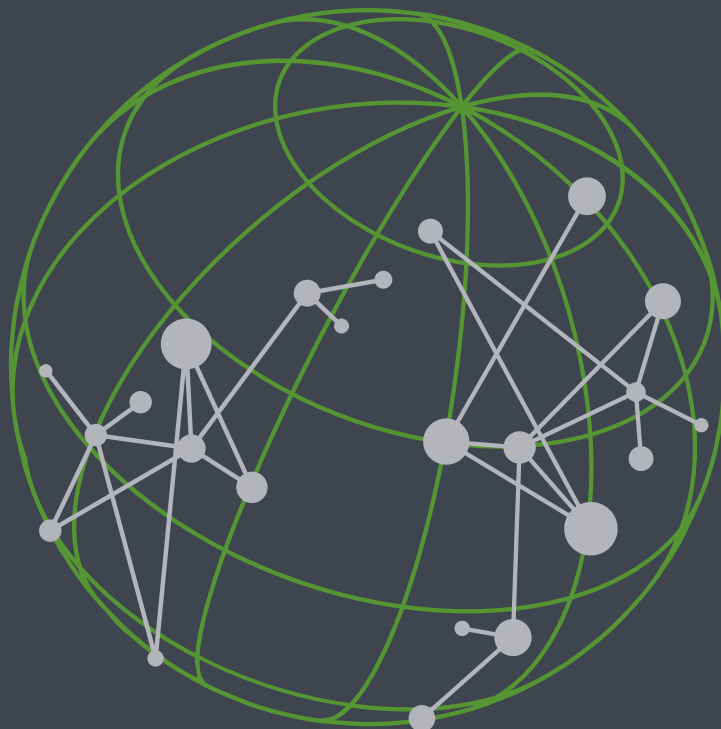

How has the current economic climate
prompted consumer companies
to regain control of the supply chain?







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Abstract



Changing consumer preferences, emerging markets, private label penetration, volatile economic conditions and the rising cost of raw materials are some of the key issues facing the consumer products industry today. According to a 2010 report by a leading global consulting firm¹, different sectors within the consumer goods industry all have unique ways to ensure that the supply chain is effective in light of these challenges. It has been noted in other research however that world class supply chain standards are not prevalent across the consumer industries.

With further factors such as skills shortages and changes in sustainability standards², there is a greater urgency for consumer companies to be at the forefront of innovative supply chain practices to ensure that they remain competitive in this hugely complex environment. This is the context for our new management report which looks at how consumer companies are responding to these challenges by seeking to regain control over the supply chain while at the same time realigning their talent strategies to focus on developing leadership skills to help reduce risk and improve efficiency.

Introduction: new world, new challenges



Analysts are adamant that market instability is here to stay. As a result, business strategy has shifted significantly from a 'sweating your assets' ethos to focusing on reducing costs and investing in the future.³ In the supply chain profession, in some respects, this has been welcome news. Once upon a time the supply chain was merely a mechanism in the wider organisation, now it plays a primary role in the overall planning and strategy of the business.

A survey published earlier this year highlighted that developing leadership capability within the supply chain was a 'critical focus' for businesses in 2012.^{4,5} In macro terms, new leaders of the supply chain have come to the fore due to their ability to comprehend and also react to the greater complexity of challenges facing businesses today – globalisation, outsourcing,

low cost production, shorter product life cycles, increased competition and price pressures to name a few.

We interviewed six supply chain leaders from different consumer businesses across Europe (UK, Nordics & Benelux)^{6,7} to discuss how they have responded to the challenges of today's economy. Our questions explored factors such as the dichotomy between outsourcing and in-sourcing, issues concerning remote management, strategies to mitigate against the risk of unpredictable consumer habits, financial volatility and long lead times and also what the most coveted skills in today's supply chain profession. The report is structured around three key areas: supplier relationships, integration and coordination, skills for now and the future.

¹ www.accenture.com/SiteCollectionDocuments/PDF/Accenture_Making_your_Supply_Chain_Famous.pdf

² Although the report alludes to sustainability and corporate social responsibility as being one of the drivers behind supply chain strategy today, we do not discuss this factor in any detail.

³ According to the McKinsey's 2011 report 'Building the supply chain of the future' www.mckinseyquarterly.com/Building_the_supply_chain_of_the_future_2729 the focus on cost reduction has resulted in 'an increased emphasis on leveraging every dollar spent on logistics and transportation activities.' This is something which is discussed later in the report in relation to a home entertainment group's European retail operations.

