RETAIL STRATEGY

2023-2027

EXECUTIVE SUMMARY

The GS1 Retail Strategy defines the strategic priorities for GS1 to engage with the retail industry more effectively, to help drive growth in value and growth in relevance for industry while supporting GS1 standards adoption in a coherent way, globally.

Retail has transformed over the last decade and that transformation was accelerated by the pandemic, presenting the retail industry with both opportunities and challenges. While industry's digital transformation has been accelerated there has also been a massive drive for sustainability initiatives, and a concerted move by governments to develop their regulatory frameworks. These developments are all driving a new and urgent rate of change impacting the retail-ecosystem.

Working with the retail industry these changes are being addressed with next generation 2D barcodes, powered by GS1 standards, opening a gateway of in-depth product information and connecting directly to consumers. A consistently scaled deployment and adoption of the GS1 registries underpins the future of product data, and a clear focus on emerging sustainability and circularity developments is taking GS1 into the future as a force for good.

As the GS1 system evolves and moves further into the online and business-to-consumer space, users often struggle to make sense of the value and relevance of the GS1 offer. Therefore, a core part of the retail strategy will be a new way to approach this challenge, with a New Narrative focusing on simple, compelling, customer centric communication. This approach originates in the overarching need to be more business focused and less technical when communicating externally. Ultimately, the value and relevance of GS1 will be made clear beyond any doubt. At a high level the retail strategy has three distinct strategic pillars:

STRATEGIC PILLARS

NEW NARRATIVE	ENGAGEMENT, ADOPTION AND USE	SERVICES AND INNOVATION

STRATEGIC FOUNDATION: TOOLBOX OF GS1 STANDARDS

Unique identity
Next-generation barcodes with global migration to 2D

Registries
Data sharing GDM, GDSN, EPCIS, EDI, GRP, L2SD

The strategy incorporates retail sector and macro trends, exploring opportunities for GS1, and a comprehensive roadmap with strategic actions guiding the federation forward for the next five years. Guided by this strategy, we approach future opportunities for GS1 with a coherent global approach. We will continue to drive growth and value to stakeholders while addressing consumer needs—and work to bring this value with powerful and simple standards, services and solutions that are timely, relevant and universal.

The 2023-2027 GS1 retail strategy has been developed with industry (Management Board retailers, marketplaces, brands, CGF), GS1 Member Organisations & Global Office. The scope of the strategy covers the CPG/fast moving consumer goods, fresh foods, apparel and general merchandise sectors, both in-store and online. Executing against this strategy will address pressing industry needs and will help MOs to make strategic choices while outlining the benefits for the stakeholder groups across the retail ecosystem. Recognising that five years is a long timeline, the strategy has built-in flexibility to adjust to unexpected changes across the user community and across the retail landscape.

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1. INTRODUCTION

This GS1 Retail Strategy has been developed to respond to significant changes in the retail ecosystem with a unique set of challenges faced. This strategy builds on the extensive global work in retail and is in line with the GS1 strategy and will help accelerate the significant opportunities that need to be captured. The retail strategy defines the strategic priorities GS1 will focus on to drive a globally coherent engagement with the retail industry.

The barcode at 50: a time to celebrate, take stock and look to the future

Today we are in the midst of the biggest transformations of the retail industry since the introduction of the GS1 barcode 50 years ago, which truly transformed the international commerce and brought billions of savings annually.

Retail has significantly transformed over the last decade and that transformation has been accelerated even further by the Covid-19 pandemic presenting the industry with both opportunities and challenges.

While the pandemic accelerated industry's digital transformation and highlighted the need for supply chain resiliency, a massive drive for sustainability initiatives, and an accelerated move by government to evolve their regulatory frameworks, are all driving a new and urgent rate of change impacting the retail-ecosystem globally.

Today, we envision a world where the digital transformation of commerce will create new opportunities to improve business operations, consumer experiences and where sustainability is at the core of what we do. The “beep” of the barcode is now heard billions of times a day by consumers around the world and it is taken for granted as a part of modern life.

During these 50 years we have worked to increase efficiency in commerce, and as we go forward we also need to include our mission to increase our positive impact, to make sure our users can do better business, every day, all over the world. There is a real paradigm shift happening globally for the retail sector, companies are facing a more complex and uncertain environment, regulations are evolving, e-commerce has become omnipresent and there are demands from consumers requiring trust through product transparency, which in turn requires more tech and data driven commerce.

The GS1 Retail Strategy at a Glance

The 2023-2027 retail strategy is focusing on a new narrative with the consumer and sustainability in focus. It draws upon the learnings of the turbulent business environment of the last several years where industry’s digital transformation was greatly accelerated.

Historically GS1 has been leading the development of retail commerce standards, primarily through business to business channels and using a technical lens. The ongoing digital transformation that we are currently part of has had a significant impact on the need for standards to do better business, as there are more actors, more channels and more data to be managed, and industry wide standards frameworks are vital to support business operations that depend on data. As the GS1 system evolves and moves further into the online and business to consumer space, users often struggle to make sense of our vision and the value and relevance of the GS1 offer. Therefore, a core part of the retail strategy will be a new way to approach this challenge, with a new narrative focusing on simple, compelling, customer centric communication. Ultimately, the value and relevance of GS1 needs to be clear beyond any doubt so that our members understand how GS1 adds value to their businesses.

Inspiring industry with a new narrative

Focus on simple, compelling, customer-centric communication is needed	Our storytelling needs to focus on external issues and reflect the voice of industry through industry-led use cases, trends, etc.	Key messages should be reimagined and targeted to different industry stakeholders.

This approach originates in the overarching need for us to be more business focused and less technical when we communicate externally. This means that we need to be able to tell the story of GS1 and the value we bring to our users and the retail ecosystem in a better way. We need to work jointly to deliver a value story that connects to the problems we can solve, with offer presented in a way that is easier to understand. All of this is encapsulated in the new narrative.

At a high level the retail strategy has three distinct strategic pillars:

1

A new narrative: Develop a simple, customer centric narrative that clearly communicates GS1's value to members and stakeholders

This is the area where we have to accelerate and look at new ways of doing things – it is the top priority for the strategy implementation and will be prioritised during years 1-3

2

Engagement, adoption and use: Drive value led adoption and correct use of GS1's portfolio in retail

This is the business as usual and ongoing interdependent initiatives – it is a high priority of the strategy, that will be addressed primarily during years 2-4

3

Services and Innovation: Foster a culture of innovation to ensure the longevity, relevance and value of the GS1 system for the retail industry

This is the future and how we approach what is coming at us – it is a medium priority of the strategy that primarily will be implemented during years 3-5

Conclusion

For 50 years, GS1 standards have powered more reliable and efficient commerce, and our future has never looked brighter.

We envision a sustainable future for retail, one that puts consumers in focus and is enabled by an industry-wide digital transformation that is already taking place. New **multipurpose 2D barcodes**, powered by GS1 standards, transform a simple scan—opening a gateway of in-depth product information and connecting directly to consumers. A consistently scaled deployment and adoption of the **GS1 registries** underpins the future of product data, and a razor-sharp focus on **emerging sustainability and circularity developments** is taking GS1 into the future as a force for good.

This retail strategy aligns with the GS1 strategy which aims to bridge the physical and digital worlds and "empower industry's digital transformation to ultimately benefit consumers and patients".

Guided by this strategy, we approach the existing opportunity for the GS1 retail and marketplaces sectors with a consistent global approach. We will continue to drive growth and value to retail stakeholders while addressing consumer needs—and work to bring this value with powerful and simple standards, services and solutions that are timely, relevant and universal.


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2. RETAIL TRENDS, CHALLENGES AND OPPORTUNITIES

Sector trends - Fresh foods, CPG, apparel and general merchandise

Every day GS1 works with the retail community of brand owners, retailers and marketplaces looking at future use of GS1 standards with a focus on empowering consumers with rich information both in store and online. This is having a positive impact on all retail sub-sectors GS1 is active in, CPG, fresh, apparel and general merchandise.

The pandemic shocked the global economy but so has its aftermath! **CPG** companies have had to respond by accelerating innovations, embracing changing consumer behaviour, and investing in supply chain improvement and operational excellence.

Consumers are buying more private-label products for the best deals on a budget. This is partially driven by availability issues during the pandemic and partially by the macro trends of record inflation and economic slowdown. Consumers are increasingly seeking out products and brands that align with their stance on environmental sustainability, social responsibility, and animal welfare. Purchasing decisions will also revolve around availability and how fast it can be delivered.

This trend will require improved logistics that supports same-day delivery to attract and retain more customers. Companies are finding ways to get closer to consumers and provide the transparency they expect through more significant digital investments and transformation that help to engage and personalise consumer experiences.

Omnichannel sales are on the rise and it's not just about reaching customers on multiple channels – it's also about offering a seamless, integrated experience across all channels.

This trend will require driving the power of data through the supply chain by enhancing data capture and data transparency capabilities.

Sustainability-related labelling on food is expected to increase, according to the international food standards organisation CODEX:

Data can power digital labels to help consumers make better decisions and can help supply chain partners coordinate and optimize logistics.

Digital labelling is on the priority agendas of regulators, with regional, and national regulatory frameworks still in early stages of development. It is evident that the evolution of the next generation GS1 barcodes will move in tandem with the regulatory developments, but also with the increasing need for direct consumer engagement and more transparent supply chains. These next generation barcodes allow brands to drive revenue, power sustainability agendas, enrich customer engagement, transform digital strategy and comply with more on pack legislation.

The **fresh foods** category is still the main driver of supermarket traffic, with high quality fresh foods remaining a top priority for in-store shoppers. Top of mind is the food waste problem, which is a major sustainability issue for the fresh food sector, and the migration to a next generation of barcodes is one of the tools available to address this—both during and after purchase.

"There is a globally recognised need to improve the sustainability of food systems to address major crises such as climate change, land degradation and biodiversity loss, and to ensure sustainable livelihoods. Sustainability-related labelling can fuel consumer demand for sustainable foods and be a powerful tool in driving practices to improve the sustainably of food systems."

