

How to Win in January

– Improving service levels



*ECRA supported by the Australian
Food and Grocery Council*

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Introduction

We operate in a volatile trading environment - one in which shoppers and consumers will switch brand and store allegiance if their needs are not satisfied. This makes it all the more important to find innovative solutions that improve service levels and deliver in-store excellence.

Product availability has been a challenge for our industry for many years for both retailers and suppliers. For many of us, January in particular is the poor cousin to Christmas, and as a result has seen poor product availability; lost sales; stock outs on shelf and a less than satisfactory offering for the consumer.

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

The following Efficient Consumer Response Australasia (ECRA) report aims to provide insight into this industry wide problem and guidance on the best ways for retailers and suppliers to meet the challenges and make the necessary improvements for January 2010.

ECRA Research Methodology

ECRA hosted a one day workshop that provided industry practitioners an opportunity to hear first hand the issues impacting January performance from retailers, wholesalers and suppliers.

This unique event offered the food and grocery industry the opportunity to shape the debate and work towards improvements in product availability for January 2010. With first hand insight current practices, challenges and potential solutions were explored and identified, providing the basis for this report.

The Industry Focus

Flexibility in responsiveness and the robustness of collaborative and integrated business plans are important factors in delivering real improvements to product availability, but these skills continue to challenge companies of all sizes.

Consistently excellent customer service is a key performance indicator for the industry, from suppliers servicing their retail customers through to the shopper in the store. Strong, consistent presence at the shelf therefore remains a major industry priority.

Planning processes such as forecasting and inventory management must work in tandem with operational excellence and be underpinned by effective communication practices. These three focus areas of **planning**;

operational excellence and **communication** are the basis for improved performance.

Why is January Special?

Within our market there is a major focus on planning and operational execution throughout December and over the Christmas period. For supermarkets this period represents 10% of yearly sales and retailers generate better average gross margins and stronger operating leverage as the increased sales base fractionalises fixed costs. ⁱ

Whilst there is a major focus on planning and preparing for this significant event, January remains the “poor cousin”, historically and repeatedly we see a significant decline in product availability; reflected in a decline in service levels to retail distribution centres of approximately 4 to 5 percent across the industry.

The month of January is under pressure from a number of independent and significant factors. These include:

- increase in public holidays leading into to January,
- a change in season / weather,
- high proportion of annual leave taken,
- production facility shutdowns,
- unreliable transport offerings,
- financial year end for many companies, and
- stock reductions throughout the supply chain.

January 2009

January 2009 was no exception. Indeed a number of factors conspired to create a more volatile demand coupled with a lower than anticipated service level. The Christmas period was particularly buoyant with Government authorities encouraging consumer spending through pensioner and family tax payments. Petrol prices returned to pre-spike (June 2008) lows and interest rates were running at low levels.

Extreme and extended hot weather across most of the country coupled with severe flooding in northern New South Wales and Queensland impacted supply chains and drove higher than anticipated category sales performance for related products eg. bottled water.

Such a volatile trading environment makes it all the more important to find innovative solutions that improve service levels and deliver in-store excellence.

The impacts were experienced along the value and supply chains; the following details these by sector.

ⁱ Citigroup Global Markets

For Suppliers	For Retailers	For Shoppers
<ul style="list-style-type: none"> ▪ lost sales / opportunities ▪ increased distribution costs ▪ material expediting ▪ production overtime / downtime ▪ inventory management issues (finished goods and materials) 	<ul style="list-style-type: none"> ▪ missed sales ▪ service level drop ▪ case fill rates drop ▪ missed / late deliveries increases ▪ transport performance and supply issues 	<ul style="list-style-type: none"> ▪ products not available ▪ disappointed / frustrated customers

Fig. 1: Value Chain Impacts

The following chart is indicative of the general trend reported by retailer and wholesaler companies. Best performing supplier companies maintained strong service levels whilst poorer performing suppliers reported a significant decline. ECRA estimates the reduction in service level across the industry to be approximately 4 to 5 percent.

