

8th edition of Top 28 Supply Chain Executives in Europe

Turmoil forces supply chain executives to make clear choices

As a result of the ever-growing number of strategic issues, supply chain executives are having to make tough choices. The war in Ukraine has further exacerbated the turmoil that has been affecting global supply chains since the start of the coronavirus pandemic. According to the executives surveyed by Supply Chain Media, the megatrend of sustainability & resource scarcity will have a greater long-term impact than digitalization. The online survey about future leadership was conducted as part of the preparations for the annual Top 28 Supply Chain Executives in Europe ranking.

By Martijn Lofvers (with support from Onno Beijers, Johan Smits, Benjamin Kats, Edwin Tuyn, Oskar Verkamman and Christian Plesca)

At the end of 2020, according to 33 European supply chain executives surveyed by Supply Chain Media, digitalization was the most important megatrend affecting their businesses in the long term, with sustainability a distant second. Since then, however, the war in Ukraine has drastically changed the world from a political and military

perspective, and therefore also from a business and supply chain perspective. Energy prices in Europe have shot up and inflation both in Europe and elsewhere has risen to unprecedented levels. Perhaps unsurprisingly, 78% of supply chain executives now rank sustainability & resource scarcity as being in the top two megatrends, followed by digitaliza-

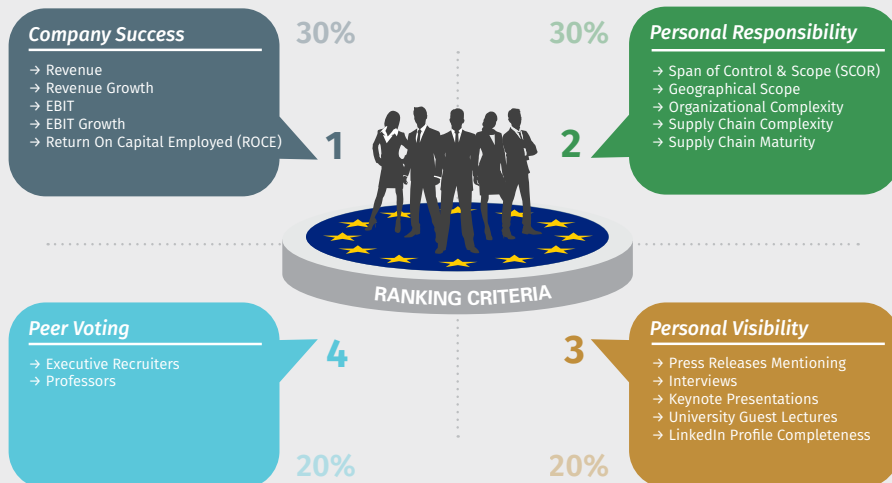
tion (47%) and reshoring or nearshoring (39%). Reshoring is an increasingly hot topic in boardrooms due to the rising geopolitical tensions around the world, not least between the US and China. This shift in the perception of trends is also evident in another recent study: the third edition of the Global Supply Chain Survey by IMD Business School. This

METHODOLOGY FOR TOP 28 SUPPLY CHAIN EXECUTIVES IN EUROPE 2022

For this year's edition, Supply Chain Media, KPMG Advisory and Inspired-Search scanned

the top European executives and compiled a longlist of 65 supply chain executives residing

and leading in Europe. All these executives have either global responsibility or responsibility within the European or EMEA regions.



The methodology for the Top 28 is based on analysis of published company data and financial reports, in combination with peer voting and an executive survey for determining their responsibility, span of control and impact within their organizations. The ranking is based on: Financial Results (30%), Personal Responsibility (30%), Personal Visibility (20%), and Peer Voting (20%).

The first quadrant is the **Financial Results** of each supply chain executive's employer. This is assessed by comparing the company's financial results in the 2021 fiscal year against

survey of 350 executives reveals that the number of issues has grown since the war in Ukraine and, moreover, that the gap between the priorities and the follow-up actions has either remained the same or actually widened. In addition to traditional issues – such as sales & operations planning (S&OP), the alignment of supply chains with the corporate strategy, and digitalization – new trends such as supply chain resilience, cybersecurity and talent retention are now jostling for a place on the supply chain executive's already crowded agenda, according to IMD.

