

**ASUG**

*May 28th –*

# **Community Conversations**

**Consumer Products in Focus:  
Rethinking Commerce in a Channel-less World**

## Let Us Interact: Opening Polls

- Which consumer products segment best represents your organization?
- Where is your organization currently on its SAP ERP/cloud journey?

The ASUG logo is displayed in white, bold, sans-serif capital letters against a dark purple background. The letters are closely spaced, with the 'A' and 'S' being particularly prominent.

**Guest Speaker:**



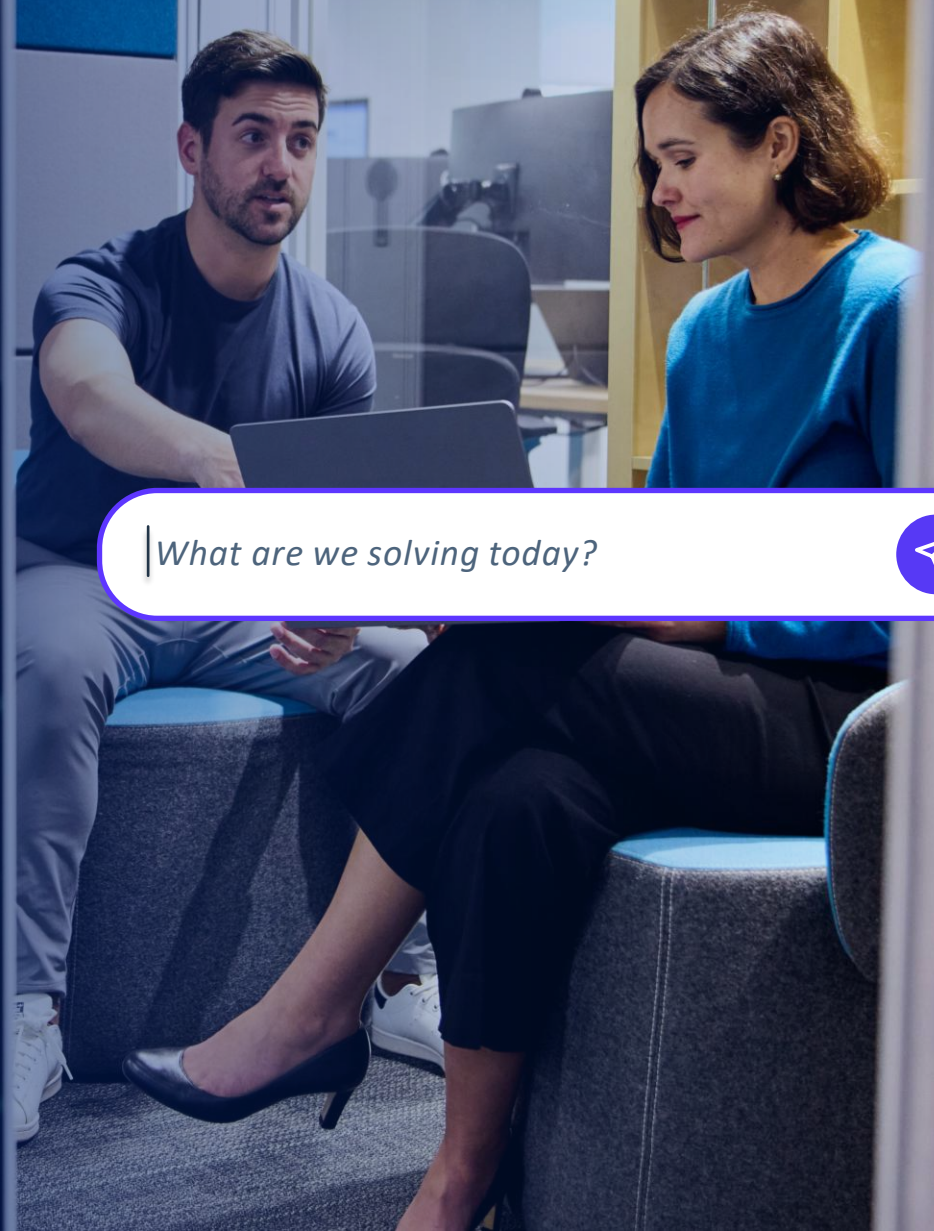
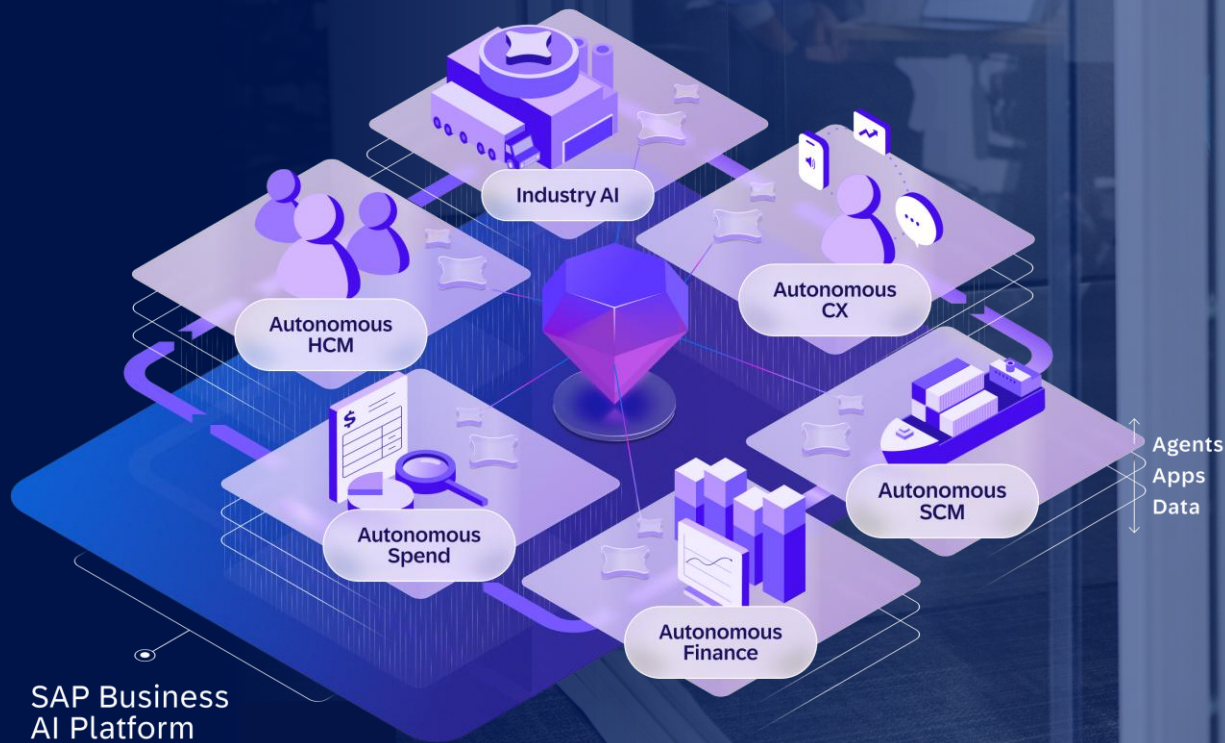
**Clotilde de Mersan**


