2025 年春季 ECR 联合工委会会议纪要

Minutes of 2025 Spring ECR Joint Committee Meeting

2025 年 3 月 20 日 上海 康师傅

20th March, 2025 Shanghai Master Kong

一、反垄断公告 Anti-trust

略（omitted）

二、欢迎致辞 Welcome Speech

1. ECR 委员会致辞 ECR China Speech

孔洪亮，ECR 专业委员会秘书长，

中国物品编码中心应用推广部主任

Secretary-General, ECR China Director of Promotion Department, GS1 China, Kong Hongliang

- 在当下复杂的经济环境中，经济复苏面临诸多挑战，外部形势亦不容乐观，零售商、供应商及系统服务商皆承受较大压力，行业发展亟待破局之道。
- In the current complex economic environment, the economic recovery faces numerous challenges, while the external situation remains far from optimistic. Retailers, suppliers, and system service providers are all under significant pressure, and the

industry's development urgently requires strategies to break through the current impasse.

- 希望通过 ECR 平台，达到以下几个目的：一，深化交流、促进协同。ECR 作为专业的分享交流平台，汇聚各方智慧。通过深入交流，实现协同发展，发挥群体优势，共克时艰。二，拥抱变化、创新发展。人工智能的崛起给零售行业带来深刻变革。企业顺应潮流，积极拥抱新技术，才能在市场竞争中赢得先机，实现长远发展。三，彼此赋能、优化生态。ECR 平台促进各方彼此赋能，共享资源与经验，共同优化生态环境，推动整个行业的健康、可持续发展。First, deepen exchanges and promote collaboration. As a professional platform for sharing and communication, ECR brings together the collective wisdom of all parties. Through in-depth exchanges, we can achieve synergistic development, harness the collective strengths, and tackle challenges together.Second, embrace change and innovate for growth. The rise of artificial intelligence is driving profound transformations in the retail industry. Only by aligning with trends and actively adopting new technologies can enterprises gain a competitive edge and achieve long-term growth.Third, empower each other and optimize the ecosystem. The ECR platform facilitates mutual empowerment among all stakeholders, enabling the sharing of resources and experiences to collectively optimize

the ecological environment and promote healthy, sustainable development across the entire industry.

2. 康师傅控股 Master Kong Speech

郑弘祺，康师傅控股 CIO

Master Kong, CIO, Flint

- 强调 ECR 平台为康师傅在新理念、先进工具及创新方法上的探索提供了丰富资源与宝贵机遇。以码为核心的 ECR 体系至关重要，作为提效机制、创新业务模式以及构建价值共同体的战略枢纽，有着多元价值。
- The ECR platform underscores its role in providing rich resources and valuable opportunities for Master Kong's exploration of new concepts, advanced tools, and innovative methodologies. The barcode-centric ECR system is of utmost importance, serving as a strategic hub for efficiency-enhancing mechanisms, innovative business models, and building a value community, thereby delivering diverse value.
- 未来，期望借助 AI 整合数据，携手 ECR 协会重塑零渠供整合生态圈。
- In the future, we aim to leverage AI for data integration and collaborate with the ECR platform to reshape the integrated zero-channel supply chain ecosystem.

三、ECR 工委会汇报

1. 供应链工委会阶段性汇报

Supply Chain Optimizing WC Working Updates

联合汇报人：

赴中国生产运营数字化负责人，郑晨越

西门子中国有限公司大客户负责人，刘堃宇

朗博斯特自动化有限公司客户总经理，丁金龙

Joint reporters:

Production Operations Digitalization Lead for China, Zheng Chenyue

Head of Key Accounts, Siemens China Ltd., Liu Kunyu

Customer General Manager, Langboste Automation Co., Ltd., Ding Jinlong

- 需求端创新：与天猫共建大数据平台，实时抓取消费者评价进行产品迭代，如基于 "辣口" 反馈开发李施德林樱花蜜桃漱口水，成功打造明星 SKU；应用机器学习算法实现经销商 - 门店 - 城市级需求预测，预测准确率提升 40%。
- Demand-Side Innovation: Jointly built a big data platform with Tmall to capture real-time consumer reviews for product iteration. For example, based on "la kou" (spicy flavor) feedback, the Listerine Cherry Peach Mouthwash was developed, successfully creating a star SKU. Machine learning algorithms were applied to

achieve distributor-store-city-level demand forecasting, increasing forecasting accuracy by 40%.