Even though so many executives regard sustainability as an impactful megatrend, 50% say that business transformation & digitalization is still the most important topic in the boardroom, followed by supply chain risk management (39%) and cost savings (36%). Sustainability & supply chain circularity scores just 22%, putting it in fifth place just ahead of talent & change management (19%). Interestingly, sustainability scored similarly low in the previous survey two years ago. Clearly, while sustainability is seen as the main megatrend in the long term, companies are not currently prioritizing it.

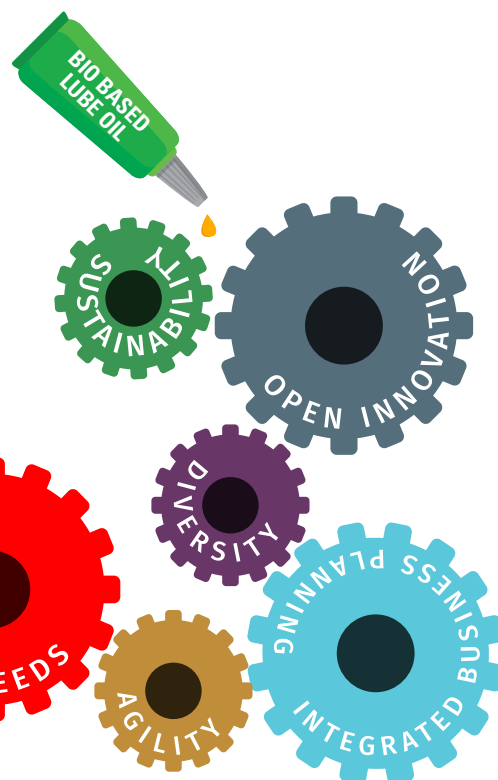
A new question in this year's survey asks about the two most important skills for

supply chain leaders. Resilience & scenario analysis scores highest with 50%, followed by strategic & transformational thinking with 44%.

Strategic execution & alignment is a distant third with 33%. Significantly lower-scoring skills are alliance development & collaboration (22%), engagement with employees (19%), storytelling & change management (17%), social responsibility & sustainability (6%) and digital insight (8%). Apart from digital insight, supply chain executives seemingly consider the softer skills to be less important than the harder ones in today's turbulent times.

Assessing supply chain leaders

To assess the strategic performance of European supply chain leaders, Supply Chain Media (the publisher of this magazine), KPMG Advisory and executive recruitment agency Inspired-Research jointly compiled the eighth edition of the Top 28 Supply Chain Executives Europe. This ranking is based on four dimensions: financial results, personal responsibility, personal visibility and peer votes. Additionally, to be included in the list, executives must have been in their cur-



rent position for at least one year.

Supply Chain Media and KPMG Advisory used several financial metrics to analyse this year's financial results. Given the huge supply chain fluctuations during the pandemic and the severe shortages in the second half of 2021, return on capital employed (ROCE) was identified as the most crucial key performance indicator (KPI) for supply chains this year.

Perhaps unsurprisingly, its successful coronavirus vaccine meant that pharmaceutical manufacturer Pfizer scored highest in the 2021 financial analysis, with Adidas achieving a very commendable second place. Ivanka Janssen of Philips received the highest personal visibility score, but dropped in the Top 28 ranking due to the health technology company's disappointing financial results. Four female executives have disappeared from the Top 28 because of career changes: Francesca Gamboni (from Stellantis to Accell Group), Stephanie Rott (from LVMH to Gerlain), Isabelle Conrot (from Roche to Gartner) and Silke Maurer (no longer at BSH Home Appliances). Likewise, David Prinselaar (Akzo Nobel), Gustavo Burger (Kraft Heinz Company), Volker Schmitz (HP) and Sikko Zoer (Medtronic) are no longer in the ranking due to career moves, while Bruce Edwards of Kellogg Company has dropped out of this year's Top 28.

2020 in terms of the revenue growth, earnings before interest and tax (EBIT) and the Return On Capital Employed (ROCE) on a year-on-year (YoY) basis.

