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# Recruitment and talent trends in the UK consumer sector



**In 2012 there has been a modest recovery in the UK consumer market. Spending on consumer goods across the different categories has slowly risen as confidence in an economic recovery has seeped back into the mindset of UK consumers. These positive results are certainly good news for many of our clients.**

## MARK SIMPSON, GROUP EXECUTIVE DIRECTOR

While overall retail spending remains sluggish, categories such as food and apparel have experienced incremental improvement during the first quarter of the year. Shopping online in particular has been a major catalyst for overall growth and the UK ecommerce market is now recognised as the biggest and most sophisticated in the world.

Analysts assert however, that despite these positive movements in the market, we are still a long way from a full recovery. Consumer companies therefore, are preparing to enter an increasingly complex and challenging period in the sector by ensuring that their hiring strategies are aligned with the major talent management trends impacting the employment market.

In the UK, intense competition to hire the best talent available has already returned to the consumer industries. With innovation in areas such as marketing, sales and customer engagement increasing at a rapid speed, more and more firms are turning to recruitment, rather than developing internal capability, to satisfy immediate skills shortages. As organisations are generally more lean and productive today, there are greater expectations on new hires to be high performing. This is particularly the case for middle and senior level appointments, and it means companies expect a significant return on the investment they have made in recruitment.

At the same time however, companies are trying even harder to keep their best employees. Employer branding as a talent strategy is once again

taking centre stage, as businesses seek to create intimate and rewarding working cultures to ensure employees feel engaged in the wider organisation and are therefore less likely to want to leave. To complement this, the use of multiple social media platforms to promote the employer brand and connect with potential new hires is also a growing trend. As competition for talent increases, companies (particularly those in the consumer industries) are aware that a poor candidate experience can have negative implications that go beyond the hiring process.

Social media and the greater internet focused job search habits of candidates have also made the talent acquisition and retention process more complex. Employee referrals, for example, have become popular in many sectors as social media has essentially democratized the recruitment process. This development, however, also means recruitment firms that can navigate this environment successfully, have also begun to stand out from the crowd. No one is more aware and engaged in social media than a recruitment consultant – the advantages are obvious. Rather than recognising social media as a recruitment solution (where the recruiter becomes obsolete) employers are instead realising that they need to work more closely with the experts, in order to get their hiring right first time.

What we have noticed is that the economic climate has essentially created conditions where there are fewer average performing businesses. Companies tend to be either quite successful or struggling to survive; not many exist in the space in between. In the consumer sector, those businesses that are performing well have invested time and resources into

trying to understand and anticipate the future in terms of what sort of skills and capabilities they need, to avoid falling behind. Understanding and developing expertise in areas such as global supply chain, ecommerce and sustainability are high on the strategic agendas of many of our clients.

For example, many UK companies (either with international operations or those with operations solely in the UK market) are seeking leadership talent to drive innovation in the supply chain. A key part of this is trying to identify better ways to integrate the supply chain with ecommerce sales channels. This requires leaders with very specific qualities such as knowledge of distribution and sales but also people with prior experience of working for online businesses and an intimate understanding of how consumers engage with products both online and offline. This kind of talent is still emerging and rare but also essential for commercial and operational success in today's consumer market.

The other big area for consumer firms is sustainability. Businesses that have an environmental, ethical or social agenda at the heart of their

corporate philosophy have been shown to outperform those that don't. Increasingly firms need to make sure they bring in the right kind of skills and expertise to develop areas such as sustainable production practises, packaging, ethical sourcing of ingredients or even eco friendly shelf stacking. It's a hugely diverse and constantly evolving area of business strategy, which again requires a very specific kind of talent to make it work.

Nigel Wright continues to work alongside small family businesses as well as global leading consumer brands, supporting them in the selection and development of talent across sales, marketing and operations roles. Although our business is international we pride ourselves on our ability to be affective at the local level, within the countries we operate. As the UK is our oldest market we have an intimate understanding of the trends that are impacting the consumer industries and our experienced consultants can advise clients on key strategic areas that go beyond the hiring process.

## Continued European expansion...

Nigel Wright

**Since our affiliation with Baird Capital Partners at the end of last year, our business has continued to grow rapidly, consistently outperforming the market.**

While retaining market share and expanding our European operations, we have increasingly supported our international clients with their growth strategies in developing economies, sourcing talent in Africa, Asia, the Americas and the Middle East, in line with global demand.

To accommodate new employees and strengthen our pan-European networks, we also moved into larger office space in London, Paris, Stockholm, Oslo, Amsterdam, Brussels, Dusseldorf, Madrid and Geneva. The new offices provide an excellent base for our teams to drive growth in our core markets as well as offering our clients and candidates professional locations to meet. They are all in central and prestigious locations and have helped to promote our premium image as well as attract high potential people.

Our growth has not gone unnoticed. In November Nigel Wright was featured in the UK Recruiter Hot 100, appearing in 19th place ahead of established names such as Harvey Nash, Hudson and Robert Walters. Nigel Wright was the only Consumer industry specialist on this year's list.

In the same week, Denmark's Økonomisk Ugebrev (Economics Weekly) published its latest research on search and selection companies operating in the Danish Market. Nigel Wright was in placed 10th in a list which consisted mainly of global executive search and recruitment providers including Korn/Ferry, Mercuri Urval, Amrop Hever, Odgers Berndtson, Russell Reynolds and Hays. Earlier this year we were also featured in the latest rankings of the 50 fastest growing recruitment firms in the UK.

Fifty percent of our fees now come from overseas and we are anticipating further growth this year as we look to expand our presence in new markets.

## INTERNATIONAL CAPABILITY

For over twenty years we have worked alongside small family businesses as well as global leading consumer brands, supporting them in the selection and development of talent across sales, marketing and operations roles. Our networks therefore are far reaching and the opportunities we subsequently bring to the market are broad, skilled and multi-disciplined.

Beyond the hiring process, we regularly publish 'thought leadership papers' on a range of issues and trends that are impacting the consumer industries. Together with the various networking events we organise every year, we ensure that our customers are provided with tools they can use in their day to day roles, as well as with vibrant communities where they can network and debate the big ideas of the day.

As a specialist consumer sector consultancy, above all else we offer customers an in-depth understanding of the complex and challenging environments they work in every-day. Because the majority of our consultants were previously employed in the consumer sectors, they have a unique ability to intimately understand the needs and the challenges those working in the industry face. This means they can act as true advisors to clients as well as ambassadors for them in the marketplace.