⁴ www.logisticsexecutive.com/cms/CEO_ExecutiveSeries_Jan_2012.pdf

⁵ Gartner's research from 2011 also highlighted that by 2015 at least 25% of new CEOs at Fortune 500 manufacturers will have 'deep supply chain experience'. www.gartner.com/id=1853218

⁶ A retailer, a furniture manufacturer, a home entertainment group, an electronics manufacturer, a pharmaceuticals business and a drinks wholesaler.

⁷ We would like to thank the following people for their help in compiling this report: Bo Rasmussen, Peter Høy, Peter Livingston and Martin Fisher.



Supplier Relationships



Accenture's 2010 report⁸ on consumer sector supply chains noted six distinct strategic priorities that would become a focus for supply chain leaders in the sector. Two of these priorities were: outsourcing to increase capability and optimising supplier networks to reduce cost and improve service. All of the leaders we interviewed as part of our research had their own interpretation of these priorities, aligned with their own unique business models.

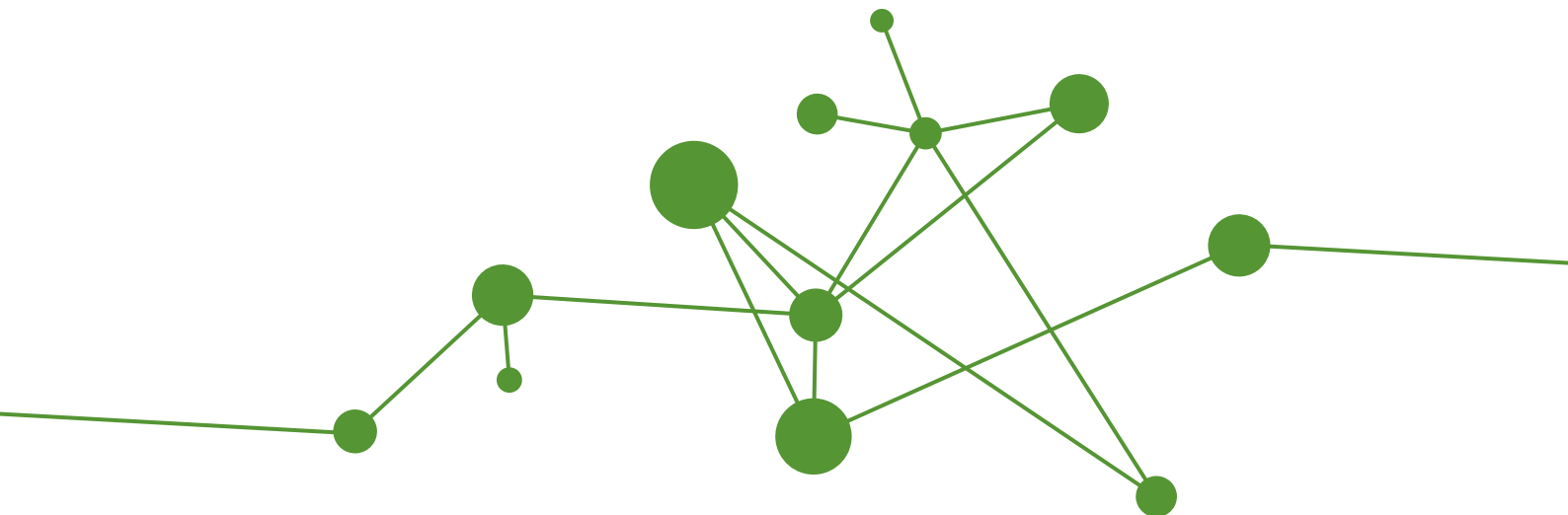
The Supply Chain Director at one retailer for example noted that consumer demand has seen the business gradually move from essentially being one product – a grocery retailer – to being an organisation which requires its supply chain to service different types of stores and try to meet the unpredictable demand of its customers. The objective of the supply chain, in his opinion, is to best serve the organisation within this more complex arrangement by *"centralising decision making and creating a more efficient warehousing system with a greater focus on partner development."*

Using a typical retail supply chain model, the business outsources around 50% of its operations. *"The hybrid model gives us access to third party expertise where we don't have the scale."* It works hard to maintain good relationships with its suppliers but admits that *"there are often times where you*

*must have difficult conversations – this will happen if it comes to a point where there is no longer a sound basis for having the relationship in the first place and at this point we have to reassess the situation."*⁹ Overall though, maintaining a direct involvement with its outsourced operations *"reduces risk and gives us greater security over our supply chain – we get the best of both worlds."*

Similarly, a manufacturer in our study has also realigned its supply chain model to maximise its effectiveness. As the interviewee explained, *"we have essentially moved from being a production company to being a 'precision' company, where the focus is all about reducing cost in the supply chain by outsourcing most of the key components to specialist suppliers."*¹⁰ Tough market conditions as well as high salaries in Denmark means the business has struggled to be competitive internationally and now seeks to streamline its workforce and focus instead on developing its supplier relationships.

