

A woman with long blonde hair, wearing a bright yellow jacket over a blue shirt, is looking down at her smartphone. She is standing in a retail store with shelves of products in the background. The lighting is warm and focused on her.

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Building a future-proof and sustainable TCG commerce

Thierry Gadou, Chairman & CEO

May 19, 2022



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SES-imagotag is the world leader in ESL and IoT solutions for retail

VUSION

- IOT ulp connectivity
- IOT cloud
- ESL
- CV/AI
- Shelf management
- Digital Ads
- Analytics

KEY FIGURES

- Revenue €600m
- Growth +40%+ pa
- 600 employees
- 300+ retailers
- 62 countries
- 33,000 stores
- 300 millions ESL2



Our Solutions

digitalize physical retail

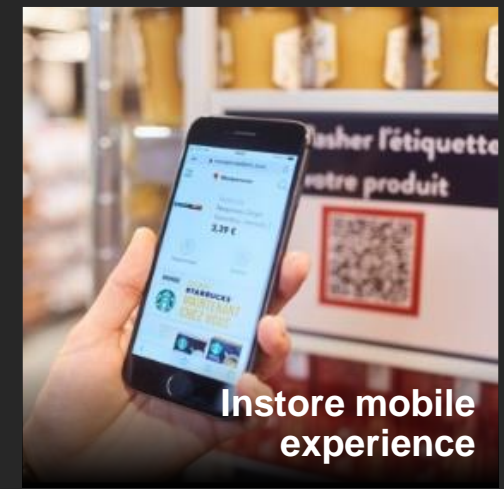
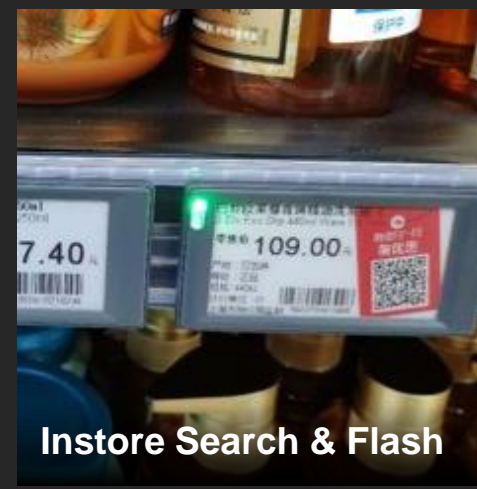
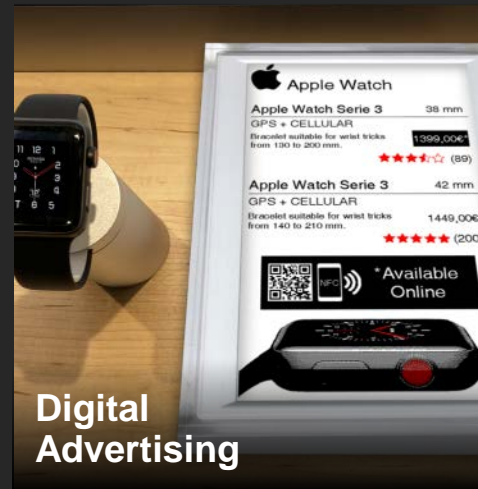
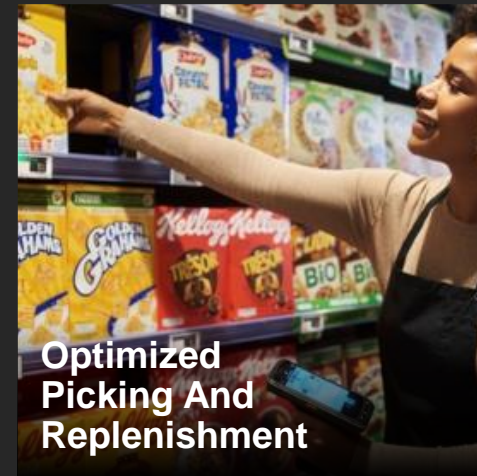
Pricing Automation

Shelf Management

Computer Vision

Digital Advertising

Scan & Go



CUSTOMERS IN TCG



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We invent IoT and digital technologies that create a positive impact on society by enabling sustainable and human-centered commerce.