Although our business is international we pride ourselves on an ability to be effective at the local level, within the countries and regions we operate. For clients, this means they have the benefit of our 'no silos' approach to recruitment. Once a candidate is identified and registered they can be immediately represented in any of our markets across Europe and beyond. The talent pool therefore is larger, as all of our offices share information such candidate profiles or trends in skills shortages and can add significant value to clients, from a domestic or international perspective.





# Long live the lipstick effect



The beauty industry in the UK is worth £15.4bn and remains one of the more resistant sectors to recession. Nigel Wright's Shona Thom spoke to Sandra Houghton, Senior Beauty Buyer at QVC, who gave her insight into some of the key trends that are driving category growth in the UK in 2012.

## SHONA THOM, SENIOR CONSULTANT

In 2011 health and beauty retailing experienced a resurgence globally. While there was a strong demand for products across most markets, without doubt, it was emerging market growth that was at the forefront of this escalation. Consumers' rising awareness of personal health and appearance, among other factors, forged a demand for a variety of sophisticated health and beauty products in emerging markets.

It is also in these markets that the most dynamic product innovation is occurring in categories such as skincare, haircare, colour cosmetics and fragrances. China, Brazil and India will experience the strongest value growth over the next few years, as women and men continue to experiment with health and beauty products. These countries in particular are growing at a pace unrivalled anywhere else in the world.

While there is clearly a focus on the growth potential of emerging markets, mature markets such as the UK are still paramount to the success of the health and beauty category overall. In western markets in general, engagement with customers via new media and tapping into a 'value for money' ethos are two ways that businesses are continuing to drive growth and deliver higher value sales.

According to Sandra, the infamous 'lipstick effect' has continued to have an impact, as women "still buy their favourite cosmetic and skincare brands regardless of the economic climate." Colour and on-trend innovation coming straight from the catwalks, has also continued to occur in 2012. 'Statement lips', for example, have been key in establishing the "ultimate impact look" which emerged from the Mugler, Erdem and Gurung shows. A matte finish and bold colours are now considered essential and cosmetic brands are trying to make the most of the burgeoning colour trend.

Eyebrows are also a focus and gone are the days of plucking to perfection. In Sandra's view 2012 is all about the 'power brow' and the 'statement eye'. Brows are defined and embellished with jewels, enhanced by strong eye shadows on the lids. Whether it's metals seen at Fendi or the cobalt blue shadow seen at Jason Wu and Rodarte, this trend is all about the eyes and the perfect evening look. Brow and lash products such as fibre mascaras and brow and lash growth enhancers have all performed strongly over the last 12 months.

Similarly in the hair category, bigger is better. With fifties style sets returning and coiffured faux bobs seen at Jil Sander, products have focused on volume and hold with a natural look. The hair sector continues to see strong growth with a number of new prestige UK brands entering the market, such as Richard Ward and Percy and Reed.

Nails were another exciting category in the beauty sector in 2011 and continue to experience phenomenal growth. "It has all been about effect and catwalk colours. The shatter coat took the beauty world by storm last year and now nail art is the way forward. 2012 will see the professional gel-nail treatments being used more at home, which will create another strong boost to this sector of the beauty market."

QVC's most loyal customers, however, according to Sandra, are those that shop for skincare products. "Banishing those wrinkles is still our aim and savvy customers are looking for the newest iconic ingredient and better formulations. This market shows steady growth and little decline. Professional skincare products and 'beauty tools' that help customers create the spa effect in their own homes, will continue to drive innovation in the sector.



In recent years rather than looking to introduce more beauty brands to their portfolios, retailers have looked for additional revenue streams through setting up 'pampering zones' within stores. "Department stores are individualising themselves and targeting visitors with additional customer pampering services and beauty essentials. From massage to threading these services are now springing up in all key beauty halls."

Loyalty schemes have also become more popular: Superdrug and Space NK have both launched loyalty card schemes, while Boots and Debenhams have reinforced existing reward cards with new online shopping point schemes and dedicated mobile apps. In times of recession these initiatives have been central to retailers maintaining their customer loyalty and have facilitated an upturn in the beauty industry in the UK.

At Nigel Wright, we have found that while candidates are willing to listen

to new opportunities in the market, businesses are trying very hard to retain their best employees and as a result a new war for talent is emerging in the sector. The incremental change in market conditions has certainly seen hiring in the sector pick-up but clients have been very specific about their recruitment needs - the element of economic uncertainty that still pervades the UK market in general, means that hiring managers are less likely to take risks, as are good candidates. Consequently, in 2012, we have worked alongside health and beauty clients on strategic recruitment mandates to identify only the best talent available in the market. We expect this partnership approach to continue over the next few months, as health and beauty businesses focus on building talent pipelines.

**Shona Thom is a Senior Consultant within Nigel Wright's UK Consumer division.**

## Food and drink sector update



Food and drink is still the largest manufacturing sector in the UK, contributing some £20 billion to the economy and employing a staggering 400,000 people.

### RICHARD ASH, EXECUTIVE DIVISION

Despite the recent economic downturn, food and drink manufacturing has remained one of the UK's few growth industries, with overall domestic and export sales remaining healthy and new product development and investment continuing to increase. Final figures from the Business Confidence Survey 2011 show that the sector remained resilient during a year of weak domestic demand, economic uncertainty and price volatility.

Despite this weaker domestic picture, export sales for UK food and drink grew by 11% in 2011 to £12 billion and will continue to be a key driver of industry growth with significant opportunities for competing in less established markets against key producers such as France, Germany and Italy. Indian sauces to Spain, cheese to Japan and breakfast cereals to China are just a few examples with strong export performances from meat, dairy, seafood and value-added grocery products, while the Scotch whisky industry continues to grow sales globally. The main recipients of UK food and drink continue to be mature markets such as the USA, Canada and the EU, however high growth markets like India and China are opening up excellent opportunities for exporters.

As with all industries, increased costs have hit the sector hard. Although food commodity prices fell slightly towards the end of 2011, these were overshadowed by increases in fuel and materials particularly due to oil price spikes after political unrest in the Middle East. While many manufacturers were forced to pass on price rises to cover costs, many

SMEs have deferred increases to avoid jeopardising their position with retailers. There appears to be increasing optimism for 2012-13, sparked by falling commodity inflation and higher than expected demand from overseas markets.

Ongoing investment in the sector has focused on product development but uncertainty over the economic outlook and consumer confidence has led some companies to scale back their plans. Capital expenditure has remained fairly low and reduced bank lending meant that capital projects remained unfulfilled for many SMEs. Research and development investment grew, with research from Grant Thornton showing that 8500 new UK products were registered in 2011 (up from 8000 in 2010) and ranking second in the world for NPD behind USA.