The key change is within the culture of the business – it now has to concentrate on creating a 'value chain' whereby employees must act as 'consultants' within the businesses of their suppliers. As the interviewee noted, they have a supply chain expert based permanently at each supplier tasked with basically *"fighting their corner against the interests of the supplier's other customers."*



⁸ www.accenture.com/SiteCollectionDocuments/PDF/Accenture_Making_your_Supply_Chain_Famous.pdf

⁹ The retailer indicated that it will sometimes go out to tender just to keep suppliers 'on their toes'.

¹⁰ For example, all upholstery is manufactured in Poland, whereas tables and lamps are produced in Denmark. The business only employs ten people in Denmark, where once it had 250 domiciled employees. Because its suppliers are 'specialists', the business claims that the overall quality of its products has improved.



This strategy was described as being 'married' to the suppliers – *"they are a key part of our success."* Large companies that outsource must take an active role in the management of the outsourced operations, developing contract management capability and ensuring that the partnership is mutually beneficial for both parties.

A common theme among businesses that choose to outsource is to release those functions that are of a minor importance to the customer's overall buying decision making process, for example, manufacturing of sub components of products or sourcing of raw materials. The benefit is that businesses can concentrate on factors that are more important to the customer, such as good delivery performance or customer service. The disadvantage however is that those companies don't fully control all aspects of their products. This is particularly risky when their suppliers are purchasing materials in other continents. As one manufacturer experienced, when their suppliers buy in specialist fabric that is faulted, it can cause serious delays.¹¹ Fundamentally though, businesses find that the benefits outweigh the negatives. Outsourcing creates less vulnerability to the changes in the market and also the freedom to source materials depending on which factor is most important at the time – be it price or lead times.^{12, 13}

As an interviewee at another business highlighted *"the objective is always about getting the right products in the right place at the right time."* Different economic circumstances however have led the business to source more of its 'input materials' from China and India *"which makes procurement more complex especially in an inflationary environment."* The key focus of the company over the last 12 months has been embedding a 'supplier relationship management program' into the supply chain. *"We are working to rationalise and consolidate our customer base – part of this has been a big tender initiative to identify the best prices available and ensure that we are working with a core group of suppliers who will provide us with a competitive cost position."*

Accurately communicating demand is an ongoing challenge however. The firm's suppliers ideally want 'one year visibility'

and the business is trying to match that by forecasting for 12 months while endeavouring to improve its communications regarding any significant changes in demand during that time. *"Essentially we're looking to work together with our suppliers to optimise the supply chain."*

At the home entertainment group in our study, the issue of reduced consumer spending is something that pervades the organisation. Consumers are spending less, year on year, on physical media and digital downloads are not providing enough of a stimulus to the category, so revenue is declining.¹⁴ In Europe however the situation varies between the North and South – i.e. the outlook in Germany is fairly positive whereas in Spain and Italy it is very poor. This means that the business must have a different, tailored approach to each market. The interviewee explained that they are *"considering alternative distribution models such as cooperating with different studios and setting up joint sales teams"* – essentially reducing its manufacturing 'footprint' by working with more wholesalers to manage through the reduction in consumer spending.¹⁵

Once again, seeking to harness the relationships with key partners and suppliers is a central business strategy. Over the last two years the home entertainment group has outsourced areas of manufacturing, production planning, warehousing and order fulfilment as well as transport and customer services. This hasn't been an issue free process. Last year the business in-sourced its customer services operations back to Europe after it was felt there was *"a disconnect with its culture."* With 3PL (third party logistics), as the interviewee noted, they also have to manage relationships with suppliers very closely, providing them with the 'solution' while relying on them for logistics capability. Overall this strategy helps to support the growth of revenue while at the same time manage operations and capital expenditure more effectively.¹⁶

In the next section we explore how businesses are beginning to rely on increasingly sophisticated tools linked to the sales and operations planning process to create more efficiency and flexibility in the supply chain.

¹¹ Another Danish company in our study that uses suppliers in the Far East also noted that if there is an issue with the stock, suppliers will often *"not tell the real picture if it is negative. There is often a culture of 'closed-ness' among the parties in the supply chain – an unwillingness to share information."*

¹² Interestingly the business is one of a group of Danish companies that have 'in-sourced' all or some of the supply chain back to Europe from the Far East. It did initially outsource all of its production to China but the rising cost of labour there as well as the complexity of managing the distribution of goods that have unique designs – i.e. furniture that isn't mass produced – it made more sense to have a local production operation. Other companies are doing the same and bringing production back to neighbouring countries such as Estonia and Poland.