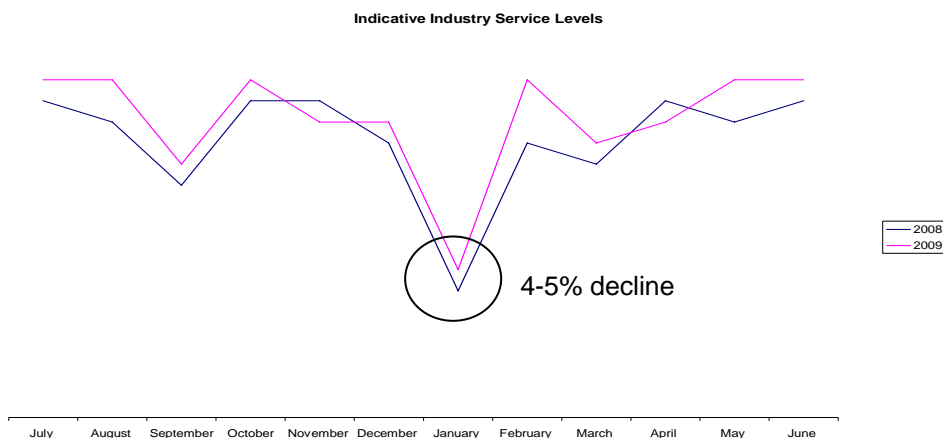


Chart 1: Indicative Industry Service Levels.

The impact in store was significant and directly impacted on the shopper.



Picture 1: January Impact in Store

Improvement Opportunities

Many ideas and opportunities for improving service levels and product availability in January for future years were raised in joint retailer/supplier discussion sessions. These have been collated by ECRA and grouped into seven key focus areas between trading partners when planning for a successful January 2010.

These seven focus areas are captured below. In each case an overview is provided, opportunities and suggestions are outlined and categorised into planning, operational and communication opportunities.

To gain maximum benefit from the content of this guide ECRA suggests users identify priority issues for their organisation based on product type, history, potential risk and demand. Priority determination against each of the suggested actions should be undertaken and organisations are encouraged to develop an action plan for each of the following key focus areas. Suggested action plan templates are located in each focus area section.



Fig 2. Key Focus Areas

1. Plan, plan, plan and plan again

Planning for January should be considered as part of an overall plan for Summer; with events such as Christmas and January being a subset of the seasonal plan.

The Summer Plan should be considered a foundational tool for meeting trading partner expectations and goals. It comprises the local business plans, account plans (including promotional plans) and is underpinned by the Sales and Operations Planning process.

Trading partners must agree to the summer plan, and the same rigour that is instigated for Christmas should apply to January. Flexibility is an essential element and is further detailed in several of the focus areas that follow.

“The plan is just that... a plan. It needs to be robust yet flexible to meet changing consumer patterns and local influences”
Supplier

Classification	Suggestions
Planning Opportunities	<ul style="list-style-type: none"> ▪ Collaborative trading partner planning should commence as early as possible in the year e.g. in winter for summer. ▪ New product introductions; packaging changeovers; category reviews; and promotional activity should be carefully considered and the benefits of considering alternate dates measured. If such events are planned for January, additional management attention should be applied. ▪ Early, proactive and inclusive planning with transport providers (3rd party or primary freight) is valuable to align volume/capacity plans and capabilities. ▪ Load consolidation plans should be discussed and procedures agreed between the retailer, supplier and transport provider. ▪ Historical sales are an input to the planning process.
Operational Opportunities	<ul style="list-style-type: none"> ▪ Operational issues such as transport requirements; distribution centre operating hours; production schedules; staffing levels should all be considered. ▪ The relevant decision makers should participate in joint trading partner planning events. ▪ Stock reviews including safety stock for raw materials, packaging and finished goods should be undertaken. The impact of global sourcing may be a critical factor at this decision point.

