

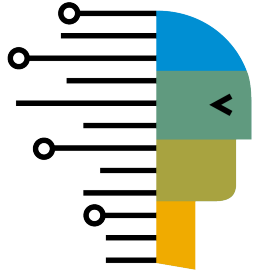


POI European Summit

Successfully Navigating Growth in the New CPG and Retail World

POI Lightning Round **SAP**

The forces of change driving industry transformation



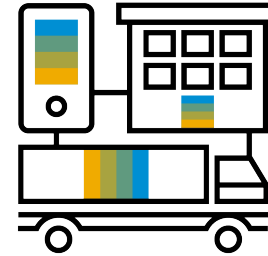
'Right Now, Right Here, Just For Me' Consumers

- Increasingly well informed consumers
- Expect to be *advised* in ways that are timely, tailored, relevant and increasingly local
- What is the *best* option *for me*?



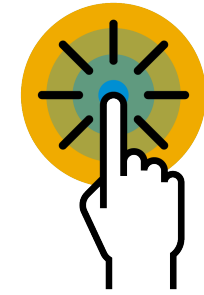
Generational Waves

- Generation Y and Generation Z consumers' needs and preferences are rapidly emerging, along with their spending power
- What they *value* is different from baby boomers



The 'Amazon Effect'

- Channel proliferation and increasing cost pressures across product categories
- Driving new, non-traditional growth models
- Challenging how products, and even the industry itself, is defined

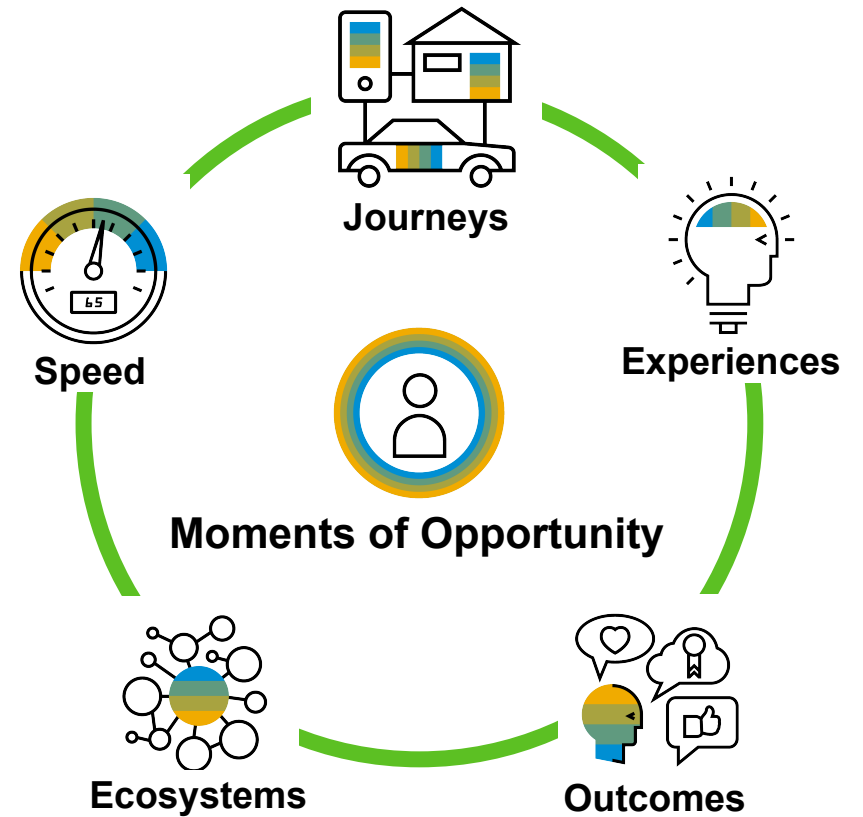
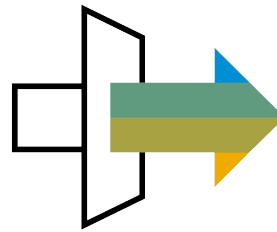
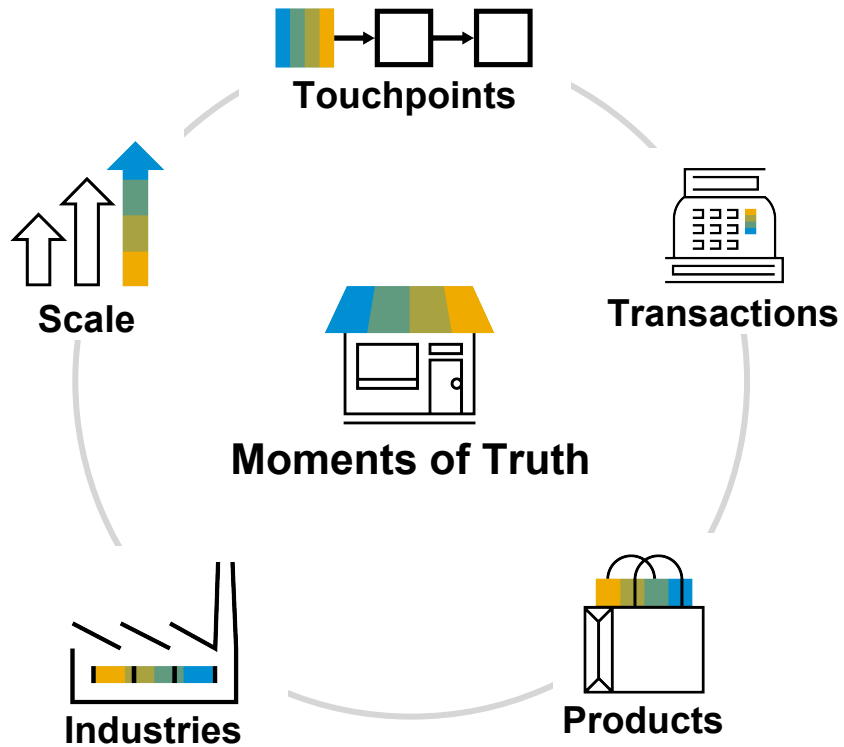