The **Personal Responsibility** is based on the executive's span of control according the SCOR model (plan-source-make-deliver), the managed geographical area (e.g. global or regional area of responsibility), overall supply chain complexity and their supply chain maturity level (from stage 1 to stage 5, based on the Gartner model).

The level of **Personal Visibility** is derived from: the number of press releases issued in their name, the total number of interviews given, the total keynotes held at conferences, and the total university lectures given in the last year.

The **Peer Voting** is done by independent experts, such as executive recruiters, professors and analysts. The peers award their points based on each executive's industry experience, knowledge and their own experience of collaborating with them. This results in a personal Top 28 from the longlist of 65 candidates.

TOP 28 SUPPLY CHAIN EXECUTIVES IN EUROPE 2022

(-) = POSITION IN 2021

28 (-) JOOST DONKERS Chief Supply Chain Officer, Perfetti Van Melle



Joost Donkers became Chief Supply Chain Officer at Perfetti Van Melle in 2019. He is leading the global supply chain transformation programme called Summit which is anchored on five zeros – zero safety incidents, zero quality incidents, zero waste and emissions, zero lost sales and zero cost losses – and relies heavily on bringing about a behavioural and cultural shift in the global supply chain organization. Before joining Perfetti Van Melle, he successfully transformed and led the supply chain of FrieslandCampina Ingredients.

27 (-) MARK HARRISON VP Operations EMEA/LATAM Global Supply Chain & Manufacturing, Pernod Ricard



Mark Harrison joined Pernod Ricard in 2008 as Supply Chain Director Pernod Ricard UK, moving to Australia in 2010 as Global Supply Chain and Procurement Director Pernod Ricard Winemakers, followed by a move to Paris in 2013 as Global Supply Chain Director Pernod Ricard Group to which Global Manufacturing was added in 2016. In 2019 the full Operations scope of the EMEA/LATAM region was added to Harrison's Global Responsibilities for Supply Chain and Manufacturing.

26 (-) MARIA PIA DE CARO CSCO, Nomad Foods



Maria Pia de Caro joined Nomad Foods in 2021. To support both organic growth and growth through acquisitions, she is tasked with integrating the supply chain from materials to customers and transforming it digitally to result in a high-performing organization, with a focus on safety, people, processes, mastery and accountability. Nomad Foods is a dynamic enterprise with 19 manufacturing sites

and 7,000-plus supply chain employees plus over 100 copackers.

25 (20) STEPHAN GOTTHARDT Senior Vice President Europe Supply Chain, Teva



Stephan Gotthardt has been at Teva since 2016. Today, he is responsible for product supply from the European manufacturing network to the European, US and international markets as well as to third-party customers. He is a senior executive with a strong international portfolio of end-to-end supply chain, operations and general management experience. Teva has over 53 manufacturing facilities in more than 33 countries, including 20-plus in Europe.

24 (23) PETER PUYPE Global Head of Supply Chain, Biogen



Peter Puype joined Biogen in 2020. He is responsible for the global commercial supply chain, driving supply chain transformation, organizational capability, creating customer-centric and adaptable supply-to-market models, and ensuring patient supply. He has bio-pharmaceutical experience in manufacturing, packaging and supply chain, in both Europe and the US.

23 (-) SVEN MARKERT Executive Vice President Supply Chain & Logistics, Siemens



Sven Markert has over 30 years of supply chain experience, having worked for several years in the forwarding industry in the 1990s before joining the Siemens Group in 2000. The company has over 300,000 employees and an annual revenue of €62.3 billion. Today, as Executive Vice President for the Supply Chain & Logistics in Siemens' Smart Infrastructure industrial business, he is responsible for steering a supply chain community of around 4,000 team mem-

bers covering over 400,000 tonnes of transport, 20,000 suppliers, 75 production facilities, 250 warehouses and 30 million order lines per year.

22 (19) PADRAIG HEALY Vice President Supply Chain, Nokia



Padraig Healy worked for many years in operations and supply chain at companies throughout Europe – including SCI, Samina and Dell – before joining Nokia, where he has been Vice President of Supply Chain for the past nine years. During the COVID-19 pandemic, he led the Nokia Fixed Networks through the challenges. This tested Nokia's resilience to the extremes, but the supply chain performed exceptionally well.