The Positive Retail Roadmap

International
Advisory
Board for
Global Retail
Sustainability
Transparency
and
Consumer
Protection



Peter Brabeck-Letmathe
Chairman Emeritus of Nestlé
Vice-Chairman of the World
Economic Forum (WEF)



Yanshun Chen
Chairman
BOE Technology



Viviane Reding
Former EU Commissioner
& VP of EU Commission



Candace Johnson
Board Member of the ICC
Chair of Seraphim Board



Franck Moison
Former Vice Chair of
Colgate-Palmolive



Hélène Ploix
Chair of Pechel Industries
Former Director of IMF & World Bank

Roadmap
for
Positive
Retail

1

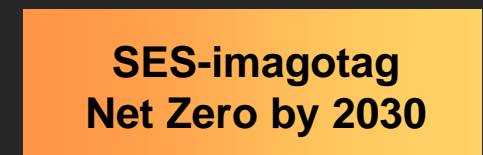
› Contribute to retail's
Net-Zero target

2

› Protect jobs, communities
and consumers by enabling
better and more
sustainable stores

3

› Develop wasteless and
ultra-low carbon IoT
devices



An aerial photograph of a dense forest with a dirt road winding through it. The trees are mostly green, with some yellowing, suggesting autumn. The road is a light brown color and runs diagonally across the frame.

RETAIL IS ASSOCIATED WITH MAJOR SOCIETAL AND SUSTAINABILITY CHALLENGES

RETAIL IS THE LARGEST ECONOMIC SECTOR AND EMPLOYER





STORES ARE ESSENTIAL SOCIAL HUBS

RETAIL SUSTAINABILITY CHALLENGES

CARBON FOOTPRINT

Construction

(Stores, Distribution & Fulfillment centers)

Energy

(heating, cold chain, logistics, last-mile, ...)

Paper consumption

(E-commerce packaging, shelf labels, POP communication)

Waste

(Food, hardware...)



**SEVERAL TRENDS ARE INCREASING
PRESSURE ON BRICK & MORTAR RETAILERS**

E-Commerce Global Growth

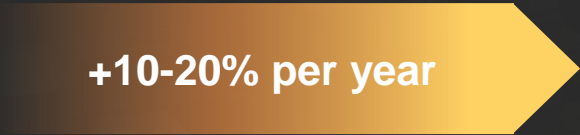
E-commerce in % of total retail sales

30-40%

In 5 years

15-20%

+10-20% per year



■ E-commerce ■ Brick & Mortar

PHYSICAL STORES UNDER PRESSURE

Labor
Margins
Opex
Tax

**PHYSICAL
STORES**

E-commerce
Consumer
behavior shift

Unfavourable
economics

Revenue & profit
under pressure

E-commerce
gaining share

SUSTAINABILITY RISKS

OVER THE NEXT 5 YEARS DIRECT E-COMMERCE COULD ADD
1B+ TONS OF CO2 NET EMISSIONS

To reach 30% to 40%
of total sales,
direct e-commerce
will require the construction
of ~1B sqm
new DC/FC
+ operations & last-mile