Global Advisor | Consumer Products | SAP

The Beginning of Better.

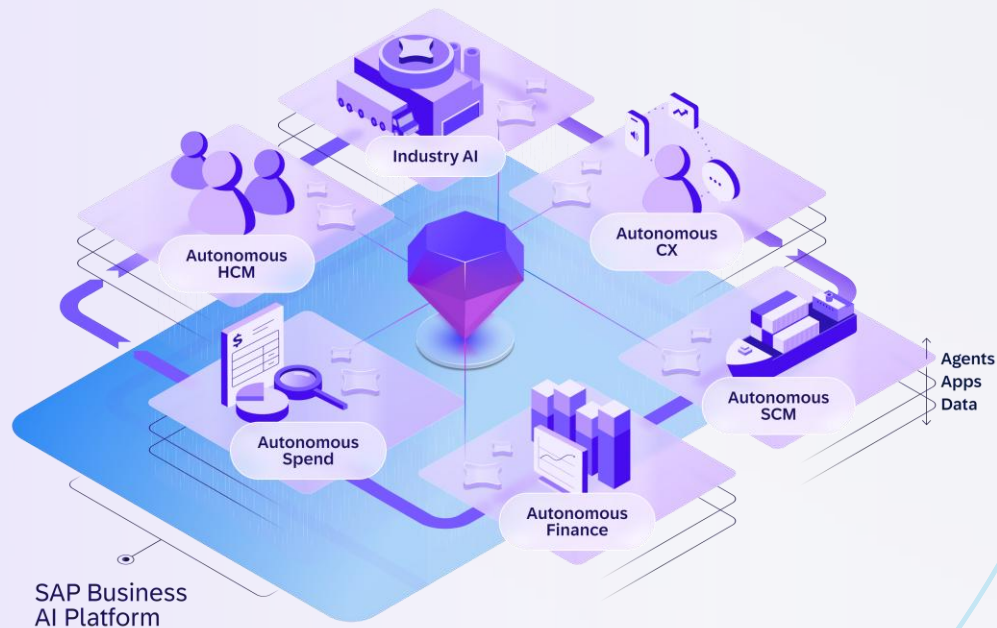
# Channel-less Commerce for Autonomous CP Enterprises

Clotilde de Mersan, Consumer Products Advisor



| *What are we solving today?* 

# An Autonomous Enterprise runs differently



## Your people can do their best work.

Agents handle routine transactions end to end, so people can focus on the decisions that move the business.

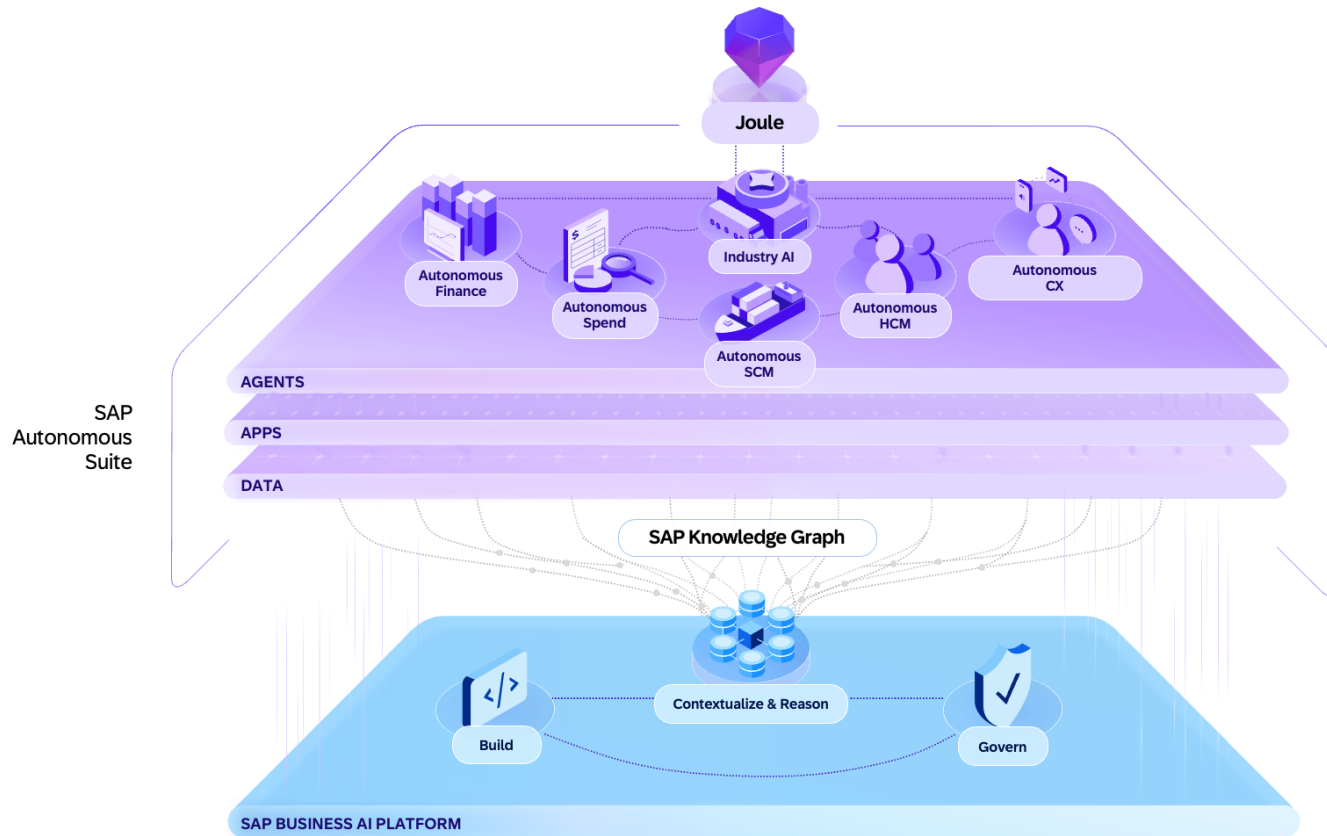
## Your business responds before teams convene.