¹³ As Ernst & Young (2011) note 'Flexibility is the remedy when uncertainty exists.' [www.ey.com/Publication/vwLUAssets/20th_annual_trends_and_issues_in_logistics_and_transportation_study/\\$FILE/2011_Annual_Logistics_Transportation_Trends.pdf](http://www.ey.com/Publication/vwLUAssets/20th_annual_trends_and_issues_in_logistics_and_transportation_study/$FILE/2011_Annual_Logistics_Transportation_Trends.pdf)

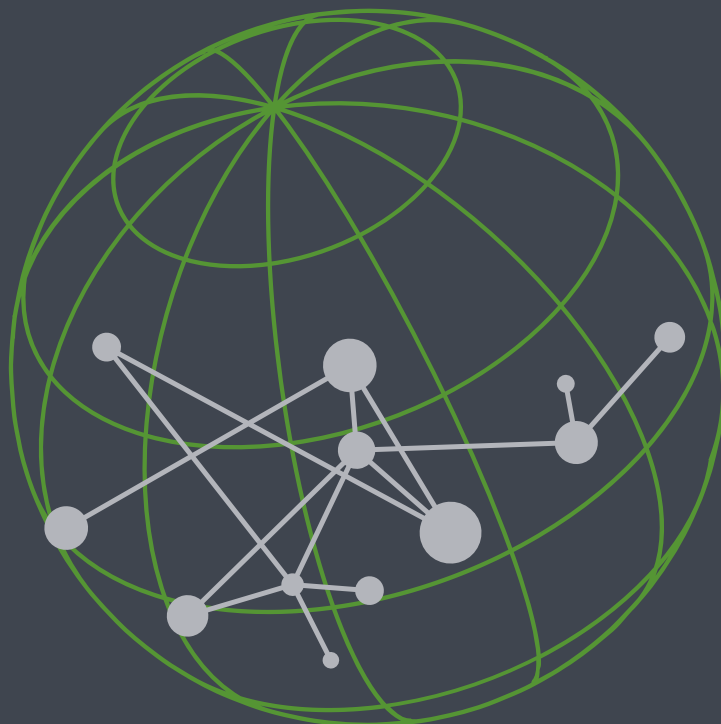
¹⁴ The business is seeking to alleviate this by introducing new alternative (mainly merchandise) products to the market.

¹⁵ Generally across the full spectrum of product categories, consumers are less able or willing to buy in advance and rather tend to purchase things at the last minute. Supply chains have therefore responded by adopting 'just in time' principles at the core of which is reducing the number of locations where stock is held.

¹⁶ E.g. Distribution costs such as consolidating freight with other studios and utilising cross docking solutions.



“Outsourcing creates less vulnerability to the changes in the market and also the freedom to source materials depending on which factor is most important at the time – be it price or lead times.”





Integration and Coordination



We asked our interviewees what the most important aspects of supply chain strategy were today. In most cases the answer was reducing inventory levels and creating more flexibility to generate faster lead times. To achieve this, the supply chain must have greater alignment with overall business strategy and better integration and visibility.

According to McKinsey, this is the 'new normal' for supply chain organisations¹⁷. However, as one interviewee noted, trying to facilitate closer coordination and integration of the supply chain with the rest of the business can be a 'tough sell internally'. *"The real challenge is to connect sales with operations and getting people to understand the value of this."* A renewed focus on cost reduction and customer service however, has essentially created a revived interest in sales and operations planning for businesses.

Three years ago, one manufacturer in our study introduced a sales and operations planning process and now *"The whole supply chain is aligned with sales."*¹⁸ Currently the business has 98% accuracy in its supply chain¹⁹ but admitted that because the sales and operations planning process is still fairly new, it is still 'learning everyday' about how to improve. By 2020 its objective is to have all lead times down to one week. Accenture²⁰ highlighted in its report that a 'gradual process of continuous improvement' is essential best practice for supply chain leaders today.

Since the drinks wholesaler in our study devolved its relationship with a major brewer in 2010, it has gradually integrated an S&OP (Sales and Operations Planning) process into its supply chain. As the interviewee explained, the business' overall operation is *"far more demand driven now"* and without the brewing partnership it must seek to reduce its stock levels by being more proactive around planning. This has been a big cultural change for the

business and although the interviewee claimed *"life seems easier now"* he admitted they are still going through a steep learning curve.