The Food & Drink Federation's vision is now for the UK food and drink industry to deliver sustainable growth of 20% by 2020. Export markets will obviously continue to play a key role in achieving this growth, however with over a third of UK food and drink employees due to retire over the next 20 years, it will also be highly dependant on effectively building the skills of UK employees and successfully attracting and retaining the right talent for the future.

**Richard Ash is part of the Executive Search team at Nigel Wright and works closely with Food & FMCG businesses to attract the right Senior / Executive level talent.**

McQueen

## Will 2012 be a better year for M&A than 2011?



To use a sporting cliché, 2011 was a game of two halves. Pre the summer, the mood for food and drink M&A in the UK was reasonably buoyant. Deals were being done, banks were lending and private equity firms were active.

### SHAUN BROWNE, MANAGING DIRECTOR OF MCQUEEN

Notable UK deals included the sales of Northern Foods, Quorn, Premier Foods canning, Tangerine and Uniq. Private equity investments were made by LDC, Exponent, Change Capital, Blackstone and Risk Capital Partners. Valuations were high with significant multiples paid for attractive assets such as Quorn, Coffee Nation, Complian, Bottlegreen and MyProtein.

The mood changed over the summer. As the storm clouds gathered over the Eurozone and caused collateral damage throughout Europe, the volume of M&A activity began to fall. As prospects declined, the banks adopted a far more cautious policy towards providing debt for acquisitions. Private equity investments in the sector dried up, with the exception of some very small transactions. A few sale processes which had commenced in the first half of the year managed to complete in the second half, the most notable being the sales of Honeytop and Daniels. A number of smaller deals also completed, such as the sale of Fray Bentos to Baxters, two further disposals from Premier Foods and the acquisition of the stricken Cumbrian Seafoods by Findus.

So what are the prospects for 2012? The year started with a bang with the announcement of Müller's recommended offer for Robert Wiseman and Premier Foods confirming that it expects to sell more businesses in 2012. Given the lack of growth being faced by the retailers, we believe that pressure on the supply base will intensify and this is likely to lead to further M&A activity. Some companies will choose to sharpen their focus still further and divest noncore assets. Many companies will be looking to enhance their positions in the categories in which they choose to operate and will be acquisitive, if appropriate opportunities become available. In

addition, we expect to see further interest in UK companies from overseas companies, especially Asian and American, as their economic prospects gather pace and European assets start to look good value.

We believe that private equity will find the food & drink sector a difficult area in which to make new investments in 2012. Whilst they may make incremental bolt-on acquisitions for existing portfolio companies, we think they will often not be competitive in situations where trade players are seeking to enhance their competitive position in their chosen categories and can act faster and generate synergies. Private equity will be further handicapped by cautious lending banks, lack of synergies and investment committee members nervous about the outlook for consumer spending and intense retailer pressure.

Amidst the concerns of the food & drink manufacturers about their profit prospects and their desire to achieve stronger positions in categories, we expect the Regulators to keep a watchful eye on proceedings. In the UK, the OFT flexed their muscles on an increasing proportion of transactions in 2011, notably Kerry / Headland, ABP / RWM and Premier canning / Princes Foods. The battle between manufacturers seeking category strength and regulators seeking to sustain competition is underway.

*Shaun Browne is Managing Director of McQueen, the largest M&A advisory firm specialising in the Consumer sectors. Within McQueen, Shaun focuses on Food & Drink manufacturers. McQueen also operates in Retail and Leisure & Gaming. In 2011, Shaun advised on completed M&A transactions for clients such as Blackstone, Lloyds Development Capital, Morrisons, Baxters and Complian.*

# Mike Hodgson, Managing Director, The Collective Dairy Gourmet Yoghurt.

Last year Mike Hodgson, former Managing Director at St. Ivel, Greencore and latterly Gu Puds, took up the reigns at The Collective Dairy, the New Zealand Yoghurt business seeking to make a success in the UK. He talked to Nigel Wright about life in a start-up environment, as well as his ambition to grow the business over the next few years.

## WHAT WAS THE ATTRACTION TO THE OPPORTUNITY AT THE COLLECTIVE?

I am convinced there is a great market opportunity. Companies such as Danone and Muller do a great job but we think that the Yoghurt market had become a bit "same as same as". We've got a great product and an exciting brand, which is already loved in New Zealand, and we believe there is a gap to create a new sector and add some value to the market.

## AFTER A LONG BLUE-CHIP CAREER AND A HUGE SUCCESSFUL TIME AT GU, HOW HAVE YOU FOUND THE TRANSITION TO THE DAIRY COLLECTIVE?

We only have one life! For me it's important to get as many 'different kinds' of experience as possible. I don't really see it as moving from big to small – when I started at Gu it was a £5m business and when I left it was £35m, still not that big.

The appeal of The Collective was to actually do a 'start-up' and, to some extent, put "my neck on the block". You certainly spend your time differently in this kind of environment. There is much more 'doing' and less managing people; it can also get a bit manic. Fortunately I have a very able business partner - Amelia Harvey (ex Gu Commercial Director) - who keeps me on track!

There is much more freedom and speed of movement in a small business compared to working in a larger organisation. I enjoy that.

## WHAT HAVE BEEN THE KEY CHALLENGES SO FAR?

Gaining distribution and availability is always a big challenge – obviously you want to get your products in front of as many people as possible. Some retailers are more receptive to new brands than others and you need resilience and persistence to persuade buyers to see the benefits of a new, premium priced brand.

Stakeholders and shareholders have to be managed and kept informed; this is usually the case whether you're big or small. We've had an encouraging star, and we're looking ahead positively, but we have a long way to go!

Recruiting the right balance of team in a start up is a challenge, in the very early stages there is so much "doing" but you also need to balance that with experience. We started with Amelia and I and recruited two young, hungry, graduates who are great at making things happen and are also keen to develop classic FMCG skills. As we grow, we'll be looking to bring in a varied mix of experienced candidates and younger, less experienced members to the team.

## WHAT ADVICE WOULD YOU GIVE TO OTHER CANDIDATES LOOKING TO MAKE A SIMILAR CAREER MOVE?

I think you have to know yourself and be honest with yourself. Try to understand how you will react in a different environment that will chop and change everyday and evolve as the business grows. It can be frustrating at times but it's equally rewarding too. You have to be a jack-of-all-trades and understand the broad cross section of running a business. One minute you're deep in a P&L or updating a social media site, the next you're jumpstarting the van to get to a sampling event!

Also, if you're moving into a smaller enterprise, make sure that the trade will support you in the early days. That means having a sound product proposal that's going to be something new to a category and add value for the buyer.