SOCIETAL RISKS

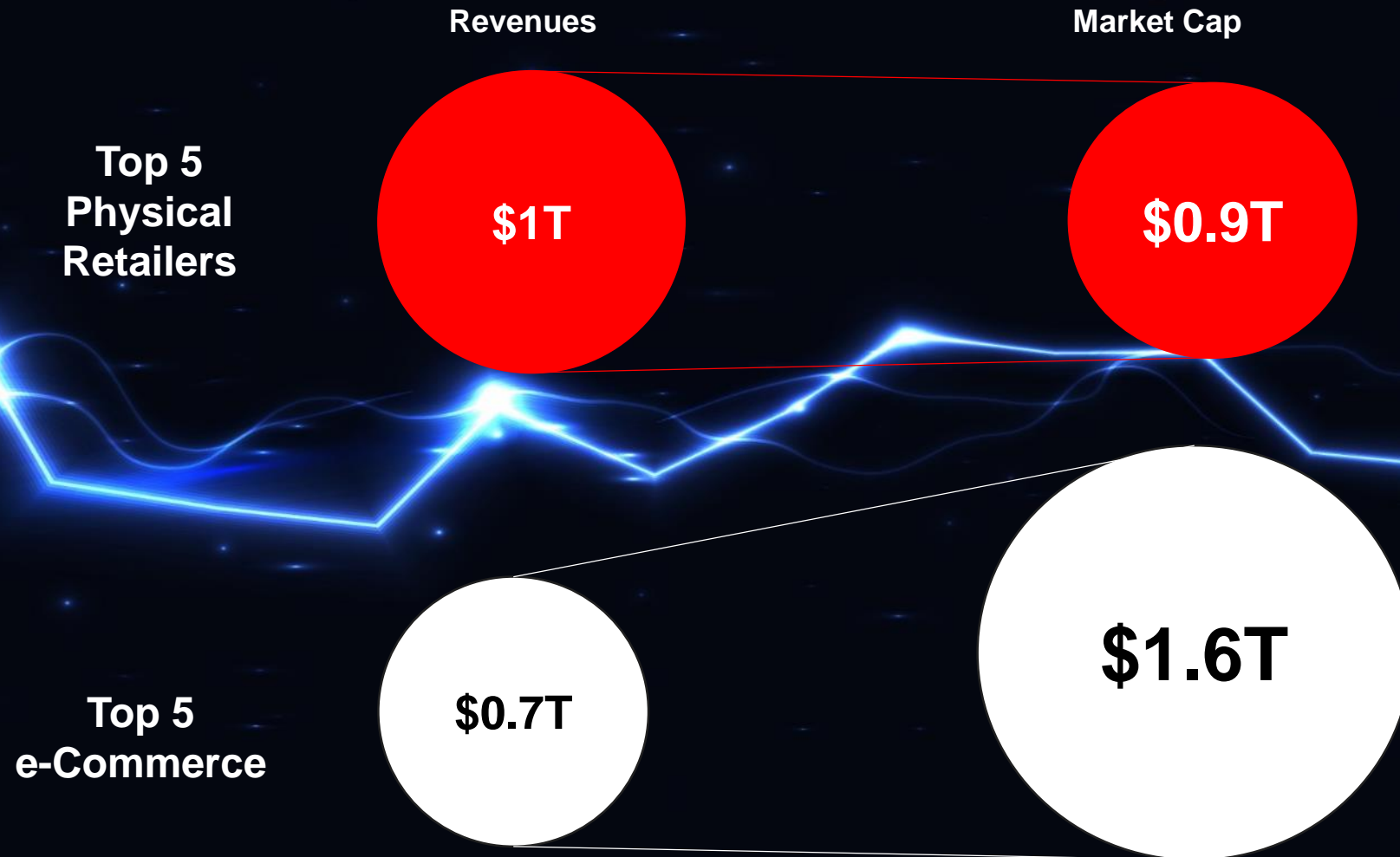
HIGH SOCIAL RISKS ASSOCIATED WITH THE CURRENT RETAIL STATUS QUO & TRENDS

-50%

Long-term potential negative impact on physical **retail employment** due to on/offline substitution

THE BIG DIGITAL DIVIDE IN RETAIL

UNFAIR SHARING OF DIGITAL VALUE



An aerial photograph of a dense forest with a dirt road winding through it. The trees are mostly green, with some yellowing, suggesting autumn. The road is a light brown color and runs diagonally across the frame.

A MORE SUSTAINABLE AND RESPONSIBLE RETAIL DEVELOPMENT MODEL EXISTS

STORES ARE (PART OF) THE SOLUTION



**~20M
stores
worldwide**

**1 Store /
400 person**

**Most goods
< 3 miles
from all
consumers**

TECHNOLOGY ENABLED STORES ARE EFFICIENT SUSTAINABLE E-COMMERCE ASSETS

**In-Store
Pickup**

**Ultra-Fast
Availability**

**Express
Delivery**

**Returns
& Service**

**Low
Carbon**

**STORES COULD DELIVER IN THE FUTURE >50% OF
TOTAL E-COMMERCE ONLINE SALES**

IKEA GOES PHYGITAL

*“By including stores in our last mile and fulfilment network we create a win-win situation. Shipping online purchases from the out-of-town stores means faster and cheaper deliveries, with **lower emissions**, than by shipping from logistics centres.”*

IKEA to spend 3 billion euros on stores as it adapts to e-commerce

🕒 10 May 2022 22:45 (UTC+04:00) 👁 1 185



RETAIL

Walmart drew one in four dollars spent on click and collect — with room to grow in 2022

PUBLISHED THU, DEC 30 2021 7:00 AM EST
UPDATED THU, DEC 30 2021 1:17 PM EST

Melissa Repko
@MELISSA_REPKO

WATCH LIVE



Employees assist customers with online pickup orders at a Walmart Inc. store in Burbank, California, U.S., on Monday, Nov. 19, 2018.