One of the big issues at another business in our study is managing returns from retailers, as the Vice President of European Retail Supply Chain commented, *"Getting to grips with returns is one of our biggest capex concerns, as it has a knock on effect across the supply chain. We are therefore continuously trying to lower lead times so we can reduce stock levels."*²¹ The interviewee explained that consumer product companies such as P&G and Unilever lead the way in terms of sophisticated and robust sales and operations planning processes and other consumer companies would benefit from trying to emulate them. As Ernst and Young stated in their 2011 report²² 'Flexibility is the remedy when uncertainty exists' – reducing inventory levels is one factor but the key is how well a business can 'increase or decrease inventory levels in response to changes in demand.' Supply chains that are strategically integrated will likely succeed in this regard, where others will fail.²³

Getting the sales and operations planning process right for this business means implementing an adequate forecasting strategy, *"We don't want all of our stock on day one - we agree the timeframes with our suppliers and then make sure that lead times are short enough to fulfil market demand."*²⁴ There are exceptions however, as the interviewee explained *"One of our gaming products is made in Japan and obviously you can't get anything from Japan to Europe in one week. So we have a postponement strategy where we only order 'cartridges', not the full product. This allows us to then customise the languages (based on specific country orders) thus reducing the number of actual finished products held in Europe."*

¹⁷ www.mckinseyquarterly.com/Building_the_supply_chain_of_the_future_2729

¹⁸ The interviewee noted that although the supply chain is perhaps less complicated than, for example, an FMCG business with lots of stock, because the businesses products are made to order and also unique in design the sales and operations planning process creates the necessary flexibility they need to be able to deliver orders on time.

¹⁹ The two percent of the supply chain that fails is usually caused by uncontrollable factors such as the faulty fabric example discussed in the first section of the report.

²⁰ www.accenture.com/SiteCollectionDocuments/PDF/Accenture_Making_your_Supply_Chain_Famous.pdf

²¹ The business regularly measures the performance of the supply chain and tries to highlight where there are problems and then link them back to the wider organisation. *"This is how we have influence."*

²² [www.ey.com/Publication/vwLUAssets/20th_annual_trends_and_issues_in_logistics_and_transportation_study/\\$FILE/2011_Annual_Logistics_Transportation_Trends.pdf](http://www.ey.com/Publication/vwLUAssets/20th_annual_trends_and_issues_in_logistics_and_transportation_study/$FILE/2011_Annual_Logistics_Transportation_Trends.pdf)

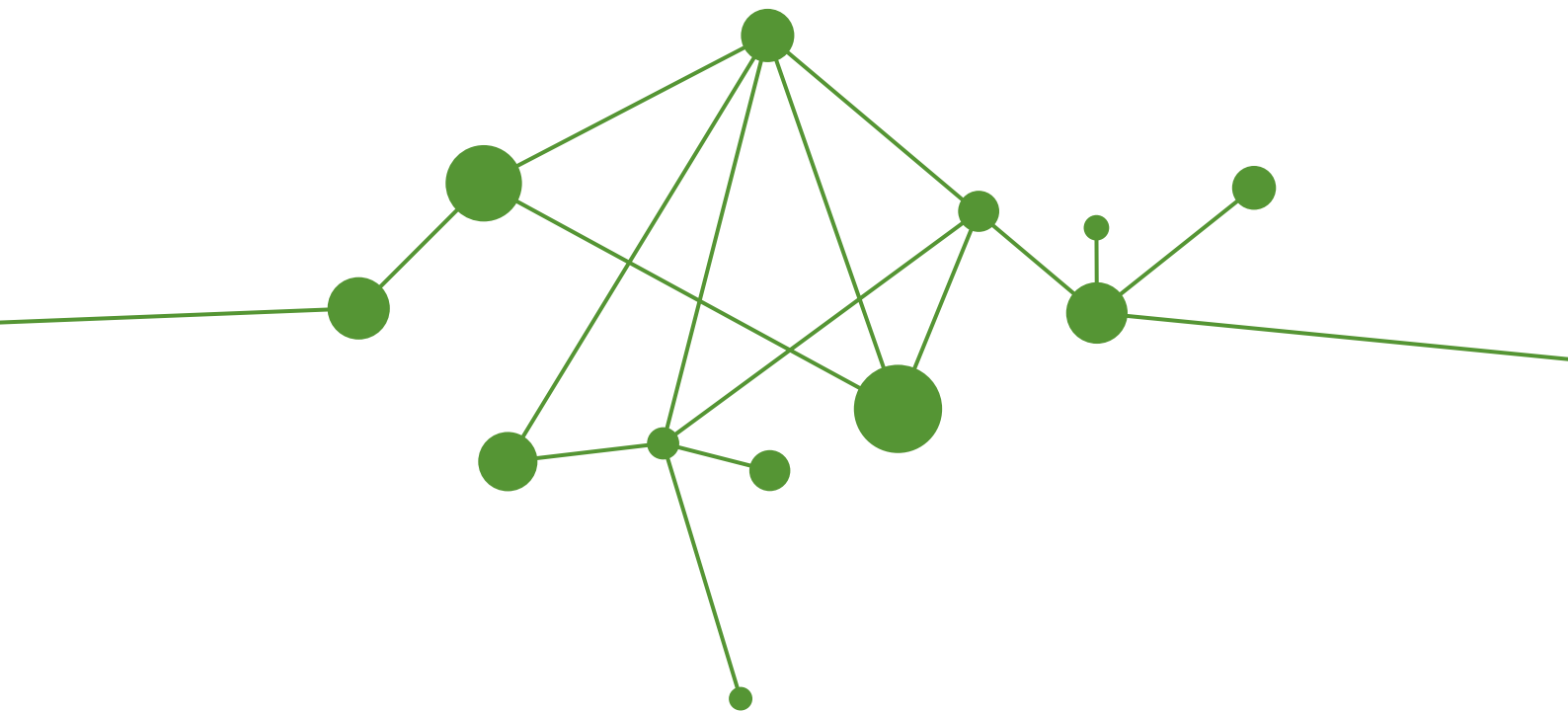
²³ A recent high profile example in the UK of poor integration was at retailer M&S. Its non food, general merchandise business ran out of stock in April after failing to accurately forecast consumer demand for some of its best selling women's wear fashion items. M&S are now looking to overhaul their non food supply chain.

