



**NRF 2019**  
**Trends &**  
**IBM Innovations**





# Summary

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## Market

1. Global Market Overview
2. Market focus
3. Retail segment focus

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## Trends

1. In store experience
2. Build community
3. Retail for good
4. High tech store
5. Intelligent supply chain

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1. Consumers
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## IBM Vision

1. Digital Engagement and Experience
2. Intelligent Supply Chain
3. Digital Enterprise Operations



# O

# THE MARKET





# Global market overview

WW retail market expected to reach **\$32T** in 2022 from **\$24T** in 2018 (**8.1% CAGR**)

## North America

- Retail sales hit a record of **\$5.5 trillion** in 2017
- **3% CAGR** (2017 - 2021)

## Latin America

- Retail sales hit a record of **\$1.9 trillion** in 2018
- **5% CAGR** (2017 – 2021)

## Europe

- Retail sales hit a record of **\$4.9 trillion** in 2017
- **2% CAGR** (2017 – 2021)

## Asia-Pacific

- Retail sales hit a record of **\$ 9.3 trillion** in 2017
- **6% CAGR** (2017-2021)

## China

- **\$5.6 trillion** sales in 2017

## India

- **\$1 trillion** sales in 2017

## Africa & Middle East

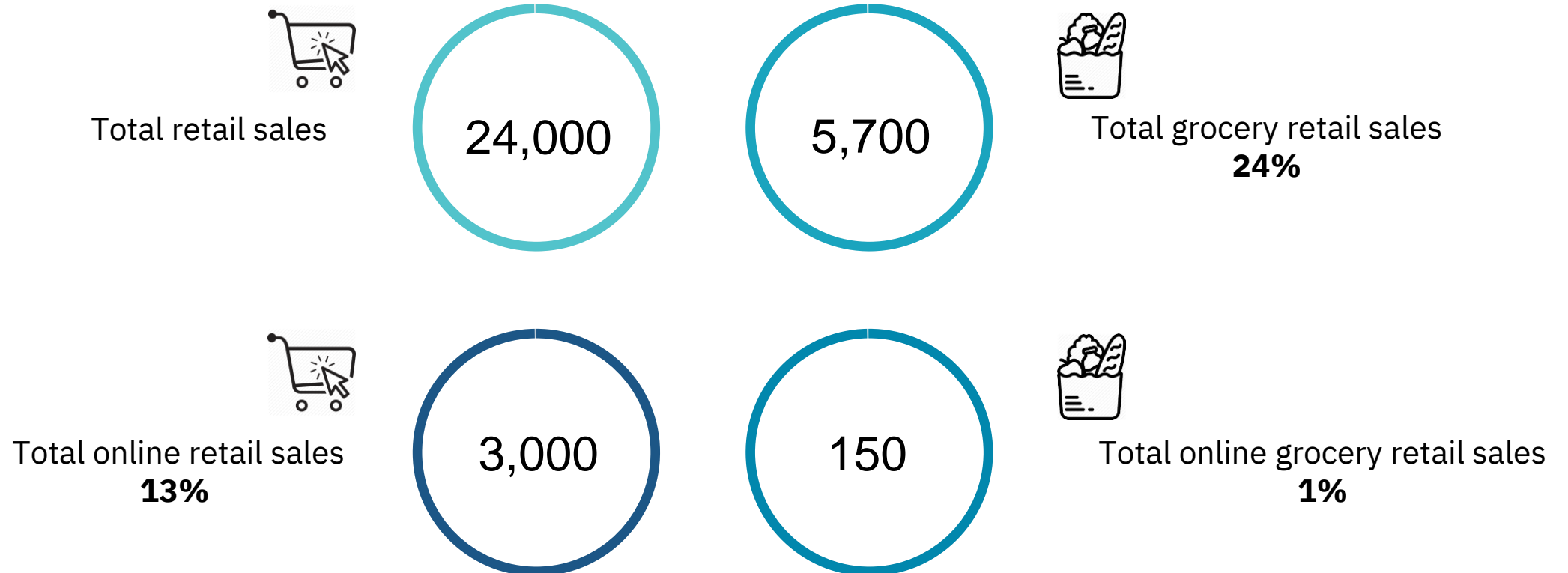
- Retail sales hit a record of **\$1.1 trillion** in 2017
- **19% CAGR** (2017 – 2021)