## WOULD YOU EVER MOVE BACK INTO A LARGER BUSINESS?

Never say never, but I think our challenge is to grow "The Collective" and create our own larger business!

## WHAT WAS YOUR EXPERIENCE OF THE RECRUITMENT MARKET AFTER YOU LEFT GU?

I made the decision to leave Gu shortly after it was bought by Noble Foods because I wanted to take on a new challenge. I was grateful to be introduced to some very helpful contacts which eventually led to a number of potential job opportunities.

I think that people tend to place far more importance on the culture, values and leadership of a business than they ever have before. This makes it more challenging for companies seeking to introduce the best talent. From the perspective of someone trying to develop the capabilities of a business by bringing the right people on board - it's never easy - and again I am grateful for the advice and help I have received over the years.

Generally though, I believe that people today want to have more freedom to 'make things happen' and small businesses can offer them this opportunity. In my recent experience this has become more important to people than the incentives bigger corporates can offer, which is just as well, because I could never match the salaries etc. of the bigger corporates!

## WHAT SPECIFIC CHALLENGES DOES THE DAIRY INDUSTRY THE UK FACE?

The Dairy industry in the UK, in my view, is a land of opportunity! It's already considered to be a 'healthy' category and that perception will only increase. In terms of challenges, there are unique elements to the Dairy sector but at the moment we're wholly focused on bringing newness and innovation to the category.

## WHAT IS IT ABOUT THE FOOD AND DRINK SECTOR THAT HAS SEEN YOU DEVOTE YOUR CAREER TO IT?

Well, I love food! I used to own a restaurant in the Lake District and food generally, has always been a passion. Chilled food is a fast paced and vibrant sector to work in. Product development is always very important and there are lots of ways in which you can engage with your customers. I get the same kick from seeing the response to new products, as I did putting a new dish on the specials board in my restaurant and seeing the orders come in.

## WHAT CONSUMER BRANDS DO YOU LOOK TO FOR INSPIRATION?

We try and take inspiration from all around us. Two chefs in New Zealand started our business, and the food and wine there is fantastic. I'm

fascinated by food and drink trends and I think that London in particular is an inspiring place for those working in the sector. There is brilliant product inspiration and design all around us in the restaurant and retail scene. For example, Whole Foods in Kensington is a fantastic consumer experience offering an exciting range, superbly presented alongside a number of restaurants offering different food options.

If I had to pick one brand that has been front of mind recently, I would choose Nespresso. The product consistently delivers quality and the design of the products, merchandising, collateral and retail outlets are all aspirational. Their engagement with consumers and follow up is also very strong.

## WHAT IS YOUR GREATEST ACHIEVEMENT TO DATE?

I hope my greatest achievement is still to come, but I am constantly grateful to the people I've worked with who still meet me for dinner, a coffee or breakfast!

## WHAT IS THE BEST PIECE OF ADVICE YOU HAVE RECEIVED IN YOUR CAREER?

I always liked the way that Terry Leahy talked about "following the consumer" I think if you consistently check in your mind, what they would want, and do it well, you will succeed.

At The Collective, we try and make it easy for people to do business with us – be it trade or individual consumers - that is the overarching ethos that pervades everything we do.

### Nigel Wright Executive Search

Nigel Wright Executive search is a specialist search business that focuses on Director, AVP, SVP and C Level placements globally. Our practises cover board and general management, commercial and supply chain and operations functions. Oliver Reed is a Senior Manager and Head of Nigel Wright's Executive search practise in the UK.

For more information about our Executive Search offering please visit [www.nigelwright.com/executive](http://www.nigelwright.com/executive)





# DIY Rebuilding?



Whisper it quietly, but it seems that we are witnessing a very small upturn in fortunes in the home improvement and building products sectors. Whilst the general outlook is still cautious, early signs suggest that the DIY sector might have hit the bottom of its deep trough and is now recovering slowly.

## DAVID LOVENBURY, SENIOR CONSULTANT

Over the last few months our consultants have noticed a sharp rise in the number of live assignments in the sector. This may be partly due to our unique category focus and industry expertise, but a significant factor is that the moribund US housing market has shown tentative signs of life - and we all know that whatever happens in the US eventually happens in the UK.

Major US house-builders like DS Horton and Pulte Group have seen a gradual rise in their share prices. Other stocks, like Chicago Bridge & Iron and Thor Industries, have also experienced sharp rises and given these businesses are primarily engaged in major civil engineering projects, augers well it seems. In January DIY powerhouse Stanley Black & Decker (SBD) beat forecasts with a 27% rise in Q4 earnings as sales grew 17%, to \$2.79 billion. These were their best figures for three-quarters and SBD ended 2011 with a 27% rise in profits and a 24% gain in revenues.

In the UK a couple of the major house-builders have recently reported a small upturn in fortunes and its clear some tepid confidence appears to be returning to the economy. With the above in mind, we took the opportunity to ask Steve Collinge of Insight DIY a few questions about the sector and for his gut-feel about the outlook. Steve runs the Insight DIY website and is probably as close to anyone to the data coming out of both the retailers and their supply base.

## DO YOU FEEL, LIKE ME, THAT SOME CONFIDENCE HAS RETURNED TO THE HOME IMPROVEMENT INDUSTRY?

It's a very mixed picture out there. Those companies who are relying upon their existing product ranges in their existing customers are still finding it tough. However, those businesses who have looked to extend their product categories, launch genuine innovation, identify and approach new customers, new channels and even explore new countries, are finding that there is profitable new business out there.

## WHAT ARE THE KEY CHALLENGES FACING THE HOME IMPROVEMENT AND HOUSEWARES SECTORS IN 2012?

The key challenges remain how to deliver sustainable growth and how to protect company profitability. There's no guarantee of any market growth in the next two years and therefore businesses are going to have to find different ways to develop their offering, engage with their target markets and listen far more closely to what their existing and potential consumers really want.

## EQUALLY, WHAT ARE THE OPPORTUNITIES FOR THE INDUSTRY IN 2012?

For those businesses that are prepared to change, to aggressively go after new business and better meet the needs of both retail customers and consumers, there has never been a better opportunity to take market share and deliver profitable growth.

## WHAT CAN THE GOVERNMENT DO TO GIVE THE WIDER HOME IMPROVEMENT INDUSTRY A HELPING HAND ON THE ROUTE BACK TO RECOVERY?

The Government can always do more, although it was good to see the steps that they took in the recent budget to support small businesses and invest in the 'Growing Places Fund'.

The reality is that while it remains difficult to get a mortgage or increase an existing home loan, house moves and more substantial investment in people's homes will remain at a low level. The correlation between house moves and spend on almost every type of home improvement project, from decorating to gardening is so close, that until people start moving home again, the market will remain subdued.