²⁴ This is currently about one week.



Initiatives like the one above are only possible if the right tools are in place. As another interviewee explained, a key function of the supply chain today is *"to consolidate the use of a number of different new IT systems and grow efficiently by having the right technology in the right place at the right time."* Supply chains are increasingly utilising very sophisticated demand planning and forecasting tools, which is also influencing their hiring needs.^{25, 26} Particularly in cases where remote management takes precedence IT capability in areas such as data governance and system maintenance are indispensable. As Deloitte argues, for many businesses this is a 'completely new mentality'²⁷ and those that succeed have mastered the art of 'synchronising' key data across the organisation.

The supply chain is IT dependant and with growing pressure to be ahead of the curve in terms of technology capability, businesses need to ensure that they have the right tech-talent on board. What's interesting however is that technical skills alone are not enough. The importance of supplier relationships as well as internal 'bridge building' with commercial departments means that diplomatic, negotiation and general communication skills are also of utmost importance. In the next section we take a closer look at the talent strategies underpinning supply chains in the consumer industries today.



²⁵ To be discussed in the next section of the report.

²⁶ This also often involves integrating IT systems with those of suppliers.

²⁷ www.deloitte.com/assets/Dcom-UnitedStates/Local%20Content/Articles/Consulting/us_consulting_valuechainplanningsolutions.pdf



“All of the supply chain leaders we spoke to for this project identified technical skills as being one of the most coveted by businesses.”





Skills for now and the future



Many consumer businesses have Chief Supply Chain Officers or Chief Logistics Officers on the executive team. This highlights how the supply chain is now recognised and valued across the wider organisation. Yet, despite the emergence of influential leaders in the discipline there is still a big push underway, across the sector, to upskill those in the supply chain as well as identify and recruit talent with the qualities deemed most important today.

All of the supply chain leaders we spoke to for this project identified technical skills as being one of the most coveted by businesses. With the greater importance of demand planning and forecasting as tools to reduce cost and add real flexibility into the organisation, predictive analysis and data modelling capability is a big focus for training and recruitment. Others noted the *"ability to implement a broad range of technical and IT solutions"* or have *"deep knowledge of the various systems and applications central to supply chain processes"* as being equally important. As one interviewee argued however, a lot of these tangible qualities can be developed internally. The real difficulty, in terms of ensuring you have the right mix of skills, *"is finding and retaining those with communications capability, as well as technical."*²⁸

Another interviewee explained *"interpersonal skills which enable people to have influence across the matrix structure of the business, with its many internal stakeholders"*, is now essential. This view was also shared by others in our study. If supply chains are to become more integrated, the ability to negotiate and build relationships with other departments as well as suppliers will be a factor in the success of the supply chain.²⁹ In the context of the retailer in our study, for example, this means the *"capability to drive high performance day in day out, with a multi-ethnic*

workforce and have influence not by bullying but rather by attracting others to work for them."

Other research has also pointed to generic competencies such as 'business and financial experience', knowledge of and the ability to effectively manage commodity volatility, process design and change management as well as an aptitude for 'social responsibility' as being emerging skills and experiences in the discipline.³⁰ According to the Supply Chain Director at the retailer, finding people who can not only deliver change but *"who truly understand the dynamic of the supply chain"* is something that is really lacking. This 'dynamic' is in reference to a multitude of complex factors that now pervade the global business and economic landscape.

