



Clipper

**RETAIL  
FORUM**

Emerge. Transform. Accelerate.

# Challenging times for retail.

The UK retail sector is facing a vortex of change, driven by three big trends:

**1**  
**TURBULENT ECONOMY**  
Conditions are tough for businesses, with economic uncertainty, low consumer confidence, unpredictable trading periods and the relentless 'death of the high street' media narrative.

**2**  
**HIGHER EXPECTATIONS**  
Technological developments mean customers expect fast, efficient, personal service as standard.

**3**  
**SUSTAINABILITY PRESSURE**  
Demand for more environmentally and socially sustainable business models is now unignorable. In response, retailers are radically rethinking their supply chains.

**These are all directly linked with logistics.**  
And transforming logistics will boost your efficiency, transparency, and competitive advantage in our rapidly changing times.

## The focus:



› 40% of the UK population now have access to lightning-fast Amazon Prime service.<sup>1</sup>



› Consumer satisfaction with online delivery fell 7% year on year.<sup>2</sup>



› Instagram shopping is exploding, enabling the purchase of items directly from posts.



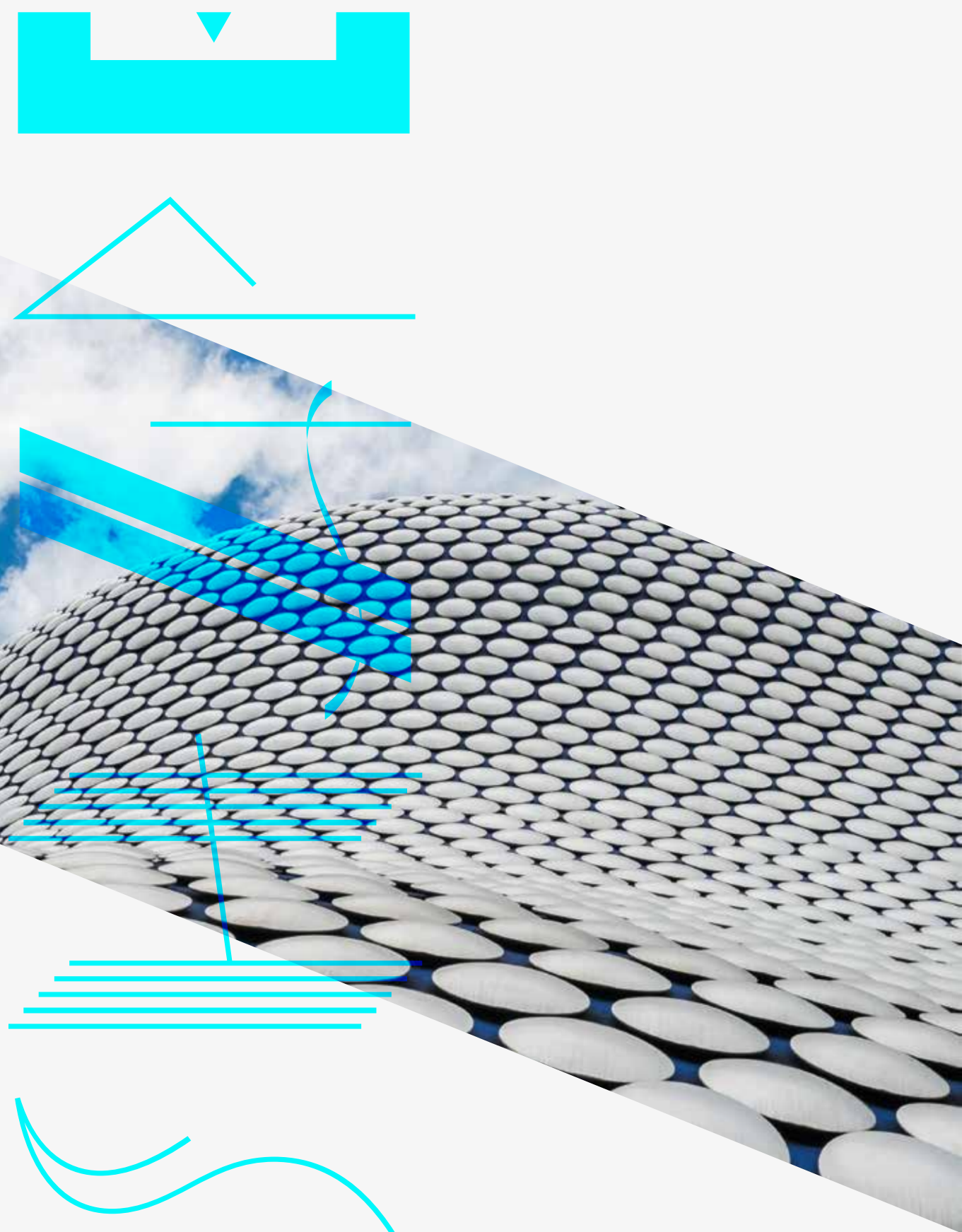
› Renting is the new buying, with start-ups like Girl Meets Dress and Front Row.



