

未来已来！战略供应链的时代已来临： 未来竞争制胜的运营模式

The Strategic Supply Chain: An Operating Model Whose Time Has Come

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Next-generation supply chains

Efficient, fast and
tailored

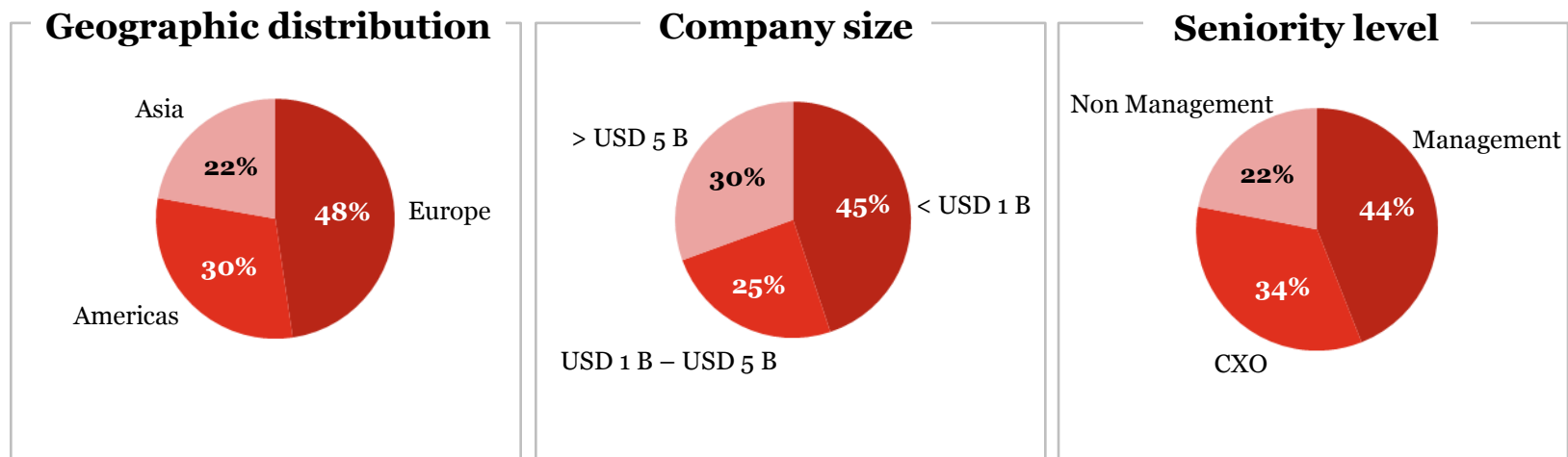
Key findings from
PwC's Global Supply
Chain Survey 2013



About the Study

This year's survey – its ninth year running – attracted the largest and most balanced population ever

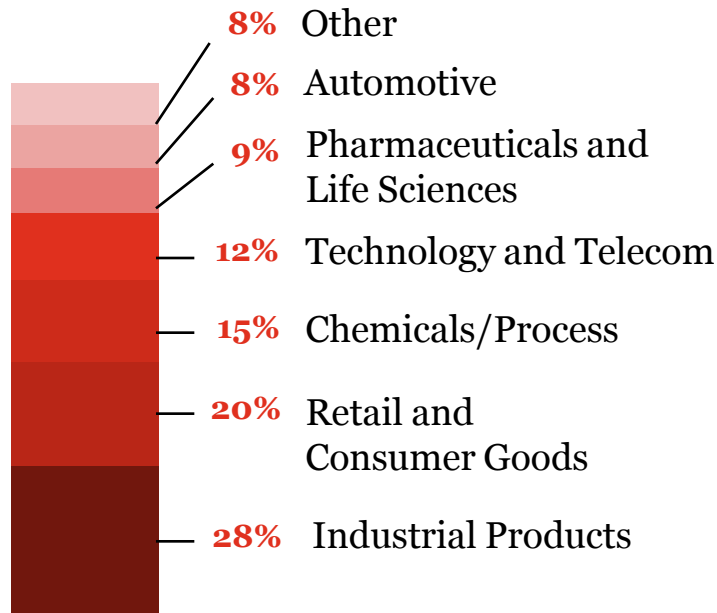
From May to July 2012, we surveyed 503 supply chain executives around the world across major industry sectors.



Forty-four percent of them hold senior management positions, while 34% hold C-level posts.

The study surveyed a balanced, cross-industry population

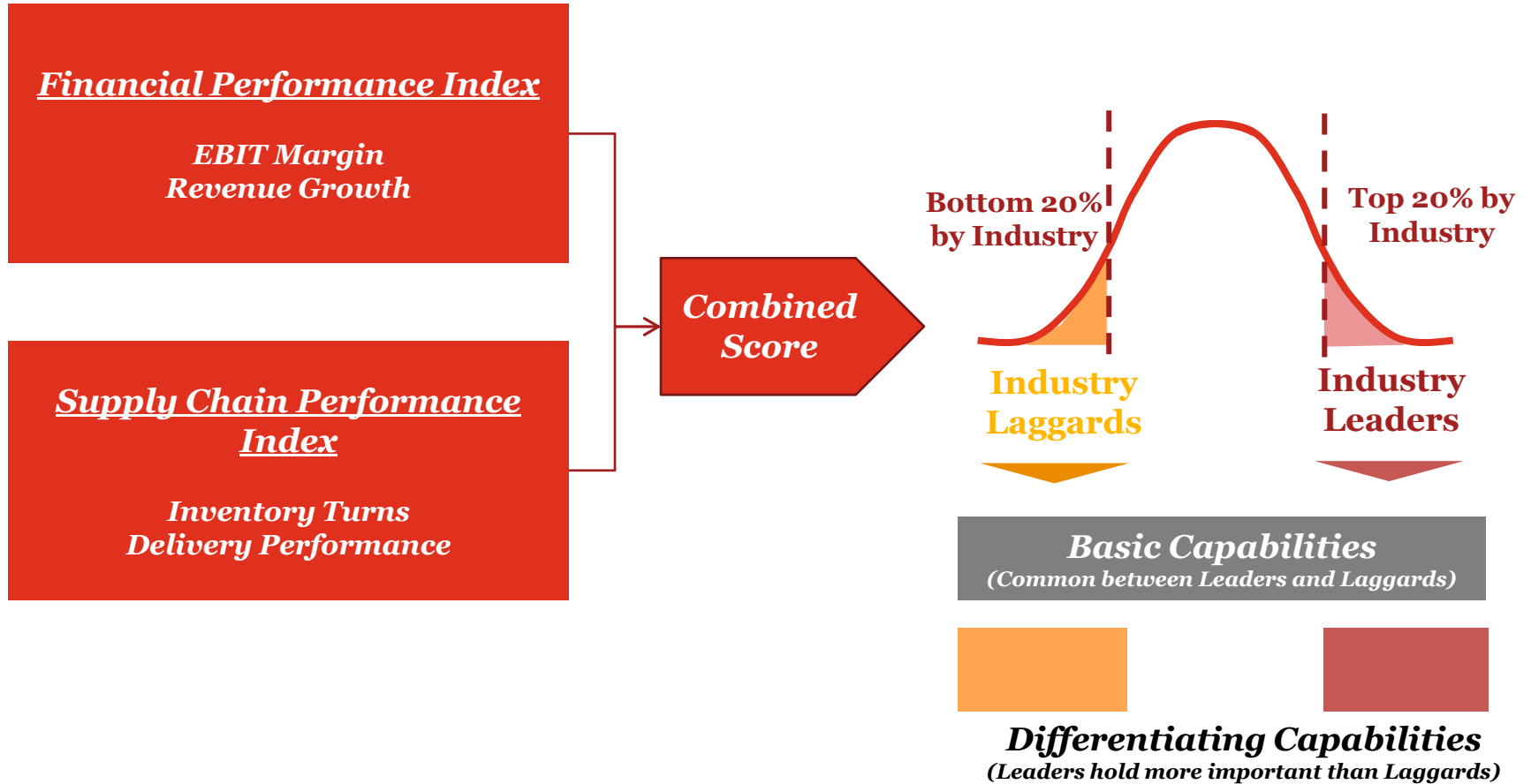
Industry participation



Study population characteristics

- 503 completed questionnaires
- Wide range of industries
- All three global regions are well represented
- The participants represent a balanced mix of company sizes
- More than half of the participants are senior executives

