to a brand that provides more in-depth product information.[14]
- **Sustainable packaging.** 55% of consumers are willing to pay 15% more for sustainable packaging.[15]
- **Environmentally and socially responsible.** 75% of consumers are likely to start shopping at a company that supports an issue they agree with.[16]
- **Environmentally friendly delivery.** 51% of consumers are willing to wait longer for eco-friendly shipping options.[17]

How do FMCG businesses deliver? Adapting the supply chain for a customer-centric strategy

Like many other industries, customer expectations have influenced the FMCG supply chain to implement an omni-channel strategy. Some may question; for an industry that has no problem getting products off the shelves, why is an omni-channel approach important? Nowadays, traditional consumer requirements of convenience and cost aren't the only forces impacting a purchase. A study shows that at least 70% of shoppers purchase (or research) FMCG products online first.[18] Testing a product in-store before buying it online has grown in popularity too. Also, FMCG companies strive to achieve very high service levels. Consumers typically won't wait if their preferred product isn't available – they'll instead go elsewhere, or worse, choose a competitor's product.

Due to e-commerce, deliveries are moving away from bulk shipments delivered to the store. Instead, e-commerce shipments will include a variety of products, often in smaller quantities needed at a higher turnover. While there are benefits to a customer-centric supply chain of converting bulk shipments to individual shipments, FMCG businesses that rely on in-store sales have their concerns. Simply leveraging e-commerce and other channels can cause complications in the reliability of the supply chain – not to mention the costs and timeliness of smaller shipments. Adding numerous buying channels and journeys makes it harder to accurately forecast inventory. Traditional FMCG businesses are also concerned about the profitability of adding more channels to the mix. In fact, 70% of warehouse executives believe that measuring the accuracy of labour and shipment costs would be a challenge in cross-channel supply chain management.[19]

Getting the right levels of inventory

Even when forecasts are finely tuned, unexpected spikes or drops in consumer demand can cause havoc on the full supply chain.

Too much demand

- out-of-stock items
- lost sales
- bad consumer experience

Too little demand

- inventory pile-ups
- markdowns
- negative impact on profits

Using IoT for omni-channel inventory accuracy

In any supply chain, there are three key factors that impact the ability to match available inventory to the real-time demand:

- Demand uncertainty and the inability to accurately forecast demand
- Production uncertainties leading to an unbalanced inventory
- Unsynchronized processes among the supply chain

Each of these factors has a common root cause – missing information and visibility in the supply chain. The inability to forecast demand is really an information gap between what customers want and what businesses actually predict. In a traditional FMCG model, historical data is often used to produce accurate predictions for inventory. For FMCG businesses using new channels to sell and market products, there is no solid historical data to produce accurate inventory predictions. Even with educated predictions of demand, inventory levels are likely to be significantly unstable, due to the many nodes and directions a product can take within the supply chain. More increasingly though, traditional forecasting methods are becoming less efficient even for traditional supply chains. For example, unique events through today's online connectivity such as a spike in social chatter, viral trends and online reviews can quickly skew the stability of historical sales patterns.

To support the success of today's FMCG supply chains (particularly omni-channel supply chains) additional timely data is required throughout the process to minimize information gaps and react quickly to change. Omni-channel requires quick decisions, so the data also needs to match its speed. Digital tools such as IoT (internet of things) can optimize traditional forecasting with improved visibility and connectivity.