# Global retail sales in 2018 (\$ billions)

Online retail sales represents only **13% of retail sales** in 2018

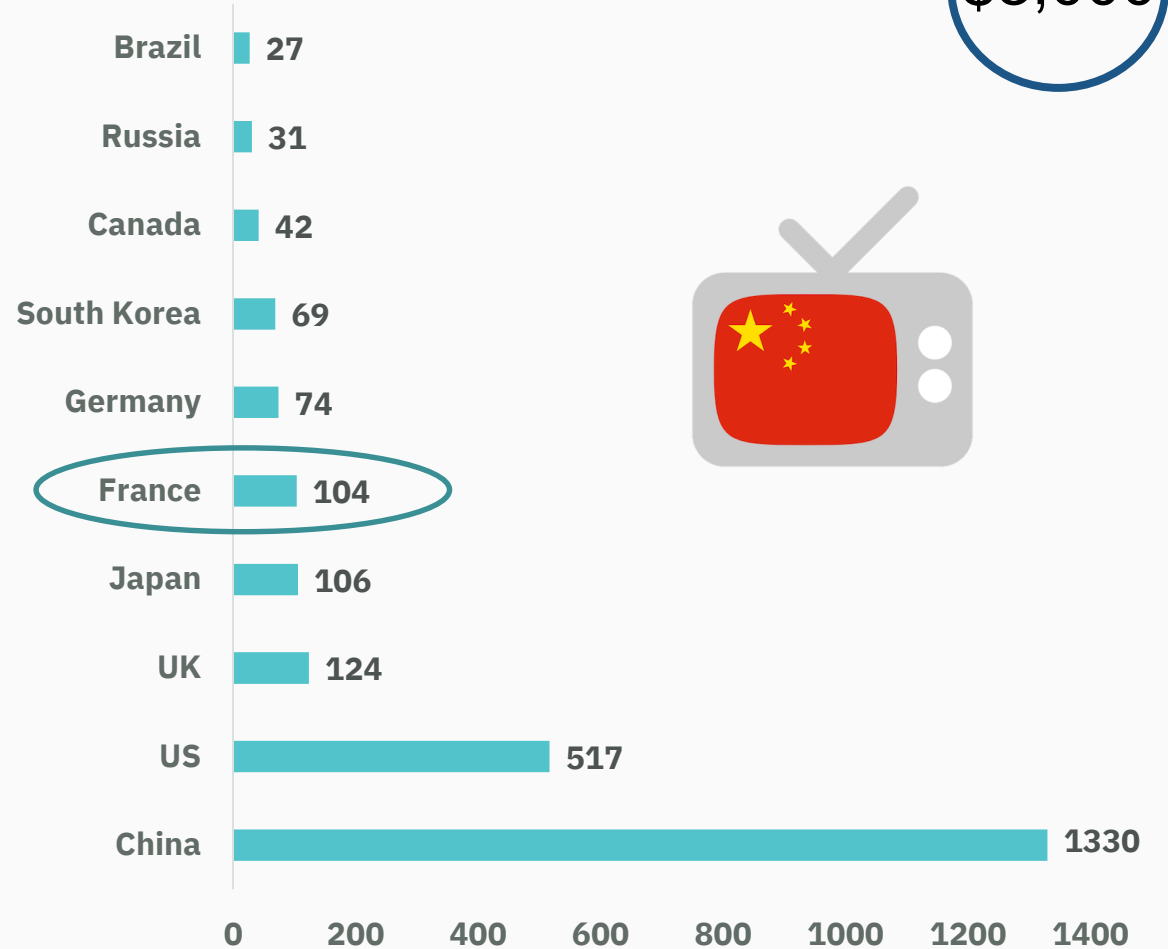






## Global online retail market sales in 2018 in \$billions per country

\$3,000







## China – Singles' day – 11/11/2018

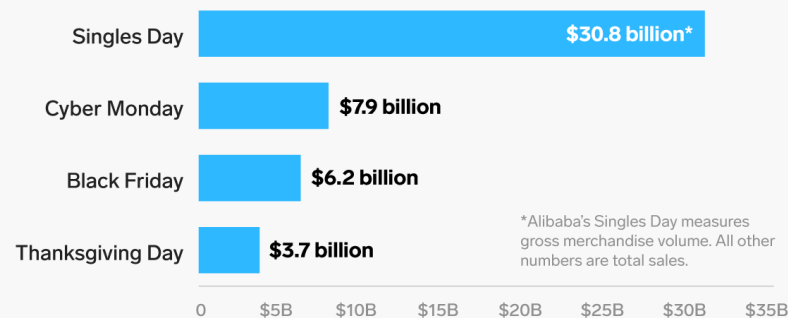
Sales amounted to **\$30.8 billion**:

- $\frac{1}{3}$  of **French e-commerce** market **yearly**
- More than L'Oréal revenue in 2018

**\$10 bn** in sales recorded in one hour

**\$30 bn** in 1 day ie a 27% increase

### Total online sales for 2018's biggest shopping days



Source: Adobe Analytics and Alibaba

Insider Inc.



# Global grocery market

Total global grocery sales: **\$5,700 billion** ie **24%** of total global retail sales

## USA

- Sales estimated at **\$1,494.4 bn**
- **3% CAGR (2018-2023)**

## France

- Sales estimated at **\$275 bn**
- **2.2% CAGR (2018-2023)**

## Japan

- Sales estimated at **\$459 bn**
- **1% CAGR (2018-2023)**

## China

- Sales estimated at **\$1,395.7 bn**
- **5.5% CAGR (2018-2023)**

## Brazil

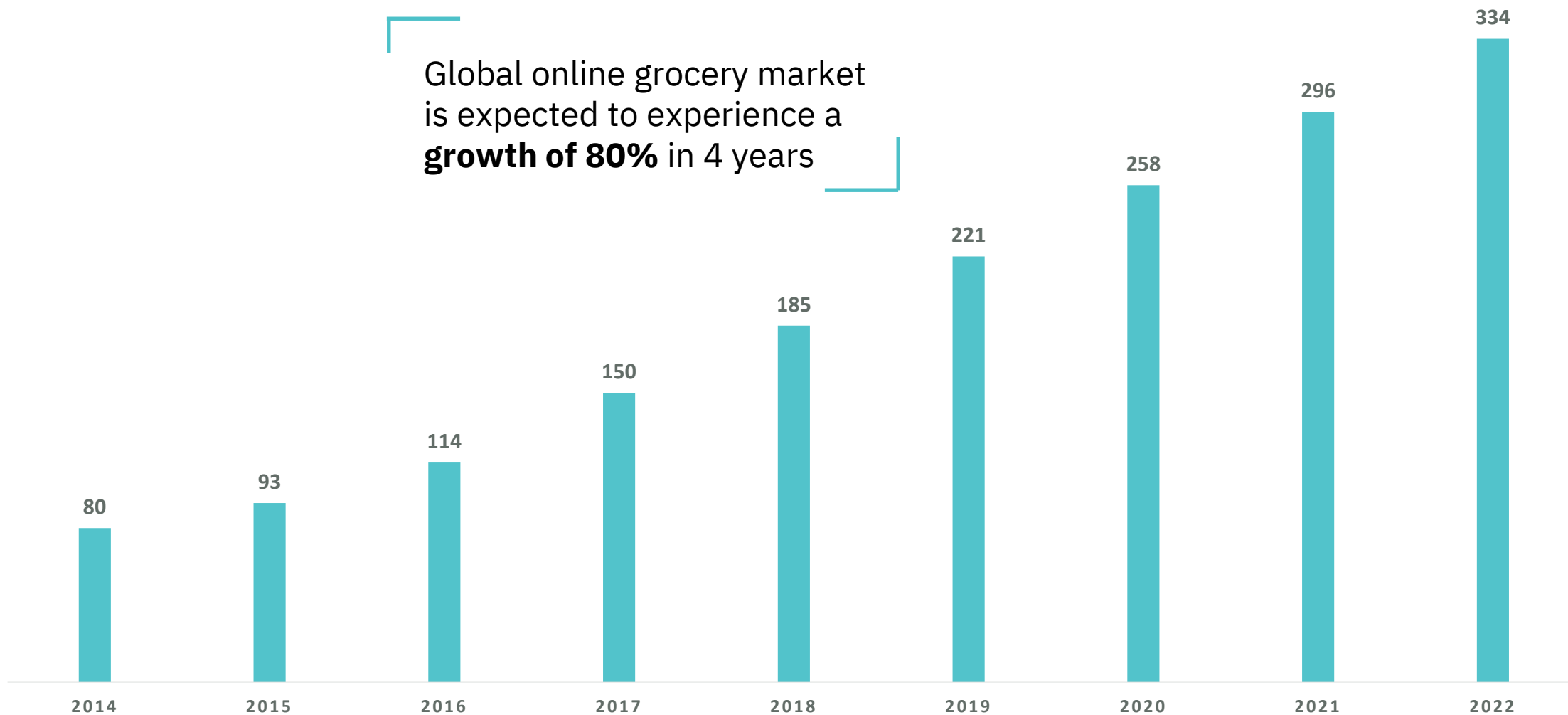
- Sales estimated at **\$328.4 bn**
- **7.4% CAGR (2018-2023)**