Agriculture plays an important role in making food systems more sustainable. Agriculture is the start of the upstream element of the end-to-end food supply chain. Fresh foods primary producers, fishers, farmers and suppliers are increasingly connected and integrated into downstream parts of food supply chain. Also, because agriculture and food supply chains frequently go cross-border it is important having a standards framework that enables recording and sharing data about agricultural products across markets and across stakeholders' systems.

At the height of COVID-19, and as the world emerged from the pandemic, an increasing number of customers turned to e-commerce for **apparel** purchases. This rapid shift to omnichannel business practices meant the apparel industry quickly had to replace proprietary practices with interoperable ones. Product identity has become even more important to verify, and even more central to consumer trust.

Going forward it is expected that the future of the apparel industry will be heavily impacted by regulatory developments, with the European Union taking the lead and proposing a number of new policies and regulations that focus on apparel sustainability and circularity. Central to this is a proposal for a regulation on eco-design for sustainable products (ESPR), which is part of the European Union's Circular Economy Action Plan (stemming from the Green Deal). ESPR outlines the minimum requirements for achieving product circularity and it introduces the Digital Product Passport (DPP) and textile labelling rules.

While the Digital Product Passport will act as a test balloon for many global apparel companies, the use cases for neutral standards will go beyond one or two pieces of legislation. A standards architecture for textile traceability will need to support a variety of regulatory schemes by transforming private business.

These measures will be important when it comes to the sharing of product information, provenance and supply chain, as well as circularity properties. While this regulation only covers the EU market, it is expected that there will be significant global impact due to the global nature of apparel supply chains.

The **general merchandise** (GM) trends followed apparel in terms of shifts to both marketplaces and increased sustainability scrutiny. But key general merchandises categories like cosmetics and DIY diverged in their explicit need for category-specific data modelling, and within consumer electronics the increased demand for AI-technologies.

On the marketplaces front, expansion into omnichannel meant renewed efforts to make listing processes simpler for categories such as consumer electronics, cosmetics, furniture, and sporting goods.

Sustainability has become an enhanced priority for DIY, furniture, consumer electronics and increasingly cosmetics. While previously self-reported sustainability metrics were enough to increase consumer interest, regulation from the EU and US has made standardization necessary. Consumer electronics is one of three product categories targeted explicitly by the DPP.

The transition to e-commerce for the DIY industries has required data modelling to digitise product attributes for both trade unit items and their individually sold component parts. Similarly, the cosmetics industry has sought to enhance online listings via data modelling, as the number of attributes associated with cosmetics proliferates. Ingredient-level components are needed for sustainability and "clean" claims.

These digitisation efforts are only made more urgent by the surge in AI-related customisations and check-out experiences offered by GM sectors. All of these require industry wide standardisation of data as GM industry players interact with an increasingly connected commerce ecosystem.

With global commerce still settling down from several crises, these tumultuous times are resulting in lasting macro changes to the retail eco-system. These major trends will be reviewed in the following section.

Macro Trends

Global trends, regulatory pressure and emerging consumer demands are shaping the retail eco-system priorities. Business is currently tasked with navigating turbulent geopolitically conditions, sustaining commercial success and implementing significant changes to achieve their business goals.

To remain competitive, companies must be agile and adaptive in their response to meeting consumer needs and driving their business' forward. Key examples include maintaining competitive pricing, communicating their ethical goals, offering product transparency and balancing multiple fulfilment models combined with an optimised omnichannel experience.

Analysing the recent macro trends with a GS1 lens we have grouped them into five categories: Sustainability & Circularity, Digitalisation, e-commerce, regulatory and technology. We are also giving an overview of what potential opportunities exist in the different areas.

Sustainability & Circularity

There is a significant shift in consumer values and the preference for greener living. These forces include sustainable living, the "war on waste" and a growing demand for products which have less impact on the environment, for example food waste is estimated to contribute significantly to global greenhouse gas emissions. This preference for greener living will impact the industry landscape and how companies communicate and interact with their customers. There are ongoing concerns about "greenwashing" by companies and there are even regulatory initiatives underway to create a set of common criteria against greenwashing and misleading environmental claims.

Consumers are interested in knowing where their products come from and how they were produced and how products packaging can be recycled. This has led to a focus on improving product and production transparency.

Governments are also legislating in order to force brands to pass more detailed sustainability information on to their consumers to enable them to make more informed and sustainable choices.

Businesses are increasingly prioritising sustainability and seeking ways to reduce their environmental impact, with many setting targets to become carbon neutral.

Discussion around product sustainability, transparency and circularity have reached corporate boardrooms. Sustainability portfolios are now becoming centralised and strategic to overall business operations.

This has led to a focus on reducing emissions throughout the supply chain, including transportation and packaging, moving from a view that supply chains are linear to now being circular.

Circular economy is a priority gaining momentum in the retail industry, including among regulators, with businesses exploring ways to reduce waste and maximize resource efficiency. This includes initiatives such as promoting product reuse and recycling, and the most prominent initiative in this area is the work on Digital Product Passports in the European Union. There are several different areas of sustainability that can be prioritised depending on local market situation (regulatory & industry needs). Work done on sustainability is done in alignment with the GS1 sustainability framework.

The product sustainability, transparency and circularity topics have reached corporate boardrooms. Sustainability portfolios are now becoming centralised and strategic to overall business operations of the GS1 user companies. This is driven by emerging regulatory developments that in many cases are extraterritorial, and industry initiatives with different levels of ambition.

These industry and regulatory initiatives will be requiring unique product identification, end-to-end traceability, and standardised data to be seamlessly shared. GS1 is in a unique position with the opportunity to be a force for good in the sustainability space and to play a significant role in enabling businesses to meet these growing demands of consumers for more sustainable and responsible products, while reducing environmental impact.

The role of product identification is front and centre in enabling the retail industry to succeed within the sustainability space. Ensuring that the correct data is captured and shared on a product level basis will be integral for complying with legislation and providing transparency to consumers.

Today the opportunity is using standards in a way that enables industry to better measure, track, learn and adapt in order to understand impact and progress towards common sustainability goals, while EU DPP clearly is front and center right now for the sustainability work, the below are other opportunities:

- There is an opportunity to drive a global approach to sustainability labelling, reporting and certifications. This could include strategic positioning on how GS1 can provide solutions using global standards and verifiable credentials to enable different stakeholders across a value chain to access and trust certifications.

- There is a unique opportunity to take a leading role in the sustainable transformation of the apparel sector, just like we played a role in the digitisation of the supply chain. Ultimately improving consumers' ability to make informed decisions, underpinning sustainable trade, and regulatory compliance.

- We need to come together with retail stakeholders to drive work to reduce food waste. Food waste is a major sustainability issue for the fresh food sector and the migration to next generation barcodes is one of the tools available to address this—both during and after purchase.

- Deposit Return Schemes / Container Return Schemes is evolving in a number of markets. Important to explore opportunities and support work as mandates develop in local markets. By ensuring standards led, harmonised approaches to the schemes GS1 can also support in providing greater potential for the schemes to work across national borders (more open loop systems). This coupled with next generation barcodes will allow brands and manufacturers to comply with multiple schemes worldwide without having to create different country specific variants of a product.

- For companies to capture greenhouse gas emission data in their operations and supply chains is becoming a regulatory requirement in some jurisdictions. The impact will be immense for the companies in the retail sector. On top of the regulatory developments there may be emerging retailer requirements to comply and report at much stricter levels than today. While the current frameworks normally do not require granular measures, there is an opportunity to prepare for a future need to capture emission data on product level as the reporting standards are being more widely implemented. Therefore, we should explore future role in greenhouse gas emission data capture.

Digitalisation

Today's consumers are more connected than ever with over 86% of the world's population owning a smartphone. We live in a world where self-serve has become the norm and we see consumers taking individual ownership and using smartphone technology to replace the roles customer service functions within banking, travel and retail.

Consumers are now "hyper-connected" and able to research products and buy them on the spot. They are also primed and ready to consume companies' digital advertising anytime, anywhere.

In the era of digitalisation, consumer data has become an incredibly valuable resource. In the context of retail, data and data exchange has exploded due to the growth of e-commerce and the use of digital technologies in retail operations. Data is collected through a growing number of sources, including transactions, customer interactions, social media. It is used to improve processes, product offerings, pricing, and marketing strategies.

Today GS1 is driving the future of retail by combining two of the greatest inventions of all time – the internet and the barcode. Brands and producers can integrate their current product identifiers into QR codes, allowing every product to become it's own media channel. This will allow brands to drive revenue, power sustainability agendas, enrich customer engagement, transform companies digital strategy, and in addition help compliance with more on pack legislation, and other emerging regulatory requirements. The below are other opportunities:

- Using GS1 powered QR codes gives brands and producers the power to turn every one of their products into its own media channel and drive revenue, power sustainability agendas, transform digital strategies and enrich customer engagement, as well as being crucial for complying with consumer focused legislation within retail.
- Companies can satisfy their need for first party consumer data scalability and at low cost: data analytics from GS1 Powered QR codes will allow brands and producers to see how their consumers are interacting with their products digitally, what consumers are interested in across times and location and will allow for efficient testing of their customer engagement materials.
- 2D barcodes allow brands to share more information directly with consumers across languages and locations thus allowing them to comply with multiple legislation through one scan of a QR code as opposed to having multiple versions of the same product. This leads to direct cost savings and range efficiency management.

E-commerce

E-commerce has significantly transformed the retail landscape: global e-commerce sales reached an estimated $6.54 trillion in 2022 which represents 18% of all retail sales globally.

With the rise of e-commerce, consumer expectations have grown. The COVID-19 pandemic has further accelerated this trend and consumers have come to expect faster delivery times, easier returns processes, a wider range of product options and rich product information. This has put pressure on brands and retailers to provide a seamless and frictionless shopping experience, both online and offline.

Selling online has led to businesses having to deal with more and more channels and parties (such as own e-commerce platforms, multiple marketplaces, distributor platforms and online sellers) and they now must collect, provide, and analyse data from these various sources. Getting the right product data in the right format is key for ecommerce as it enables to build better catalogues, improve product visibility, offer seamless omnichannel and personalised customer experiences. This is amplified for online marketplaces who sell millions of products and rely on data provided by third parties such as sellers, sometimes without processing the product physically. the below are other opportunities:

- Standards adoption: As the amount of data and parties explode, GS1 standards provide a consistent and standardised way of representing data, which ensures that everyone is using the same language when exchanging information at scale.