A key objective of the study is to link responses to key performance outcomes—separate the Leaders and Laggards



Our report identifies six key traits of highly effective supply chain managers

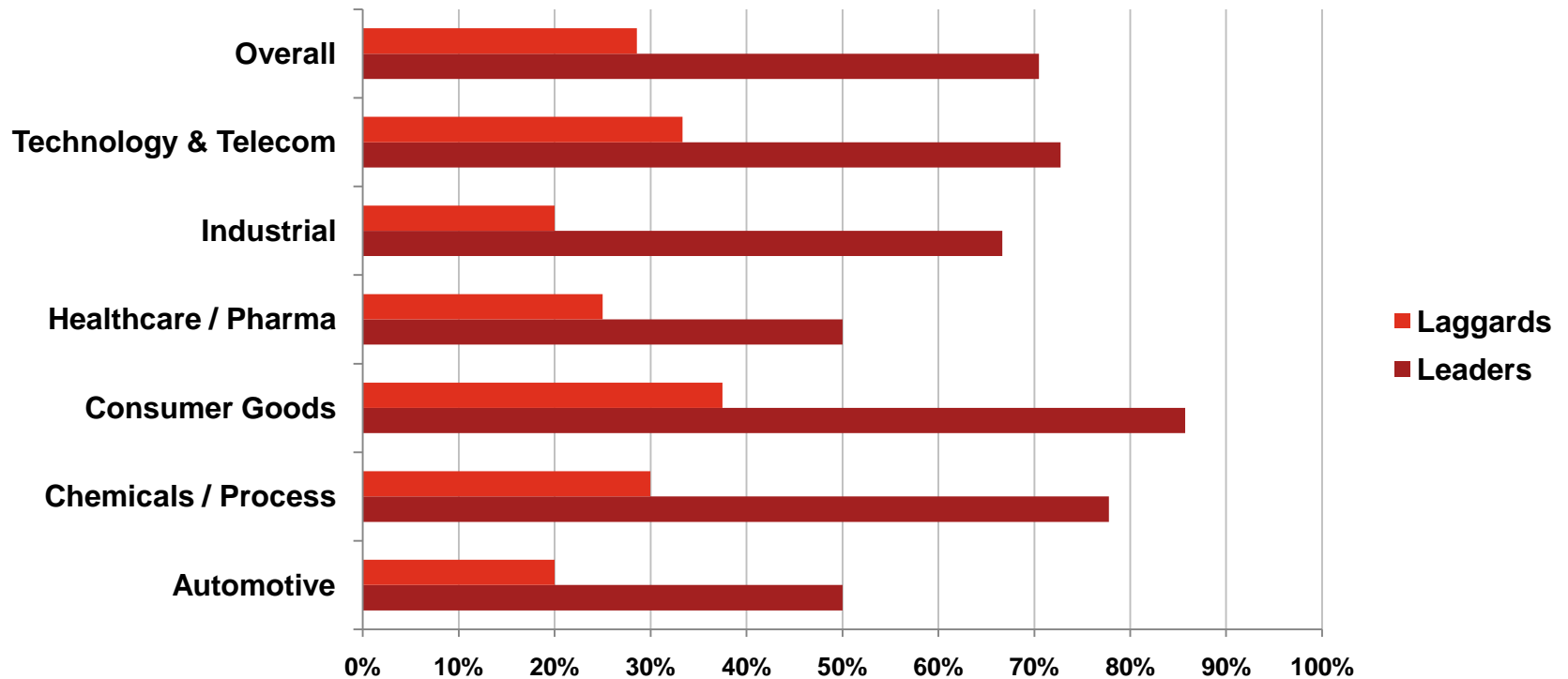


You can have it all: companies that acknowledge supply chain as a strategic asset achieve 70% higher performance

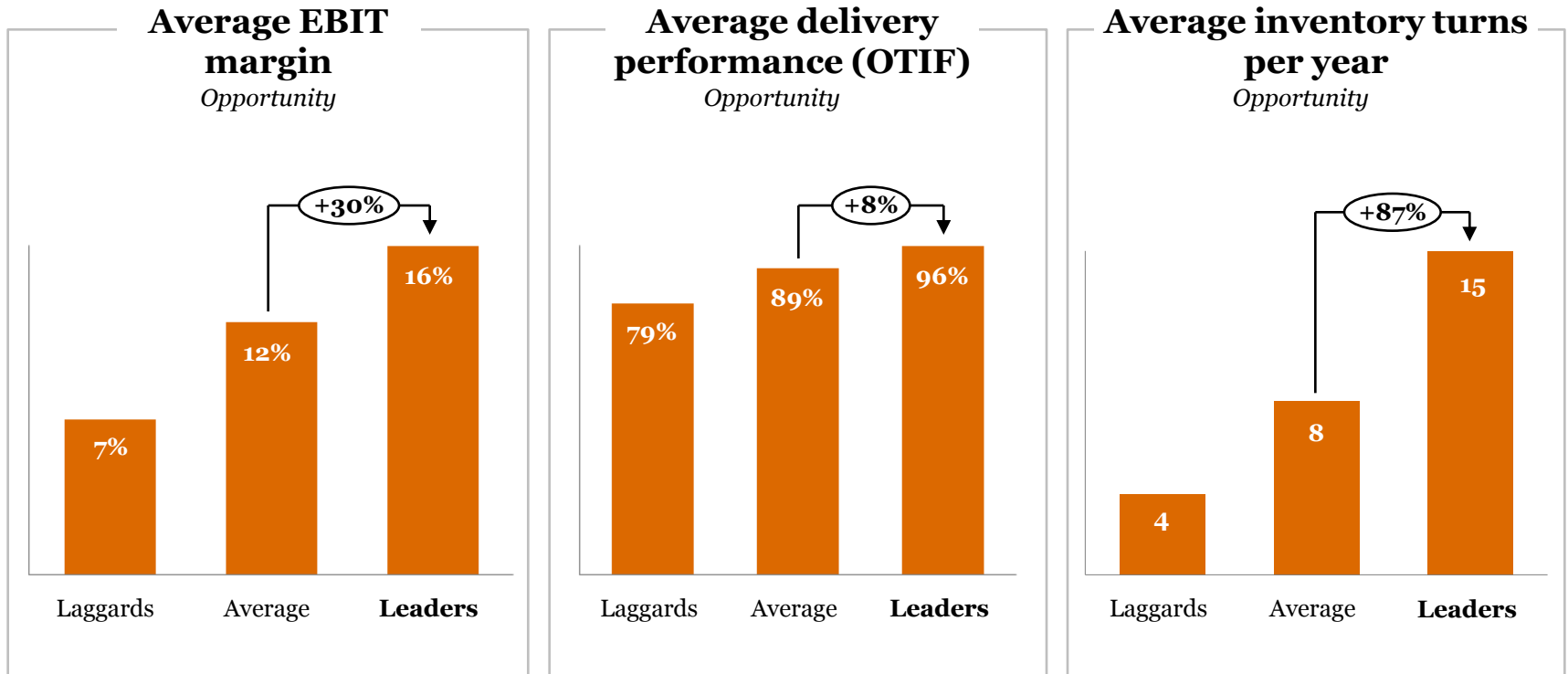
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Leaders are more than twice as likely to treat their supply chain as a strategic asset