## India

- Sales estimated at **\$510.5 bn**
- **11.2% CAGR (2018-2023)**



# Global online grocery sales forecast (\$ billions)





# Global luxury market



The global luxury market grew to **nearly €1.2 trillion in 2018, up 5% from 2017**

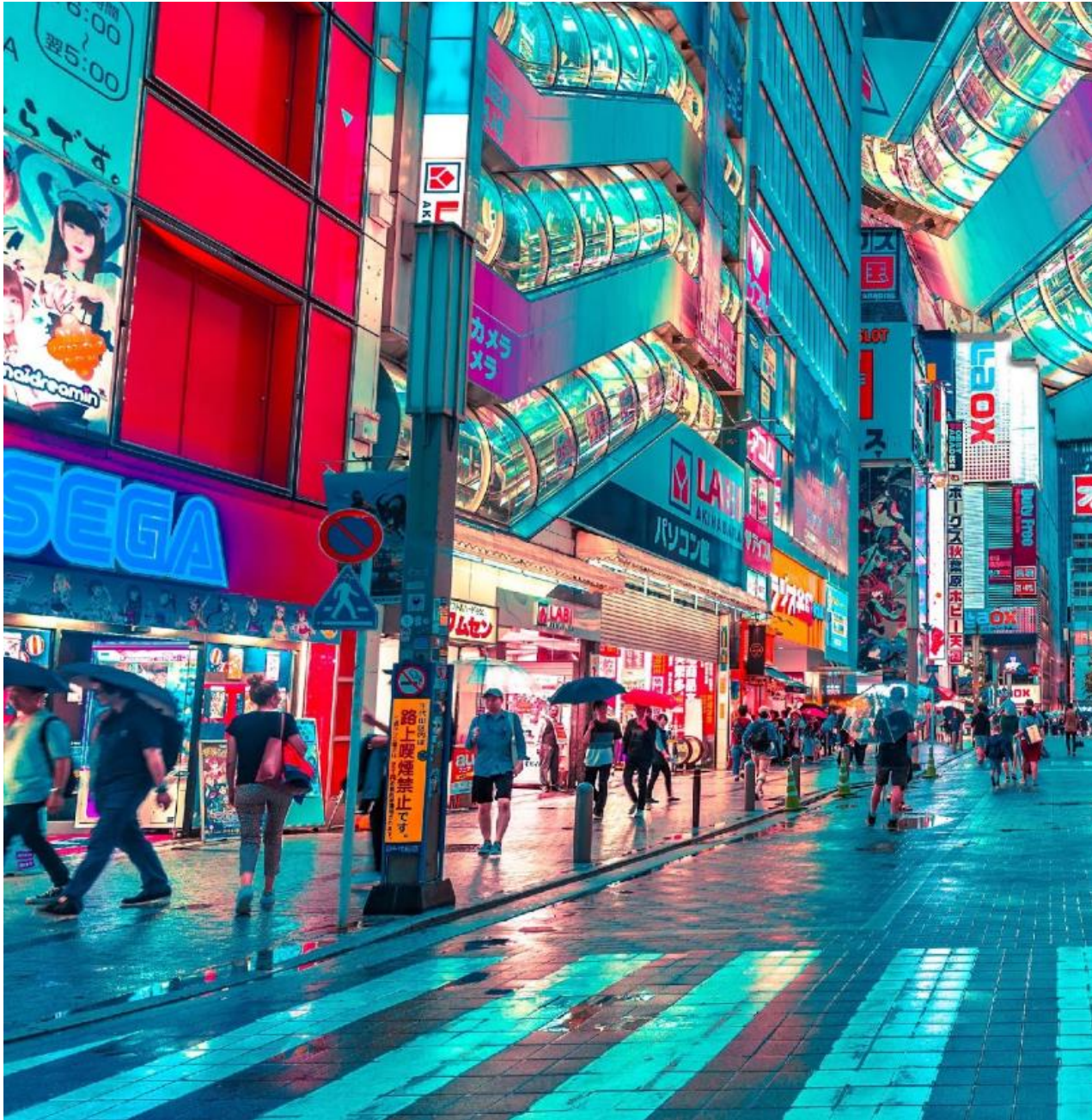
The **personal luxury goods segment** outperformed other luxury segments in 2018 – expected to reach **365 billion in 2025**

**> 6% global growth in 2018**

By 2025, **Chinese consumers = 46% of personal luxury goods market (+14% vs 2017)**

**> 50% of purchases will be made in China**







# 3 disruption factors

## CONSUMERS

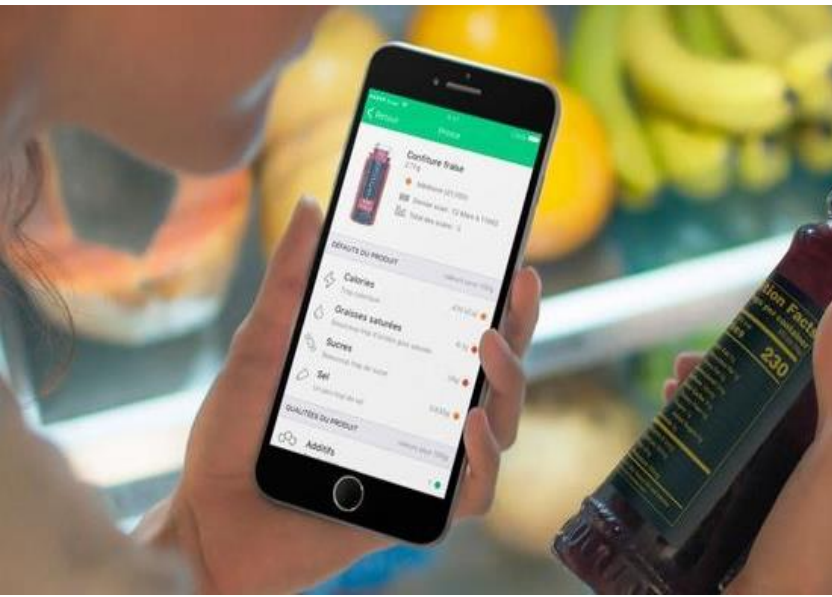
expectation is reshaping demand across the industry