- Identification of a product through supply chains is crucial to the success of e-commerce particularly as supply chains are complex and there is limited handling and visibility of physical goods.

- Services adoption: Getting product identification right is key for the stakeholders to exchange product data effectively. GS1 registries enable stakeholders to verify and retrieve product data.

- Engagement with marketplaces and sellers: As actors have emerged with new questions and new business models such as marketplaces and sellers/SMEs, there is an opportunity for GS1 to actively engage with these stakeholders to improve awareness and adoption of GS1 standards. Adoption by the wider e-commerce ecosystem is beneficial to all members of the community. Work on this topic is ongoing based on the marketplace strategy approved by the General Assembly in 2020.

- New standards and data models: E-commerce brings new needs for standards and data sharing. For example product images for e-commerce, standards for bundles, spare parts.

GS1 standards are as relevant for e-commerce as for brick-and-mortar retail

Regulatory

The regulatory environment keeps evolving and getting more complex. Regulations have a profound impact on a company's operations and their ability to sell products in—and across markets. A lack of regulatory harmonisation adds burden to industry and risks to international supply chains, hindering efficient and sustainable trade while limiting consumers ability to make informed decisions. Therefore, there is a growing need for scalable and easy-to-use solutions to help industry comply with existing and emerging regulatory requirements. Companies need to be agile and quickly deploy the right standards.

As GS1 we can provide globally a harmonised approach to regulatory frameworks. This will prevent the proliferation of different local requirements that would add burden to industry and by extension the GS1 user community. Specifically the next generation 2D barcodes can allow brands to comply with more on pack legislation across multiple geographies, and other emerging regulatory requirements.

Significant opportunities to engage with regulatory authorities do exist. Increasing awareness of GS1 across industry, governments and NGOs is helping to build new connections and cross-disciplinary understanding. We need to double down on our strong and consistent engagement with government going forward. To be successful GS1 as a federation will need to address this area with a more strategic and harmonised approach, ensuring that we can help streamline future industry compliance with regulations, which ultimately benefits our users.

There is an opportunity to apply a global approach towards regulators on use of 2D with a cohesive messaging that drives for regulatory harmonisation if/when 2D requirements are regulated.

Complying with legislation across multiple geographies is a core problem that GS1 powered QR codes can answer. By allowing consumers to access relevant legislation based on location through the scan of a simple smartphone brands can comply with legislation across borders.

Labelling and certifications is a new area that needs to be understood by the federation and prioritised in every market, in addition digital labelling information, especially for CPG/grocery, needs to be a prioritised, in a defensive position in all markets (this is key to avoid two/more data carriers on-pack in future)

Full chain traceability including upstream is emerging as a new requirement including for CPG, fresh, apparel, textiles (e.g. ingredients, palm oil, cotton etc. to plot/farm level) from earlier one up one down requirements. Our role as a traceability enabler will underpin the industry transformation and ensure compliance. Here it will be important to draw from existing cases in key leading markets.

A wide range of additional regulatory issues have been also been identified under the sustainability and other headings above.

Technology

Technology enables new trends—as well as the adoption and use of new solutions. The most obvious example is the smart phone "revolution" that began in 2007 and has continued to accelerate with the broad roll-out of high-speed internet connectivity. These have enabled today's "hyper-connected" consumers to be at the centre of their retail experience, controlling when, how and where they access products, goods and services. The introduction of new technology offers new opportunities—sometimes with unexpected outcomes—and helps solve problems for consumers.

Technology should enable change, however—not drive it—and is best when implemented with a foundation of global standards (identifiers) and the use of high-quality data.

We are in the midst of one of the biggest transformations of the retail industry since the introduction of the retail barcode 50 years ago. The use of multipurpose 2D barcodes powered by GS1 on packages is growing, and so is the use of scanners with image-based capabilities that can scan GS1 2D barcodes at retail points-of-sale, which will be key to this retail revolution.

New technology trends are also allowing emerging markets—and markets with younger populations—to accelerate the global digital transformation. For example, the popularity of online marketplaces allows shoppers in remote towns and villages throughout the world to access the global market—all with a simple click. The emergence of these alternative sales channels is also helping small businesses make inroads in global markets, which is evident looking at the number of e-commerce marketplaces that have emerged in different regions of the world and the amount of goods now sold online by micro and small companies.

The ability to identify products everywhere around the world is fundamental to enabling the next generation of companies, big and small, to leverage technologies and sales channels that are emerging today.

Specific to the Future of Retail, there are some powerful trends and applications emerging:

- Cashier-less retail: an explosion of options are now available to speed up the in-person checkout process, including grab-and-go automation enabled by computer vision technologies and artificial intelligence.
- Metaverse: while still a nascent trend, many companies are accelerating their investments to find opportunities for their products to have a "digital twin" that enhances the consumer's online experience.
- Sustainability and Circular economy: circular economy concepts have taken centre stage in focusing action and regulation, such as the Digital Product Passport initiative in the EU which provides a roadmap to increase recycling and optimise resources.

While no single technology enables any one of the examples above, it is clear that it will be important to track technologies that accelerate implementation and adoption of new retail trends. In addition to Artificial Intelligence and Computer Vision mentioned above, other relevant technologies that are being tracked through the GS1 Innovation Board's bi-annual GS1 Trend Research Report are robotics, sensors and IoT systems (which are key elements to enable advanced automation), verifiable credentials and decentralised identity (which enable new ways to enhance trust in product data exchange) and Virtual/Augmented Reality (which are crucial elements that enable Metaverse). Opportunities could include:

- As technology evolves at pace, GS1 can play a pivotal role in innovating with standards. For example, the 2D barcode can now be used in tandem with point of sale scanners to prevent the sales of out of date stock or recalled product preventing retailers form facing fines and enhancing consumer safety.
- Technology trends and innovation many times have an outsised impact on developing markets and allow for leapfrogging. Therefore, it will be important to have a dedicated approach to high growth developing markets . These fast growing and dynamic retail markets and their move to digitisation will be key for GS1 to add value to industry in the future

[2]According to Accenture research 1 billion new consumers will emerge in Bangladesh, Egypt, Ethiopia, India, Indonesia, Kenya, Nigeria and the Philippines over the next decade.

3. RETAIL USER COMMUNITY NEEDS

The better we understand our users and their needs, the more likely we are to deliver standards and solutions that work well for them. We need to ask ourselves what the benefits for stakeholders are and what the relevant challenges or 'pain points' that create friction are — and then address where can GS1 help.

The Retail Strategy Benefits all key Stakeholders

Brand owners [including private label] and manufacturers including SMEs	**Reduction of risk, lowering of cost, increase in trust and compliance.** Visibility of supply chain movements allows for anticipation and more precise supply chain management. **Positive impact on bottom** line and profitability while dealing with complex, globalized supply chains **SMEs gain access** to international markets and sales channels. They are new to GS1 and are searching for basic information about standards and their added-value with their peers and online.	**Enablement of compliance with regulation.** Non-compliance to regulatory / sustainability requirements can degrade brand. **Possible to increase speed to market,** improve cost efficiency and eliminate data management tasks
Regulators and intergovernmental organisations	**Implementable scalable interoperable** solutions are available for regulators and intergovernmental organisations can leverage for their purposes Use of **interoperable industry standards** can help ensure harmonisation of regulations	**Potential to learn** from similar implementations in other markets and regions **Increasing number of modernised and impactful regulations,** need modern approaches to the how (how do industries comply)
Primary producers (fresh foods, textiles), fishers, farmers and suppliers	**Reduction of risk, lowering of cost, increase in trust and compliance.** Visibility of supply chain movements allows for anticipation and more precise supply chain management. **Positive impact on bottom line** and profitability while dealing with complex, globalized supply chains. **SMEs gain access** to international markets and sales channels. They are new to GS1 and are searching for basic information about standards to make collecting and providing data easier.	**Enablement of compliance with regulation**. Non-compliance to regulatory / sustainability requirements can be costly and complex. **Possible to increase speed to market and expedited cross-border trade,** improve cost, efficiency, and eliminate data management tasks.
Industry associations and other partner organisations	GS1 offers an **industry wide approach** to solve common business challenges	GS1 can be a **bridge between industry and government** bringing stakeholders together
Solution providers	As regulatory pressure drive adoption solution providers can achieve **unprecedented scale of adoption** by using solutions based on open, interoperable standards	GS1 can be a **bridge between industry and government** bringing stakeholders together

Consumers	As regulatory pressure drive adoption solution providers can achieve **unprecedented scale of adoption** by using solutions based on open, interoperable standards	Consumers need more access to information underpinned by quality data, to make informed purchasing decisions Supply chain visibility enables **product availability** during supply chain disruptions
Retailers	**Food waste** is a major sustainability issue for the fresh food sector and the migration to a new generation of barcodes is one of the tools available to address this—both during and after purchase	**Increased customer satisfaction** with accurate and on-time product delivery and on-shelf availability Improve inventory management
Marketplaces	**Getting product identification right:** Marketplaces rely on data as they don't process products physically. Because of this the GTIN is central to their operations and catalogue structure.	

Strategic Partner organisations

GS1 works closely with retail industry stakeholders around the world, these are brand owners and manufacturers, retailers and marketplaces. In addition GS1 regularly collaborates with industry groups like The Consumer Goods Forum and Food Industry Asia.

There is also ongoing strategic engagement with development partners such as Food and Agriculture Organisation (FAO), Asian Development Bank (ADB)—as well as regional regulators and intergovernmental organisations like European Commission (EC), UNCEFACT, UNECE, UNESCAP, CEPAL and WCO.

These engagements are all strategically important, and there is a need to double down on the work that is being done, as there are real positive long-term implications coming out of this work. Going forward it will become increasingly important that we ensure that a broader group of GS1 stakeholders including in the MO community can benefit locally from this work, as well as other major engagement initiatives.