21 (-) DAVID BOULANGER Executive Vice President & CSCO, Arla Foods



David Boulanger, who studied general engineering at Ecole Civil des Mines de Paris, joined European dairy cooperative Arla Foods in the middle of the COVID-19 pandemic. "Managing a stable supply chain as part of a continuous improvement process is a thing of the past," he said on the 'new normal' in an interview in Supply Chain Movement earlier this year. "Today, more than ever, we need to continuously rethink our operating models, adjust very quickly and make bold strategic moves to strengthen the resilience and the sustainability of our value chain."

20 (5) IVANKA JANSSEN Chief Supply Chain Officer, Executive Vice President, Philips



Ivanka Janssen is responsible for all end-to-end supply chain activities for Philips' health systems, medical devices and personal health products. On LinkedIn she describes her role as "being part of a great team and focused on transforming Philips' supply chain into a customer and consumer-

centric, integrated, digital and agile supply chain to create a competitive edge”.

19 (-) MASSIMO ANDOLINA

Senior Vice President Global Operations, Philip Morris International



Massimo Andolina joined Philip Morris in Lausanne in 2008 as Director, Operations Planning. He became Vice President, Operations of the Latin America & Canada Region in 2011, and moved to oversee the European Union Region's operations two years later. In 2016 he was appointed Vice President, PMI Business Transformation. He has been in his current role since 2018 and is now responsible for an organization of 37,000-plus people and a yearly budget of US\$8 billion.

18 (14) REGIS SIMARD

President Global Supply Chain, GSK



Regis Simard is GSK's President of Global Supply Chain and member of the Global Leadership Team. As a qualified mechanical

engineer, he heads up an organization of 14,000 colleagues who together manufacture and supply for the patients. Simard additionally leads, as part of his role, Quality, EHS and Environment Sustainability at corporate level.

17 (-) ALEXANDRE BAUBERT

Chief Supply Chain Officer, Signify



Alexandre Baubert has been head of supply chain at Signify (formerly Philips Lighting) since 2019. With his background in electronics engineering and space science and his aptitude for maths, he is helping the company transform from conventional to digital lighting and smart energy-saving lighting products and services.

Some call him their 'fearless leader' and he's certainly had to show courage and resilience recently. "Since I joined in 2019, we've faced extremely disrupted supply chain ecosystems, and the pres-

sure is not easing ahead. We must anticipate, decide and execute faster than ever before in this new normal, where resiliency is a competitive weapon that you learn to sharpen as you exit every cycle stronger than you entered it," he stated in Supply Chain Movement earlier this year.

16 (-) CHRISTOPH HÄUSLER

Chief Manufacturing Officer, Refresco



Christoph Häusler joined Refresco as Chief Manufacturing Officer and Member of the Executive Committee in 2021.

His focus, responsibility and accountability in this new chapter of growth under KKR's ownership is to lead the Operational Excellence strategy and successful execution of its strategic programmes, driving productivity gains across the full value chain. With a network of over 75 manufacturing facilities and over 200 logistic sites across Europe, North America and Australia, Refresco is the world's largest independent beverage solutions provider.

15 (22) FREDERIC BRUT

Head of Supply Chain EEMEA & APAC, MSD



Frederic Brut has been leading the supply chain for EEMEA and APAC at MSD (Merck & Co) since 2020. He oversees end-to-end

supply chain functions, developing the strategic approach to deliver internal efficiencies and external transformation of the supply chain from factories to end customers (i.e. blockchain, digital logistics). With MSD, he's sponsoring and volunteering with non-profit organizations in several African countries supporting projects to enhance local supply chains and mentoring healthcare executives.

14 (-) KAREN-MARIE KATHOLM

Chief Integrated Supply Chain Officer, AkzoNobel

Karen-Marie Katholm has a strong track record in supply chain and manufacturing leadership roles in



global companies across different industries. Currently she is Chief Integrated Supply Chain Officer and Member of the

Executive Committee at AkzoNobel, a global paints & coatings company. In this role, she is leading the global supply chain with over 14,000 people across 140 manufacturing sites.