## INNOVATORS

dictate the new standard & transcend industry boundaries

## TECHNOLOGY

is accelerating and enabling innovation and disruption at scale

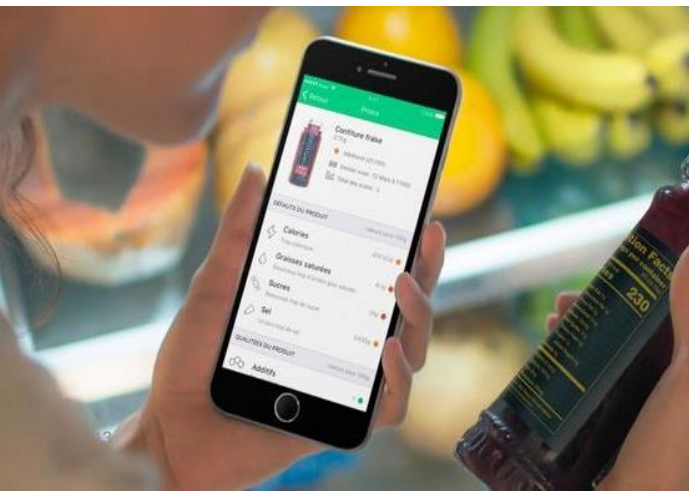


# 3 disruption factors

## 1 - CONSUMERS

expectation is reshaping  
demand across the industry

- Millennials
- Chinese consumers
- The consumer = the channel
- Ethical retailing





# — Millennials: the most powerful consumer group on earth

## 2.3 Bn Millennials in the world - 44% in Asia

- **Asia:** >1Bn - China: 415Mn, India 440Mn
- **US:** the largest demographic group > Baby Boomers in 2019  
Millennial spending by 2020 = \$1.4 trillion annually ie 30% of total retail sales
- **France:** 16 Mn - 50% of the labour force in 2020
- **Luxury consumer is getting younger**  
By 2025: Millennials & Gen Z = 55% of the WW luxury goods market



# — Millennials: shopping characteristics

- 1 The best value for money
- 2 Low brand loyalty
- 3 Experience first
- 4 Omnichannel: online shopping - store - mobile
- 5 Social media  
Sharing with friends & Peer generated endorsements
- 6 Originality, relevancy
- 7 Brand authenticity, health conscious

## European Millennials - Omnichannel shopping habits

- Web to store: 68%
- Store to web: 56%
- In store pictures to collect friends/family's opinion: 44%
- Comparing prices on internet while in store: 56%





# Chinese consumers: the 2.0 shoppers

New retail consumers, used to the most advanced consumer experience in the world

- **Tech savvy**
- **Fan of Retail-tainment**  
enjoy a sociable and entertaining shopping experience
- **M-shopper** – 67.5% use smartphones to buy and pay
- **Social media commerce** – 64% of Chinese Millennials buy on WeChat, QQ, Weibo and Youku
- Expect a **fast and simple consumer experience**

“The boundary between **offline** and **online** commerce **disappears** as we focus on fulfilling the personalized needs of each customer”

*Jack Ma, Alibaba co-founder*



*New retail: “the complete integration of online, offline, logistics, and technology and data for a single value chain*

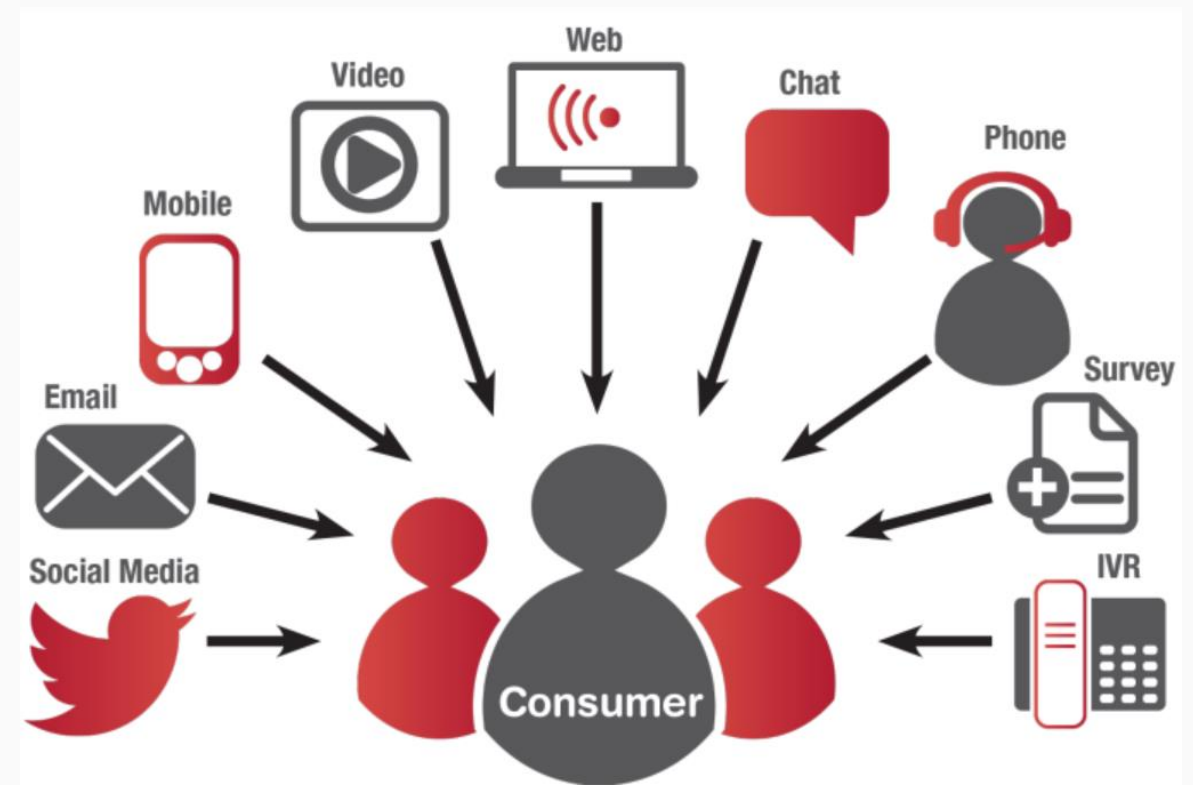
*Source: Bearing point – Mintel, August 2018 New research from the world’s leading market intelligence agency - Asia Briefing, Dec 2017 - China Briefing, Sept 2018 – LSA, Jan 2019*

# The consumer is the channel: prerequisites

“Consumers don’t think about the world online versus offline, neither should brands and retailers.”

*Michael Evans, Alibaba Group President*

- Merge of online and store data for a 360° customer view
- Empower & digitalize the store associates
- Provide high quality service to consumers
- Transform logistics: zero stock stores?
- Transform the whole organization





# — Ethical retailing: a growing demand from consumers

## Shift in consumer expectations: ethics & brand purpose

- **Product, price + ETHICS**
  - nearly 75% of global consumers list product origin as key purchase driver
- **Consumers assess what a brand says, what it does, what it stands for**
  - sustainability, transparency, fair employment practices, waste management
- **Gen Z and Millennials consumers drive shift to ethical buying**
  - 60% consider companies' ethical values and authenticity before buying their products
  - 73% spend more if products come from a sustainable or socially conscious brand

# 62%

of customers want companies to take a stand on current and broadly relevant issues like sustainability, transparency or fair employment practices.