User needs

Articulating user needs requires an outside-in, customer perspective. In early 2023, 40 retail leaders[1] came together, selected from the GS1 Management Board member companies, GS1 MOs and Global Office colleagues, who shared their insights and agreed on a common set of 5 industry needs. These needs are aligned with emerging trends and demands from consumers, regulators and other stakeholders.

[1]Note: In addition to the major contributions from the GS1 Member Organisations who were present at the workshop (GS1 Australia, GS1 Brazil, GS1 Denmark, GS1 France, GS1 Germany, GS1 India, GS1 Ireland, GS1 Italy, GS1 Japan, GS1 Netherlands, GS1 Paraguay, GS1 Spain, GS1 Turkey, GS1 UK and GS1 US), we would like to thank GS1 China, GS1 Hong Kong China, GS1 New Zealand, GS1 Nigeria, GS1 South Africa and GS1 Sweden for their guidance and input

Consumer engagement

Today there are new ways of engaging consumers that businesses cannot ignore. They need to “future proof” their businesses in order to drive revenue and market share.

Challenges in consumer engagement stem from a lack of knowledge about what the customer wants and finding ways within an organisation to make the necessary improvements.

Being customer-centric has always been a key requirement for retail companies, as an example Amazon's mission is to be “Earth's most customer-centric company” and having actionable consumer insights is necessary in today’s market. On top of this, there is a need to build, increase and maintain trust with customers.

According to PwC Global Consumer Insights Pulse, “Consumers globally are shifting their consumption habits... as the cost-of-living surges and supply chain disruptions impact product availability and delivery times.”

The ability for companies to be quicker and more agile in the implementation of new solutions and offerings will be a key indicator of competitive advantage. In today’s evolving digital landscape companies digital interaction is becoming central to success. Consumers are using internet to research, understand, seek information on products. These consumers that are more engaged in the shopping experience demand more information about the products they buy.

While consumers will continue to shop through traditional channels for CPG, retailers understand that the consumer is ever more active in the digital space and that they need to have a digital presence to drive their products and revenue. There is an opportunity for companies to gain market share and revenue by helping consumers make more informed purchasing decisions.

Smart phones allow consumers to access product information immediately—and this is a clear marketing opportunity for brands. With the advent of next generation barcodes on product, there is a new opportunity for companies to engage, by offering consumers promotions, link them to the rest of the product range and collect consumer data, ultimately helping companies drive business growth.

Regulatory needs

The regulatory environment is getting more complex and keeps evolving, and it is beginning to impact many sectors and markets. We are particularly seeing a wide range of regulations emerge in the space of circularity, greenwashing, and ESG reporting. Overall, the sustainability arena is a fast-evolving space, with direct impact on companies, today and in the future. Other areas where regulations are having a significant impact on company operations are data security, privacy and consumer protection.

Regulations have a profound impact on a company's operations and their ability to sell products in—and across markets. Therefore, there is a growing need for scalable and easy-to-use solutions to help industry comply with existing and emerging requirements. Companies need to be agile and quickly deploy the right standards.

From an industry perspective, a globally harmonised approach to regulations is ideal. This could prevent the spread of disparate, local requirements that add burden to industry—and by extension, the GS1 user community. A lack of harmonisation limits the ability of consumers to make informed decisions and blocks efficient and sustainable trade.

An ongoing challenge is also the ability to help regulators understand the value of GS1 standards and how they can enable industry to comply, while still facilitating trade. This is an area where GS1 needs to be more unified in the approach to regulators and work on a global scale to help demonstrate our role, as an enabler for industry, addressing the "how".

Visibility & efficiency

Visibility of product movements across the supply chain allows for more precise supply chain management, and can improve trust and efficiency. Supply-chain visibility can ensure the bottom-line growth and profitability of global, complex—and sometimes disrupted—supply chains, with limited resources.

Challenges include making a business case and clarifying the expected return on investment (ROI) for technology, people and processes. Solutions and standards can be complex, which has led to lack of ubiquity for standards-based identification. Although companies are facing forecasting challenges, they continue to use legacy systems. A lack of interoperability across the supply chain makes it challenging to broaden supply chain reach.

Visibility optimises business operations and can create an integrated customer experience, where consumers receive on-demand information about a product and its availability - in real time.

Visibility provides a good opportunity to reduced logistics costs and better capacity usage. Sourcing is easier and processes become more efficient. There is also an opportunity for companies to improve planning and customer satisfaction with improved on shelf availability, while reducing excess inventory.

Listing & cost reduction

There is a need to simplify and shorten the product listing and verification processes, despite the growing complexity of data flows. This complexity is being driven by higher consumer and regulatory data expectations, such as the desire for more and better data and faster speed-to-market for new products. So-called "agile listings" are now a competitive advantage for companies.

Additional data needs, such as certificates, ingredients, carbon emission and agile e-commerce data with images, are putting pressure on brand owners in an already complex environment with shorter product life cycles and changing regulatory requirements.

Data is seen as an integral part of the product itself and the demand for data from consumers and regulators is higher than ever.

Challenges include complex data flows, maturity of markets, companies and regulations, not to mention the speed of creating standards and the rate of standards adoption. Another impediment to change is the receiver's readiness and ability to automatically take-in data.

There are opportunities for standardised and automated data exchange, digital labels, increased speed-to-market and cost efficiency—as well as the elimination of repetitive data management tasks.

Traceability (end-to-end)

Tech enabled traceability can underpin food and product safety. It helps companies comply with regulations and supports trading partner requirements and it is a tool used by companies to protect their brand.

But companies need better ways to set priorities and operationalise their traceability strategies, in order to address challenges in their supply chain. This is an investment that needs to be funded and the return quantified.

Interoperability, scalable solutions and levels of identification are all challenges that need to be addressed. A better understanding of the role of GS1—will help with buy-in, both across industry and inside organisations, and help build trust. Something that is especially relevant as trust between trading partners can be a challenge.

Efficient product recalls through greater traceability not only reduce cost, but also the risk to health and safety. Opportunities are present for product recycling and reuse, improving sustainability and complying with regulations.

4. ENABLERS

The main building blocks for the GS1 Retail Strategy are the enablers designed to support all stakeholders in the retail ecosystem. The enablers were established together with industry leaders.
The following enablers (in order of priority) are broad, overarching topics that will ultimately be supported by corresponding strategic actions to drive the retail strategy forward:

Our story … and a new narrative

Fresh storytelling with a new narrative helps us clearly communicate the value of GS1, while inspiring industry and driving demand.

GS1 has been leading the development of retail supply chain standards, primarily through business to business (B2B) channels—and through a technical lens. As the GS1 system evolves and moves further into the online and business to consumer space (B2C), users often struggle to make sense of the value and relevance of the GS1 offer. Our standards, services and solutions are not well known or easily accessed. We need to remove these barriers to entry, strengthen brand awareness and drive demand.

To address these urgent issues, the following is needed:

- A new narrative and focus on simple, compelling, customer-centric communication.
- Our storytelling needs to be holistic, focus on external issues and reflect the voice of industry through industry-led use cases, trends, etc.
- Key messages should be reimagined and targeted to different industry stakeholders.

Ultimately, the value and relevance of GS1 needs to be clear beyond any doubt so that our members understand how GS1 adds value to their businesses.

Above all, we need to ensure that the retail community feels a sense of belonging and is inspired to amplify the GS1 story and its value.

A foundational step that we need to take in the journey in order to **develop our story and a new narrative** is for us to analyse and better understand the offering and value of GS1—through the eyes of our users. We need to find ways to communicate how GS1 address common business challenges and ensure that we explicitly explain the value opportunity. This will require effective marketing programmes and use cases—and we need to take a more **proactive and agile approach** overall.

There needs to be a **simplified and effective message** that tells the GS1 story, that is easy to understand for GS1's external stakeholders, with simplified wording that resonates with our audience. Specific actions would include targeting stakeholder audiences, focusing on increased community engagement and ensuring that users feel a sense of belonging. All of this can result in the community being willing and able to spread the word about GS1, and ultimately lead to increased community engagement and adoption.

Supporting actions would include **growing the customer base**. Specifically, we would focus on expanding the reach (including SMEs and new sectors expansion) and awareness of GS1 to grow adoption and use of the GS1 system.

A tool that should not be underestimated, is the **use of existing initiatives** to support the story so that we can increase knowledge of GS1 and build effective use cases and marketing programmes to support them.

Engagement, adoption and use

Driving value led adoption and correct use of GS1 portfolio in retail.

There is a global need to better coordinate and prioritise our engagement for maximum impact on the retail sector, as best as we can. The key word here is "engagement", which requires actions on a global scale.

While preparatory actions such as analysis, education and marketing are important, taking action is key. Successful engagement with industry groups, regulators, solution providers and other stakeholders will lead to increased adoption and use of the GS1 system.

A first step in the engagement, adoption and use work is to understand the **current adoption** of GS1, as well as the **barriers to adoption**, while **identifying opportunities**. This would be done via a comprehensive review—where levels of adoption are classified and gaps are identified, for example for registries. Finally, the GS1 standards and solutions toolbox could be mapped to the gaps.

A key deliverable of the work will be to clearly **prove GS1's added value**. Simply stated, we need to prove the WHAT and the SO WHAT, including measurable benefits of global standards adoption. The HOWs include the toolbox (GS1 standards and solutions), but also training & education, solution provider partnerships and small and medium enterprise (SME) onboarding tools and models.

GLocal engagement =
a global approach to support
local success.

A GLocal approach to engagement has been successful in the past to create and nurture strategic collaboration, especially with intergovernmental organisations and industry groups. It should be more widely used to engage regulators and extend value to new industry communities. Preparatory work would include identifying and mapping stakeholders, assessing the regulatory and market conditions, and exploring different ways to collaborate with key stakeholders to support the engagement.

Services & Innovation

A practice of innovation is essential to ensure longevity, relevance and value of the GS1 system for industry into the future.

At GS1, we need to be ready for retail's next "big thing", with clear technology strategies and methodologies in place. First and foremost, we should ensure that we **innovate with industry**. This entails developing a methodology that prioritises what we do together with industry—and how we can fund it and lead it successfully. Innovative technology and business trends conversations should become a natural part of our ongoing work with industry. As relevant areas of innovation emerge, GS1 and industry would work together to implement them.