When conditions change, the business acts as one. Agents coordinate across the business in real time. No lag between signal and action.

## You move fast because you can trust the system.

Every AI action is governed, auditable, and traceable. Not added later. Built in from the start. Speed and control aren't a tradeoff.

# Key elements of the Autonomous Enterprise



- 1 Joule as the new engagement layer, bringing together data, workflows, and agents across SAP systems and beyond
- 2 SAP Autonomous Suite to reinvent how enterprises run, based on AI assistants and agents executing work E2E
- 3 Industry AI embeds the process knowledge, compliance rules, and data models specific to your industry
- 4 SAP Business AI platform delivering business context, unified data, models, and enterprise-grade governance
- 5 Accelerate the evolution to an Autonomous Enterprise with agent-led transformation, delivered through RISE and GROW.

# AI that already knows how your industry operates

## SAP Industry AI

Autonomous domains give breadth across functions.

**Industry AI goes deeper, with fully agentic solutions built for the processes that matter most in an industry's value chain.**

- Jointly developed with our customers as Forward Deployed Engineering
- Built for industry standard as well as customer specific last-mile extensions
- Developing a industry-specific context layer on our Business AI Platform
- Starting with seven industry themes, but scaling beyond, unlocking value-based commercial models

**25+**  
industries

**98** of the world's 100  
largest companies

**50** years  
of co-innovation

### Industry AI Domains

Oil, Gas, & Energy	Autonomous Asset Management	Coordinate assets, supply chain, and workforce in a continuous loop. Reduce cost. Reduce downtime.
Agribusiness	Autonomous Commodity Management	Connect traders, planners, and logistics in one continuous commodity flow. From origin to delivery.
Industrial Manufacturing	Autonomous Adaptive Production	Coordinate decisions from design through delivery. Engineering, production, and service operate as one connected lifecycle
Life Sciences	Autonomous Regulated Manufacturing	Unify engineering, production, sales, and service across the full product lifecycle. One view from lab to patient.
Consumer Products	Autonomous Revenue Growth Management	Optimize trade strategy in real time. Respond to demand shifts as they happen, not next quarter.
Retail	Autonomous Unified Commerce	Plan, execute, and fulfill as one continuous operation. From demand signal to shelf.
Professional Services	Autonomous Project Delivery	Coordinate project delivery from staffing through billing. One flow, not five systems.
...	...	

# Consumer Products leaders face unprecedented pressure.

...but AI is opening a unique window of opportunity



# Estimated gains at each step of the Promote to Cash process

## Opportunity to order

**>80%\* standard deals:** high-volume, low-value deals with standardized offering, pricing and contracts.

**<1%\* revenue-leakage rate:** advanced analytics provide visibility and alerts into leakage at every step.

## Order to invoice

**>90%\* error free orders:** captured electronically and error free.

**>95%\* success rate on delivery to promise:** on-time delivery, with real-time visibility to customer.

## Invoice to cash

**<5\* days gap** to best-in-class days of sales outstanding

**99.5%\* invoices without dispute:** AI and machine learning enable invoice accuracy

\* Source: [finding hidden value with order-to-cash optimization report, McKinsey, May 2022](#)