Communication Opportunities	<ul style="list-style-type: none"> ▪ To ensure the appropriate level of planning internally and with trading partners occurs it is essential to use cross functional, cross discipline and cross trading partner teams. For example if discussing logistics issues it is essential to have the decision makers present for these areas e.g. transport manager, distribution centre manager etc. ▪ Developing contingency plans is essential, and must include a communication plan detailing possible 'what if' scenarios and responses.
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Proposed Action Plan

	Priority	Action Plan
Suppliers:		
<ul style="list-style-type: none"> ➤ Develop and share plans. ➤ Cross functional participation in plans. ➤ Include upstream supply chain. ➤ Incorporate transport into planning cycle. ➤ Decide on event management and communicate. 		
Retailers:		
<ul style="list-style-type: none"> ➤ Plans owned by replenishment. ➤ Data and information sharing including historical and forecast. ➤ Cross functional disciplines participation in plans. ➤ Liaise with primary freight teams and incorporate into planning cycle. ➤ Decide on event management and communicate. 		

2. Focus on one number

Within organisations (and between them) a significant amount of planning is required to execute product availability at the moment of truth – the shelf. To achieve this goal it is vital that everyone involved agrees what the sales volume target is, so that this can be planned for and any variance to “the number” can be quickly and accurately identified.

Within the supplier organisation the Sales, Marketing, Finance, Production and Supply Chain function heads should agree, commit to, and sign off against one number for forecast sales volume. This should be shared and agreed with the retailer. This facilitates a no surprises environment. All functions in the value chain understand the same plan, and can therefore work together to identify issues and prioritise actions as soon as any potential or actual variance to the forecast plan is noticed.

"There is no point in promoting your product in my store if the product can not be delivered - we end up disappointing the customer"
Retailer.

Classification	Suggestions
Planning Opportunities	<ul style="list-style-type: none"> ▪ Sales, Finance, Production Planning, Supply Chain numbers should be the same. Resolve any internal functional disputes about the forecast early. ▪ Review with trading partners and agree on final number. The retailer's plan should be the same as the suppliers. ▪ The inputs to true demand forecast should be accurate, relevant and timely. They should aid decision making. ▪ Consider how the plan will be reviewed and adjustments incorporated when needed, timing is critical. ▪ If promotional activity is undertaken during the month of January consider and agree the benefits with your trading partner of a sensible 'lockdown' period. Stability around promotions is essential to delivering January results. ▪ Trading partners may respond to competitor price point but need to ensure all functions can realise the plan prior to any agreement.
Operational Opportunities	<ul style="list-style-type: none"> ▪ Operational flexibility should be assessed against critical or at risk products. ▪ Data accuracy – ensure information is accurate, relevant and timely within data management framework.
Communication Opportunities	<ul style="list-style-type: none"> ▪ To ensure the appropriate level of planning internally and with trading partners occurs, it is essential to use cross functional, cross discipline and cross trading partner teams. For example if discussing logistics issues it is

	<p>essential to have the decision makers present for these areas.</p> <ul style="list-style-type: none"> ▪ Late promotional changes, responses to competitor price points etc need to be communicated early, validation of stock availability is essential prior to agreements.
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Proposed Action Plan

	Priority	Action Plan
Suppliers:		
<ul style="list-style-type: none"> ➤ Develop and share plans – agree on one number. Communicate through out the organisation. ➤ Continual review and manage. ➤ Agree on event undertakings and ‘lockdown’ periods. 		
Retailers:		
<ul style="list-style-type: none"> ➤ Agree on ‘one number’ and communicate through organisation. ➤ Agree on event undertakings and ‘lockdown’ periods. 		

3. Daily responsiveness

Once the plan has been committed to and is underway, the follow up requirement to continually monitor for issues, and respond accordingly, is of the highest importance for both suppliers and retailers.

The development of a 'watch list' and plans around each issue should be completed as part of the planning phase. The 'watch list' will be specific for products and product categories. It could include areas as diverse as; weather; industry trends; store sales; consumer spending patterns... and more.