We need to work jointly to scale the adoption of GS1 Registries, 2D and data sharing standards. Prioritise full alignment throughout the GS1 federation and our network of solution partners to consistently scale deployment and adoption of the GS1 data service portfolio.

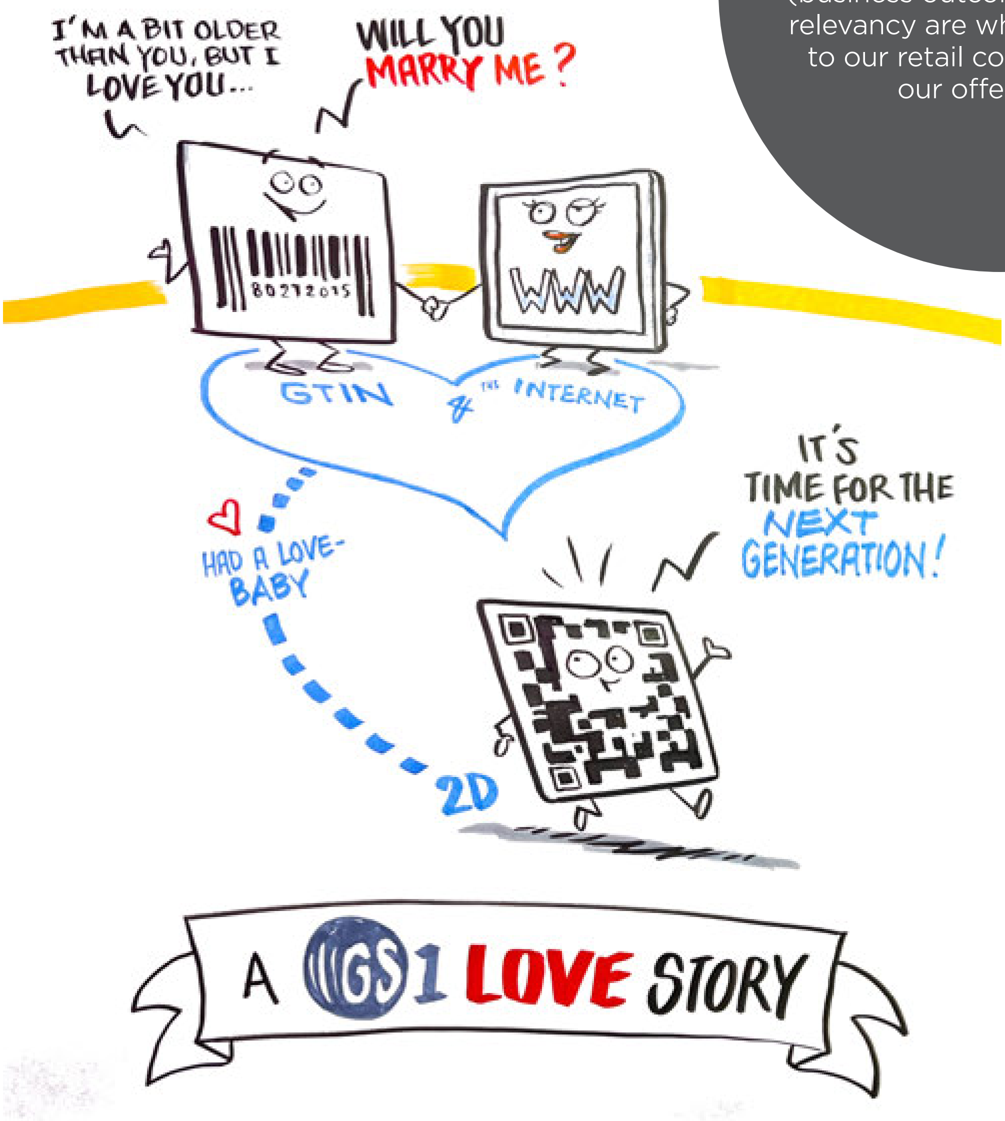
Instilling an ethos of innovation across the GS1 Federation—at the intersection of standards and emerging tech—will help us better anticipate and serve industry needs at the speed of business, while ensuring scalable adoption and use.

Toolbox of GS1 standards and solutions

A toolbox, consisting of GS1 standards and solutions, underpins everything we do for the retail industry.

Simple and powerful on their own, the real value of GS1 standards, services and solutions is how they help solve retail industry challenges—now and in the future. The toolbox includes: (1) Unique Identity (2) Registries (3) Next Generation Barcodes and Global Migration to 2D (4) Data Sharing including GDM, GDSN, EPCIS, EDI, GRP links to other sources of data, etc.

The toolbox should not be seen as an enabler in itself, the focus should be on the value that the GS1 offering brings to industry (business outcomes). Value and relevancy are what is important to our retail community—not our offer alone.



5. GS1 RETAIL STRATEGY 2023-2027

This GS1 Retail Strategy has been developed to respond to significant changes in the retail ecosystem with a unique set of challenges faced. This strategy builds on the extensive global work in retail and is in line with the GS1 strategy and will help accelerate the significant opportunities that need to be captured. In this section we are focusing on the enablers and the associated strategic priority areas of work that will be vital to advance the GS1 retail work and guide the roadmap implementation of the strategy.

STRATEGIC FOUNDATION: TOOLBOX OF GS1 STANDARDS

- Unique identity
- Next-generation barcodes with global migration to 2D
- Registries
- Data sharing GDM, GDSN, EPCIS, EDI, GRP, L2SD

New narrative [top priority]

Clearly communicate the value of GS1 while inspiring industry and driving demand.

What we will achieve by 2027:

- Ensuring the value and relevance of GS1 is clear beyond any doubt and our diverse community of stakeholders understand how GS1 adds value to their businesses
- Using simple, compelling, customer-centric communication
- Using storytelling that focuses on external issues and reflect the voice of industry through industry-led use cases, and reflecting emerging trends
- Building on key messages that are reimagined and targeted to different stakeholders

How to win:

To better communicate the story, we need to analyse and understand the offering and value of GS1 to the community. Building on these findings there is a need to create a simplified and effective messaging, aiming to give the audience a better understanding of what GS1 offers. There should be specific focus on increased community engagement (covered in engagement part). With the objective for the community to feel sense of belonging, and for the community to be willing and able to amplify the message of the GS1 story.

To support the story, existing initiatives and use cases that resonate with industry should be used, supported by communication / marketing programmes. Hence, we need to find ways to communicate how we address the common business challenges, and ensure our offers explicitly communicate the opportunity. Telling the story with a simplified messaging that resonates with users should help expand the reach within the retail ecosystem, and help communicate with every user, in a way that they understand. Ultimately expanding the reach and awareness of GS1 - growing adoption and use of the GS1 system.

Engagement, adoption, and use [high priority]

Driving informed engagement, value led adoption and correct use of GS1 portfolio in retail

What we will achieve by 2027:

- GS1 will have a leading and compelling role in support of global sustainability & circularity ambitions
- Adoption of 2D barcodes and GS1 Digital Link in line with 2027 ambition date
- Enhanced GO and MO collaboration driving engagement and adoption

How to win:

To understand current adoption and barriers to adoption and use, there is a need to review and classify levels of adoption, identify gaps and map toolbox to gaps. Proving the WHAT and the SO WHAT including measurable benefits will be foundational to be able to prove GS1's added value; the HOWs include the toolbox, training, solution provider partnerships, and SME onboarding tools.

A GLocal approach to engagement will require global coordination and initiative that feeds into the activities in the local markets. This can be related to industry engagement, intergovernmental organisations or other influential groups. But it is foundational to recognise that every country, market and MO are unique in terms of maturity and local priorities. By having a central coordination, it will be easy and fast for MOs to catch up locally with engagements and ensure that there is global momentum in all our engagements and that we are able to build on already existing successes, while adjusting to the local situation and priorities.

As we are building our engagements a foundational activity is to identify opportunities. This will include the key stakeholders, mapping of the regulatory and competitive landscape in the local market and exploring new and creative ways to collaborate. A supporting function to a stronger engagement will be to strengthen marketing & education. To consistently communicate and educate key stakeholders, work with stakeholders to broaden the knowledge of GS1 standards, allocation rules, and the value of adoption.

Innovation and Services [medium priority]

A practice of innovation is essential to ensure longevity, relevance and value of the GS1 system for industry into the future

What we will achieve by 2027:

- A culture of innovation instilled in the federation, ensuring longevity, relevance and value of the GS1 system for industry into the future
- GS1 Registries adopted at scale addressing articulated business challenges around the world
- We have developed a mature ability to innovate with industry

How to win:

Through the development of a methodology that prioritises what we do together with industry and how we can fund and lead it successfully, the retail sector communities at GS1 are to make innovative tech and business trends conversations a part of their work with industry. When the areas of relevant innovation emerge the GS1 and industry innovation community is engaged. For this work to take hold there is a need to instill ethos of innovation across the Federation. GS1 should be active in the intersection of standards with emerging tech. This will help serve and anticipate future industry member needs at speed, while ensuring a balance of work to scale adoption and use.

The GS1 community will work jointly to scale the adoption of GS1 Registries, 2D and data sharing standards. Full alignment throughout the GS1 federation will be prioritised including with our network of solution partners to consistently scale deployment and adoption of the GS1 data service portfolio.

Retail Strategy Roadmap

The Retail Strategy roadmap is a bridge between strategy and execution where we are clearly outlining what must be done as well as the sequence and prioritisation. Essentially, these are the tactics of the strategy. The roadmap visualises the key outcomes that must be delivered over a time horizon – which in our case is five years – to achieve the strategic vision for GS1 retail, with a high-level strategic alignment. Activities have been planned to ensure timing is appropriate with industry needs, regulatory developments, GS1 overall strategy alignment and to allow for leveraging work from other areas of focus, which are interdependent.