% of Leaders and Laggards viewing supply chain as strategic asset



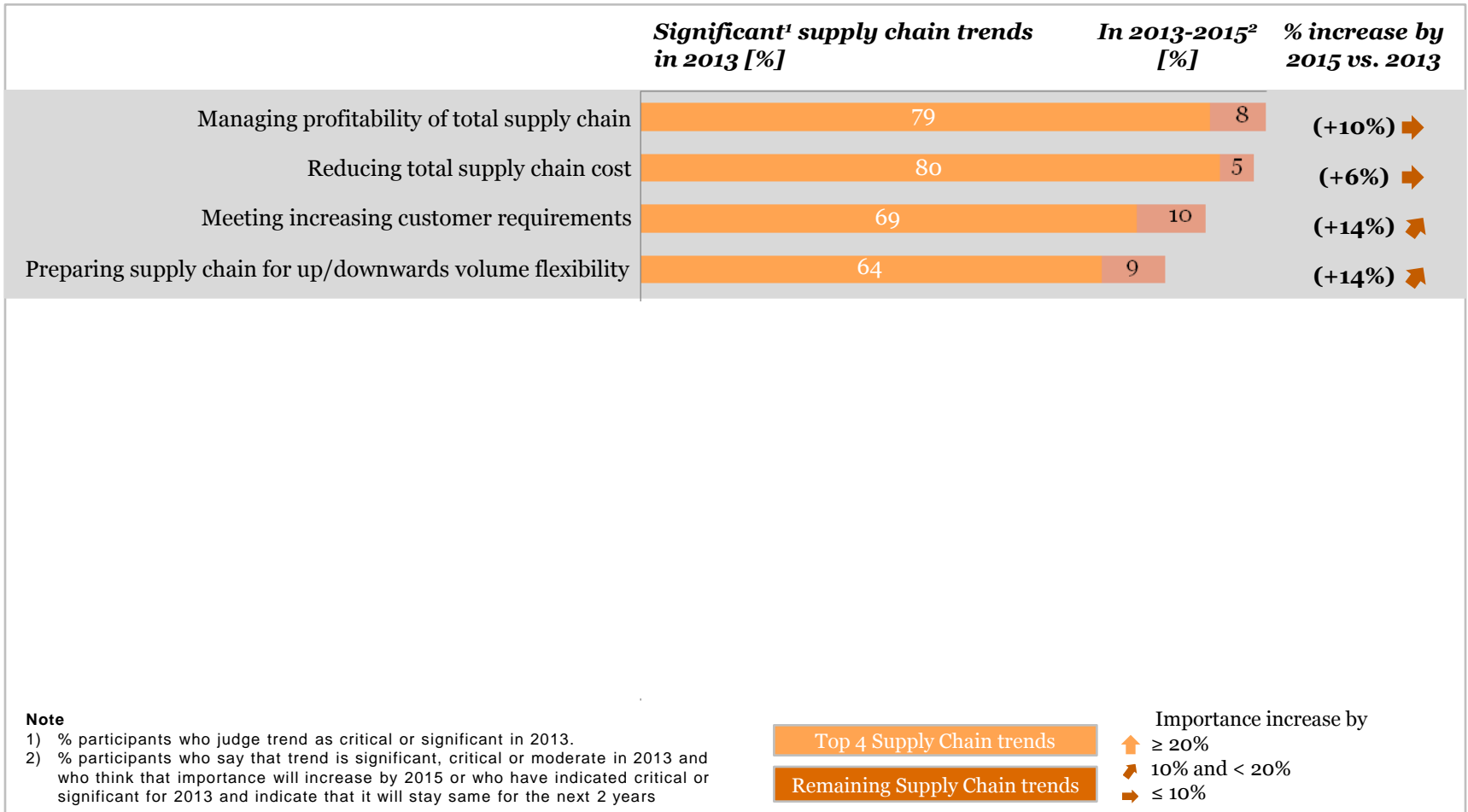
There is a significant opportunity for Laggards to improve operational performance and to follow the Leaders



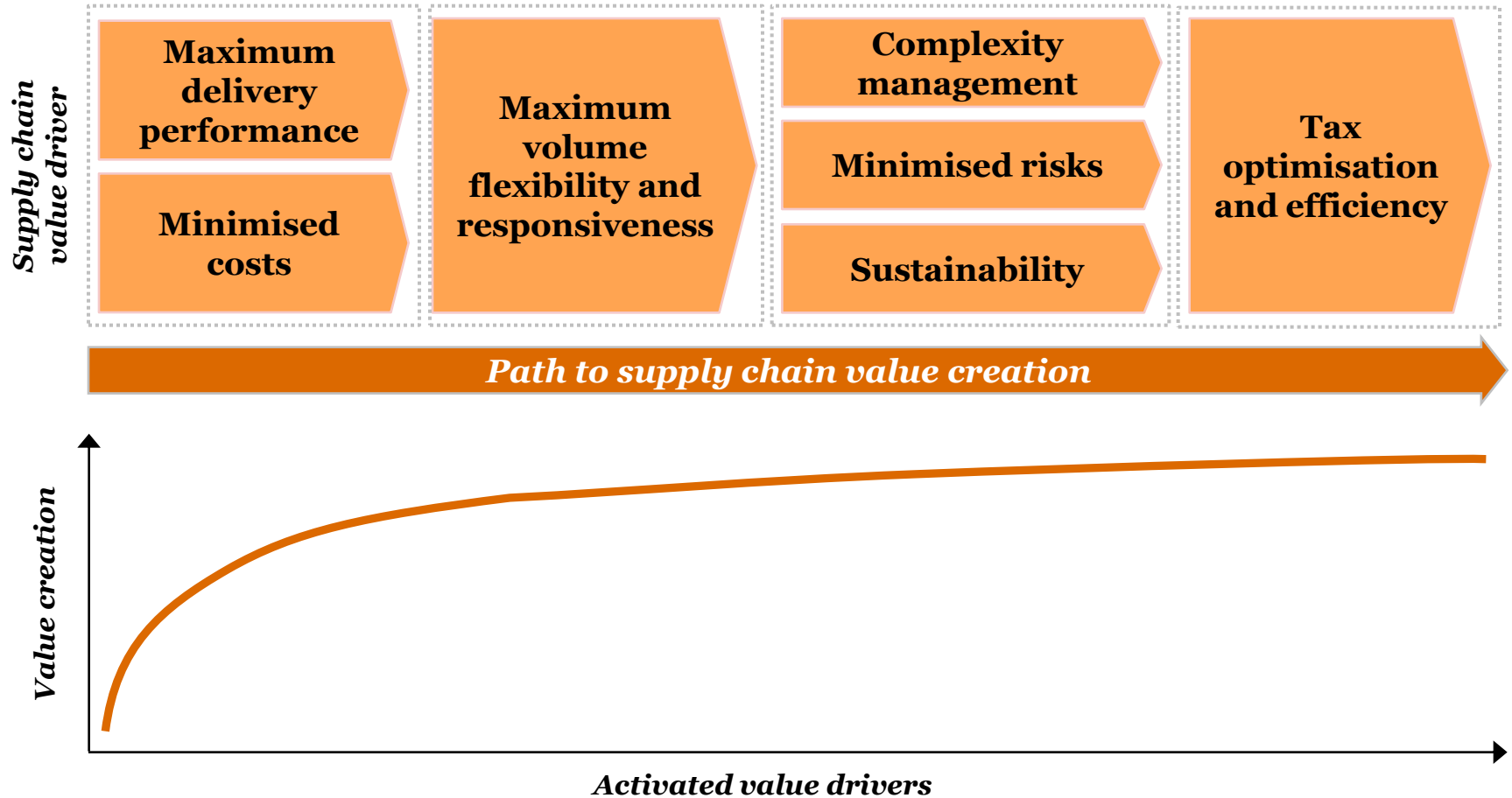
Leaders focus on best-in-class delivery, cost and flexibility to meet increasingly demanding customer requirements