The problem, however, is that businesses cannot rely on training and development alone. Yet in Europe, in particular, it is increasingly difficult to find and retain supply chain professionals with these qualities. A 2011 report by BCI (Business Continuity Institute)³¹ highlighted that a loss of talent/skills was one of the top three causes of supply chain disruption in Europe, behind IT and telecommunication outages and bad weather. Continental Europe was the only geography to give prominence to a loss of talent/skills as a leading source of supply chain disruption.^{32, 33}

We asked our interviewees how they were addressing skill shortages in the supply chain. It emerged that although there is a big emphasis on training, businesses are also trying to introduce alternative skill sets into teams. The retailer in our study for example identifies skills gaps and then seeks to develop those skills internally. At the same time it will compliment this by bringing in external expertise often with the intention of *"introducing new skills to the organisation"*.

²⁸ Interestingly a report published earlier this year noted that supply chain professionals would need to add social media skills to their repertoire due to the increased focus on service and communication in the discipline. www.logisticsexecutive.com/news_and_insights/media_and_articles/2012/predicting_2012_-_talent_trends_in_supply_chain

²⁹ The employment culture at the business is about giving employees autonomy and expecting them to drive projects forward independently. This is how it seeks to compete with larger organisations, by attracting people who will thrive on the responsibility and freedom that they perhaps wouldn't get in a larger organisation.

³⁰ All referenced in this report: www.logisticsexecutive.com/news_and_insights/media_and_articles/2012/predicting_2012_-_talent_trends_in_supply_chain

³¹ www.bcifiles.com/SupplyChainResilience2011PublicVersion.pdf

³² Overall, talent shortages had moved up the list of causes of major disruption across all continents, since the 2010 survey.

³³ This has had a direct impact on those currently in supply chain roles by creating a greater demand for professionals to upskill.



Supply Chain Disruption Global Top 10 2011

1. Adverse weather
2. Unplanned outage of IT or telecommunication systems
3. Transport network disruption
4. Earthquake/tsunami
5. Failure in service provision by an outsourcer
6. Loss of talent/skills
7. Product quality incident
8. Volcanic ash cloud
9. Insolvency
10. Civil unrest/conflict

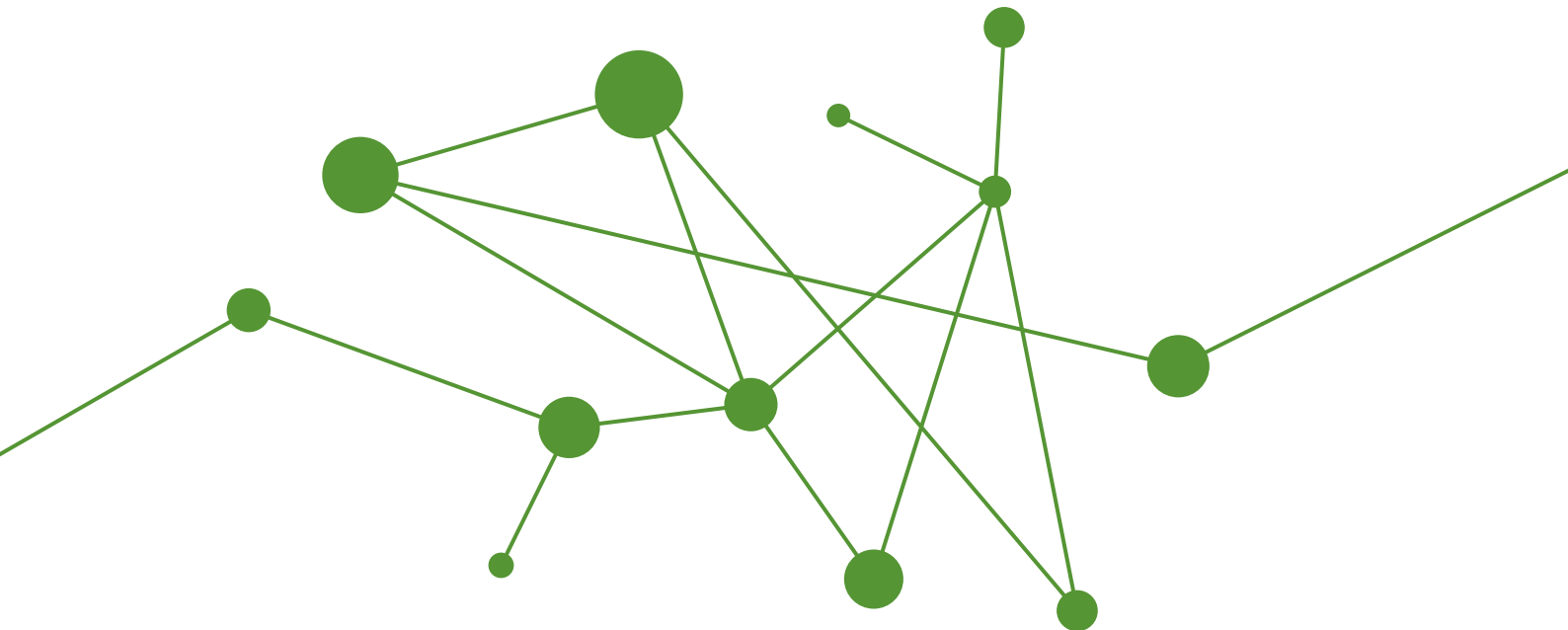
Supply Chain Disruption Continental Europe Top 3 2011