## Market to Lead

Trade Promotion Planning Assistant

Trade Promo Planning Agent

Bulk Promotion Creation Agent

Trade Spend Optimization Agent

Demand Sensing Agent

Channel Execution Assistant

Visit Creation Agent

Channel Compliance Agent

## Lead to Fulfillment

Order Management Assistant

Order Reliability Agent

Revenue Reconciliation Agent

Sourcing Optimization Agent

Last Mile Distribution Assistant

Full Truck Load Optimization Agent

Settlement Automation Agent

## Issue to Resolution

Resolution Assistant

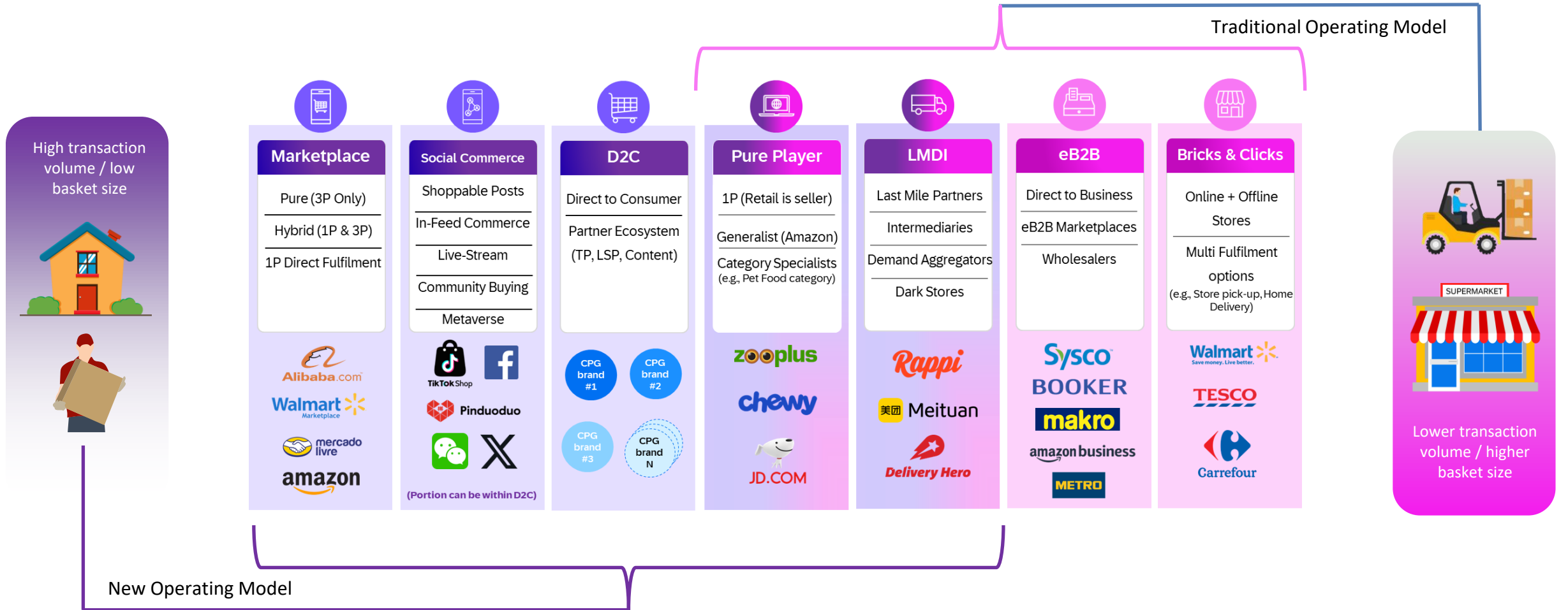
Trade Claim Management Agent

Dispute Management Agent

Dispute Resolution Agent

# Traditional operating models struggle with digital commerce scale and complexity

The shift toward high-volume, parcel-based consumer transactions requires new orchestration capabilities.