The ability to respond quickly to increases in sales, for whatever reason, requires flexibility throughout the value chain. Failure to be able to swiftly respond by suppliers will result in retailers' replenishment teams needing to make stock management decisions for distribution centres and stores.

"Supplier failures can ripple through the supply chain, creating havoc. The shift to global sourcing; pressure to achieve low inventory holdings but faster order fulfilment cycles mean our supply chain is more extended and more sensitive than ever before"
Supplier

Classification	Suggestions
Planning Opportunities	<ul style="list-style-type: none"> ▪ Knowledge sources should be utilised to the fullest e.g. VRP/VMI, re-buyers. Supplier organisations should engage actively with their VRP to maintain close links with ordering patterns and trends. For those supplier companies that do not have a VRP the retailer re-buyer should be considered a point of contact and fostered. ▪ Plan for constant reviews and discussions to occur as changes in demand are first noted. Define responsibilities. ▪ Include transport providers in daily planning particularly when changes to volume or timing of transport needs may be impacted.
Operational Opportunities	<ul style="list-style-type: none"> ▪ Insert control points into the supply chain for quick identification of changes to planned volume movement and demand signals from customers / VRPs.
Communication Opportunities	<ul style="list-style-type: none"> ▪ Resolve last minute supplier disruptions based on cross functional business goals. Set up joint problem solving and cross functional forums to facilitate decision making e.g. field teams, demand planning, manufacturing and distribution teams. ▪ Ensure decision makers are provided with the correct level of authority to act. ▪ Prioritise and ensure side issues are quickly resolved so that organisations can focus on the key issues.

Proposed Action Plan

	Priority	Action Plan
Suppliers:		
<ul style="list-style-type: none"> ➤ Develop VRP/ Re-buyer relationship. ➤ Develop 'watch list'. ➤ Use the cross functional team to respond to demand issues. ➤ Authority levels clearly articulated. 		
Retailers:		
<ul style="list-style-type: none"> ➤ Develop 'watch list'. ➤ Share sales variance with suppliers in a timely fashion. 		

4. Understand your trading partner – *insider trading*

For quality collaboration trading partners need to understand how each other operates. Including:

- performance metrics,
- operational practices,
- information flows,
- safety stock holdings,
- lead time implications,
- likely responses to competitor activity.

At a basic level each retailer / wholesaler has different systems at work and the output is slightly different – it is important for suppliers to understand these differences and respond accordingly. Equally it is important for retailers to appreciate safety stock holdings and lead time implications for the supplier.

It is important to work with trading partners in a regular and structured way to take stock of what’s working well, but to also understand the need for change and the key barriers and cost drivers of making those changes.

"For our product range - if demand suddenly increases it is not possible to just turn on the tap and make a bit more, to maintain quality we have holding period that must be achieved. It is important to understand this."
Supplier

Classification	Suggestions
Planning Opportunities	<ul style="list-style-type: none"> ▪ Make “understanding each others business” a component of the planning process. Identify the business specific issues that may impact forecasts and the internal characteristics of a trading partner that need to be considered in reacting and communicating in such instances. ▪ Understand trading partners’ key performance metrics, particularly the major metrics. They could include: <ul style="list-style-type: none"> ○ Inventory Measures <ul style="list-style-type: none"> ▪ Safety stock levels ○ Forecast Measures <ul style="list-style-type: none"> ▪ Accuracy % ○ Service Level Measures <ul style="list-style-type: none"> ▪ Customer Service – delivery in full on time ▪ Inbound service level ▪ Outbound service level ▪ Case Fill

Operational Opportunities	<ul style="list-style-type: none"> ▪ Formal joint business planning discussions to include focus on operational and business practices, systems, metrics, processes and cultures.
Communication Opportunities	<ul style="list-style-type: none"> ▪ Speak the same language. Utilise knowledge of partners' business to tailor communication such that makes easy to relate to and avoids misunderstandings.