## DO YOU PERCEIVE ANY FURTHER CONSOLIDATION IN THE INDUSTRY, OR WAS STANLEY BLACK & DECKER THE LAST BIG DEAL?

Consolidation will always remain a feature of an industry such as Home Improvement, whether that it is on the supply side or the retail side. Only last weekend, it was rumoured that Wilkinson along with two other trade buyers were in the running to purchase the Robert Dyas chain. The





tough economic climate will result in more businesses (both retailers and suppliers) being vulnerable to takeover and acquisition, by their more successful peers.

**DO CONSUMERS WANT BRANDS OR VALUE, WHO WILL BE THE WINNERS/LOSERS IN 2012?**

I believe that consumers want both of these things. Yes, they want value for money, which doesn't mean cheapest price, but they also want the reassurance of what brands can deliver for them. Unfortunately, in this market place the number of good, strong brands can be counted on two hands and this was commented on, during the recent Kingfisher results presentation.

The companies who continue to innovate and invest appropriately in their brands will always be desired by consumers and will have to be stocked by retailers.

**IF YOU WERE A 21YR OLD GRADUATE WITH A GOOD HONOURS DEGREE, WHY WOULD YOU ENTER THE DIY INDUSTRY? WHY DIY AHEAD OF FMCG?**

Given the choice, I don't think any 21 year old graduate would favour the DIY Industry ahead of FMCG; unfortunately, it's just not sexy enough. B&Q's initiative to introduce a 'Youth Board' helps to raise the awareness of the industry and if more companies took a similar approach, it would certainly help to raise the profile of the industry and make it more attractive as a career option for graduates.

**LIKE TESCO, HAS B&Q GOT A FEW HARSH MONTHS AHEAD, ARE WE WITNESSING A BIT OF A CONSUMER/SUPPLIER/COMPETITOR FIGHT BACK?**

B&Q and Kingfisher are currently on a high, having successfully delivered their four year 'Delivering Value' strategy. There is yet more value that can be extracted from their global direct sourcing initiatives and therefore I don't see them having many difficulties in the next 6-12 months. Their traditional competition remains relatively weak and (with the exception of CDS The Range) is unlikely to take share from B&Q in the next 12 months.

However, where I do believe that they are storing up problems is in their multi-channel approach. At present, they are the market leader because they have the most and also, the largest stores. However, as the percentage of overall internet sales continues to rise dramatically (now at 10.7% of overall Retail Sales), they could well be storing up problems for the future. With only 2% of B&Q sales currently being solely internet based (compared to 40% at Argos) and with a relatively poor website they are exposed to internet only retailers, whose business lives or dies on a good internet platform.

Last December Amazon became the largest on-line retailer of home and garden products, without any retail outlets at all. How long will it be before they become the largest overall retailer of Home, DIY and Garden products?

**WHAT IS THE RETAIL OUTLOOK LIKE WITHOUT FOCUS, WHERE ARE CONSUMERS GOING?**

Now that Focus has vanished from the retail landscape, it would appear that consumers are switching to the nearest credible retailer of home improvement products. This has undoubtedly benefited B&Q, Wickes, Homebase and probably a number of good independent retailers.

You can argue that there was over capacity in the DIY retail market place with Focus and that we have now reached a far better 'supply versus demand' position.

# Business Leaders Dinner



**In March, Nigel Wright hosted its latest business leader's dinner for clients based in the South of England. The event took place in The Regency Room at the York and Albany, Gordon Ramsey's chic European restaurant in Camden Town.**

The dinner was attended by fourteen senior executives from the UK's Food & Drink and Health & Beauty sectors, comprising CEOs as well as Marketing, Brand and Commercial Directors from leading consumer brands.

The business leaders' dinners, which take place once or twice per month across all of our European territories, are intended to provide executives from the FMCG and wider consumer sector an opportunity to establish connections and discuss topical issues.

The intimate format of the evening meant attendees at the York and Albany were able to enjoy a relaxed and informal setting to network with

other guests and Nigel Wright hosts Robin Weston, Richard Ash, Shona Thom, Stuart Miller and Chris Vallow (pictured).

*"Thank you for a great networking evening that can lead to business opportunities with partnerships between our respective brands."*

**Global Marketing Director, PZ Cussons.**

*"Nigel Wright facilitated an excellent event in which to meet with peers and discuss industry matters in a very convivial atmosphere."*

**Chief Executive Officer, MCM Select Foods Ltd.**

# Tracking our service performance

**'Big data' is one of the trends dominating the strategic agenda at businesses across all sectors. According to the McKinsey report Big Data: The Next Frontier of Innovation, competition, and productivity: 'The use of big data will become a key basis of competition and growth for individual firms'.**

Nigel Wright is committed to offering outstanding customer service across all of its markets and part of that is seeking regular feedback from customers so that we can continually improve our service. Collecting valuable data helps us to refine our processes as well as develop adequate training programs for our teams. This in turn gives us a strategic advantage in the marketplace by allowing us to review issues and then make immediate improvements, across all areas of our business.

Last year, we enjoyed continued growth, expanding our operations in Europe while assisting clients with their growth in key developing consumer markets, such as China and Brazil. Even during this period of rapid expansion both clients and candidates have consistently provided Nigel Wright with excellent feedback for the services they have received.

The UK Consumer Market is an essential part of our European operations. For over twenty years we have worked alongside small UK family firms as well as UK headquartered global leading food and drink brands; supporting them in the selection and development of talent across sales, marketing and operations roles. In 2010/2011 our UK Consumer Business NetPromoter Score, over four quarters, was 88%. That means that 88% of customers would recommend our services to others. This is particularly high for any growing business and we believe it positions us ahead of our competitors.