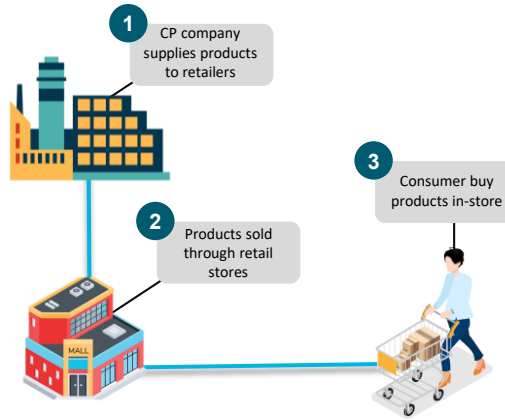


As digital channels grow, organizations must shift from **fulfilling pallets to customers' distribution centers to delivering parcels to consumers' locations** at scale

CPG can no longer manage **digital orders** in a segregated way, now they are reaching up to 30% of their **revenue** and most of their **growth**.



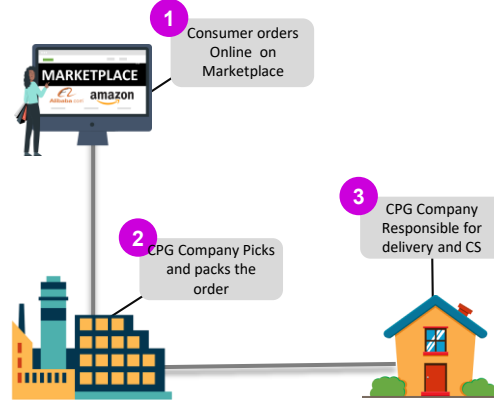
### Modern Trade



- Traditional CP companies are optimized for pallet-based distribution
- Products are shipped in large volumes to retail warehouses or distribution centers (modern trade)
- This model generates 70–90% of revenue for CP companies

70 - 90% of Revenue

### Marketplaces (FBM)



- Consumers place orders through online marketplaces (e.g., Amazon, Alibaba)
- The CP company picks, packs, and delivers the order from its own logistics network
- Due to marketplace privacy policies, CP companies must delete consumer data after fulfillment

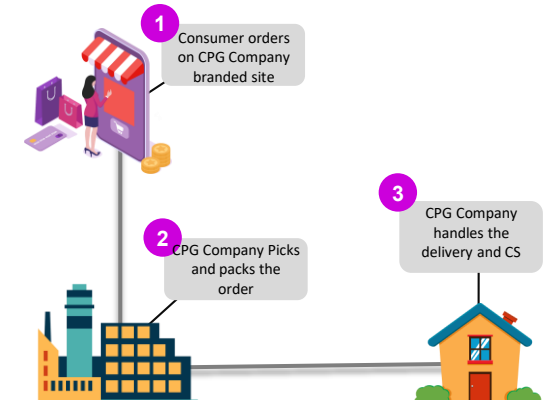
### Fragmented Trade



- CP companies sell products to distributors or wholesalers through B2B channels
- Distributors supply products to many small and independent retail stores.
- Consumers purchase products from local neighborhood shops

10 - 30% of Revenue

### Digital Commerce



- CP companies sell products directly to consumers through their own online stores
- Orders are processed and fulfilled by the CP company's own logistics network
- Consumers purchase products online and receive them through parcel delivery

A  
N  
D

CP companies must continue to serve both traditional and digital channels. However, rather than operating them in segregated models, CPG Companies require a unified operating model that efficiently supports both large-volume retail distribution and high-volume digital transactions.