Proposed Action Plan

	Priority	Action Plan
Suppliers:		
<ul style="list-style-type: none"> ➤ Gain knowledge of the retailers business. ➤ Build relationships. ➤ Support the retail customer. ➤ Promote the supplier as a positive trading partner. ➤ Work in closer harmony to overcome challenges. ➤ Include upstream supply chain. 		
Retailers:		
<ul style="list-style-type: none"> ➤ Understand suppliers processes (including product ranges, variants, pack sizes formats). ➤ Data and information sharing. ➤ Establish communication channels through VRP, re-buyers or other mechanisms. ➤ Implement more joint business planning. 		

5. Operational flexibility

Operational flexibility for products and product categories that have previously been identified 'at risk' is essential. This may result in decisions to hold additional safety stock or alternatively the opportunity to alter planning, production and transport schedules.

Flexibility to respond and adapt to volatile demand considerations includes downstream supply chain product availability; production capability; transport providers response time; distribution centre flexibility etc.

"Throughout Summer and at peak periods of demand we have had to increase the operational opening hours of our distribution centre to accommodate the volume."

Retailer

Classification	Suggestions
Planning Opportunities	<ul style="list-style-type: none"> ▪ Identify key "at risk" items and ensure that flexibility is considered for such items. ▪ Identify potential gaps in flexibility should unforeseen demand occur in January.
Operational Opportunities	<ul style="list-style-type: none"> ▪ Stock management for shortages (raw material, packaging and finished goods). Ensure clarity for how to manage scarce stock in first instance whilst producing / importing back up stock. ▪ Production – scrutinise the decision to close factories / review of shutdown plans, production schedule adherence, material availability etc. Ensure that these decisions do not place stock availability at risk. <ul style="list-style-type: none"> ○ Review product changeover procedures. Do they allow for flexibility if a stock "crisis" were to emerge at short notice? ○ Integrate Private Label processes. ○ Understand the cost to the business of out of stocks, both short and long term. ▪ Work closely with transport providers to identify issues and find collaborative solutions. ▪ Distribution centre opening hours may need to be modified and extended during the Summer period. ▪ Retailers – focus on how truck turnaround times can be optimised. Can booking hours be extended? ▪ At the Store: <ul style="list-style-type: none"> ○ Replenishment practices may need to be different for January, particularly to manage scarce stocks. ○ Merchandisers and reps daily work patterns may need to be modified given product type / mix.

Communication Opportunities	<ul style="list-style-type: none"> • Discuss customer delivery and order fulfilment expectations early – particularly order and delivery windows – eg if customer is moving to 7 day DC operations, what should be discussed? • Clarify products that have limited/no flexibility once initial forecast requirements have been produced. Monitor and discuss issues early as needed.
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Proposed Action Plan

	Priority	Action Plan
Suppliers:		
<ul style="list-style-type: none"> ➤ Include upstream supply chain. ➤ Determine operational flexibility for at risk products and develop plans. ➤ Identify products with limited flexibility and communicate. ➤ Incorporate transport into development of flexible plans. 		
Retailers:		
<ul style="list-style-type: none"> ➤ Review distribution centre, transport and replenishment practices. ➤ Agree with trading partner delivery expectations. ➤ Incorporate primary freight into planning. 		

6. Communication plan

Communication plans should be developed on two levels: within own organisation, and with trading partner.

Leveraging the functional AND cross functional communication channels between trading partner organisations is an essential element of an integrated supply chain and will ensure issues are dealt with in the most effective manner. The right people must be involved in discussion. For example– Buyer and Replenishment: Seller and Inventory Management.

Trading partners are encouraged to discuss issues early and openly, and have clearly defined escalation stages. Visibility and transparency need to be the basis for communication where there is threat to January performance.

"I had to ring the company's Managing Director while he was on holiday as there was no one within their organisation who could make the decision to increase production."