2

Cost, profitability, and service continue to increase in importance, but executives see the importance of many other characteristics growing rapidly



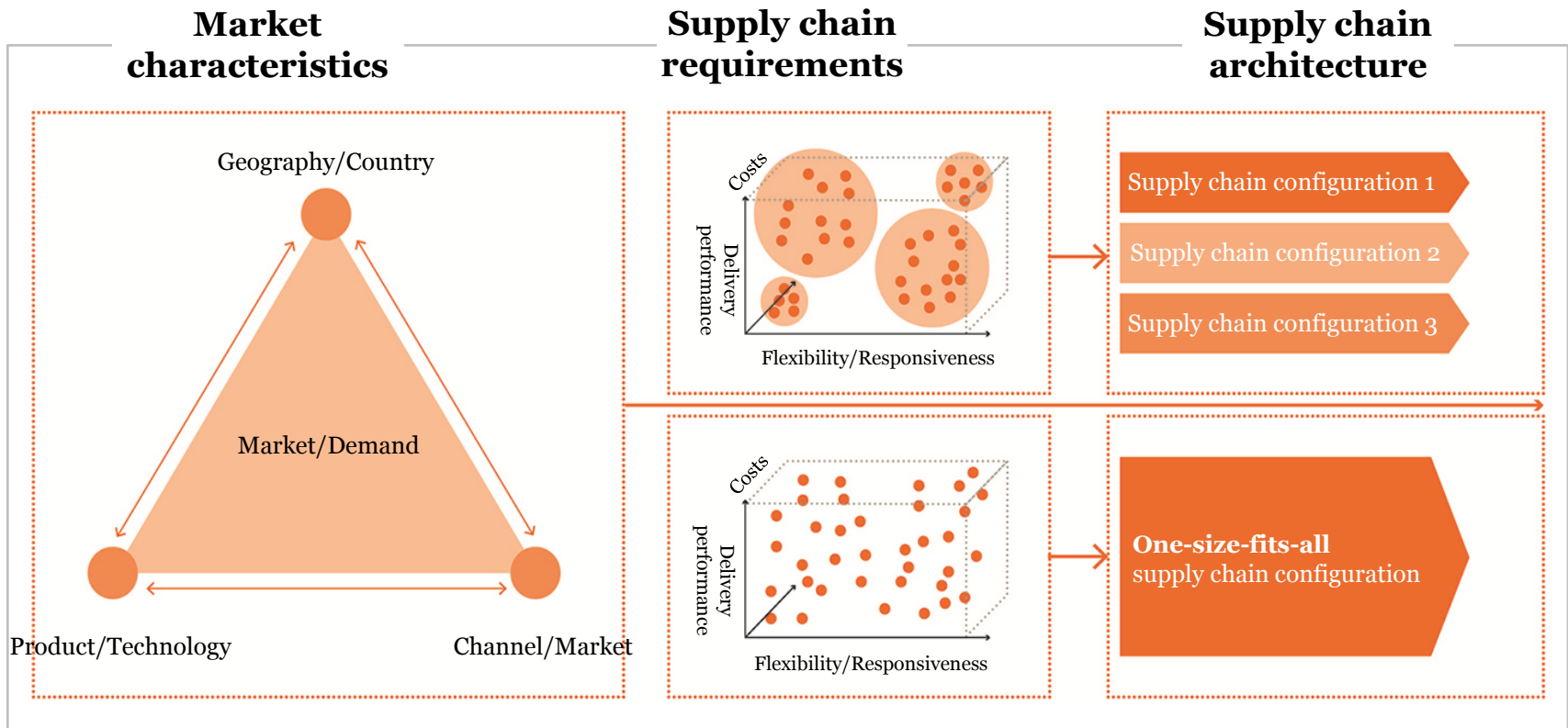
Seven supply chain value drivers have been defined on the path to supply chain value creation



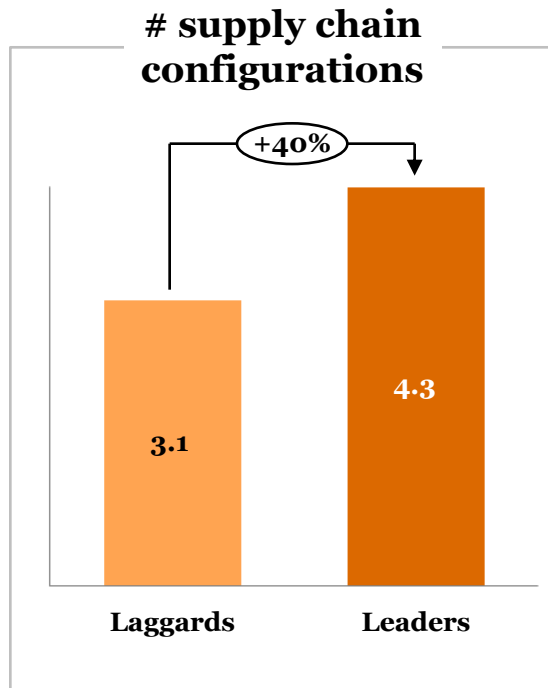
One size does not fit all – Leaders tailor their supply chains to the needs of different customer segments