# Challenges and Opportunities in Consumer Product Industry (CPG)

The Structural Shift Reshaping the Consumer Products Industry

## Challenges



### Margin Pressure & Transaction Fragmentation

High order volumes with low basket value reduce profitability



### Shift to Smaller, More Frequent Orders

Increased operational and fulfillment complexity



### Marketplace Proliferation

1000+ platforms with diverse integration and operating models

Paired with challenges in the CPG Industry

## Growth Potential



### Global eCommerce Growth Through 2030

- USD 25T (2024)
- USD 73T+ projected by 2030
- Nearly 3x growth



### Marketplaces to Dominate Retail Growth by 2030

- USD 1.6T incremental sales
- 51% of total retail growth
- 78% of eCommerce growth

CPG Leaders Need a Scalable, Standardized Global eCommerce **Operating Model to Capture Profitable Growth**

Channel-less is a design principle: **one unified core** that serves every channel without compromise

## WITHOUT CHANNEL-LESS

Siloed, fragile, expensive

- Separate system per channel
- Duplicated integrations & data
- Pricing inconsistency across channels
- Inventory blind spots between platforms
- New channel = full re-architecting

Every workaround adds cost and risk.

## WITH CHANNEL-LESS

Scalable, unified, future-ready

- ✓ One order orchestration core
- ✓ Single pricing & promotion engine
- ✓ Real-time inventory across all channels
- ✓ Modular fulfillment (3PL / EWM / last-mile)
- ✓ New channel = edge extension, not a rebuild

Add channels at the edge. Never touch the core.

# A Scalable End-to-End Architecture for Profitable eCommerce

Enabling marketplace growth through unified order orchestration, fulfillment, and financial reconciliation

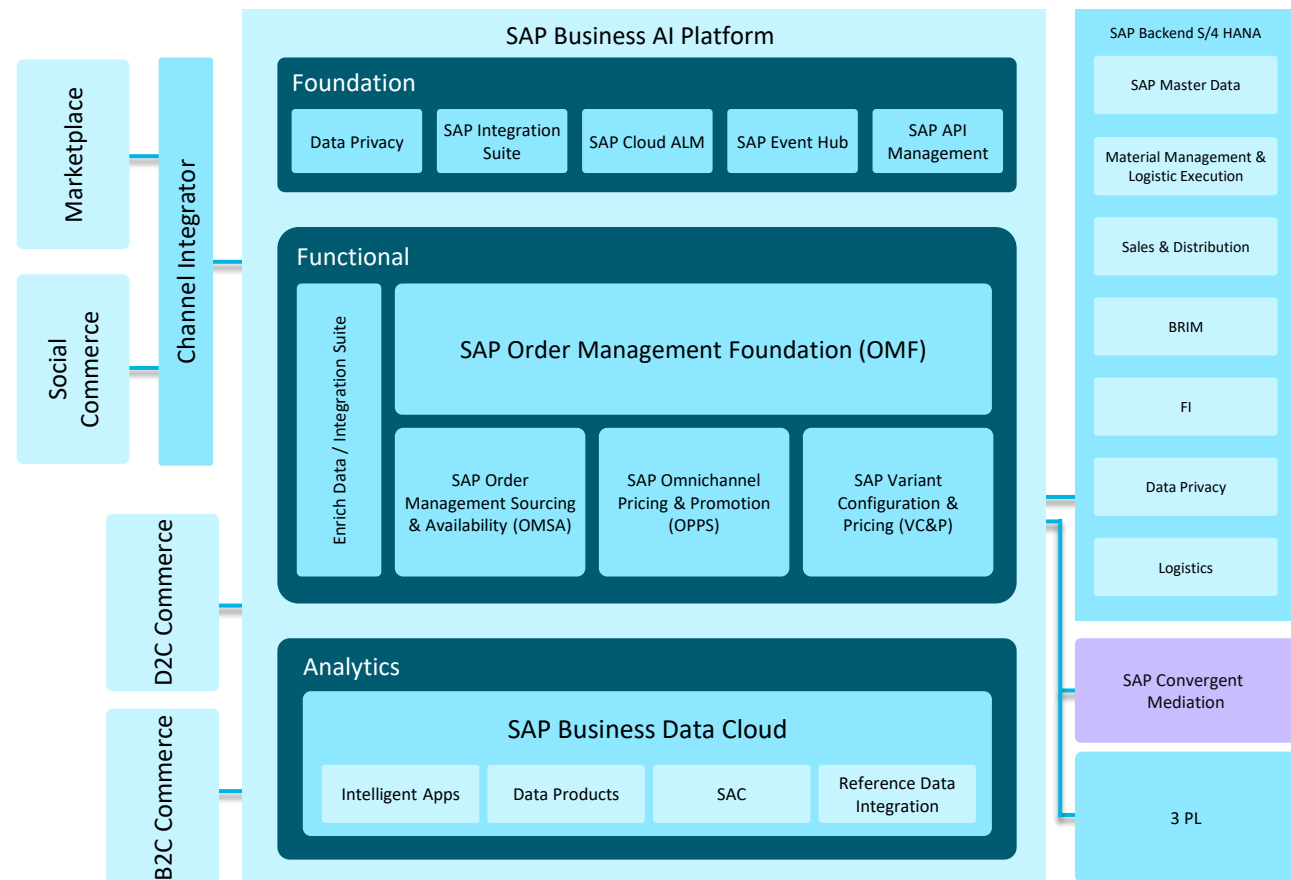
## Reference Architecture for Scalable Digital Commerce