› The buy-return-buy cycle has become the norm.

<sup>1</sup> A Shopper's Perspective - Mintel, January 2019

<sup>2</sup> IMRG Consumer Delivery Review 2018



**Retail is still the beating heart of our cities, communities and businesses.**

Everyone's talking about how retail (especially fashion retail) is changing. And while some have adapted well, others are still reeling from new entrants disrupting the market.

As a retail-focussed solutions provider, we want to support UK retailers in leading the change and grasping the opportunities it brings. And in doing so, ensure that our high streets continue to thrive. Here are two challenging areas that forward-thinking brands are addressing:

**CONSOLIDATING DELIVERIES**

1/3 of urban traffic is put down to last mile delivery,<sup>3</sup> much of it may be empty trucks returning from drops. It's inefficient and unsustainable.

**COMBINING THE BEST OF CLICKS AND BRICKS**

It's not about online versus bricks-and-mortar, it's about both working together. After all, online sales currently only make up 18% of retail sales.<sup>4</sup> And consumers still want to experience products and brands, even if the transaction happens elsewhere. It's why e-commerce giants like Amazon, Farfetch, and eBay are opening high street stores. And Urban Outfitters stores offer constantly evolving brand experiences.

This is tomorrow's retail, today.

<sup>3</sup> Renault quoting Les Echos Etude – September 2017

<sup>4</sup> Office for National Statistics – March 2019

# To compete, collaborate.

# 43%

**increase in retailers  
investing in shared  
warehouse space by  
2023 (predicted).<sup>5</sup>**

**Logistics defines  
a retailer's offer.**

But to compete against  
the e-commerce giants,  
today's start-ups need  
to think differently.

»

**More and more retailers  
are discovering that savings,  
efficiencies, and brand value  
can be gained by sharing  
services with complementary  
partners. By working with like-  
minded competitors, smaller  
brands can share services,  
scale, and investment, to rapidly  
accelerate their growth.**

Clipper Retail Forum is about  
helping businesses of all sizes and  
life stages to share world-class  
retail supply chain knowledge,  
systems and infrastructure.

#### **EVERYTHING'S CONNECTED**

It's not just clicks and bricks  
that are becoming more  
interconnected. Our cities are  
too. With our partners, we're  
finding new ways for city  
authorities, planners, transport  
executives, retailers, food service,  
hotels and residential planners  
to work together, to create more  
desirable, sustainable places  
to live, work and play.

This spirit of collaboration is  
the driving force behind creating  
our Retail Forum. New businesses  
will always appear, both on and  
offline. We're here to help them  
avoid common pitfalls and  
grow smoothly.

<sup>5</sup> Full Speed Ahead: Meeting the delivery  
challenge in UK retail - GlobalData  
on behalf of TLT LLP

**Retail Forum's DNA.**  
**Get answers to your burning questions.**



»

**In such a changing retail environment, going it alone is no longer an option.**

Our customers said they needed an innovation hub. So, as retail logistics pioneers, we've created one.

The Retail Forum gives you the insight and knowledge you need to help your business:

- › Emerge
- › Transform
- › Accelerate

It's where businesses big and small, old and new, come together to embrace the future of retail.

**GET ACTIONABLE ADVICE**

A forum for Clipper to share its wealth of knowledge in specialist retail logistics solutions.

**COLLABORATE FOR GROWTH**

Meet other retailers to share ideas and unlock new opportunities.

**OVERCOME ANY OBSTACLE**

Whatever area you're struggling with, we'll help you find a way forward.

- › E-fulfilment
- › Returns
- › Click & Collect
- › Cross border trading
- › Sustainable supply chain solutions



# Insightful experts.

» Challenging times demand fresh thinking. So we've assembled the best minds from a multitude of backgrounds to create our panel of experts. They will help shape the content and direction of the Retail Forum.

Get essential insights from Clipper's retail solutions specialists and a truly collaborative group of retailers, from start-ups and growth chasers to retail bastions.

Many people with one goal: helping your business develop and grow.