P - Top priority | **H** - High priority | **M** - Medium priority

STRATEGIC PILLAR 1: NEW NARRATIVE

Strategic Action 1: Develop the Narrative- Provide industry with a clear, easy to explain narrative of how individual elements of our toolbox of GS1 Standards can allow users to meet their business needs (include real life industry examples where possible).	**Implementation timeline & Priority**	**Alignment**
Value story: • Clearly communicate and demonstrate how GS1 standards act as critical business enablers and solve business needs • Develop New Narrative and Value Story of GS1, to make the value of our standards and GS1 Registries clear beyond all doubt • Develop alignment with major business needs and proactively demonstrate a solution to business needs by positioning GS1 as the cohesive business enabler **When developing value story on the GS1 offer the areas that need to be addressed include:** • Create a compelling and engaging story on the GS1 offer that clearly ties GS1 value proposition to commercial business needs of today and tomorrow (YEAR 1) • Bring the 2D/digital link vision to life globally. The next generation barcodes will be our biggest innovation to industry since the invention of the barcode 50 years ago. (YEAR 1) • Deliver compelling value proposition for GS1 services which demonstrates (1) overall value proposition for business aligned to the needs of our members (2) engaging case studies and success stories (3) clear ROI • Create a new GS1 value story on GS1 services (the big picture and how they fit together with each other and with standards) services should simplify the use of GS1 standards (YEAR 1) • Identify, Capture, Share - Clarify/modernise the story for retail using real life examples and success stories (YEAR 1) • GTIN terminology (confusion between of UPC, EAN, GTIN, barcodes) for SMEs ALIGNMENT with marketplaces] (YEAR 1) • Develop a clear narrative on how GS1 standards can directly impact business needs such as driving revenue, progressing sustainability initiatives, maximising operating efficiencies, enriching customer engagement and complying with legislation (YEAR 2)	**YEAR 1-3** **P**	**ALIGNMENT WITH REGISTRIES** **ALIGNMNENT WITH MASTER DATA** **ALIGNMENT WITH MARKET PLACES** **ALIGNMENT WITH 2D MIGRATION** **ALIGNMENT WITH MARKETING/BRAND WORK**

• Leverage GS1 Integrated Value Story across all sector-specific collateral created for MOs; to help ensure the work will achieve a 'red thread' throughout all of our communications with MOs and industry	**YEAR 2** **H**	**ALIGNMENT WITH MARKETING**
STRATEGIC ACTION 2: Active segmentation and comms per industry segment with clear sector positioning		
Segment messages and use cases (retail/ecommerce/marketplace/distributor), brands (small, multinational) and regulators: • Leverage our industry network across members (brands, retailers, SMEs) legislators and solution providers to develop world leading value propositions for industry • Use our networks to clearly understand the needs of industry through interviews, consultations, user panels • Develop our value propositioning and key messaging in line with industry needs and in the language of industry (YEAR 2) • Sense test with industry including key messaging, language, practical application etc. (YEAR 2) • Launch alongside strong advocacy from key industry stakeholders (YEAR 3) • Implement effective segmentation with case studies adjusting messages and value propositions per sector and business challenge can lead to deeper adoption and retention among SME members significantly accelerating growth • Engage emerging categories with significant growth opportunities based on local market conditions (e.g. DIY) and global (regulatory trends) agri-chemicals • Apply case studies/value props/ use cases/webpages/videos that are produced per segment and specific market conditions (marketplace sellers, SMEs, regulators) [alignment with case study work] (YEAR 3) **Flex core messaging to reflect the needs and narratives of different subsets of stakeholders within our retail networks:** • This could be segmentation by retail department (supply chain, commercial, marketing, master data) according to business type withing retail member base (retailer, manufacturer, distributor, SME) or according to business type withing the wider retail stakeholder ecosystem	**YEAR 2-4** **H**	**ALIGNMENT WITH CASE STUDY WORK**

STRATEGIC ACTION 3: Communication plan with real-life implementation success stories and case studies in easy to digest and share formats		
Commercial value: • Clearly show how GS1 adds value and show it in context – make it clear beyond all doubt including with practical examples, communicate with clear focus on the commercial value • Develop commercial value stories that demonstrate value and relevance with proof including the value of membership beyond the GTIN • Use Value-add Narratives, that are clear, simple, easy to explain but transactional narratives bearing in mind that the business' major priority is driving revenue and increasing profit. If a narrative does not suit this objective, there is little attention to be received.	**YEAR 1-3** **P**	
Global marketing and communication plan and social media campaign: • Develop best in class world leading marketing campaigns around our standards • The creation of a global GS1 in retail marketing and communication social media campaign will bring together the messaging and external communication and can be used by all MOs running for a year. Building on the roll out of the new narrative and value story globally	**YEAR 2-5** **H**	**ALIGNMENT WITH MARKETING**
Develop / continue production of robust case studies: • Develop processes for better case study creation, education and release/dissemination to make them more agile and usable for MOs' Marketing, Community Engagement and Public Policy teams • Leverage existing work on case study development by marketing across products & services and sectors • Learn from MO success cases, by identifying MOs that are successful in strategic areas and replicate	**YEAR 2-4** **H**	**ALIGNMENT WITH MARKETING**
Leverage industry and government supporters of GS1 as advocates: • Industry and government supporters of GS1 are the most important and effective advocates. This has to be further leveraged. • Supporting the case study development, we will create new videos featuring these GS1 champions, and collect new user quotes for broad, consistent use in marketing and community materials (including for ratification of standards).	**YEAR 2-5** **M**	**ALIGNEMENT WITH PUBLIC POLICY**
Strengthen ability to navigate between GS1 speak and industry speak: • Training and coaching, to learn to communicate with our users and listen to our users ongoing process for the federation; as part of this we also need to learn how to ask the right questions and listen to the customers.	**YEAR 1-4** **P**	

STRATEGIC PILLAR 2: ENGAGEMENT, ADOPTION & USE		
STRATEGIC ACTION 4: GLOCAL coordination and sector engagement, including industry associations	**Implementation timeline & Priority**	**Alignment**
GLOCAL engagement plan and sector engagement- Opportunity to expand and grow the existing membership in other sectors / markets where GS1 lacks comprehensive engagement today: • Identify engagement priorities globally, building a structure for a results focused engagement on a global scale that directly can benefit the MOs local operations • Help develop a focus on what issues and engagement should be addressed on a global, regional and local level and how to support at different levels • Establish MO WGs to support the work, these could cover a CE in retail group • Group would work through the top priorities and analyses the sectors local global level, giving an assessment of the global status of the industry - criteria for engagement could include market / sector growth potential • Findings would guide relationship with other organisations and industry groups on local, regional and global levels, in a strategic and globally coordinated way – leveraging materiality matrix to analyse • Identifying associations to engage with globally/regionally and guide local market engagements with associations, • Develop messaging how to collaborate with local industry associations, initiate local joint activities like webinars, global sector updates, opportunity for MO to deliver education to association membership	**YEAR 2-3** **H**	
Develop strategic relationships with targeted organisations and industry associations: *(local, regional, global) and formalised partnerships that are in our mutual sphere of interest and indirectly drive growth.* • Expand industry engagement to other industry associations (other sectors) – Identify Opportunities and Prioritize • Peak body-led engagement to leverage sector knowledge and existing network per market e.g. agriculture, upstream traceability, fashion/luxury-sustainability etc.	**YEAR 2-3** **H**	**ALIGNMENT WITH PUBLIC POLICY**
STRATEGIC ACTION 5: Drive a **coherent and strategic approach to key opportunities** impacting retail sector, specifically sustainability including sub-sectors; and including regulatory		

Regulatory task force for retail community and engagement with regulators: *Regulatory pressure will impact the future of the retail ecosystem, it will be important to have active monitoring, discussions and engagement as this happens.* • Establish a regulatory task force with members to discuss and understand emerging regulations. • Work with regulators and government agencies to raise awareness of the importance of local implementation of globally harmonised standardsleveraging GS1 identifiers, registries, data. • Build a regulatory retail community (they are being staffed on brand/Retail side) which means new counterparts for GS1. These staff members have global/regional scopes so global level makes sense. • Getting started guide for legislation with clear guidance on the right messages, what GS1 should be doing, how GS1 should be influencing.	**YEAR 2-4** **M**	**ALIGNMENT WITH PUBLIC POLICY**
Regulatory harmonisation (for 2D): *Regulators in different jurisdictions will inevitably use different terms, require different data structures and set different disclosure rules - poor coordination will impact on traded brands creating yet more trade barriers to overcome* • Apply a global approach towards regulators on use of 2D with a cohesive messaging that drives for regulatory harmonisation as (if/when) 2D requirements are regulated	**YEAR 1-3** **H**	**ALIGNMENT WITH PUBLIC POLICY**
Drive Global Approach to Sustainability Reporting and Certifications: • Develop strategic positioning on how GS1 can provide solutions using global standards, GS1 Registries and verifiable credentials to enable different stakeholders across a value chain to access and trust certifications. • Develop understanding of various company and brand owner requirements to assess environmental impact and report on this to stakeholders such as consumers, regulators and investors. • Develop knowledge within GS1 on the role of certifications and verification of claims made by brand owners (e.g. ESG credentials) and how it integrates with global standards and GS1 Registries • Develop understanding of the certification ecosystem for specific sectors e.g. apparel, wood/furniture, electrical appliances / ICT etc. and specific channels like marketplaces (eco labels), retailer mandates etc.	**YEAR 1-2** **P**	**ALIGNMENT WITH SUSTAINABILITY FRAMEWORK**
Support work on Digital Product Passports: *The EU Circular Economy Plan and Ecodesign of products regulation envision a Digital Product Passport to ensure compliance with sustainability and circularity requirements for products distributed and sold in the EU market.* • Recognising the global impact of these regulatory developments the work on digital product passports needs to be supported among the MO community, especially in the relevant retail sectors/product categories • Any activities addressing the EU policy implementation should be done in close coordination with the GS1 in Europe and EU Public Policy leads.	**YEAR 1-5** **P**	**ALIGNEMENT WITH EU PUBLIC POLICY**