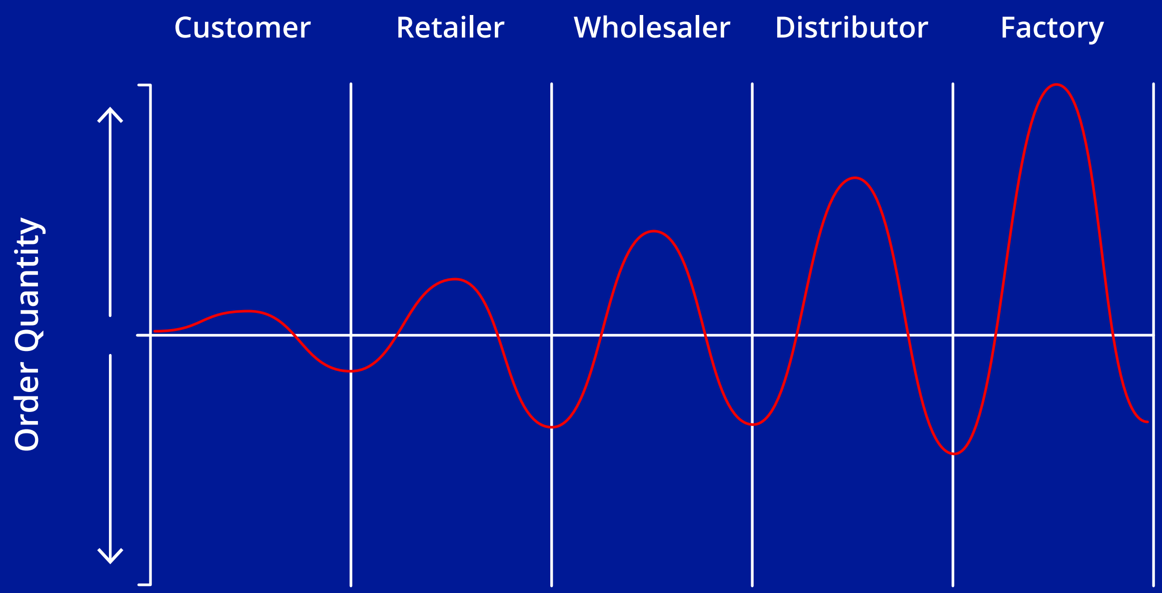
Some of the new data that's being used is coming from IoT devices – a new level of connectivity. Warehouse executives are seeing the benefits, with 52% planning to expand the use of IoT over the next five years.[20] Throughout the supply chain, RFID trackers used in IoT can keep a consistent record of inventory, from the moment it enters the warehouse to the moment it ships out. Data can be communicated to a platform that analyses stock levels and can automatically trigger replenishment orders when required. Impressively, these automatic replenishment triggers don't require human interaction, which has its own benefits. IoT can also provide more efficiency with just-in-time predictive maintenance – an important component in remaining timely. Devices can continuously monitor machines within the supply chain, track unique KPIs and then use predictive analytics to understand what these performance metrics mean for production efficiency and the likelihood of machine failure.

52%

of executives plan to expand IoT in warehouses.[20]

Unpredictable inventory? Introducing the bullwhip effect

The bullwhip effect is a concept for explaining how small influxes of consumer demand can aggregate and become a major distortion at the manufacturer level.[21] During the COVID-19 pandemic, the bullwhip effect was evident for many FMCG products including toilet paper, hand sanitizer and face masks.



How does the bullwhip effect happen?

In a grocery store, **100 extra units** of toilet paper are sold to customers in one week, due to panic buying. To prohibit stock-out, the retailer then orders **150 extra units** from a wholesaler to make sure they're prepared for the next week. The wholesaler wants to make sure there's enough toilet roll for the retailer and other retailers with a similar demand, and orders **200 extra units** from the distributor. The distributor then orders **300 extra units** from the factory to ensure the economy of scale in production that will meet demand.

Automated warehouse functions to increase fulfillment speed and efficiency

Everything is becoming quicker to grasp with the rise of online connectivity. With that, consumers expect their purchases to be delivered much faster than before the rise in e-commerce. Delivery timeframes of a week are no longer acceptable – 62% of today's consumers consider "fast shipping" as two days or less.[22] Along with the speed, consumers are looking for a reliably seamless service to their doorstep. In order to keep up with consumer demand from all channels, omni-channel approaches often require numerous inventories to move through the same space. Warehouses are often an inventory point for specific stores and online deliveries in the area. In order to stay on top of inventory organization and fulfillment speed, automated functions are being implemented alongside, or instead of, human workers.

To be competitive and customer-centric, companies are starting to allow orders of low-cost items to be delivered, sometimes even for free. Due to smaller order quantities, these orders require more case picking and loose picking. Walking and manually picking orders can account for more than 50% of the time associated with picking. [23] Pairing this statistic with an increasing amount of small orders creates a costly and inefficient supply chain.

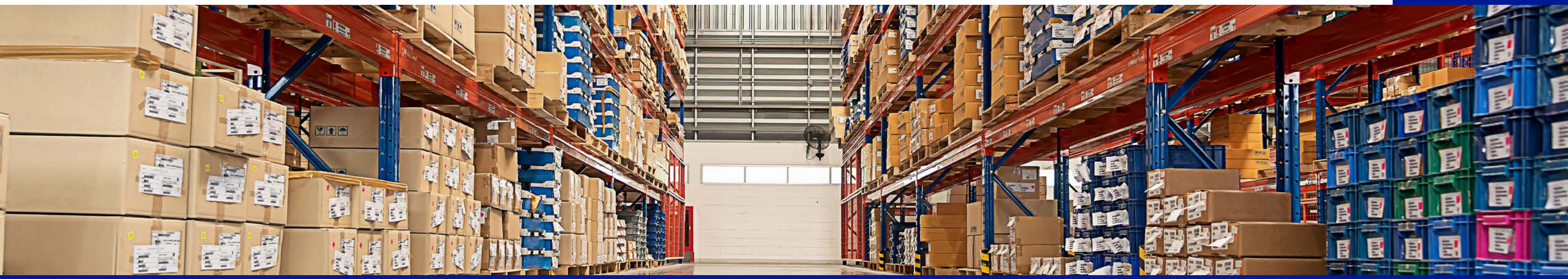
>50%

picking time is from walking and manual labour.[23]

As warehouses prepare to increase the volume of individual items shipped, automation is helping to combat fulfillment time and costs. In an optimized supply chain, robotics can benefit fulfillment duties, replacing the need for human activity in some processes. Robots are generally cost effective –they're faster and their efficiency is consistent. And, unlike human workers, they don't require breaks and work longer hours without requiring a salary.