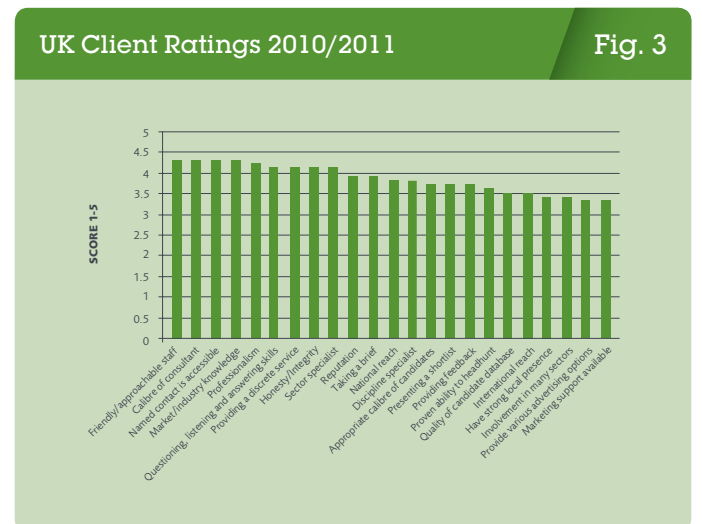
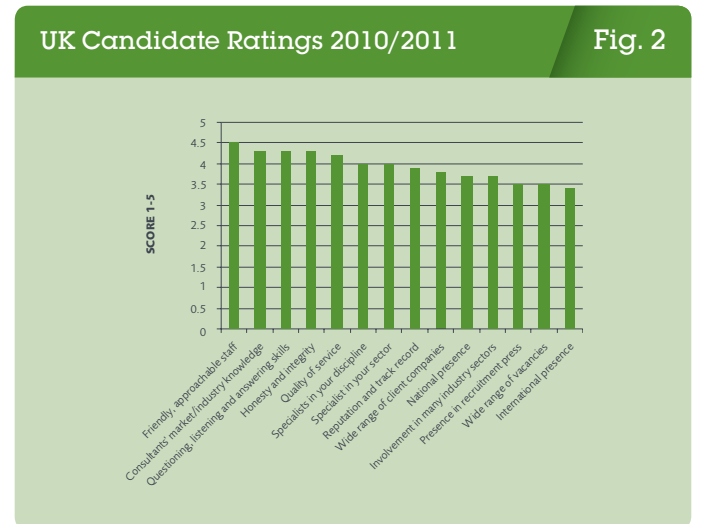
Each month we survey clients and candidates to find out how they perceive our services. As well as the NetPromoter score we also ask customers to rate different aspects of our service on a scale of 1-5 (five being excellent and 1 poor). Fig. 1 represents data from over 300 client/candidate responses over the last four quarters. An overall percentage has been calculated for each service category.

As you can see our relationship building, professional knowledge, service and quality are all rated between 80-100% (Very good to Excellent).

If we delve into the detail, Fig. 2 outlines fourteen of the key factors central to the candidate engagement process. All categories are rated above 3 (Good) while half are rated 4 (Very Good) and above by UK based consumer sector candidates served in 2010/11.

Similarly, as highlighted in Fig. 3 clients are also content with the overall service they received. Out of twenty three customer service factors, none fall below a rating of three (Good). Some key areas central to our business ethos such as sector specialism, professionalism and communication are all rated above 4 (Very Good).

In any aspect of performance measurement the objective is to analyse results and look for ways to improve scores. This is what we have endeavoured to do over the last twelve months and the outcome has been very positive. The first results of 2012, which we published internally in March, show that the NetPromoter score for our UK Consumer business has risen to 95%, while at the same time there has been incremental improvement across all areas of both the candidate and client engagement process.







# Is Consumer Demand About to Rise?



The latest results from IGD's ShopperVista research programme show small improvements in shopper confidence across a number of measures, such as future economic expectations and focus on product quality.

The apparent upturn in confidence coincides with positive movements in other economic and commercial measures, among them rising equity prices, slowing inflation and rising retail volumes.

2012 is a year of special events for the UK, most prominently the Olympics and Paralympics, the Diamond Jubilee and Euro 2012, all of which might have a morale boosting effect on the public. The question, however, is this: do these changes indicate the beginning of a sustained economic recovery – and an upturn in demand – or are we seeing a short-lived “blip” in an otherwise gloomy landscape?

## PUTTING THE DATA IN CONTEXT

Unsurprisingly, signs that the economy may be strengthening have received wide coverage in both specialist and mainstream media. After the traumas of the last few years, any good news is welcome, but it is important to view the latest data with some caution:

**Fundamentals remain unchanged** – it is not easy to associate improving sentiment with any improvement in economic fundamentals; the strategic situation remains worrying

**Improvements are mainly in forward-looking measures** – most of the improvement highlighted in the research is associated with future expectations, not with current circumstances

**Improvements are very minor** – consumer confidence remains weak, compared with pre-crisis standards and improvements to date are very minor.

Given that the economic challenges faced by UK shoppers remain as

daunting as ever, it is not clear why sentiment may be improving. A number of forces may be at work:

**Normalisation** – shoppers have been under relentless pressure for several years and, over time, this may have a “numbing” effect, with shoppers becoming accustomed to bad news.

Alternatively, survey respondents may believe that the worst hazards have now passed – a view which may be mistaken

**Slowing inflation** – inflation has slowed for four consecutive months and this is expected to continue to over the course of 2012, offering some relief to hard-pressed households.

Note, however, that inflation continues to outpace wage growth for most workers and there is no sign that living costs will fall in the foreseeable future.

Improvements in business sentiment may likewise be attributed to a range of factors, some of which may be of limited duration:

**Funding** – having spent some years paying off debt and hoarding cash, many businesses in the UK are now relatively cash-rich, leaving them well-placed to resist further shocks

**Liquidity** – for the time being, financial markets are awash with cash, much of it provided by central banks via quantitative easing.

Rising prices for equities, metals and so on may be due to investors converting cheap cash into “real” assets and not a sign of improving confidence.



## THE ROAD AHEAD

It is clear that improved mood does not necessarily reflect an improving economic situation and, looking ahead, there are still a range of economic hazards that must be negotiated:

**Austerity** – the UK government's austerity programme will begin to take effect from 2012 onwards, with direct impacts on the finances of many households

**Low growth in 2012** – forecasts from a range of bodies suggest that economic growth in 2012 will be relatively subdued, placing more pressure on government funds. On the positive side, however, the danger of a renewed recession has receded

**Shoppers looking the wrong way?** – ShopperVista data suggests that shoppers remain focused on inflation as the central threat to their economic well-being.

## SO, WHAT WOULD IMPLY A SUSTAINED RECOVERY?

Speaking in February, Mervyn King, Governor of the Bank of England suggested that the UK faces a "zig-zag" recovery, with periods of improvement balanced by periods of stagnation or contraction. Businesses will naturally wish to identify a sustained economic recovery when it eventually arrives and to distinguish this from "false dawn" events. IGD suggests that the following indicators will be useful:

**Currency changes** – strengthening of Sterling on exchanges, suggesting increased demand for UK goods/assets.

**Expansion of investment** – watch for new construction by private companies, investment in capital items such as vehicles/machinery and expanded new product development (NPD)

**Falling gilt yields** – look for governments being able to access credit on more advantageous terms, especially for long-dated loans.

**Falling lending costs** – look for a reduced spread between base interest rate and cost of wholesale / retail lending, for both businesses and individuals.