Walmart is putting stores at the heart of its E-commerce strategy

Instore fulfilment
Pick-up &
Express delivery



3700 stores
80% of total fleet
\$100 Bn sales in 2022



THE POSITIVE RETAIL RESEARCH PROGRAM

An independent cross-sector
knowledge collaboration
addressing the role of digitization
in the revitalization of retail and its
potential societal and
environmental positive impact

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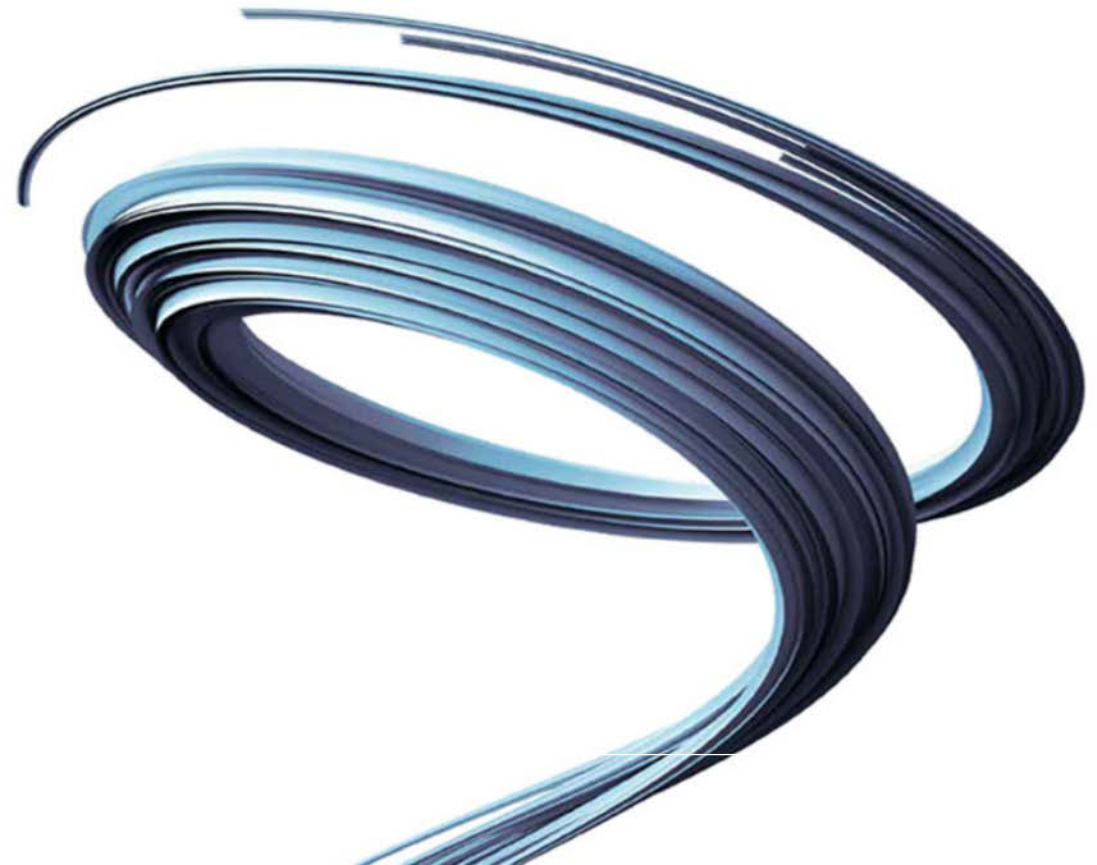


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Qualcomm

McKinsey
& Company

 Microsoft



POSITIVE RETAIL



So what for the TCG
retailers and brands?

The “phygital” opportunity

Sustainability

Local / Physical E-commerce (lower emission)
Paperless

Positive social impact

More / better jobs
Communities well being

Consumer expectations

Faster pickup & delivery
Seamless O2O / Human centered store experience

Brand-retailer collaboration

Supply chain
Retail media

In a cookieless world Retail Media will eat digital Ads

amazon ads



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Stores will become the next big digital media

Our advantage

Nine million people shop at Kroger (the 3rd largest retailer) each day, and we capture 97% of those transactions. A relationship with Kroger gives companies exclusive access to customer data and 84.51° science on a massive scale.