An example of automation is using robot pickers in a warehouse. Robot pickers can be programmed to pick individual items to make up an order or multiple orders at the same time. Items are then placed into a crate for a human worker to package in a centralized location. Robots can navigate warehouses in different ways. Some can follow magnetic strips or tracks installed in the building. More advanced models employ further features such as camera vision and infrared sensors for human visibility, and to avoid obstacles along their programmed route. Robots can be coordinated by a central computer that allows them to work efficiently together, completing a larger order or picking several items that are harder to reach in a timely manner. With robotics, this process can take a matter of minutes. In a traditional FMCG model where warehouse items are scattered around on distant shelves, this process can take hours.

Articulated robotic arms are also an example of robotics technology that's started to be used in fulfillment. These tools are multi-jointed and used to quickly lift, move or turn a wide variety of FMCG items. While these arms can also help with general picking and packing, they're often beneficial for particularly heavy product maneuvering. For example, an articulated arm can be used to de-palletizing products and moving to their designated locations. The arms carry out these repetitive and strenuous tasks with the help of powerful sensors and grippers. They can locate individual packages and then analyze their size and shape to determine the optimal unloading method.



The rise of micro fulfillment centres for same-day delivery

Same-day deliveries are becoming the norm for many items within the FMCG space due to online grocery shopping. But, this is costly for solo sales and FMCG products have thin margins already.

Micro fulfillment centres provide a solution:

- Allows for items to be closer to the final destination, be it a store or residence (or alternate pick up point).
- Cuts last-mile delivery costs for the brand and, in turn, the consumer.
- It creates an opportunity to bypass retailers completely and sell D2C in a local environment.

4 key takeaways for 2020 FMCG supply chain adaptations

1 Cut out the middleman.

A traditional FMCG model relies on various third parties to sell their products. In turn, these brands have little control or data over the buyer experience. D2C emergents are able to easily market and alter their products to their target audience through consumer data visibility and full control over the digital buying experience.

2 Embrace complexity, provide local offerings.

The FMCG landscape used to be defined by scale. Now, consumers are becoming more research-driven about purchases, rather than making habitual decisions. The sheer range of hyper-targeted online brands mean the mass target can find products that almost feel tailored to each individual. Businesses should accept the increased complexity of providing local and niche product offerings, rather than just nationally available products.

3 Meet real-time demand with IoT.

To support an omni-channel model, supply chains need to optimize traditional forecasting with improved visibility and connectivity. IoT devices are providing a new level of efficiency, including the ability to automatically trigger replenishment orders and determine production efficiency.

4 Leverage automation.

E-commerce has attributed to the rise in smaller order quantities being fulfilled in a quick time frame. Warehouse automation tools, such as robots and articulated arms, are able to carry out strenuous and repetitive tasks instead of human workers to combat fulfillment time and costs.

Improving the customer-centric strategy with supply chain adaptations

As consumers continue to grow accustomed to an on-demand way to purchase goods, FMCGs are starting to follow the path of retail brands. Traditional players are maintaining their strong presence within stores. But, in order to compete with emerging competitors, they need to provide alternative channels to purchase their products and diversify offerings rather than serving solely to the mass market. Consumers are becoming more research-driven and the emerging competitors are responding well. Online D2C and niche brands are providing value with customer-centric alternatives to in-store products. Direct-to-consumer brands are removing the costs of extra logistics and strengthening their brand voice online. Meanwhile, smaller, local FMCG companies are taking advantage of underserved demographics and providing convenient solutions for a niche.

Supply chains are also adapting to execute a customer-centric experience. Inventory forecasting can be optimized by IoT to improve product availability and optimal inventory levels. Automation in warehouses allows for quicker fulfillment, enabling the start of a successful last-mile.

FMCG brands of all shapes and sizes must react by improving their customer-centric strategy for the long run. As trends are shaped by the changes in today's society, brands must continue to invest in alternative purchasing channels and more targeted products to benefit the customer of the future. In order to achieve these adaptations for the long haul, it all starts by optimizing today's supply chain – from distribution, through to the last-mile.

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