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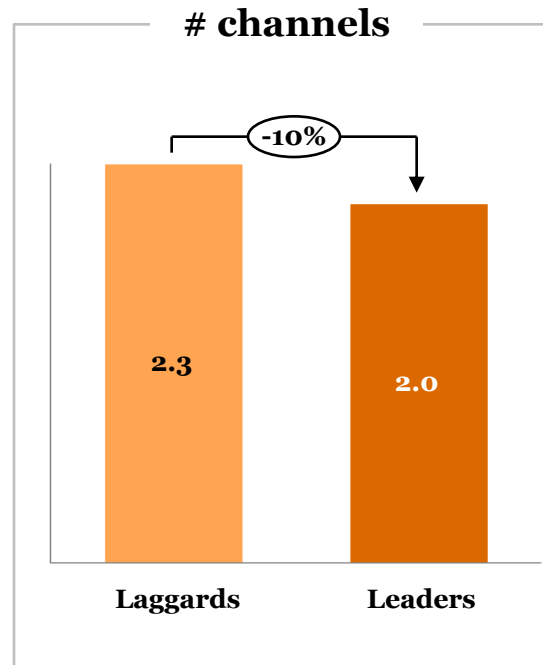
“One-size-fits-all” vs. differentiated supply chain architecture



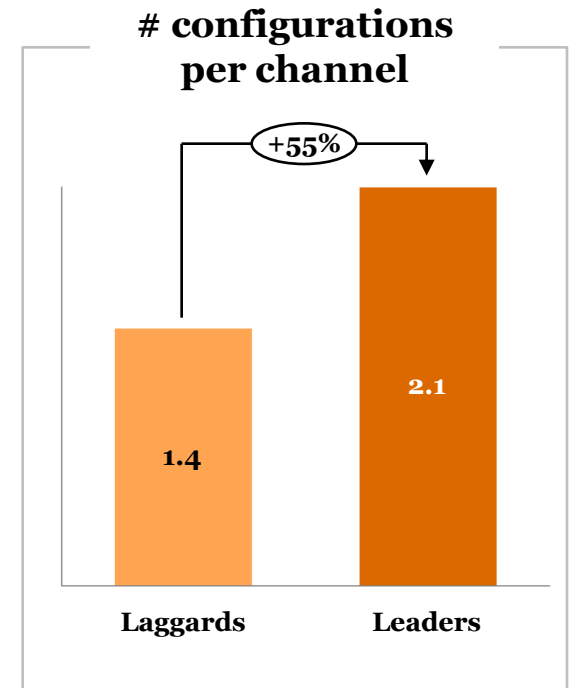
Leaders operate more supply chain configurations to achieve a competitive advantage



Leaders operate more supply chain configurations

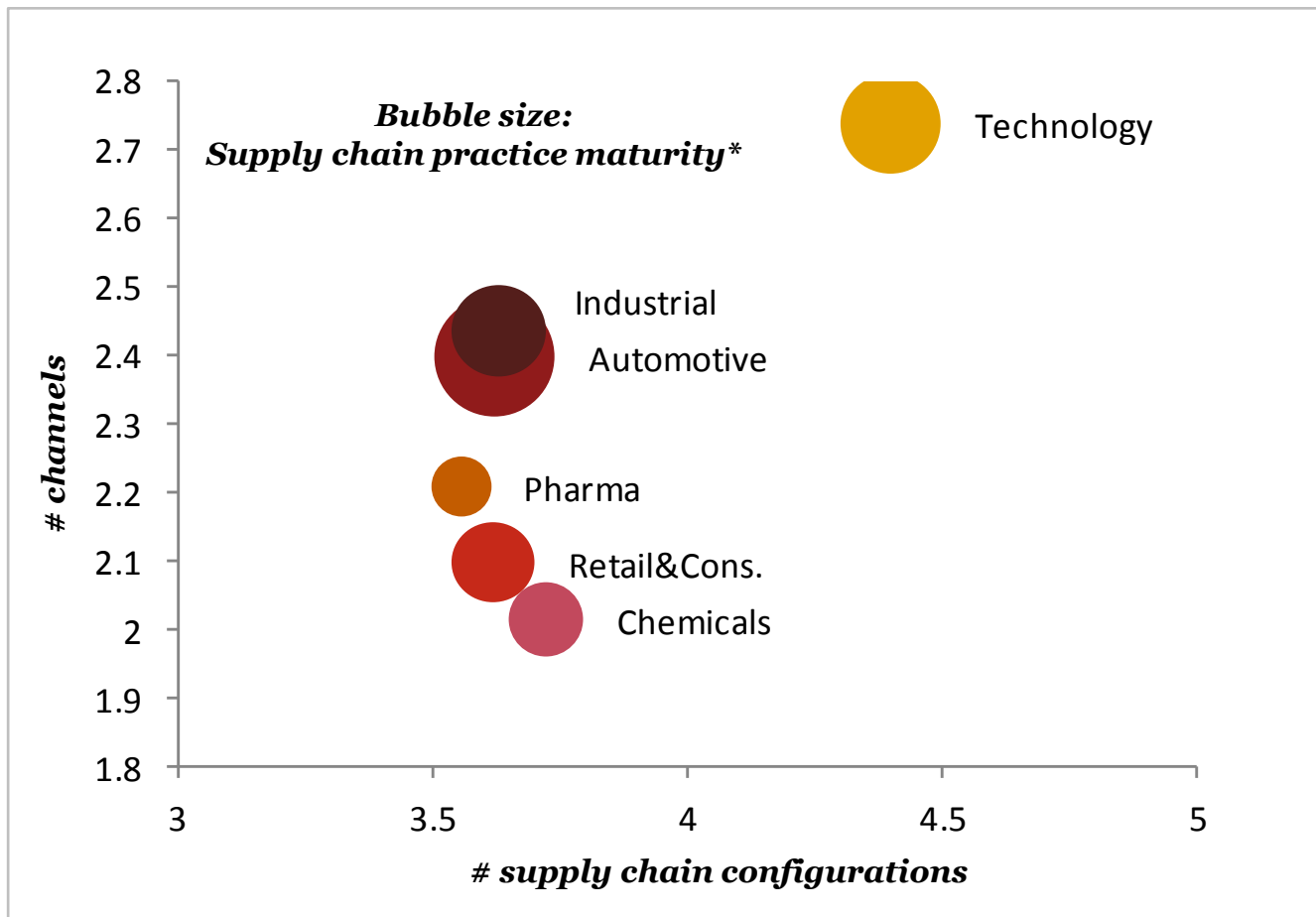


Leaders are more focused than Laggards since they operate in less channels



Leaders operate up to 50% more configurations per channel than Laggards

Industries operating more supply chain models have had to more rapidly develop their supply chain practice maturity