# 3 disruption factors

## 2 - INNOVATORS

dictate the new standard & transcend industry boundaries

- Disruptors
- New standards
- Merges & Acquisitions





## ■ Innovators



**CPG & Retail market:  
\$2.95 Trillion over the  
next decade (2017-2026)**

- New store formats
- Partnership between traditional retailers and disruptors
- Additional value arising from platforms such as Amazon or Alibaba
- Strategic M&A

# 3 disruption factors

## 3 - TECHNOLOGY

is accelerating and enabling disruption at scale

- Voice commerce
- Visual recognition
- Blockchain
- AI
- Mobile



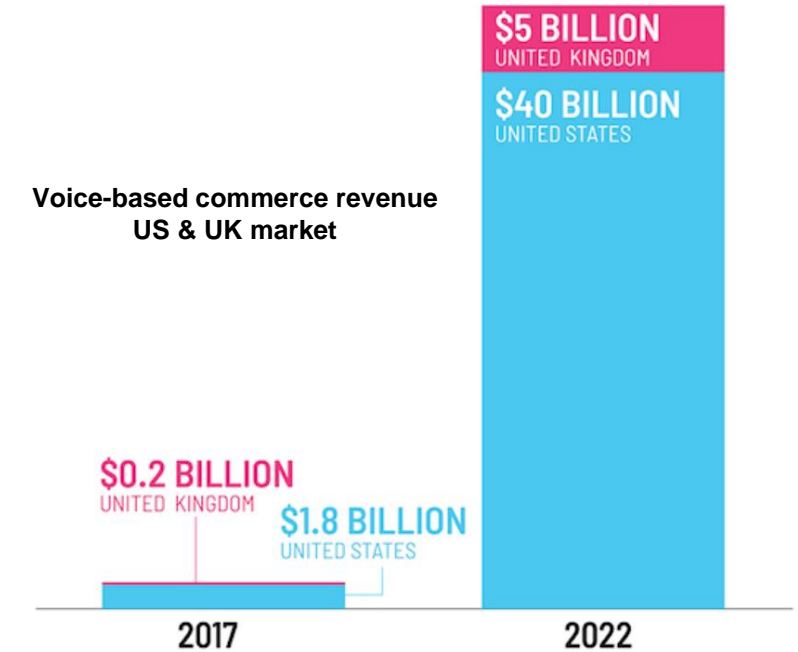


# – Voice commerce: a fast growing market<sup>+</sup>

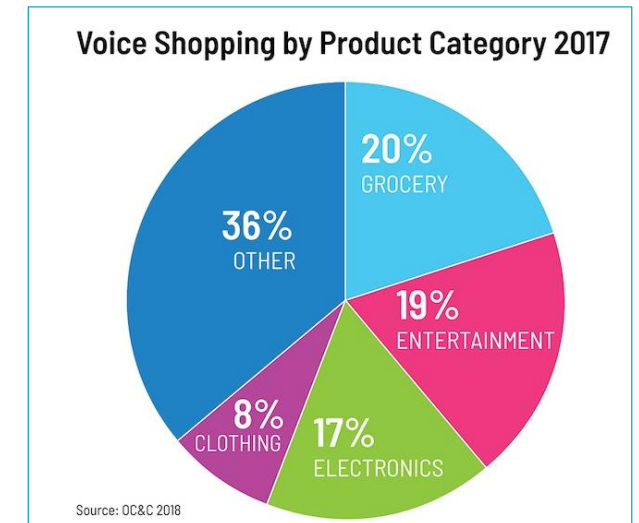
Voice commerce to play a significant role in eCommerce

WW Voice-based commerce by 2023 = \$83 Billion

- **US & UK markets**
  - by 2022: 50% of the WW voice commerce revenues
  - 2017-2022: 2150% growth (x23) - CAGR: 86%
  
- **Digital voice assistants = 8 Billion globally by 2023**
  - 2018-2023 CAGR = 25%
  - the fastest selling consumer technology in 2018 outpacing wearables and VR
  
- **Voice Shopping: popular for Grocery, Entertainment and Electronics**
  - US: 35% of voice based devices' owners make toiletry and grocery purchases



Source: OC&C 2018



Source: OC&C 2018

# Visual recognition: a game changing technology

- A growing market pushed by machine learning & big data from \$16 Billion in 2016 to \$38.92 Billion by 2021
  - CAGR of 19.2% from 2017 to 2025
- Retail applications
  - ✓ Fraud management
  - ✓ Payment
  - ✓ Inventory
  - ✓ Facial coding
  - ✓ Customer experience
  - ✓ Store maintenance
  - ✓ ....

# 80%

reduction in out-of-stock rates.

Image recognition & AI technology is paramount in evolving the retail experience and boosting operational performance.

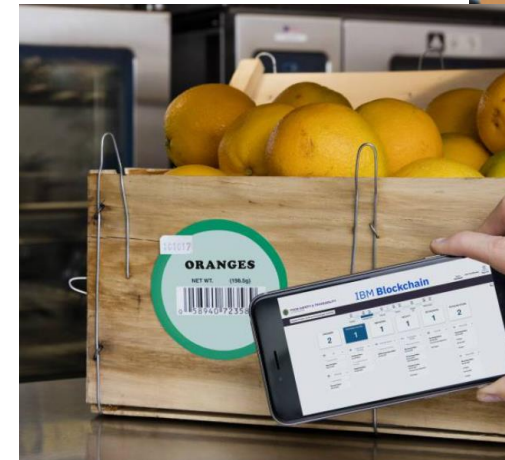


# Blockchain: transparency, trust, operational efficiency

Retail is the 4th largest Blockchain market - \$933 million by 2022

Supply chain management segment to dominate the Blockchain in retail market

1. **Increasing transparency and consumer confidence**
  - create transparent and decentralized supply chain system
2. **Guaranteeing authenticity and reducing counterfeits**
  - reduce fraud and errors, issues identification
3. **Meeting with the new supply chain requirements**
  - improve efficiency and speed
  - speed up delivery and smooth logistics
  - faster and reliable inventory management
4. **Protecting consumer privacy**
  - increase data prevention and manipulation



## — Artificial Intelligence: benefits in customer facing & operations areas

- 1 retailer out of 4 are deploying AI - in 2018 28% retailers (4% in 2016)
- **AI penetration by sector:** Apparel and footwear followed by Food & Grocery lead the pack
- 3 out of 4 AI use cases are deployed in **customer-facing area** / 74% of projects
  - Expected benefits in customer-facing areas
    - => #1: Enhanced customer satisfaction due to a better experience
- 26% **operations-focused initiatives**
  - Expected benefits in supply chain operations and logistics
    - => improved consumer experience, inventory productivity, operational efficiency

### Retailers are accelerating their AI deployments

Walmart has used AI-driven image optimization and saved \$86Mn  
Estimated savings of >\$2Bn over the next 5 years

Morrisons used AI for stock replenishment to reduce shelf gap by 30%

## — Mobile: impact on shopping and payment

Shopping is going mobile, in-store and out  
Mobile payment is the world's largest and fastest-growing market

### By 2021 in Europe:

- ✓ 59% of adult mobile phone owners use their phones to research physical products before purchase.
- ✓ 60% use their phones in brick-and-mortar stores
- ✓ Share of mobile in online retail sales: 25%
- ✓ 56% of online adults expect companies to make their websites mobile-friendly

# 50%

of digitally influenced in-store sales will be driven by mobile in 2021.