13 (8) EMER CUNNINGHAM

VP Global Supply Chain Internal Medicine, Pfizer



Emer Cunningham is the highest-ranked female supply chain professional in this year's Top 28. She has over 20 years of experience in

the pharma industry across manufacturing, engineering, operational excellence and supply chain. Her experience is in the field of overall programme management of initiatives identified with commercial partners to optimize product portfolios and managing platform processes.

12 (25) RICHARD OOSTERHOFF

VP Operations, Royal DSM



Richard Oosterhoff has long-standing experience in operations and has a strong passion for safety, sustainability, customer

centricity and continuous improvement. In 2019 he was appointed to the role of SVP DSM Operations & Responsible Care. Oosterhoff is end-to-end responsible for the operations of the DSM Food & Beverage division, its supply chain and 17 manufacturing sites on all continents.

11 (9) VINEET KHANNA

SVP Global Head of Supply Chain, Nestlé

Vineet Khanna joined Nestlé in 1986 after completing an MBA and has since held various regional and international roles in finance and control, technology implementation, sales operations and supply chain. He became SVP, Global



Head of Supply Chain in 2018. His contributions beyond Nestlé demonstrate his passion for furthering the sustainability agenda within and beyond the supply chain industry.

10 (26) RALF BUSCHE SVP European Site Logistics, BASF



Supply chain management and logistics are Ralf Busche's passion: "The size and complexity of BASF's chemical logistics are unique. More than ever, high-performance and competitive site logistics are essential for BASF's business success. Transparency, resilience and agility are essential for profitable growth in times of unprecedented business volatility and uncertainty," he says on LinkedIn.

9 (21) MARTIN SHANKLAND Executive Board Member, Global Operations, Adidas



Martin Shankland joined Adidas in 1997 as Finance Director for Adidas Russia/CIS and was Managing Director from 2000

to 2017. From 2017 to 2019, he led Adidas Emerging Markets as Managing Director. Martin was appointed to the Executive Board in 2019 and is responsible for Global Operations.

8 (-) JAMAL CHAMARIO Senior Vice President Global Supply Chain, Estée Lauder



Jamal Chamario has been responsible for implementing end-to-end supply chain solutions and managing operations for all Estée Lauder brands and categories in EMEA and Travel Retail Worldwide since 2018. He has significant experience in supply chain (product development, procurement, planning, manufacturing, distribution and business engineering.

7 (4) EWAN ANDREW President, Global Supply and Procurement & Chief Sustainability Officer, Diageo



Ewan Andrew has been at Diageo for 25 years and was appointed President, Global Supply Chain & Procurement in

2019. Today, he leads the global supply chain team of over 18,000 people based across 132 production sites. His global supply chain team extends from agriculture, distilling, brewing and packaging through to the engagement and delivery of Diageo's brands to customers in 180 markets around the world. Andrew is also Diageo's Chief Sustainability Officer.

6 (7) FARES SAYEGH SVP Supply Chain Europe & Global Supply Network Operations, Procter & Gamble



Fares Sayegh studied electrical engineering in Washington DC and joined P&G in 1988. Following various assignments in plant

management, leadership roles in supply chain as well as a commercial assignment, Sayegh was appointed as Senior Vice President Supply Chain – Europe & Global Supply Network Operations in 2020.

5 (18) THOMAS PANZER Head of Supply Chain Management, Bayer Pharmaceuticals



Thomas Panzer started at Bayer over 25 years ago. He worked in various roles (controlling, accounting, supply chain management)

at three different sites before becoming Head of Supply Chain Management for Bayer Pharmaceuticals. He is responsible for both the global and upstream supply chains, comprising more than 1,600 professionals and roughly 280 brands with approx. 5,400 SKUs and €3.3 billion of inventory supporting more than €18 billion in sales.

4 (17) PAUL CAMPBELL SVP Supply Chain Europe, PepsiCo



Paul Campbell is now geographically responsible for PepsiCo's supply chain in Europe. His role is to look after 'plan-make-move-

customer service' across these categories with responsibility for cost, quality, service, people and indirectly for procurement. Campbell also takes care of health and safety for the sector and drives PepsiCo's sustainability journey.