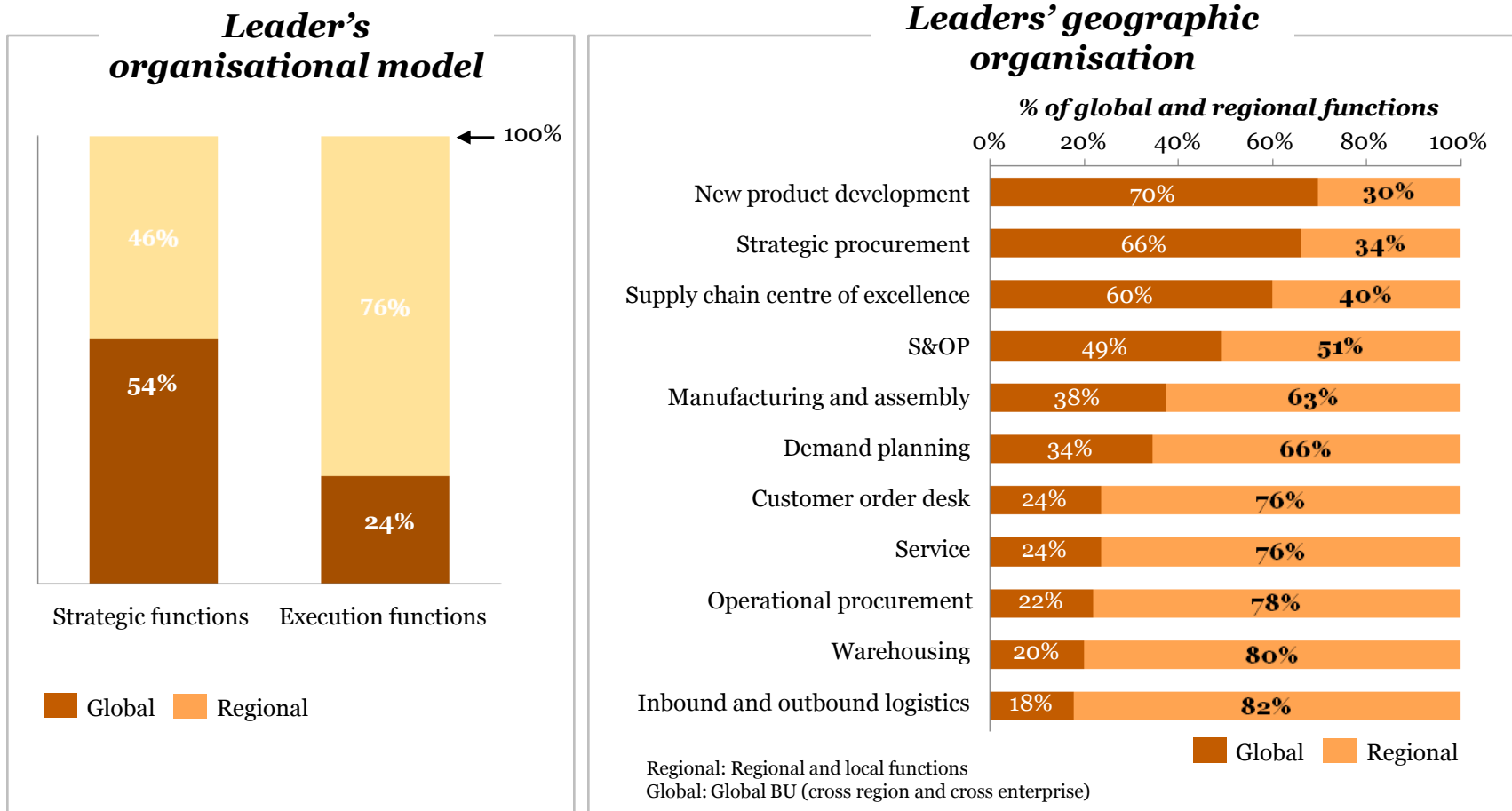


* From PwC's Performance Measurement Group Supply Chain Practice Maturity benchmark data

Leaders retain global control of core strategic functions

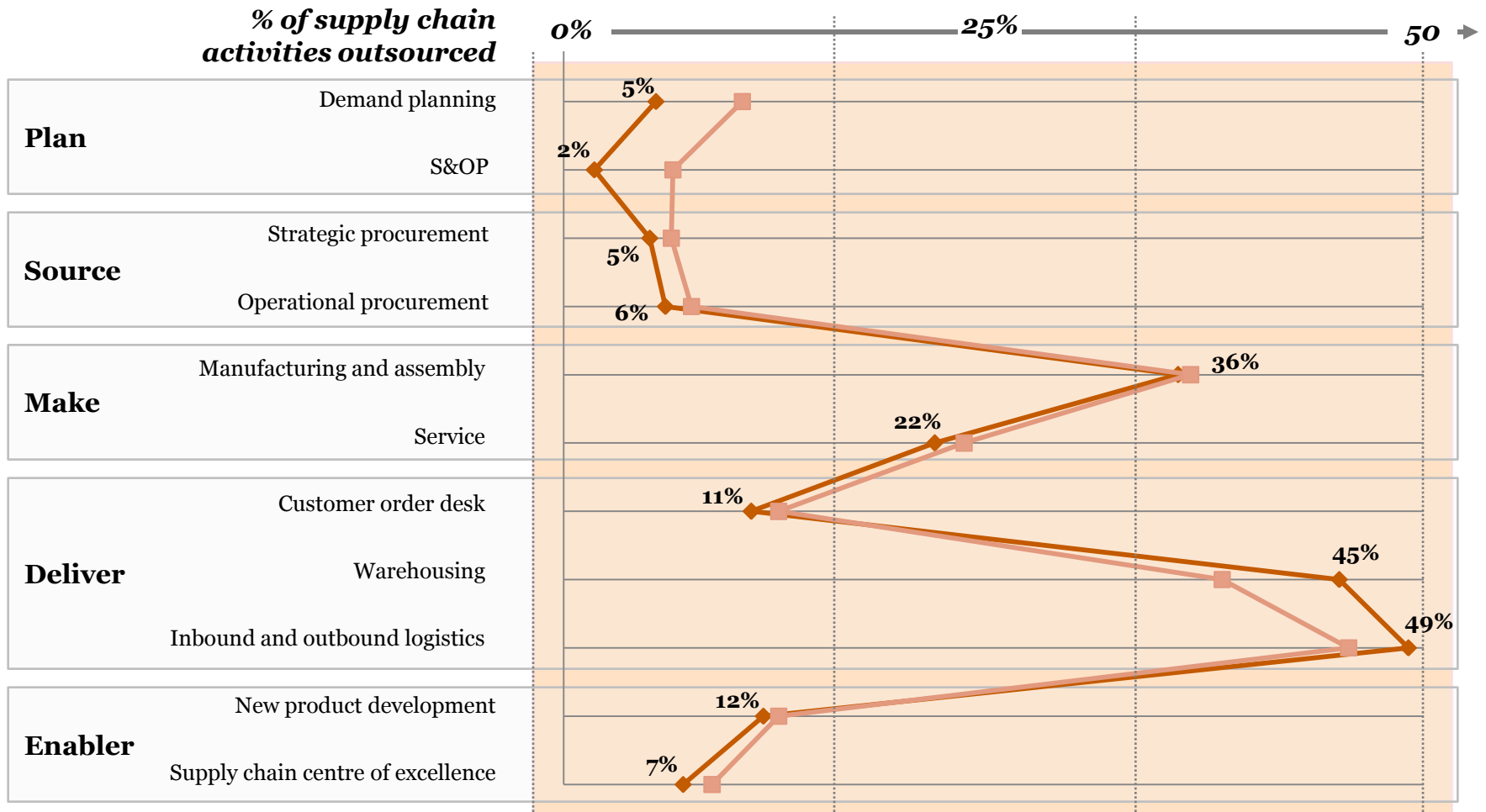
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Supply chain Leaders keep core functions under global control and focus on regional execution



Strategic functions: Demand Planning, S&OP, Strategic Procurement, New Product Development, Supply Chain Centre of Excellence
Execution functions: Operational Procurement, Customer Order Desk, Inbound and Outbound Logistics, Manufacturing and Assembly, Service

Supply chain Leaders utilise outsourcing in manufacturing & assembly and inbound & outbound logistics