# ■ Mobile: disruptive payment options in China

- Mobile payment
  - ✓ 98.3% of Chinese netizens use a mobile device
  - ✓ Payment market dominated by AliPay and WeChat Pay
  - ✓ E-retail via mobile influenced by popularity of smartphones and 5G connections for China in 2019
- QR Code payment: the mainstream offline payment option
  - Hold 70% of the Chinese mobile payment device market
- Smile to Pay: Facial recognition payment system
- Cashierless store: Alibaba's Futuremart and Hemma stores





03

# RETAIL TRENDS



# Trends Overview

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3

## Trends

### 1. In store experience

- DIY
- Product customization
- Extended services
- Entertainment
- New store concept
- Innovative merchandising

### 2. Build community

- Create social link
- Share & develop expertise

### 3. Retail for good

- Transparency & traceability
- Sustainability
- Making the world a better place

### 4. High tech store

- Personalized experience
- Visual recognition & Cashierless store
- Mobile apps
- AR/VR & Voice commerce
- Robots & Empowered store associates

### 5. Intelligent Supply Chain

- Last mile fulfillment
- Omnichannel capabilities
- Supply Chain efficiency
- Demand forecasting





# 3.1 IN STORE EXPERIENCE



Do It Yourself



Extended services



New store concept



Product customization



Entertainment



03-1



# Do It Yourself



## AromaZone

- Display with instructions to making ourselves
- Workshops and specialized trainer to create homemade cosmetics
- Personalized content

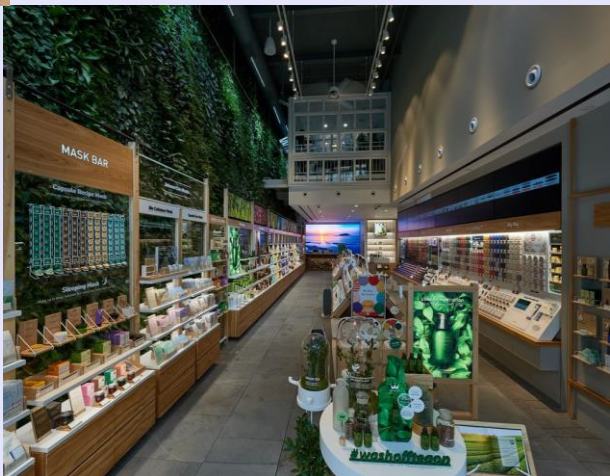


## Dresden

- Shoppers create their own pair of eyeglasses or sunglasses
- For 49\$, customers get lenses and frames made up
- Choose the frame styles and color combinations

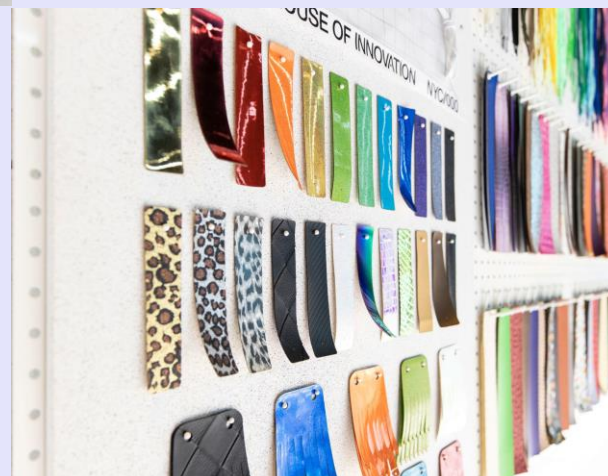
## Innisfree

- “My Palette” installation consists of 137 colors and shades of make-up
- Creating his own face mask



## Nike

- Nike By You: workshop to customize sneaker
- Sneaker Bar Create unique products



03-1 

# Product customization



## Converse

- Workshop to create Chuck Taylors from scratch with a sneaker design
- Customer choose fabric, soles, color of the logo
- A dedicated floor for personalization



## Levi's

- Tailor shop: Self-desk for customize t-shirt, jeans
- Integrate your own creation, logo

## Salomon

- S/Lab ME:sh to measure consumers and find the best size
- Digital co-creation merging Salomon DNA & expertise with needs and preferences of the customer



## Covergirl

- Customization stations to personalize make-up
- 3D printer for makeup bags





03-1 

# Extended services



## Adidas

- Concierge desk service
- Same-day hotel delivery service
- NYC guide to discover the city
- Guest kiosk with healthy juices & fitness consultants



## Leroy Merlin

- Development of an ecosystem with start-ups Steady and Trusk specialized in home delivery
- Interior decoration coaching with Littleworker
- Reparation service with Bob'depannage

## Carrefour Bio

- Digital lockers for Airbnb keys
- Space to drink a coffee with shared library
- Neighborhood concierge desk service



## American Eagle

- Free laundry service
- Jeans Gallery featuring an in-store maker's shop
- Digital concierge iPads in dressing rooms
- Collaboration space



03-1 

# Entertainment



## Buzz Feed Camp

- “Secret moving wall”
- New theme that rotates every 8–12 weeks
- Activities daily, including arts and crafts workshops



## Starbucks Reserve Roastery

- Celebrate the heritage of roasting
- Journey from bean to cup through tubes
- Staging of coffee making

## Casper

- Design like a camp
- A nap “survival kit” for customers
- Giant playground for kids



## Gucci Wooster Bookshop

- A cinema in the middle of the store
- Celebrate Soho’s creative heritage
- A library area





03-1 

# New store concept



## Glossier

### Showroom

- Tinted windows almost private
- No purchase without a seller
- Open space, minimalist price
- Purchase via automated conveyer belt



## Facebook @Macy's

### Pop-up

- Small e-commerce brands exposure
- Growing brick-and-mortar presence for online players

## IKEA

### Smaller is beautiful

- No apartment showroom, no in-store course
- Selection of mainly decorative and space-saving items
- No stock, no big furniture
- Partnership with Mondial Relay



## Auchan minute

### Automatic format

- 500 self-service references, without staff, accessible 24/7, without cash register
- QR code for virtual shopping cart
- Online paiement





03-1



# Innovative merchandising



## Amazon 4 Star *Bestseller merchandising*

- Preferences of local customers
- On the shelves only the most popular articles (4-5 stars) from the e-commerce site
- Rotating inventory on a weekly basis