Retailer

Classification	Suggestions
Planning Opportunities	<ul style="list-style-type: none"> Make communication an element of the planning process. Document what communication needs to take place, between whom and on what basis if significant variance to the sales volume plan should occur.
Operational Opportunities	<ul style="list-style-type: none"> Identify staff who will be on leave, and communicate this early to trading partners – draw up a table for trading partners showing who to contact in the absence of each key manager in the value chain.
Communication Opportunities	<ul style="list-style-type: none"> Ensure the right people participate in the planning stage and in the execution stage. Proactive communication should ensure the correct touch points eg replenishment participate in the discussions.

Proposed Action Plan

	Priority	Action Plan
Suppliers:		
<ul style="list-style-type: none"> ➤ Clearly formulate articulate communications plans. ➤ Share plans with retailers. ➤ Identify key decision makers for the period and communicate. 		
Retailers:		
<ul style="list-style-type: none"> ➤ Ensure supplier contact details are correct. ➤ Identify escalation stages. 		

7. Contingency planning

Planning for contingency should commence at the same time as the plans for Summer and specifically January. Plans should be developed and shared with trading partners, their input is essential to the ensuring the correct authority levels are clearly identified.

The Summer plan should be reviewed within organisations during the execution period on a daily/weekly basis according to risk profile; any identifiable trends should be reviewed internally and when appropriate escalated to trading partners.

Contingency plans should be based on vigorous risk assessment which identifies what to do if the plan becomes derailed. Identifying specific risks for January and classifying them according to their potential occurrence may assist in focussing targeted actions.

Determining a hierarchy of potential products/product categories for focus between trading partners provides a robust start to risk management and planning. However history has shown that not just 'at risk' products are impacted and therefore this guide remains valid for the industry as a whole.

To determine the 'at risk' products consider the following:

- Seasonality
- Lead times / ability to respond to sales spike
- Heavily promoted items
- Items with high weather-driven impact
- Impulse purchase driven items
- Items with only one major competitor (if competitor goes OOS will drive a run on the item)

"Our products tend to be pretty stable over the Christmas / Summer period. This year however we had a significant surge in January. Our contingency planning allowed us to support most of the unplanned demand."

Supplier

Classification	Suggestions
Planning Opportunities	<ul style="list-style-type: none"> ▪ Forecasts may need to be scrutinised against promotional plans to a greater extent and more often than usual. ▪ Develop 'what if' dynamics to make a quick decision.
Operational Opportunities	<ul style="list-style-type: none"> ▪ Flexibility of operations and execution – where to build additional flexibility in January? Which items?
Communication Opportunities	<ul style="list-style-type: none"> ▪ Develop overall contingency plans – communicate broadly within the organisation. Agree with trading partners.

	<ul style="list-style-type: none"> ▪ Ensure the relevant authority levels are available when required for empowered, quick decision making. ▪ Be prepared to be open in communication – no surprises.
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Proposed Action Plan

	Priority	Action Plan
Suppliers:		
<ul style="list-style-type: none"> ➤ Develop and share contingency plans, based on input from a cross functional team. ➤ Identify 'at risk' products, 'what if' scenarios and develop contingency plans. 		
Retailers:		
<ul style="list-style-type: none"> ➤ Develop and share contingency plans, based on input from a cross functional team. ➤ Ensure early warning systems in place. 		

In Summary

Under-performance during the month of January results in

- reduced sales for retailers and suppliers;
- erosion of margin for retailers and suppliers;
- additional costs for retailers and suppliers; and
- disappointed customers in store.

There are no winners.

By working collaboratively on planning, operational and communication opportunities with trading partners, and implementing robust Sales and Operations Planning (S&OP) practices along with clearly defined performance measures, improvements to performance in January should be achieved for future years.

Focus on:

- Plan, plan, plan and plan again
- Focus on one number
- Daily responsiveness
- Understand your trading partner
- Operational flexibility
- Communication plan
- Contingency planning

Efficient Consumer Response Australasia

Efficient Consumer Response (ECR) is a business concept aimed at better satisfying consumer needs, through businesses and trading partners working together.

In doing so, ECR best practice will deliver superior business results by reducing costs at all stages throughout the supply chain, achieving efficiency and streamlined processes. ECR best practices can deliver improved range, consumer value, sales, service, convenience offerings and uniform industry standards. This in turn will lead to greater satisfaction of consumer needs.