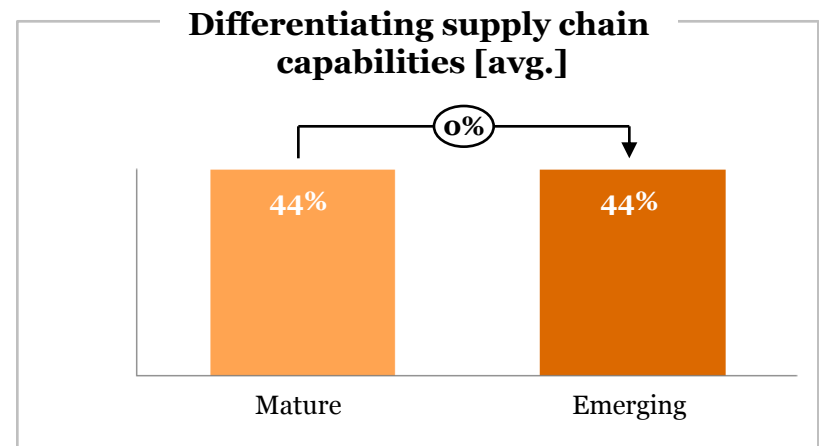
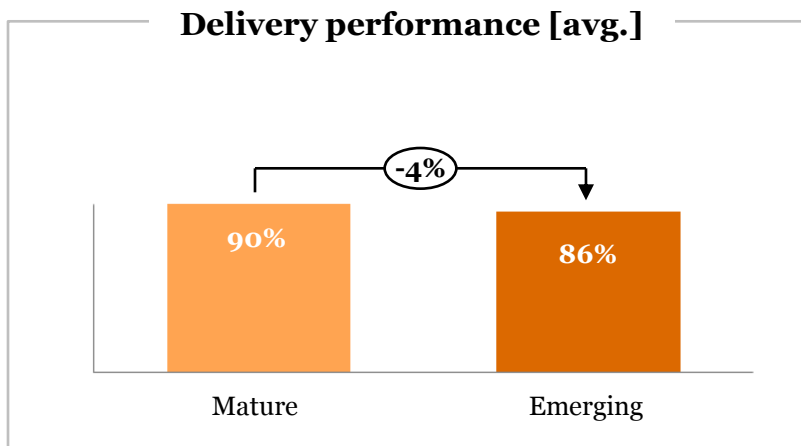
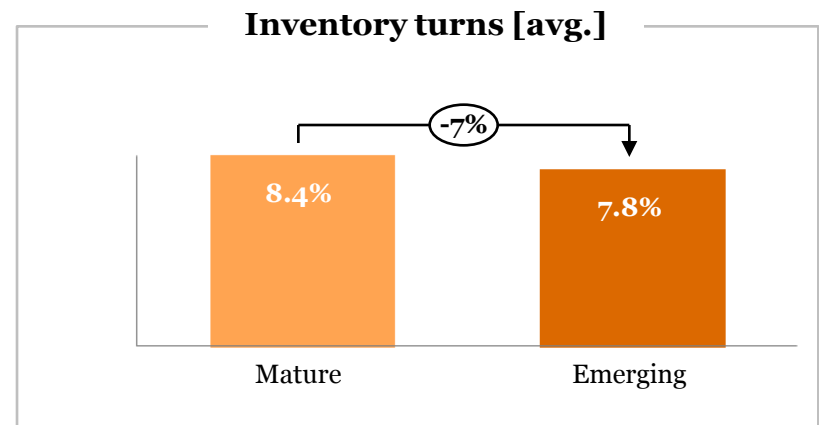
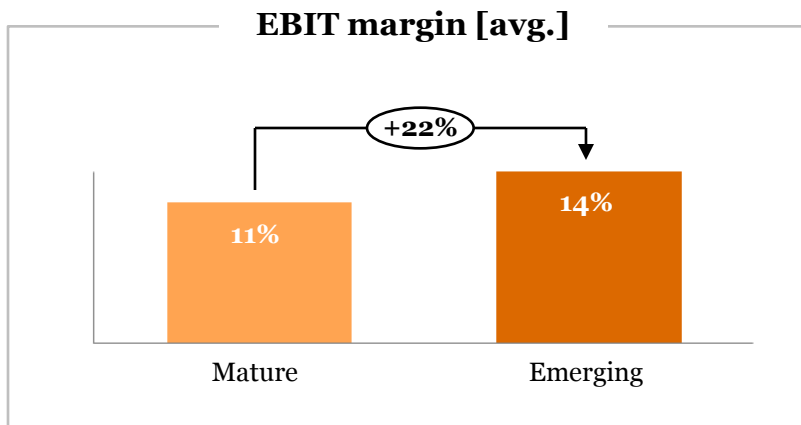
Leaders invest more heavily in differentiating supply chain capabilities

5

Leaders focus on differentiating capabilities which provide the platform for superior performance

Supply chain value driver	Top three differentiating practices of Leaders
Maximum delivery performance	<ol style="list-style-type: none"> 1. Collaboration with key customers on planning (e.g., effective forecasting) 2. End-to-end supply chain planning and visibility 3. Vendor-managed-inventory (VMI) direct-replenishment model
Minimised costs	<ol style="list-style-type: none"> 1. Best-cost country sourcing 2. Differentiated order-to-delivery time 3. Differentiated service level including potential reduction
Maximum volume flexibility and responsiveness	<ol style="list-style-type: none"> 1. Internal capacity flexibility 80%-120% 2. Flexible shift models/payment structure 3. Regional supply chain set-up
Minimised risks	<ol style="list-style-type: none"> 1. Multiplication of sources and sole-sourcing avoidance 2. Regular review of suppliers' financial risk and mitigation through risk-sharing partnerships 3. Visibility and regular monitoring of main suppliers' operational indicators
Complexity management	<ol style="list-style-type: none"> 1. Develop multi-skilled employees in order to cope with complexity 2. Late stage product customisation 3. Use of distributors and other channel partners
Sustainability	<ol style="list-style-type: none"> 1. Agreement of supply chain partners to adhere to highest ethical standards 2. Responsible supply chain partner footprint and procurement framework 3. Internal carbon footprint optimisation and improvement
Tax optimisation and efficiency	<ol style="list-style-type: none"> 1. Manufacturing and assembly optimisation (toll manufacturing) 2. Localisation of inventory ownership in tax-efficient countries 3. Localisation of procurement organization in tax efficient countries (e.g., Singapore, Switzerland, Cayman Islands...)