High architectural alignment with customer program

**End-to-End Order Orchestration**  
Integrated fulfillment and financial reconciliation enabling rapid onboarding of new channels

**Architecture Beyond ERP**  
Designed to handle high-volume consumer transactions without overloading core systems

**Composable Commerce Platform**  
Built on OMS and BRIM as scalable core components



# Thank you.

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## Let Us Interact: Closing Poll

- Which topic are you most interested in learning more about?

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**What Are Your Thoughts?**



# What's Next For This Community?

The ASUG logo is displayed in white, bold, sans-serif font on a dark purple rectangular background. The letters 'A', 'S', 'U', and 'G' are connected, with the 'S' and 'U' being particularly prominent. The 'A' has a unique shape with a pointed top and a wide base. The 'G' has a thick, rounded bottom and a small tail that curves upwards.

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Post-Sapphire Community Conversation:

Date TBD

# Upcoming Event:

ASUG { Tech Connect }

In partnership with SAP TechEd

November 4–6, 2025 • Louisville, Kentucky

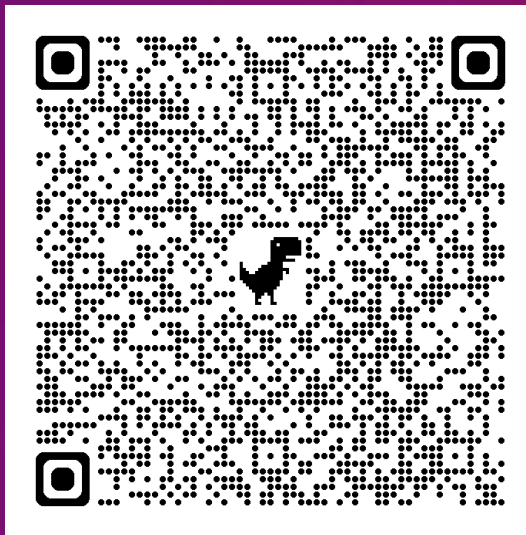


# ASUG

## Engage with Your Community

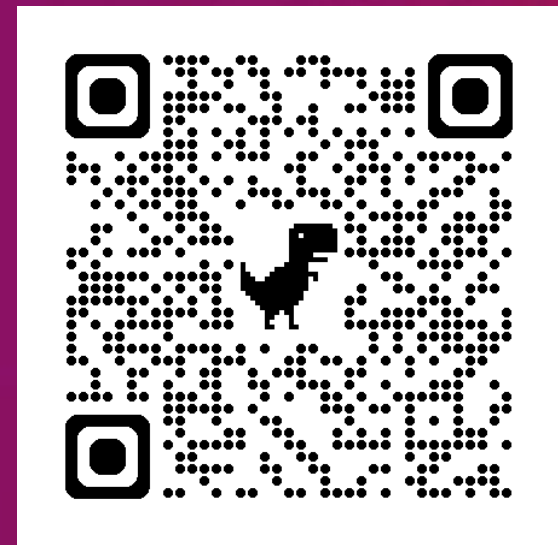
Consumer

Products Community on ASUG:



Consumer Products Community

on LinkedIn:



**On Behalf of the Consumer Products Community**

*Thank you!*