**Increased inward investment** – this would suggest that foreign backers see long-term growth potential in the UK.

**International upturn** – no country can thrive if its neighbours are suffering. Look for a widespread, consistent upturn amongst key trading partners

**Rising numbers of job vacancies / rising wages** – especially for full-time workers and for skilled individuals.

## WHAT ARE THE IMPLICATIONS FOR THE GROCERY INDUSTRY?

**Don't get carried away** – despite a number of "good news" stories, in the media in early 2012, it is difficult to identify any evidence of a long-term economic upturn

**Stay on "emergency running"** – the major challenges facing both the UK and other Western nations remain unsolved; they may even have become worse. Businesses should not anticipate a dramatic easing of trading conditions in 2012

**Stay flexible** – prediction and forecasting remains extremely difficult and any plan or objective set even six months ago may need to be revisited. Over the next few years, flexibility and speed of action will be what distinguishes winning businesses

**Inflation, the next big challenge** – steady inflation in grocery prices has limited the impact of weak volume growth for many grocery businesses. If, however, price change begins to slow down in 2012, some will run into difficulty, especially those with large outstanding loans

In general, any signs of recovery in sentiment should be viewed in context. Businesses must be careful to temper their enthusiasm at apparent improvement; we are not likely to find a silver bullet. We must watch economic and confidence indicators with both interest and caution; a sustained recovery may not be reached for a long time, but businesses must be ready when it does arrive.

*James Walton, IGD's chief economist, can provide you with a bespoke briefing to support your business planning process. For more information, please email james.walton@igd.com or call +44 (0) 1923 851 940.*

# Non Food & Drink Grocery



Category specific retailers continue to struggle in today's economy. Last year, DIY giant Focus, who employed 4000 people across 178 stores in the UK, went into administration.

## SIMON WEST, MANAGING CONSULTANT

Although Focus' assets were bought up by competitors B&Q and Wickes, a lot of the business also shifted to major multiple grocers, increasingly doing business in categories outside of food and drink.

From manufacturers and suppliers in categories ranging from beds to brown goods, consumer products businesses continue to shift trading away from traditional retail partners and towards a far more progressive and diverse customer base.

The reality is that consumer spending and shopping habits are changing and this will continue to impact the British high street for the foreseeable future. Major multiple grocers, therefore, are discovering that the relative importance of doing business outside of food and drink, has become greater. Beds in particular is a good example. During the recession, many bed manufacturers went out of business, due in large part to an over reliance on selling their products in specialist retail stores. Today, however, it is common to see brands such as Silent Night on Tesco's website or in retailers such as Argos.

Consumer electronics retailer DSG, which recently lost its CEO to Apple, is also trying to cut operating costs by £200 million as it battles against the changing dynamic of the UK retail industry. Whilst this evolution is mostly born out of necessity, from a recruitment perspective this opens up a number of significant opportunities for clients and candidates alike. Even for larger consumer products companies, already trading extensively

with the grocers, there are considerable benefits of recruiting FMCG sales professionalism that have a highly developed understanding of their customer base.

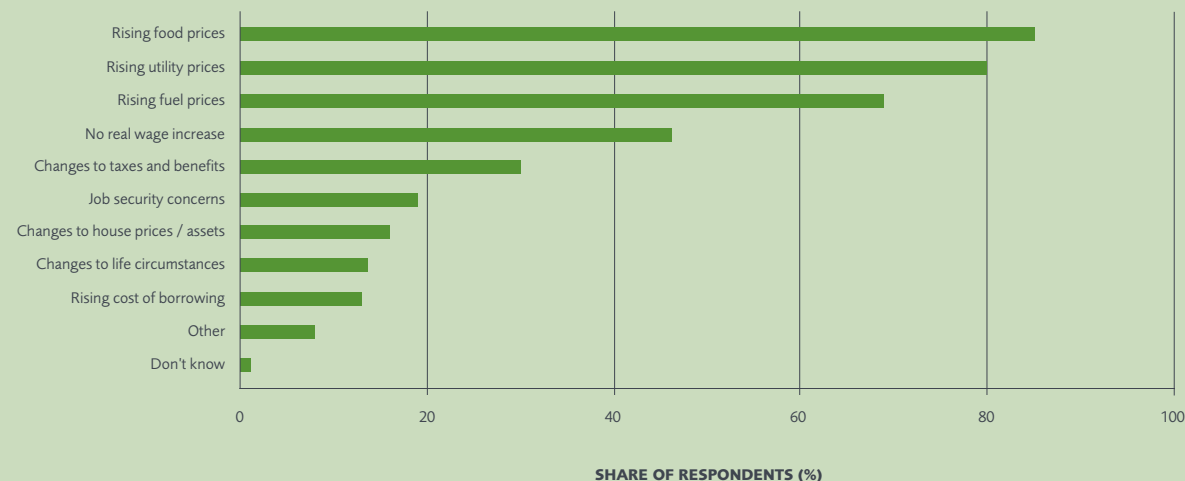
Candidates from other categories, by definition, bring fresh perspectives and working practices to a new employer's working environment, which can only be constructive in both the short and long term. Progressive and proactive SME clients are now seeking to engage with similar individuals who can personally offer them a significant step change in performance, through their knowledge of a previously unknown, or at least underdeveloped, group of retailers.

The experience of Nigel Wright's Consumer UK team has been, that some of the historical reluctance FMCG candidates have demonstrated towards career moves into Consumer Goods, has lessened. As individuals look to broaden their experience with longer term general management objectives in mind, the positive benefits of achieving success across a broader range of product categories opens rather than closes doors. Over the last twelve months we have placed a number of candidates from non traditional consumer goods backgrounds into the sector, for businesses seeking to gain this type of expertise.

The expertise and highly developed candidate network of the Consumer UK team makes us ideally placed to strategically advise and work with a broad range of Consumer Products clients, delivering recruitment projects of this type.

## Main reasons shoppers expect to be worse off, next 12 months

Nigel Wright



Source: ShopperVista IGD, January 2012. Base: 1,000 UK main shoppers per month, balanced sample.





# New report on digital and ecommerce trends

Nigel Wright's latest management report 'Digital futures in the consumer sector: leadership, organisational structure, strategy and investment' confirms that many companies in the consumer industries still have a long way to go in terms of developing sophisticated and 'slick' ecommerce channels.

The research is based on a series of interviews with ecommerce and digital marketing experts, as well as the opinions of over one hundred senior executives from major consumer brands, that completed an online survey.

Although the economic crisis was a catalyst for many traditional consumer businesses to start investing in building digital capability, the majority of respondents to the European wide survey would only describe their digital infrastructure as fairly sophisticated or not sophisticated at all. Despite this, 77% agreed that most consumer businesses must seek to increase investment in digital infrastructure, if they want remain competitive.