2.8B
annual visits

2800
stores in 35 states

60MM
households



THE EUROPEAN TCG SECTOR IS READY TO START

Flashing

Dynamic Price

Sponsored Badge



QR/NFC

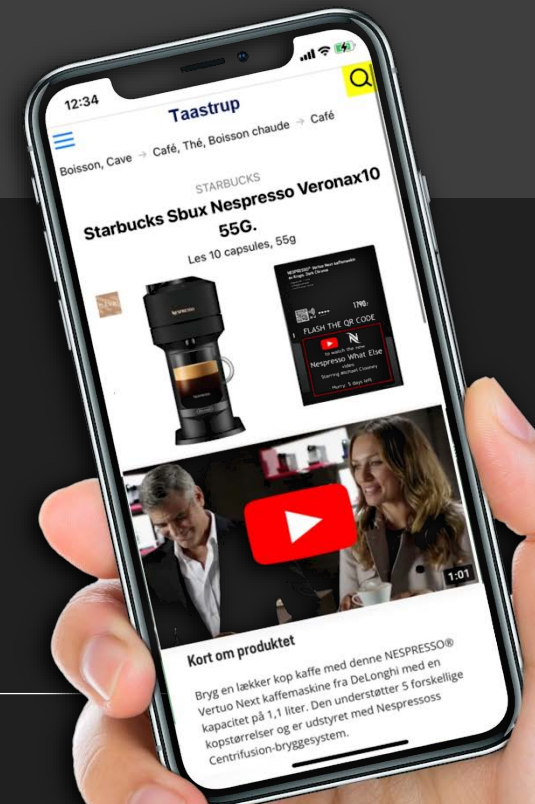
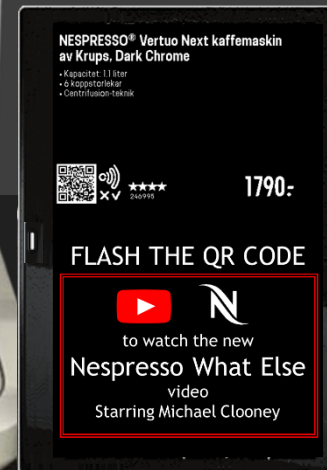


Sponsored Content

DIGITAL IN STORE BRAND CAMPAIGNS



Video Content
Product Launch
Influencer Link
Augmented Reality Experience
Online + In-store Synchronized Ad
Cashback
Seasonal Message..



PAN EUROPEAN CAMPAIGNS

NESPRESSO PROJECT



NESPRESSO® Vertuo Next kaffemaskin av Krups, Dark Chrome

- Kapacitet: 1,1 liter
- 6 kopperstørrelser
- Centrifusion-teknik

1790:-

FLASH THE QR CODE

to watch the new Nespresso What Else video Starring Michael Clooney

- Hurry: 5 days left -



DE'LONGHI Macchina Espresso EN200R

Dim. (LxPxAl): 11,8x39,7x26,6 cm.
Compatibilità marca: Nespresso
Tipo di controllo: Pulsanti
Supporto Smartphone: Sì
Sistema acqua calda: Sì
Capacità in tazze: 1
Numero di erogatori: 1

189,99

94 Punti Unieuro Club

Smile service ASSISTENZA AGGIUNTIVA 3 anni € 24,99

FLASH THE QR CODE

to watch the new Nespresso What Else video Starring Michael Clooney



M.CAFÉ NESPRESSO LATI.G.EVENEYOLB

249,99

ou 43.00€ x 6 meses

FLASH THE QR CODE

to watch the new Nespresso What Else video Starring Michael Clooney

12:34

Taastrup

Boisson, Cave → Café, Thé, Boisson chaude → Café

STARBUCKS Starbucks Sbux Nespresso Veronax10 55G.

Les 10 capsules, 55g

FLASH THE QR CODE

Nespresso What Else Starring Michael Clooney -Hurry: 5 days left-

Kort om produktet

Bryg en lækker kop kaffe med denne NESPRESSO® Vertuo Next kaffemaskine fra DeLonghi med en kapacitet på 1,1 liter. Den understøtter 5 forskellige kopstørrelser og er udstyret med Nespresso's Centrifusion-bryggesystem.

SES LAUNCHES THE TCG IN-STORE DIGITAL MARKETING HUB

Brand Campaigns

Retailer Campaigns

	unieuro	ELKJOP	SATURN	worten	TRONY	euronics	netonnet	FNAC DARTY	MediaMarkt	boulangier
SAMSUNG										
Lenovo										
dyson										
SONY										
magimix										
DeLonghi										
SEB										
Electrolux										

Retailers
 Bring new services to brand
 Develop store-only services
 Direct to consumer new win-win partnerships

Brands
 Leverage qualified store traffic thanks to existing shelf-edge digital technology
 Real time & traceable
 Moment of truth / high conversion
 Web-like analytics

THE TCG INSTORE DIGITAL MARKETING HUB

- ✓ Captivating for Shoppers
- ✓ New Revenue for Stores
- ✓ Performance for Brands
- ✓ Better than Online



THANY YOU