- 供应端敏捷化：通过电子记录、3D 打印及 AR 技术实现产线快速换型，数字孪生技术模拟混合工艺参数，使新品试车一次性成功率提升至 95%。西门子提供的工业元宇宙解决方案，依托物理机理模型与算法结合，在研发阶段缩短 30% 实验周期，生产阶段实现实时工艺调优。
- Supply-Side Agility: Leveraged electronic records, 3D printing, and AR technology to enable rapid production line changeover. Digital twin technology simulated hybrid process parameters, raising the first-time success rate for new product trials to 95%. Siemens' industrial metaverse solution, combining physical mechanism models with algorithms, shortened the experimental cycle by 30% during R&D and enabled real-time process optimization during production.
- 数字化生态构建：设立互联网学院与数字化办公室，通过沉浸式技术培训提升一线员工数字素养，累计收集超 200 条来自车间的创新建议。朗博斯特开发的 AI 备件识别系统，将传统备件更换周期从 3-4 天缩短至 4 小时内，显著提升供应链响应速度。
- Digital Ecosystem Construction: Established an Internet Academy and Digital Office to enhance frontline employees' digital literacy

through immersive technology training, collecting over 200 innovative suggestions from the shop floor. Langboste's AI spare parts recognition system reduced the traditional spare parts replacement cycle from 3-4 days to within 4 hours, significantly improving supply chain responsiveness.

2. 消费者需求与创新工委会阶段性汇报

Consumer Demand & Innovation WC Working Updates

联合汇报人：

伊利品类经理，宋玲

联合利华供应链经理 Jennifer Song

Joint reporters:

Category Manager, Yili Group, Song Ling

Supply Chain Manager, Unilever, Jennifer Song

- 当前零供关系已从货维、场维时代转向以人为中心的新阶段，消费者呈现 "理性消费 + 功能升级" 的双重特征：2024 年数据显示，尽管整体消费单价下行，但健康属性强的茶饮品类增速显著，同时个性化需求催生了睡眠改善、儿童营养等细分市场。厂商需从商品和渠道端满足消费者需求，展示针对消费者健康、个性化需求的产品研发。
- The current retailer-supplier relationship has evolved from a merchandise-focused and venue-focused era to a new stage

centered on human needs. Consumers exhibit dual characteristics of "rational consumption + functional upgrading": 2024 data shows that despite overall downward pressure on unit prices, tea-based beverage categories with strong health attributes have seen significant growth. Meanwhile, personalized demands have spawned niche markets such as sleep improvement and children's nutrition. Brands and manufacturers must address these needs through product innovation and channel optimization, demonstrating R&D capabilities aligned with health-conscious and personalized consumer preferences.

- 提出通过数字化平台实现需求与库存的动态平衡。针对天猫超市 2 万 +SKU 与 26 个仓位的复杂管理场景，团队构建了"控制塔" 一体化平台，整合三方数据实现全链路库存可视化，通过 AI 算法精准定位缺货归因，将爆品有货率提升 1.5 个百分点，库存水位降低 1%。该系统不仅解决了传统人工管理的效率瓶颈，更通过消费者需求预测优化了端到端备货策略，在提升客户满意度的同时实现了成本控制。
- Propose a dynamic balance between demand and inventory through a digital platform. In response to the complex management scenario of Tmall Supermarket involving over 20,000 SKUs and 26 warehouse positions, the team constructed an integrated "Control Tower" platform. By integrating third-party

data, this platform achieved end-to-end inventory visibility. AI algorithms were employed to accurately pinpoint stock-out attribution, leading to a 1.5 percentage point increase in the in-stock rate for popular products and a 1% reduction in inventory levels. This system not only resolved the efficiency bottlenecks of traditional manual management but also optimized end-to-end stock preparation strategies through consumer demand forecasting. As a result, it enhanced customer satisfaction while achieving cost control.

3. 信息化与解决方案工委会阶段性汇报

IT & Solutions WC Working Updates

汇报人：

毛凤明，中国物品编码中心产品开发运营与数据共享室主任

Reporters:

Director of Data Sharing Division of Product Development and Operations Department, GS1 China, Mao Fengming

- 分享了家电、家具家装领域以旧换新政策，商务部通过 GS1 商品条码强化资金监管，解决补贴产品界定、交易协同及事后审计难题。利用 GS1 条码实现数据交叉核验，揭示假冒产品、信息错误、套证等乱象，有效支撑补贴资金精准投放与风险防控，凸显数据标准化对提升监管效率的关键作用。

- Discussed the trade-in policy for home appliances, furniture, and home improvement sectors, where the Ministry of Commerce strengthened fund supervision through GS1 product barcodes to address challenges in defining subsidized products, transaction coordination, and post-audit compliance. By leveraging GS1 barcodes for cross-data verification, the initiative uncovered irregularities such as counterfeit products, information discrepancies, and certificate fraud, effectively supporting the precise allocation of subsidies and risk prevention. This highlights the critical role of data standardization in enhancing regulatory efficiency.