## Story *Editorial merchandising*

- Design, theme and products renew every two months
- Create surprise and delight
- How to get the customer back

## Nike Speed shop *Local offer*

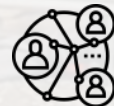


- Selection of the most popular products in NYC
- Seasonal products and Nike Sneaker Bar
- The space designed in the spirit of New Yorkers (black and white)

## 3.2 BUILD COMMUNITY



Create social link



Share and develop expertise



03-2 

# Create social link



## Rapha

- Build social link around same passion
- Rapha Cycling Club
- App to be in the loop with rides, events, news



## Lululemon

- Social Club: community around personal growth
- “Be a mission with a company”
- Events with local leaders (Sweat Life Festival)
- Ambassador program

## Salomon

- Test of shoes & group running sessions
- Free and self-service lockers
- App to connect with others runners



## The Phluid Project

- Value of sidestepping conventional gender divisions
- Instagram-worthy corner & 33% of hang-out space
- No paid marketing to keep safe the authenticity





03-2 

## Share &amp; develop expertise



### H&M Take Care

- Sewing and embroidery workshops
- Dedicated team for clothes repair
- Awareness to recycling clothes
- Tips on clothing care



### French Cheese Board

- Cooking lessons & cheese discovery
- Creation of a community around cheese
- Features event and exhibits

### Aroma Zone

- Dedicated workshop space for home-made product courses
- Presence of professional on-site



### Apple

- Free workshops for people who want to learn more about their devices
- Programs available for kids, include Apple camp and field trips
- Sessions in Photography, Art & Design, Music, and more





# 3.3 RETAIL FOR GOOD



Transparency & Traceability



Making the world a better place



Sustainability



03-3 

# Transparency & Traceability



## Everlane

- Radical transparency via storytelling
- Ethical production practices at each step of the process
- Helmets to listen the silence of factories
- Informative queue



## Naadam Cashmere

- History of Mongolian family that provides raw material
- Translating transparency into sustainability

## Carrefour

- Trace different stages of product transformation
- QR code on the finish product (origin, producer...)
- Scalability facilities



## Lush

- Suppliers: local, organic, fair-trade
- Products are hand made
- Manufacturer's name on each product
- Clear message against animal testing



03-3 

# Sustainability



## Patagonia

- Certified B-corp
- Assessment of fabrics in their line to determine pollution causes
- Shifted entire cotton line to organic & incorporate sustainable materials



## Allbirds

- "the world's most comfortable shoe"
- Edible shoes made of wool and eucalyptus fiber
- ZQ & Forest Stewardship Council certification

## Rent the Runway

- Renting is the new buying
- Rotating selection of clothes & accessories rental
- No selling product, only services



## H&M Take Care

- Sewing & embroidery workshops
- Customer involvement in the product lifecycle
- Certified cleaning products
- Recycling service & Repair space





03-3 

# Making the world a better place



## Lego

- Only toy company named a WWF Climate Savers Partner
- Minimising the impact of their footprint
- Using their own wind farm
- Employee engagement is at a 96%



## Ben&Jerry's

- Certified B-corp
- Promoter of fair trade, world peace and equality
- Ben & Jerry's Foundation: engage employees in philanthropy & social change work

## TOMS

- 1 pair of shoes bought = 1 pair offered to a child in need
- For other TOMS products, a part of the income goes to help others (pair of glasses = help people in need of eye care)



## Kroger

- Reduce food waste by promoting the option of buying imperfect produce that is still wholesome and safe to eat.
- Launched an “ugly produce” brand in 2018 to encourage consumers to buy imperfect fruits and vegetables.





## 3.4 HIGH TECH STORE



Personalized experience



Cashierless store



AR & VR



Robots



Visual Recognition



Mobile Apps



Voice Commerce



Empowered Store Associates



03-4



# Personalized experience



## Mystor-e

- Artificial intelligence and predictive analysis to identify the customers age, gender and "style" in order to suggest products that may appeal to them.



## Klepierre

- Klepierre supports retailers in improving their business model by providing them with data on traffic volume like stores visited, duration of visit.

## Cali Burger

- Facial recognition technology with AI self-ordering kiosks to provide customers the option of immediately activating their loyalty accounts eliminating the need of swiping a card.



## L'Occitane en Provence

- Personalized experience through mobile with personalized recommendation feed and mix of popular products and items based on recent viewing history updated every few minutes.

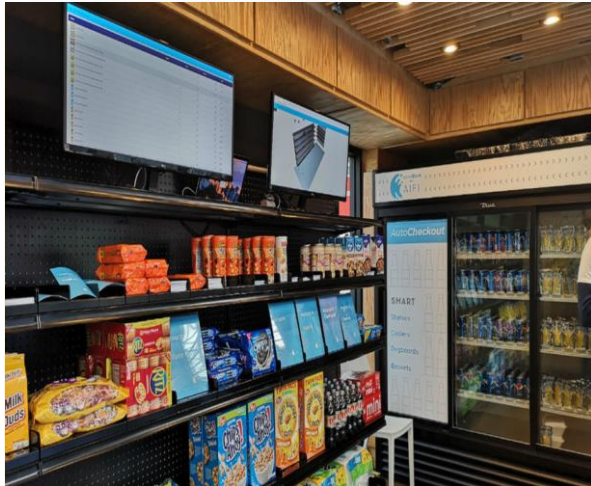


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03-4



## Visual recognition



### Aifi

- Offers an experience similar to Amazon Go
- All you have to do is present your credit card or mobile app

### Zippin

- Visual recognition and computer vision technologies combined with sensors
- Credit card linked to the App



## Cashierless store



### Caper

- Autonomous Checkout with Smart Carts
- Once you have completed shopping, pay directly on the cart, with mobile payment

### Smart Shelf

- Connected shelves, algorithm to prevent fraud.
- Cameras located within the store interpret the entire shopping basket before debiting the final amount from customers' electronic wallet when they leave the store.





03-4



# Mobile Apps



## Nike

- Shopping entire looks on in-store mannequins
- Scan bar codes
- Scan to try
- Instant Checkout



## Dirty Lemon

- Take what you want
- Text what you took
- Pay what you took
- Get on with life

## Amazon 4 Star

- Scan a QR code that's shown throughout the store.
- An unique-to-you QR code is created and linked to your payment info on Amazon, the cashier scans it and you are done



## Le 4 Casino

- Designed to be open 24 hours a day
- Simply present the app barcode to enter
- Instant payment directly from the App



03-4



# AR & VR



## Covergirl

- Virtual greeter. Say hi to Olivia when you walk through the door.
- Olivia can direct you to your favorite product, share beauty trend advice or answer a question. Just ask!