ECR Australasia reflects a commitment to take costs out of the grocery supply chain and better satisfy consumer demands through the adoption of world's best practice. In an increasingly global food and grocery industry and a retail environment subject to rapid change, the future for Australian and New Zealand suppliers, retailers and wholesalers depends on increased efficiencies, reduced costs and added value for consumers.

ECR Australasia is an initiative of manufacturers, retailers and wholesalers in the Australian and New Zealand food and grocery industry and is supported by the respective industry associations.

Launched in November 1999 and directed by a Board of senior industry executives, ECR Australasia seeks to build on earlier collaborative work in the industry in Australia and New Zealand and to access the outcomes of global ECR related activities. Access to the outcomes of international activities will enable ECR Australasia to take the best, adapt it to the Australasian scene and avoid the need to reinvent the wheel.

For more information about ECR Australasia visit www.ecraustralasia.org.au

For further information contact;

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APPENDIX B

Workshop Attendees

First name	Surname	Company
Adam	Arnold	Metcash Trading
Alan	Balmer	Coca-Cola Amatil Ltd
Adam	Barrett	Cadbury Pty Ltd
David	Bissett	Coles Group Ltd
Hugh	Callander	Campbell Arnotts Asia Pacific
Glen	Cooper	Coles Group Ltd
Kenneth	Coorey	Kellogg Australia Pty Ltd
Kevin	Cusack	George Weston Foods - Don KRC
Greg	Dalton	British American Tobacco
Trent	Debnam	Woolworths Ltd
Martin	Drinkrow	Clorox Australia Pty Ltd
David	Elliston	SCA Hygiene Australasia
Evonne	Fazi	Schweppes Australia
Adam	Foote	Cerebos (Australia) Limited
Joseph	Freeman	Coca-Cola Amatil Ltd
Nick	Frith	Schweppes Australia
Jain	Gautam	Ferrero Australia
Helena	Golden	Coles Group Ltd
Andrew	Graham	Sanitarium Health Food Company
Paul	Harker	Woolworths Ltd
Catriona	Hassett	British American Tobacco
Justin	Henderson	Woolworths Ltd
Jeremy	Hill	Lion Nathan Ltd
Sarah	Jack	Procter & Gamble Aust Pty Ltd
Michael	Johns	Ferrero Australia
Steve	Longley	Woolworths Ltd
Neville	Lord	Coca-Cola Amatil Ltd
Mark	Luckie	National Foods Ltd
Armin	Lumsden	British American Tobacco
Hoss	Matar	Coca-Cola Amatil Ltd
Rick	McCaffrey	Cerebos (Australia) Limited
Grant	Milmlow	Kellogg Australia Pty Ltd
Stephen	Mitchell	Unilever Australasia
John	Monck	Lion Nathan Ltd
Iain	Myers	Sanitarium Health Food Company
Trish	Naggs	Simplot Australia Pty Ltd
Andy	Olsen	Fonterra Brands (Aust) Pty Ltd
Stephen	Ray	Nestle Australia Ltd
Wendell	Rumbel	Campbell Arnott's Asia Pacific
Andrew	Russell	Procter & Gamble Aust Pty Ltd
John	Ryan	Kimberly Clark - Supply Chain
Brett	Scott	National Foods Ltd
Naomi	Smailes	Cadbury Pty Ltd
Warren	Smith	Simplot Australia Pty Ltd
Matt	Swindells	Coles Group Ltd

APPENDIX B

Gary	Tempany	Metcash Trading
Mike	Thomas	George Weston Foods - Don KRC
Sarah	Usher	Bundaberg Brewed Drinks
Jan	van der Merwe	Coles Group Ltd
Debbie	Wellwood	Mars Petcare Australia
Philippa	Whitehead	Procter & Gamble Aust Pty Ltd
John	Wolfe	Stuart Alexander & Co Pty Ltd