Emerging markets are already close to mature market's supply chain performance

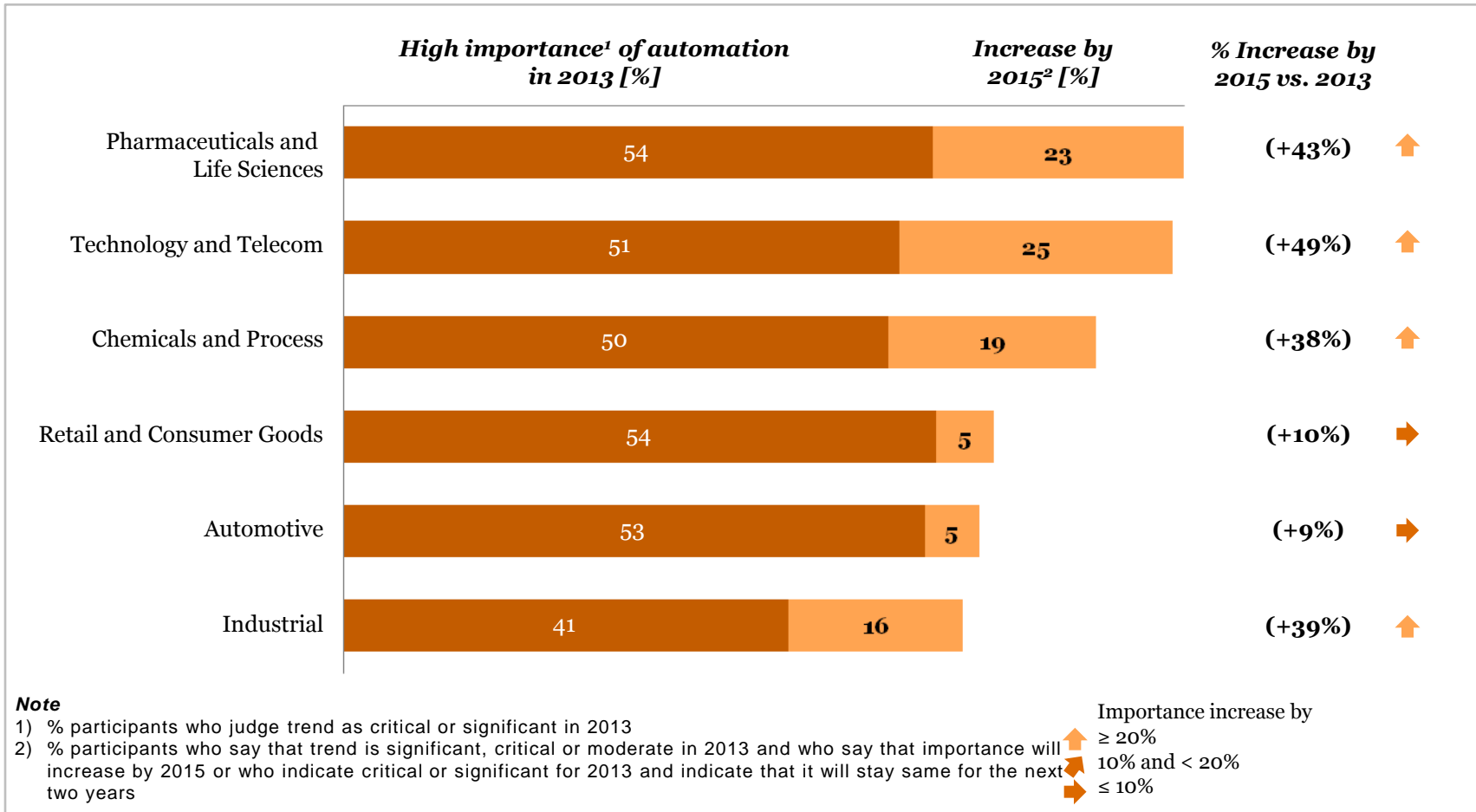


Based on participant's origin country

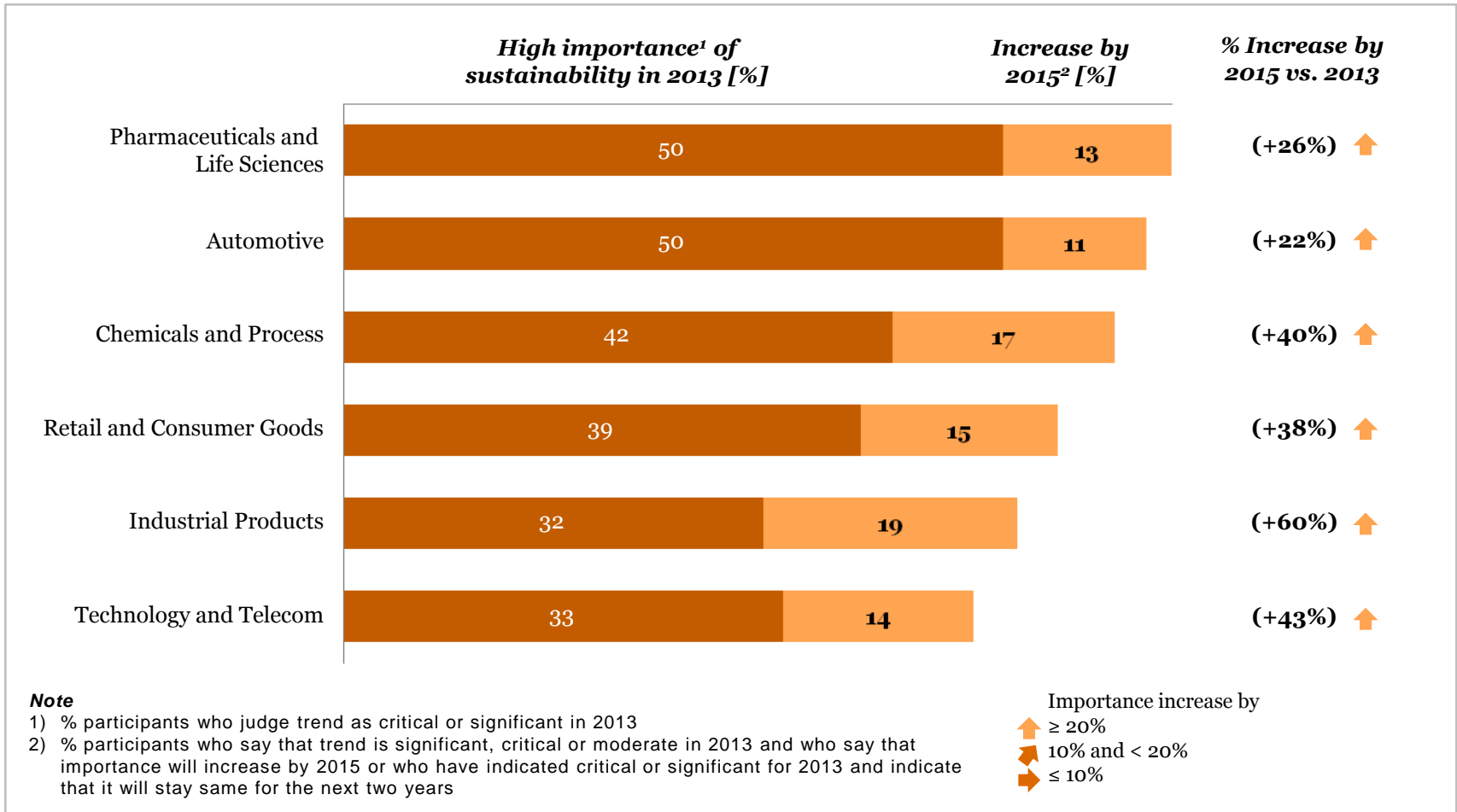
Interest in next-generation technologies and sustainable supply chains is growing

6

Supply chain trend: Implementing techniques to automate and increase transparency



Supply chain trend: Making the supply chain more sustainable



“Strategic” supply chains have emerged as a key source of competitive advantage

This year’s global supply chain survey shows how Leaders are moving ahead of the pack. They’re tailoring their supply chains to customer needs and investing in next-generation capabilities while keeping the focus on supply chains that are ***fast, efficient and tailored***. That's a model that allows them to flex to the needs of different customers and serve them seamlessly in turbulent market conditions.

For more information

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