## Macy's

- Use a virtual reality headset to see how your space looks with furniture in it
- You can do it at home too, using augmented reality on the Macy's app



# Voice commerce



## Jumbo

- Vocal Shopping List App
- Innovative & flexible customer experience
- Increase customer brand loyalty

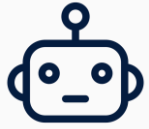
## Starbucks

- Voice ordering capabilities within the Starbucks mobile iOS app and Samsung's voice assistant: Bixby





03-4



# Robots



# Empowered store associates



## Freshippo

- The restaurant combines mobile applications, smart screens, conveyor belts, mechanical arms and robot carts. Orders and payments through the application



## Orvis

- Orvis associates can engage with shoppers via Aptos Mobile Store on tablet devices and select and locate items of a particular size, color, style online or at another store and arrange to have items shipped directly to the customer's home.

## Walmart

- Walmart is testing robots, built by Bossa Nova Robotics, to see if they can monitor store inventory more cheaply than human workers.



## Mulberry

- Mulberry's store associates can access the entire product catalog, check out customers anywhere in the store, see customer profiles, send personalized messages, and connect with backroom employees.





# 3.5 INTELLIGENT SUPPLY CHAIN



Last mile fulfillment



Omnichannel capabilities



Supply chain efficiency



Demand forecasting



03-5 

# Last mile fulfillment



## Hema

- Customers can place orders through the mobile app
- Delivery in less than 30min for those living in a 3km radius
- Some people move to live near a Hema location



## JD.com

- The 211 promise available to 99% of the Chinese people
- White-glove delivery
- 40,000 deliveries using drones
- Retail-as-a-service

## Takeoff

- Hyperlocal grocery micro-fulfillment center powered by robots and AI
- Faster and cheaper assortment of orders
- Reduction of carbon footprint



## Amazon key

- Allows customers to have their packages delivered inside their home, garage, car, without having to be there
- Eventually, the scope of services offered will extend



03-5 

# Omnichannel capabilities



## Target & Shipt

- Target leads the way in omnichannel grocery
- Stands as the “Anti-Amazon”
- Innovative omnichannel capabilities



## Walmart

- Network of numerous outlets, online capabilities
- Pick-up Towers: order online, pick-up in store very easily and quickly

## Eileen Fisher

- Objective : Build a unified and omnichannel inventory
- Develop SFS and BOPIS capabilities
- Boost accuracy and trust in inventory data



## Decathlon Lab

- 5,000 m2 outlet in Singapore open 24h/24
- Web to store very quick
- Store to web very fast
- Mobile paiement exclusively





03-5 

## Supply chain efficiency



## Ocado

- Automated logistic solutions for retailers
- 36,000m<sup>2</sup> of automated warehouse for Monoprix
- 50-item order ready in 5 minutes



## DHL and AR

- Introduces AR glasses for employees within its warehouses
- 15% increase in productivity
- Faster and more simple onboarding process

## Undiz

- Innovative and efficient order fulfillment: delivery of the order in a capsule (pneumatic tubes)
- Optimization of the outlet's surface
- Very easy return policy



## Lenovo

- Uses cognitive capabilities to get insights out of internal and external data
- Reduces response time to supply chain disruption by 90%
- Reduces its operational costs



03-5 

# Demand forecasting



## Afresh

- Aims at reducing food waste
- AI-based demand forecasting



## Hovis

- Leverage data to get insights on the quantity of bread it should produce and where to ship it

## Conad

- Price optimization solution
- Faster reaction time
- Improved competitive positioning
- Increased return on promotions



## Mr.Bricolage

- Avoids stock-out and over-stock
- Supply automation depending on demand scenarios
- Vekia's client for 5 years
- Ambition to deploy it in all outlets in France





**IBM VISION**

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# IBM platforms & offerings: DISCO



## Digital Experience & Engagement

### Design & Execute Enhanced Experiences

Watson Customer Engagement, iX, Watson

*Customer Data and Insights  
(Advanced Customer Engagement)*

*Product Innovation  
(Watson)*

*Re-Platform The Store  
(re:Store)*

## Intelligent Supply Chain

### Greater supply chain visibility

Blockchain, Watson Customer Engagement, Watson IoT

*Data Platforms  
(MetroPulse)*

*Enhance Demand Forecasting  
(MetroPulse, Weather)*

*Intelligent Processes & Apps  
(Watson Customer Engagement, Services)*

## Digital Enterprise Operations

### Next Generation Enterprise Architectures

S4/HANA

*Cloud Migration  
(ICP, Hybrid Cloud)*

*Product and Asset Optimization  
(MetroPulse, Watson IoT)*

*Optimized Operations  
(Services, Security, Mobile)*



# Digital Experience & Engagement



## 1-800 flowers

Uses a AI-powered chatbot GWYN (Gifts When You Need)

- Finding the perfect gift, delivered quickly and within budget
- Manage multi-brands (Flowers but also chocolates, fruits etc.)
- 80% of users say they will use GWYN again



## Leroy Merlin Brazil

Uses IBM Watson for the Consumer Chatbots

- Optimize customer service through digital platforms
- The virtual assistant takes questions about store addresses, trading system, services and opening hours

# Intelligent Supply Chain



## Unilever

Unilever uses IBM Metro Pulse, using internal and hyper-localized external data, to get actionable insights and use it to act with agility (truly personalized offers, assortments, more responsive supply chains, targeted services and much more)



## Walmart

Walmart now uses IBM FoodTrust to trace its lettuce, spinach and mangos to :

- Avoid contamination in the supply chain
- Enable customers to know in details where their food come from but also how it was produced and shipped



# Digital Enterprise Operations



## COFCO

Having done major acquisitions in recent years, COFCO International is looking to build a global platform for its growing business and has selected SAP S/4 HANA to be a catalyst for the organizational transformation



## 4 Casino

4 Casino uses **Watson IoT and Watson capabilities** to

- Better master the cold chain
- Monitor out of stock
- Ultimately improve operational efficiency and take better care of customers' health

# IBM platforms & offerings

## Business Transformation Imperatives

## Selected Technology & Industry Platforms

### Digital Experience & Engagement

Seamless brand experience at Home - On the Go - In the Store



Watson Assistant



Advanced Customer Engagement

### Intelligent Supply Chain

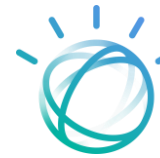
Build trust by reliably delivering with agility anywhere



IBM Food Trust



IBM TradeLens



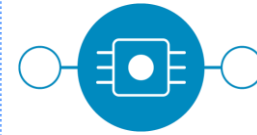
Watson Supply Chain Insight



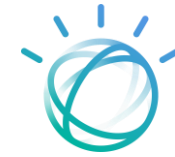
MetroPulse

### Digital Enterprise Operations

Re-invent the model for efficient associates and continuously funded innovation



Watson IoT



AI / Watson Mobile

## Architecture



Data



Cloud



Security

## Industry expertise

CPG

Retail

Agribusiness





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