Digital Innovators

- Speed is the new big
- Smaller, more agile competitors are entering the market, challenging the old order
- Becoming the new engines of category growth and innovation

~~Incrementally better?~~

Fundamentally different



SAP CUSTOMER EXPERIENCE VISION FOR CONSUMER PRODUCTS

Simplify Your Front Office

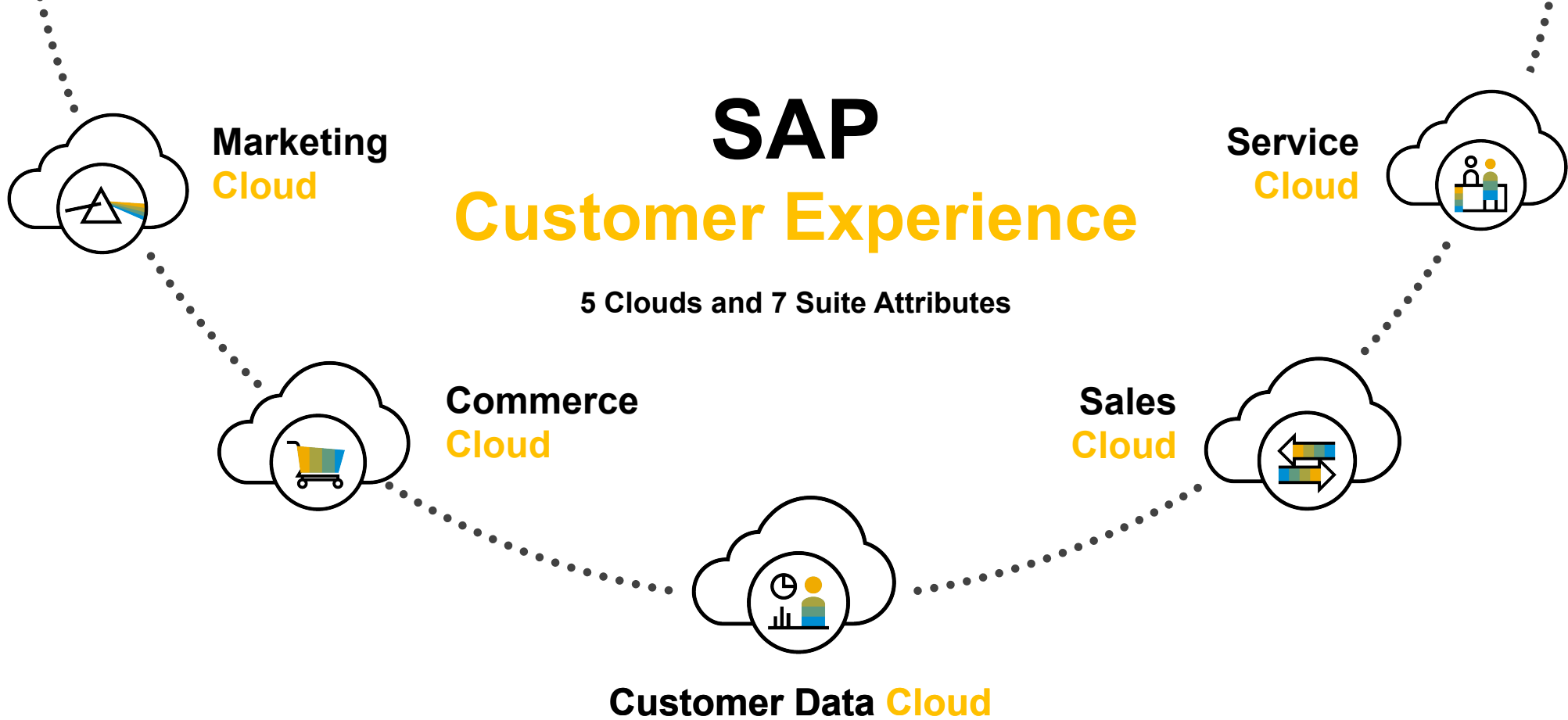
**SERVE SAVVY CUSTOMERS AND END-CONSUMERS BY
DELIVERING PERSONALIZED EXPERIENCES AND
RELEVANT PRODUCTS IN THE MOMENT.**