• GS1 standards for identification, 2D data carriers, master data and GS1 Registries would provide companies and trading partners with a common language and technologies to support a DPP drawing on information from a diversity of sources throughout the product lifecycle.		
Explore opportunities in Extended Producer Responsibility: • Carry out a regulatory review of evolving EPR requirements, region per region to assess opportunity	**YEAR 3-5** **M**	**ALIGNMENT WITH SUSTAINABILITY FRAMEWORK**
Explore opportunities and support work on Deposit Return Schemes / Container Return Schemes: *It is expected that schemes (regulations) will evolve in all regions of the world. These normally mandate the refund of a consumer deposit to promote the recycling of certain types of product packaging (mostly plastic and glass bottles) within a closed loop system within a country.* • As mandates develop in the local markets explore how GS1 standards for identification (in some cases serialisation), master data, traceability and GS1 Registries can help in achieving the local more DRS / CRS objectives. • By ensuring harmonised approaches to the schemes we can also provide greater potential for the schemes to work across national borders (more open loop systems).	**YEAR 1-2** **P**	**ALIGNMENT WITH SUSTAINABILITY FRAMEWORK**
Explore opportunities in Packaging and Plastics: *It is vital that GS1 develops a joint deeper understanding of the complex issues surrounding plastics circularity and practical insights for driving progress, including how and if the use of GS1 standards is suitable.* • Focus on the strategic opportunity to work in the space of packaging and plastics circularity, exploring how business can further advance towards a more sustainable future with the help of GS1 standards and GS1 Registries • Examine the current state of plastics recycling and highlight the challenges and opportunities that lie ahead and stress the existing use cases for GS1 master data and identifiers.	**YEAR 3-5** **M**	**ALIGNMENT WITH SUSTAINABILITY FRAMEWORK**
Support work on Food Loss and Waste Reduction: *Reduction of food loss and waste is currently central to the work GS1 is carrying out in fresh and 2D migration, and that interdependence should be recognised as work in this space is advanced.* • Supply chains that leverage GS1 standards, GS1 Registries and 2D data carriers for the identification and traceability of foods can make a measurable reduction in food loss and waste along the chain and at point of sale. • Build on existing cases in retail to develop engagement in food waste • Explore potential partner organisations to collaborate with for food loss issues – can be cross-border supply chain	**YEAR 2-4** **M**	**ALIGNMENT WITH SUSTAINABILITY FRAMEWORK**
Explore future role in green house gas emission data capture: • Explores status of reporting under scope 1, scope 2 and the role scope 3 will have	**YEAR 1-2** **H**	**ALIGNMENT WITH SUSTAINABILITY FRAMEWORK**

• Explores to what extent GS1 standards (GTIN, GLN) can bridge the data reporting including for identification of components, raw material, origin, economic operator • Explore needs for alignment with ISSB standards • Determine any future standards development required to ready GS1 users for compliance through the use of GS1 standards		
STRATEGIC ACTION 6: Marketplaces expansion		
Expand the reach and engagement of GS1 with marketplaces globally and deepen the engagement with existing relationships	**YEAR 1-3** **H**	**ALIGNMENT WITH MARKET PLACES**
STRATEGIC ACTION 7: 2D Deployment		
Actively support 2D deployment and migration work: • Standards and Barcodes: Work with Solution Provider community to ensure scanners can recognise and read barcodes “powered by GS1” at speed and in real-world conditions. • MO engagement with industry: Next phase of support and collateral delivery including updated FAQs, MO training modules, 4 new 2D Case Studies and pilot engagement materials. • Establish a brand marketing engagement model for MOs to connect with the manufacturer stakeholders on 2D benefits. • Measure and report on MO progress towards the 2027 Ambition Roadmap and Pilot activity.	**YEAR 1-5** **H**	**ALIGNMENT WITH 2D MIGRATION**
STRATEGIC ACTIONS 8: Promotion of RFID technology and accompanying GS1 standards		
GS1’s Retail organizations will aim to provide the following with regards to RFID: • Continue to promote industry wide adoption of RFID technology and accompanying GS1 standards for a multitude of use cases. We will only rely on real cases of RAIN RFID deployment that make use of GS1 numbering systems. We will continue to promote the use of standardized performance measurement methodologies to increase trust between stakeholders. • Create and/or adapt standards for emergent use cases, particularly around topics like luxury goods, loss prevention, seamless checkout, and sustainability • Regularly conduct industry insights gathering missions to assess which RFID use cases could require additional standards work, such as the issue of 3rd party downstream tagging or EU Digital Product Passport additional data needs	**YEAR 1-5** **M** **YEAR 3-5** **M**	**ALIGNMENT WITH TRAINING** **ALIGNMENT WITH TRAINING**
STRATEGIC ACTIONS 9: Upskill and develop business functional expertise		
Develop and upskill in-house expertise: • Address the lack of in-house expertise in GO and MOs with a high-level business process training. Focus on better understanding of the challenges businesses face, and the role GS1 can play to support.	**YEAR 2-3** **M**	

• Upskill among GO and MOs – including business functional expertise and a day in the life • Training MOs to use data as an engagement tool • Provide high-level business process training for MOs and GO	**YEAR 2-3** **M**	**ALIGNMENT WITH TRAINING**
Day in the Life experience [GO only] learning from MOs: *GO teams have little direct contact with industry users, and little direct experience of the business day at an MO. Due to this there is sometimes a disconnect in how GO thinks MOs engage with industry and by extension the advise and input GO gives in some situations.* • A way to address this would be more day in the life exposure that would help GO to understand MO challenges and how they engage with their members	**YEAR 3-5** **M**	**ALIGNMENT WITH TRAINING**
STRATEGIC ACTIONS 10: Identify barriers to adoption of GS1 standards and services GS1 Registries		
• Carry out thorough analysis of barriers to adoption of GS1 standards and GS1 Registries (partly building on marketplaces work already in place) • Proactively demonstrate a solution to business needs and positioning GS1 as the cohesive business enabler	**YEAR 1-2** **H**	
• Develop adoption matrix and gap analysis tools for MOs to guide users through beginning, progressing and advanced stages of standards and GS1 Registries adoption	**YEAR 2-4** **M**	**ALIGNMENT WITH TRAINING**
• Better understand reason for low adoption and adapt to needs – explore how VBG can be adapted to flows e.g. VbG is not adopted in the flows today because retailers need the data upon launch and brands consider this as private/competitive. It might be an opportunity to look into adding a publish date for VbG products if we want better adoption	**YEAR 1-3** **H**	
• Expand the reach and engagement with the retail industry - target a more effective and renewed engagement with the retail key players to understand their emerging challenges coming out of the current turbulent times and where GS1 can add value • Explore together with industry how GS1 can make the customer journey easier as companies engage with GS1	**YEAR 1-3** **H**	
STRATEGIC ACTIONS 11: Consistently communicate with and educate key stakeholders		

• **Brands** – focus on added value, adoption and basic rule
• **Reseller** - clarification and position (find a GTIN or allocate)
• **SMEs/sellers** - For SMEs in the market there is significant confusion regarding GTINs and the role of resellers
  ▪ Clarify position and added-value vis a vis resellers
  ▪ This action could be a specific deliverable coming out of the education and awareness work in the Marketplace Programmet
	YEAR 2-4
	
	H
		ALIGNMENT WITH MARKET PLACES

STRATEGIC ACTIONS 12: Develop **value propositions for key industry business challenges and use cases** to more clearly articulate the GS1 organisation/role, offer, benefits as well as toolkit of standards and the GS1 registries		
• Renew focus of the case studies to make them more relevant to the audiences and better applied to the direct challenges that are top of mind for industry users (and use cases can more clearly articulate the GS1 organisation/role, offer, benefits as well as toolkit of standards and the GS1 registries)	**YEAR 2-3** **H**	**ALIGNMENT WITH MARKETING**
STRATEGIC ACTIONS 13: Develop clearer roadmaps for key initiatives		
• Flow of roadmap could be to identify 1) Actions to take, 2) Resources to help, 3) Benefits to expect, 4) Risks for no action; with a built in feedback loop to identify opportunities and challenges	**YEAR 3-4** **M**	

STRATEGIC PILLAR 3: SERVICES & INNOVATION

STRATEGIC ACTION 14: Localised innovation work - Ensure that the innovation work is closer to the MO activities, with localised innovation approaches	**Implementation timeline & Priority**	**Alignment**
• Establishment of regional retail innovation boards, with broad non-GS1 participation, suggested to be at least 75% non-GS1, but managed by the "regional" GS1 organisations, to ensure a better geographical coverage with regards to the innovation monitoring, and activities that are closer to the local MO operations, geographically, culturally and operationally. With an active ongoing local in-market research function, reporting back to the regional (and global) innovation board. • Create a retail innovation board	**YEAR 3-5** **M**	**ALIGNMENT WITH INNOVATION**
STRATEGIC ACTION 15: Innovation thought leadership - Expand thought leadership on trends & technology and raise profile of innovation board		
Raise the profile and role of the innovation board across industries and MO communities (possibly through local retail innovation boards and regional innovation boards with focus on retail)	**YEAR 3-5** **M**	**ALIGNMENT WITH INNOVATION**
Convene industry to innovate with GS1 across topics and accelerate meaningful pilots: • Develop a program to drive innovation across GS1 Standards, Services (global and local) and leverage the power of the federation to drive adoption and use of GS1 Standards in retail (downstream and upstream); seeking to drive collaboration between the GS1 Retail Industry Engagement Team, the Global Office Innovation lead and Board as well as the establishment of innovation interest groups between MO, industry, and solution providers.	**YEAR 3-5** **M**	**ALIGNMENT WITH INNOVATION**
Industry trends analysis, end user interviews, and stakeholder mappings: • Use global resources to consistently do industry trends analysis, end user interviews, and stakeholder mappings for MO staff to utilize • With an ongoing industry trends analysis linked to stakeholder interviews there is less risk to miss opportunities and developments that are top of mind for user companies • Ensure clear distinction between how we communicate about innovation, especially if we are adapting what we currently have to fit the current and near term needs or creating something new including adopting new technologies.	**YEAR 2-3** **H**	**ALIGNMENT WITH INNOVATION**
Innovation programme: • Develop a program to drive innovation across GS1 Standards, Services/ GS1 registries (global and local) and the power of the federation to drive adoption and use of GS1 Standards in retail (downstream and upstream) - seeking to drive collaboration between the GS1 Retail Industry Engagement Team, the Global Office Innovation lead and Innovation Board as well as the establishment of innovation interest groups between MO, industry, and solutions providers	**YEAR 3-4** **M**	**ALIGNMENT WITH INNOVATION**