« **Tony Mannix**  
Clipper Logistics



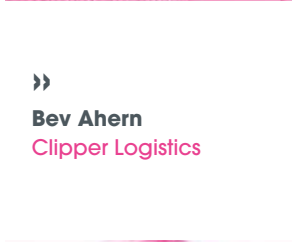
« **Peter Loudon**  
Clipper Logistics



» **Phil Barnes**  
N Brown



» **David Grimes**  
Sorted



» **Bev Ahern**  
Clipper Logistics



» **Dino Rocos**  
Future Retail Logistics



« **Richard McMurrough**  
Propaganda



« **Tracey Barley-Wild**  
Cotswold Outdoors



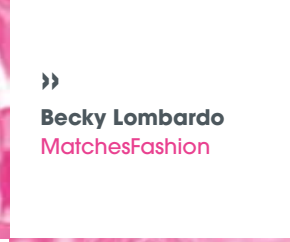
« **Sam Holden**  
Yodel



« **Mats Nilsson**  
Polarn O. Pyret



» **Gordon Knox**  
Superdry Plc



» **Becky Lombardo**  
MatchesFashion



» **Phil Hackney**  
Shop Direct



» **Manju Malhotra**  
Harvey Nichols



« **Neil Ashworth**  
Executive Advisor



« **Orla Flynn**  
Joules

**Unique challenges.  
Unique solutions.**

»

We're here to solve your retail problems, help you scale smoothly and compete with the giants. And all our solutions remove cost, risk and complexity from your supply chain. It's the Clipper Way.

The challenge.

The solution.

**Boosting sustainability**



**Retail consolidation hubs**

**Growing infrastructure**



**Shared user facilities**

**Streamlining returns**



**Boomerang™**

**Kickstarting Click & Collect**

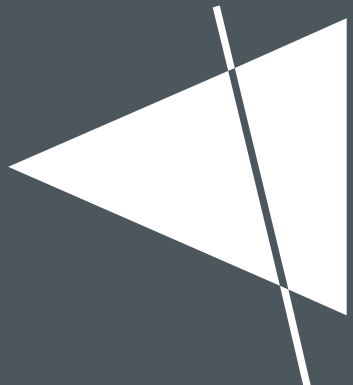


**Clicklink™**

**Tracking orders**



**World-class IT**



## Retail Forum in action.



Discover how Clipper's helped some of today's pioneering brands to realise their retail ambitions.

### Emerge Case Study

## HOPE & IVY



#### The challenge

- › Support operational growth
- › Maintain customer service excellence

#### The solution

- › A shared user operation at Clipper's e-commerce centre
- › Entire stock migration and go-live in **one** weekend with **zero** disruption
- › Implementing a bespoke WMS platform

#### The result

- › Improved inventory visibility with **24** hours returns processing and stock repatriation



**Transform** Case Study

**A M A R A**  
LIFE · STYLE · LIVING



**The challenge**

- › Keeping exceptional service, while scaling
- › Managing over 350 brands with multiple stock lines

**The solution**

- › Bespoke E-fulfilment services to exceed customer expectations
- › 140,000 sq ft warehouse extension
- › 20 new specialist pick and pack staff

**The result**

- › Go-live in 4 weeks
- › Later cut offs - next day delivery until 8pm available on 85% of stock

**Accelerate** Case Study

**POLARN O. PYRET**



**The challenge**

- › Support operational growth/remove capacity constraints
- › Enhance warehousing and distribution capability

**The solution**

- › Shared user facility at Clipper's e-commerce centre
- › 140% increased operational footprint as brand has scaled
- › Integrated E-fulfilment and returns service
- › Distribution service to 15 UK & ROI stores
- › Continuous improvement to reduce supply chain packaging waste

**The result**

- › Optimised order visibility
- › Instant, automated customer refunds on returns
- › Standard deliveries reduced from 5 to 2 days
- › Introduction of next day delivery with 6pm cut off
- › 400% growth in average weekly units processed

# Discovered. Connected. Growth.

Clippier Retail Forum

FOR ALL THE FASHION BUSINESS  
**Drapers**

Emerge. Transform. Accelerate.

We're launching  
with a year of  
content to inspire  
and inform.  
**Created in  
collaboration  
with Drapers.**

»»

Look out for the following:

The Retail Forum's purpose  
launch campaign:  
**Powering Fashion's Future**

Insight white paper:  
**Taking the Next Step:  
Growth in a changing economy**

New online portal on  
Drapersonline.com:  
**Guide to Growth**  
Your hub for indispensable insights,  
analysis, and expert answers to  
tough questions.

And much more, including helpful  
guides, breakfast briefing sessions  
and networking events across the UK.

Our mission is to create a truly  
collaborative forum for retailers  
to network and share best practice, to  
help drive growth for all.



**Let's evolve retail**

Join the Forum to connect with today's retail disruptors and drive tomorrow's growth.

**New customer?**

Get in touch with our CEO, Tony Mannix.  
T 0113 204 2050

**Existing customer?**

Speak to your Clipper contact.

**Clipper Logistics plc**

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