OMNI-BUSINESS. OMNI-CHANNEL.

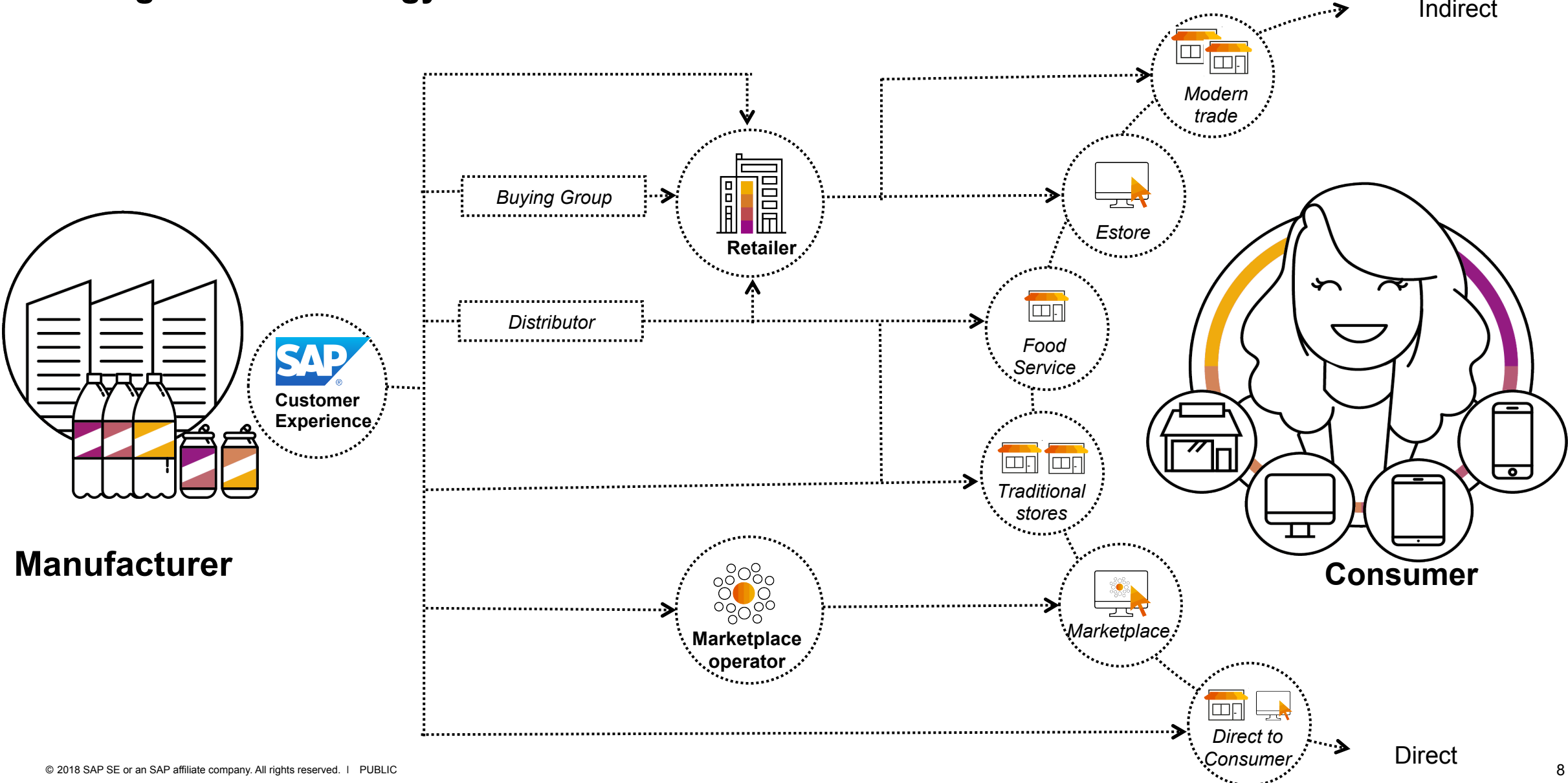


SAP
Marketing Cloud





SAP Supports Multiple Business Models and Routes to Market with one integrated Technology Stack



Thank You.

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