1. Unplanned outage of IT or telecommunication systems
2. Adverse weather
3. Loss of talent/skills

Similarly, at another business in our study, one of the areas it is seeking to address skills shortages in is procurement. The company has a team in Shanghai which acts as the main interface with suppliers in China and India. The most important factor

for the Chinese team is to "bring in people who understand the technical aspects of products". As the interviewee argued it isn't necessary for these people to have traditional negotiation skills. "We can develop these skills and ensure that people have the right mix. The ability to plan and do complex analysis as well as communicate effectively with internal and external stakeholders is what we seek to build into the supply chain."

A recent report³⁴ on supply chain talent argues that '2012 is the time for the emergence of a more sophisticated supply chain professional.' Yet as our research has shown this 'sophistication' is something that is clearly rare among those in the discipline and what is emerging is a hugely competitive environment for talent at a time when a high performing, lean supply chain is becoming increasingly synonymous with business success.



³⁴ www.logisticsexecutive.com/cms/CEO_ExecutiveSeries_Jan_2012.pdf



Conclusions



In this report we wanted to explore how businesses in the consumer industries were seeking to regain control of the supply chain to remain agile and competitive in volatile economic conditions. We discovered that streamlining manufacturing 'footprints' and giving greater emphasis to developing supplier relationships were central to the strategies of businesses across different consumer categories. Integration and collaboration were also themes that emerged in the research, as companies seek to become more interconnected and leverage the expertise of the whole organisation, making key data visible and available to those who can exploit it. It is clear that the supply chain has grown in importance as a tool to help businesses manage the risks associated with some of the big challenges facing them today. As a result, an era is emerging where supply chain leaders will take on greater responsibility for strategy that goes above and beyond their discipline. It is also an era, as our research has shown, where consumer businesses will focus on both the development of core and new supply chain skills as well as finding and retaining the top supply chain talent.

Implied throughout the report is that globalisation has influenced and continues to influence how supply chains are structured and operate. Whether it's utilising the low cost expertise of suppliers in emerging European markets, sourcing raw material from India and the Far East³⁵, integrating advanced planning software to help respond quicker to unpredictable emerging market demand or building local in-country teams, supply chain leaders today need to take a 'truly global' approach to strategy. Also notable is that changing customer expectations are forcing businesses to

move away from mass production to a 'mass customisation' of their goods and services. This, in many ways, has provided the greatest opportunity for supply chain leaders to drive change and give their businesses a competitive advantage in the market.

It is also interesting to note that in the context of supply chain strategy, price control is only half of the story. Our research highlighted that customer service is now very high on the agenda for supply chain leaders. In many cases the decision to outsource or in-source aspects of the supply chain is driven by a desire to please customers – be it in terms of product quality or service quality. Often cost is forfeited for either of these things in the short term as companies seek to invest in the supply chain, to get quality and service right. Outsourcing can create issues however, but the trend we are beginning to see is one where businesses are prepared to take risks and working to optimise supplier networks is therefore very much about sharing those risks in order to reduce them.

With so many factors at play it is difficult to write a definitive report covering all trends impacting the supply chain today. This was why we chose not to discuss sustainability in great detail – that in itself is a separate report. What we hoped to do with this report was add informed thinking to the supply chain debate, particularly around the trends we uncovered in our research. We would like to continue this debate with you online, where you can contribute your own thoughts and ideas via our supply chain networking groups on LinkedIn.³⁶

"It is clear that the supply chain has grown in importance as a tool to help businesses manage the risks associated with some of the big challenges facing them today."

³⁵ One of the big questions today though concerns the rising cost of raw material in places such as China, which has traditionally been a source for low cost procurement for supply chains.

³⁶ Nigel Wright - Nordic Supply Chain Network - www.linkedin.com/groups/Nigel-Wright-Nordic-Supply-Chain-4121542?home=&gid=4121542&trk=anet_ug_hm
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