STRATEGIC ACTION 16: Consistently scale deployment and adoption of the GS1 Registries to solve industry's most pressing business needs	Implementation timeline & Priority	Alignment
• Align GS1 Registries Programme sector engagement priorities and projects • Develop approach to successfully demonstrate VGB to a retailer audience	YEAR 2-3 H	ALIGNMENT WITH REGISTRIES
Equip the retail sector engagement teams with the registries offer in support of their go to market plans: • Awareness of offer, value story and connection with adoption of GS1 standards • Exploration of priority use cases based on industry needs identified in retail strategy (consumer needs; regulatory needs; visibility & efficiency; listing, ranging & cost reduction; end-to-end traceability) • Partnership to pilot registries services and data • Background support to rollout based on successful pilots	YEAR 3-4 H	
Create and deploy sector engagement strategies for registries deployment (Licence, GTIN, GLN, Links): • Collaborate to understand where and how to integrate the complete GS1 Registries offer into each global sector's deployment and go-to-market strategies that helps mobilise MOs to step-change industry adoption and usage of GRP based services offerings • Map sector priorities to registries offering to define go-to market approach • Include focus on governments and their use cases with registries e.g. trace, anti-counterfeit, sustainability etc. • Ensure relevant materials to support MOs with engagement towards pilots are developed in a timely way (including value props, holistic value story etc.) • Drive MO awareness and engagement with registries offering to address key use cases, leading to pilot opportunities to test and learn. [note: supporting marketplaces OGSM] • Sequence sector engagement - prioritise marketplaces, apparel and government engagements. Expanding to other sectors as their go-to-market approaches are defined • Increase global implementation, education and support for standards and guidelines in apparel (DPP) CPG (GM2D) Fresh (Traceability, 2D) • Promote VBG to marketplaces via MOs [note: supporting marketplaces OGSM] • Gather new sector needs from retail sector engagement teams to understand business drivers, formulate need and assess feasibility/impact, partner to innovate and experiment using registries services and data, support prioritised enhancements to registries and interaction with product team	YEAR 1-2 H	ALIGNMENT WITH REGISTRIES ALIGNMENT WITH PUBLIC POLICY ALIGNMENT WITH 2D PROGRAMME

6. ABOUT GS1 RETAIL

GS1 retail's efforts are committed to supporting industry's digital transformation across global subsectors CPG, Fresh Foods, Apparel and General Merchandise- through broad deployment of a combination of standards and services.

VISION

A trusted partner to the retail industry, *we inspire and lead trading partners to do better business and connect products to consumers, digitally and sustainably, around the world.*

MISSION

To be an integral part of the global retail ecosystem, *with strong ties to the local retail communities in the markets we serve*

- **Collaborating**: Working with businesses big and small, across all retail categories, both online and offline.
- **Connecting**: Making connections, removing barriers and facilitating trade via global standards and registries.
- **Adding Value**: Creating value for business, governments, consumers, and society while contributing to a better, more sustainable future.
- **Driving Demand**: Communicating clearly the value of GS1 to achieve greater awareness and understanding, while inspiring industry and driving demand.

Internal Governance, Industry and MO Collaboration

The GS1 Retail strategy implementation will be led by the GO retail team working closely with GS1 MOs. The strategy implementation will be closely connected to the sector communities that already are in place for fresh, apparel, general merchandise, CPG and marketplaces. These communities including the Global MO Interest Groups, the Retail Industry Group and the local user groups in MOs will help ensure global rollout with a coherent retail voice from GS1.

It will be important that these groups all act as conduits for the work, and ensuring that MOs get direct feedback from industry, and GO receives feedback from MOs through the different channels.

This global stream of communication can in turn bring a coherent approach to how we work with retail industry globally.

As part of the implementation, it will also be important to deliver coherent feedback, updates and communication with important GS1 governance bodies, as well as the advisory council. Feedback received will be used to adjust strategy implementation to be in sync with these groups and evolving global initiatives that have an interdependence with the retail strategy and clear links to the retail eco-system.

There are also links to GSMP committees e.g., 2D in Retail, GS1 GDSN Board members, Marketplace Advisory Team, and others.

Measure and KPIs

The main measurable KPI for the timely implementation of the retail strategy is the roadmap, where each activity has a short, mid-term or long-term timeline based on complexity and prioritisation. The outcomes of the strategy roadmap are substantiated by our deep understanding of user needs, enablers, the organisations capabilities, and priorities with the sequence or prioritisation. We foresee using an annual report function where updates are given to the main governing bodies on the progress of the retail strategy implementation.

Audience

The retail strategy has been developed primarily for GS1 Member Organisations (MOs) to work with the retail industry more effectively in local markets—and help drive growth in GS1 standards adoption in a coherent way, globally.

Alignment with GS1's organisational goals

The GS1 Retail Strategy has been developed to be in line with the GS1 strategy. It is also aligned with the GS1 Global Office three-year plan; this helps ensure that any work proposed in the strategy is fully aligned with the overall organisational goals and that the organisation is aware of the retail activities while ensuring the right support from other departments within GS1 Global Office.

Annual planning and reporting

Each August, the GS1 retail team prepares a set of strategic focus areas as part of the annual 3-year strategy development. This is part of the Global Office overall 3 Year plan and subsequently shared with the AC by the GO Leadership Team. These strategic focus areas will be closely aligned with this strategy in the years going forward and helps clarify what the actual operational needs (FTE, budget etc.) are. As the retail work evolves the three-year strategy will also change. But ultimately the intention is that the retail strategy has enough flexibility built in to be able to still be relevant and well aligned in the years ahead.

APPENDIX – Strategy development process

GS1 Member Organisation’s interview input

The strategy development process consisted of four major activities, with several GO and MO colleagues working together. The goal was to seek alignment with key industry members and MO priorities for the retail sector.

01 Step

Planning

During this phase, the retail team planned for the required actions to develop the strategy.

Research was done and key themes identified. The strategy development process was initiated with a kick-off meeting at the CEAT level, with the community engagement leads from the AC MOs to launch the effort.

02 Step

Interviews

Interviews with a majority of the AC MO retail leads, community engagement leads and CEOs were carried out during 2022 and early 2023.

The interviews were used to better understand how the individual MOs are structuring their retail sector and what their local retail strategy looks like. The interviews also collected a global list of potential areas of focus from all regions of the world

03 Step

ASE Design/ Planning/Execution

The ASE Sponsor group was established in December 2022. The work of the ASE Sponsors was to develop Industry Needs and Enablers, that later would be proposed to the ASE workshop. The group consists of MO CE and retail leads.

The key transformative action during the process was the two-day ASE workshop in Utrecht on 9-10 February 2023. It was fully in-person with participants from industry, selected from the GS1 Management Board member companies primarily, GS1 MOs and Global Office colleagues. Participants came together to share insights and agree on the industry needs and how we can enable the needs going forward, while being in sync with emerging trends.

GS1 Retail worked with consulting firm Capgemini to manage the preparatory process for the ASE and the execution of the ASE. The process was designed to be inclusive, ensuring that representatives from key retail and marketplaces stakeholders had their say.

04
Step

Drafting and Reviews

The drafting was ongoing during March – April 2023 with weekly reviews with GO and MO teams.. During this time, the MO Sponsor group helped with reviews, and to prioritise the enablers informing how the work will be driven forward including the design of the strategic priorities and roadmap.

Contributors

Thank you to the many industry stakeholders that invested their time and shared their expertise throughout the process and the invaluable input from the Consumer Goods Forum, the GS1 MO Retail CE leaders and GO colleagues who contributed their insights and knowledge to the development of the GS1 Retail Strategy. Thank you to Capgemini, who assisted us in this work.

ASE Participants

Amazon, Ahold Delhaize, Carrefour, The Consumer Goods Forum, Dr Oetker, GS1 Australia, GS1 Brazil, GS1 Denmark, GS1 France, GS1 Germany, GS1 Global Office, GS1 India, GS1 Ireland, GS1 Italy, GS1 Japan, GS1 Netherlands, GS1 Paraguay, GS1 Spain, GS1 Turkey, GS1 UK, GS1 US, L'oreal, Metro, Migros, Nestle, P&G, Unilever

Strategy MO Steering Group

GS1 Australia, GS1 Brazil, GS1 Nigeria, GS1 South Africa, GS1 UK, GS1 US

Interviews

Colleagues were interviewed from the following GS1 Member Organisations: GS1 Australia, GS1 China, GS1 France, GS1 Germany, GS1 Hong Kong, China, GS1 Netherlands, GS1 Nigeria, GS1 New Zealand, GS1 Sweden, GS1 UK, GS1 US

MO interview key findings

GS1 Member Organisations were included in a series of interviews carried out in preparation of the retail strategy work.

The majority of the interviewed MOs do not have an explicit retail strategy. But generally, the retail sector is so broad and important to the operations of the MO and very mature and historically the focus that the retail strategy rather is the major part of the overall strategy at GS1 MO.

Customer in focus is something that has been core to the thinking of the GO retail team, and MOs also have this explicitly as the central part of their strategy. The focus on consumers is something new to GS1, and it should remain a priority.

Acceleration of digital transformation: It is well established that Covid-19 accelerated the digitisation of retail and moved customers to online purchases due to external factors like lockdowns. While the situation has normalised, retailers and brand owners are taking advantage of the focus in management on this digital transformation. A key driver for the need to update the retail strategy is this accelerated digital transformation and to help ensure that consumers get a seamless shopping experience, as they migrate from physical channels to online.

Regulation will increasingly be a driver for change in the retail sub-sectors. There must be a significant boost in readiness among MOs to reap local benefits from this. Even through some of the regulatory developments are seen in EU first, this trend is global. The upcoming circularity/sustainability requirements such as EU DPP but also including DRS, packaging material, ESG reporting were key topics.

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