3 (11) MAGNE SETNES Chief Supply Chain Officer, Heineken



Magne Setnes joined Heineken R&D in 2000 and held various roles in supply chain and commerce between 2002 and 2011, including

Heineken Export, Planning Manager Heineken Netherlands Supply, Director

2 (12) HARALD EMBERGER Chief Supply Chain Officer, Beiersdorf



Harald Emberger held a variety of supply chain leadership roles with Unilever and Mars Inc. before joining Beiersdorf as Chief Supply

Chain Officer – with overall responsibility for the end-to-end supply chain globally – in 2015. He is also a member of the Executive Committee. Beiersdorf's sales increased in 2021 to €7.6 billion, compared to €7.02 billion in the previous year. Sales for the consumer business segment were €6.1 billion, compared to €5.7 billion in the previous year.

"My responsibilities include direct and indirect procurement; planning; manufacturing including that of third parties;

HALL OF FAME

Marc Engel, Chief Supply Chain Officer at Unilever, was the first person to be added to the Supply Chain Movement Hall of Fame in recognition of him being named the No. 1 executive in two consecutive years (2017 and 2018).



Carsten Rasmussen, Chief Operation Officer at Lego Group, was the second person to be included in our Hall of Fame after winning the 2019 edition.



Dirk Holbach, Corporate SVP and Chief Supply Chain Officer at Henkel, was the third person to join our Hall of Fame after topping the 2020 ranking.



Tariq Farooq, SVP Global Supply Chain at Sanofi, was the fourth person to enter our Hall of Fame after securing the top spot in the 2021 ranking.



Supply Chain Heineken USA, Director Control Heineken Global Supply Chain, and Supply Chain Director Brau Union Austria. He was appointed Senior Director Heineken Global Commerce Innovations in 2014 and Managing Director of Brau Union Austria in 2018, before being named as Chief Supply Chain Officer in 2020.

global logistics; IT and process engineering; customer service; logistics, quality management and our training academies. I have strong dotted lines to finance, HR and our business units in the markets. I am also responsible for a unique group we call technology innovation. This is a team of ten people with one project leader whose objective is to get innovations into factories fast and in a sustainable way. It has proved to be a very powerful tool. We have also integrated engineering into this group for end-to-end design, such as of the nine factory investments we are currently working on. In total, we have 16 plants globally at the moment. I have 14 direct reports and around 7000-8000 indirect if we include all the factories," he stated in Supply Chain Movement in 2021.

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(2) SAMI NAFFAKH Chief Supply Officer, Reckitt

Sami Naffakh has more than 25 years of broad international leadership experience in fast-moving consumer goods (FCMG) companies such as Unilever, Danone and Estée Lauder, as well as within Reckitt. Since 2020 he has been Chief Supply Officer and Member of the Executive Board at Reckitt, where he is responsible for the end-to-end supply chain globally. Over the past two years, his focus has been on navigating through the multiple and successive disruptions confronting supply chains worldwide. Meanwhile, he is driving a major transformation in the Reckitt supply operations aimed at becoming responsible and purpose-driven, with a strong focus on ESG, resilience, leading-edge performance, efficiency and effectiveness, and future-proof (with a specific emphasis on digitalization).

In its 2021 annual report, Reckitt listed a net revenue of GBP13,234 million, with growth of 3.5% on a like-for-like basis. Adjusted operating profit was GBP2,877 million, at an adjusted operating margin of 22.9% (excluding IFCN China), down 160bps on 2020. In the business agenda of Reckitt, managing the supply chain was a particular priority, according to the annual report: "In the middle of a pandemic, with brands that play a strategic role in combating infection, maintaining adequate supply was clearly critical. We were able to scale up product supply dramatically when needed and achieved significant performance improvements with our major customers, getting them product on time and at the right levels. We've drawn on that experience to further strengthen our global supply chain to better manage significant supply disruptions and combat cost inflation. These efforts have helped to make the organization more integrated and resilient."