The report asserts that to build this capability businesses need to identify and hire the right talent and introduce the right kind of leadership to drive digital change across the organisation. Experts were clear about what this should look like: "...strong commercial background with a good understanding of the mechanisms of the internet and the way in which consumers engage with products both online and offline. Ideally, you need people who have worked in the internet industry and who have conducted business online for a number of years."

Those that completed the survey, however, largely (72%) agreed that there is a shortage of people with the necessary skills to drive digital change in the consumer industries. Individuals with strong 'pure play' credentials are difficult to identify and as a consequence many businesses are still relying on traditional marketers to lead the digital function. According to industry experts, companies should endeavour to have their

digital channel separate from marketing and led by an expert positioned at the same level with the same strategic focus, as other commercial departments.

Traditional consumer businesses do have an advantage in one area. The digital segment will increasingly be based around customer experience as people today expect the same level of service they receive offline, online. Companies that started out offline have a lot of experience in creating excellent customer service experiences for customers, while businesses that start online that don't invest in creating adequate service channels, often fail. Traditional retailers can also utilise their store assets to be creative, and take on pure plays in an environment where they don't exist.

The future of digital, according to experts, relies on a gradual transition from it being the bottom-up responsibility of the 'technocrats' to a situation where it is 'truly owned' by the executive functions. Seventy percent of respondents to the survey felt that eventually, digital would be integrated into all business units. We can deduce from this that many consumer companies see the evolution of the digital channel as something that will require executive leaderships to drive its initial development. In the long term, however, the aim of the strategy should be to provide business units with the necessary skills and autonomy to utilise it for their own purposes.

**View the full report at [www.nigelwright.com/downloads](http://www.nigelwright.com/downloads)**

# Consumer Salary Survey 2012



Salaries in the UK consumer sector, according to our 2012 salary survey, increased on average by just over 4% last year. This was in line with the European average across the other markets we surveyed at the end of 2011/beginning of 2012.

Although there has been an increase in hiring and some marginal improvement in confidence in the sector, the rate of increase has slowed slightly since 2010, where average increases were closer to 5%. This year, those employed in the sector are again less optimistic about the rate of increase they will receive, with respondents to our survey indicating, on average, that they are expecting to get between 3-4% in their next review, which is lower than in the previous two years.

The Nigel Wright Recruitment European salary review is based on the details we hold on our database and is supplemented with the information

that we have collected as part of our annual salary and benefits survey. Whilst we make every possible attempt to ensure the data we provide is accurate it should be noted that salary levels can vary depending on company size, industry sector and the availability of candidates in a specific discipline

**To download the full European Salary Survey please visit [www.nigelwright.com/downloads](http://www.nigelwright.com/downloads). For specific salary advice please speak to one of our consultants.**

Executive (£)	Minimum	Maximum	Average
CEO	150,000	500,000	200,000
Managing Director	90,000	300,000	160,000
Commercial Director	90,000	220,000	120,000
Marketing Director	80,000	180,000	110,000
Sales Director	80,000	180,000	110,000
Operations Director	80,000	180,000	110,000
Supply Chain Director	80,000	180,000	100,000
Procurement Director	70,000	150,000	100,000
National Account Director	70,000	120,000	100,000
Engineering Director	70,000	120,000	95,000
Technical Director	70,000	120,000	90,000

Marketing (£)	Minimum	Maximum	Average
Senior Marketing Manager	40,000	90,000	55,000
Marketing Manager	30,000	70,000	50,000
Trade Marketing Manager	30,000	70,000	45,000
Senior Brand Manager	30,000	60,000	45,000
Senior Product Manager	30,000	50,000	45,000
Brand Manager	30,000	50,000	40,000
Product Manager	30,000	50,000	40,000
Digital Marketing Manager	30,000	50,000	40,000
Assistant Brand Manager	30,000	40,000	35,000
Assistant Product Manager	25,000	35,000	30,000

Sales (£)	Minimum	Maximum	Average
Senior Sales Manager	40,000	90,000	55,000
Sales Manager	30,000	80,000	50,000
Business Development Manager	40,000	70,000	50,000
Regional Sales Manager	30,000	70,000	45,000
National Account Manager	30,000	60,000	45,000
Category Manager	30,000	60,000	45,000
Key Account Manager	30,000	50,000	40,000
Field Sales Manager	30,000	50,000	40,000
Area Sales Manager	30,000	40,000	35,000
Ecommerce Manager	30,000	40,000	35,000
Account Manager	30,000	40,000	35,000
Junior Account Manager	20,000	35,000	30,000

Operations (£)	Minimum	Maximum	Average
Operations Manager	40,000	90,000	55,000
Engineering Manager	30,000	70,000	50,000
Production Manager	30,000	70,000	45,000
Supply Chain Manager	30,000	60,000	45,000
Quality Manager	30,000	50,000	45,000
Maintenance Manager	30,000	50,000	40,000
Logistics Manager	30,000	50,000	40,000
Shift Manager	30,000	50,000	40,000
Senior Buyer	30,000	40,000	35,000
Buyer	25,000	35,000	30,000



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# About Nigel Wright Recruitment

Since its formation, Nigel Wright Recruitment has become the leading specialist consumer search firm in the industry. We have extensive experience of bringing together high-calibre candidates and world-class organisations. Our consultants are committed to delivering a quality service, to clients and candidates alike.

**GLOBAL DATABASE OF TALENT**

We can find the best candidates from anywhere in the developed world. If you require a pan European or a global search, we have the candidates and contacts in your markets to get the results you need.

**LOCAL DATABASE OF TALENT**

We have native consultants present in each of our key territories. They all have strategic relationships with managements up to board level executives that extend over a number of years. This gives us an in-depth knowledge of your national talent pool.

**LINGUISTIC CAPABILITY**

A multi-linguistic capability is essential in today's global businesses environment. We cover 21 languages including all European through to Arabic and Japanese.

**CONSUMER INDUSTRY SPECIALISTS**

We are the largest specialist recruiter for the Consumer sector. We have over 100 international consultants communicating to the market on a daily basis; building a powerful network of clients and candidates.

**ALL FORMS OF RECRUITMENT**

We offer our clients executive search and selection, headhunting, professional networking, database searching and press and online web advertising.

**SALARY LEVEL**

We recruit at two levels on a permanent and interim basis: management and executive. All projects would be managed by a senior consultant, Manager or Director, where applicable.

**DISCIPLINE**

We recruit across various disciplines ranging from Finance, HR, Operations / Supply Chain, Commercial / Marketing & General Management.