4. 全渠道零售工委会阶段性汇报

Omni-channel Retail WC Working Updates

联合汇报人：

菜鸟全球供应链事业部，行业高级专家，项艺 和贝泰妮集团供应链 ITBP 副总监，李操

Joint reporters:

Senior Industry Specialist, Global Supply Chain Division, Cainiao, Xiang Yi

Deputy Director of Supply Chain ITBP, Betteni Group, Li Cao

- 以 AI 构建数字化供应链平台“能量屋”，针对商家在供应链计划、销售预测、补货及库存健康的核心痛点，提供定制化解决方案。
- Constructing a digital supply chain platform "Energy House" through AI, addressing merchants' core pain points in supply chain planning, sales forecasting, replenishment, and inventory health with tailored solutions.
- 三大核心优势：其一，深度结合阿里生态数据资源，实现从营销拆解到物流履约的全链路数字化穿透；其二，依托运营专家团队提供持续调优服务，区别于传统交付即终止的解决方案模式；其三，通过 AI 算法托管机制，构建 "预测 - 决策 - 反馈" 的闭环系统，支持人工干预与机器学习的双向迭代。
- Deep Integration with Alibaba Ecosystem Data: Achieves end-to-end digital penetration from marketing decomposition to logistics fulfillment by leveraging Alibaba's ecosystem data resources. Continuous Optimization Services: Distinct from traditional solution models where delivery marks the end, this platform provides ongoing tuning through operational expert teams. AI Algorithm Trusteeship Mechanism: Builds a "forecasting-decision-making-feedback" closed-loop system via algorithm trusteeship, supporting bidirectional iteration between human intervention and machine learning.

- 未来规划中，将进一步推进 AI 辅助决策的智能化水平，通过算法托管实现供应链各环节的动态协同，最终目标是在多级仓网结构下提升库存周转率、降低缺货率。
- Future Plan: We will further advance the intelligence of AI-aided decision-making, enabling dynamic collaboration across supply chain links through algorithm trusteeship. The ultimate goal is to enhance inventory turnover rate and reduce stock-out rate within multi-level warehouse network structures.

5. 法律政策工委会汇报

Policy & Law WC Working Updates

汇报人：

中国物品编码中心物流供应链推广高级主管，丁一

Reporter:

Senior Manager, Logistics & Supply Chain Promotion, GS1 China, Ding Yi

- 分享围绕国家、地方及国际相关政策展开。国家层面，一季度多项政策与零工企业和物流行业密切相关。如交通运输部印发相关行动方案，强调标准引领，涉及运输结构调整等多方面，有 22 项具体任务；国家发展改革委发布物流数据开放互联试点工作通知，旨在降低社会物流成本；商务部等制定稳外资行动方案，释放积极信号。

- Policy Sharing Focused on National, Local, and International Developments. National Level: In the first quarter, multiple policies closely aligned with gig economy enterprises and the logistics industry were rolled out. For example: The Ministry of Transport issued an action plan emphasizing standardization leadership, covering transportation structure adjustment and other areas with 22 specific tasks. The National Development and Reform Commission released a notice on pilot projects for logistics data open connectivity, aiming to reduce societal logistics costs. The Ministry of Commerce and other agencies formulated an action plan to stabilize foreign investment, sending positive signals.
- 地方层面，浙江等地就政府采购云平台电子卖场及商品条码应用发布要求。国际方面，欧盟于去年生效可持续产品生态设计法规，要求 2030 年前在欧盟范围内对所有生产和销售产品应用数字产品护照（DPP），依托条码和二维码等实现产品全生命周期唯一标识，首批聚焦多类产业，后续将推广。各企业需重视相关政策，提前布局 。
- Local Level: Provinces such as Zhejiang issued requirements for electronic marketplaces on government procurement cloud platforms and the application of GS1 barcodes. International Level: The EU’s Sustainable Product Ecodesign Regulation came

into effect last year, mandating the implementation of a Digital Product Passport (DPP) for all products manufactured and sold in the EU by 2030. Relying on barcodes and QR codes for unique identification throughout the product lifecycle, the regulation initially targets multiple industries, with broader rollout planned. Recommendations: Enterprises should closely monitor these policies and proactively prepare for compliance.

6. 绿色可持续发展工委会汇报

Sustainable Development WC Working Updates

联合汇报人：

康师傅饮品事业生产规划部经理，李勇

中国物品编码中心电子商务推广高级主管，高卓君

Joint reporters:

Production Planning Department Manager, Kangshifu Beverage Division, Li Yong

Senior Supervisor, E-commerce Promotion, China Article Numbering Center, Gao Zhuojun

- 企业将可持续发展作为工厂管理的重点，秉持“家园常青，健康是福”理念，从三个方向规划行动方针。能源减碳：生产能耗大，年耗电超十亿度、蒸汽十几万吨，减碳对降成本和履行社会责任都很关键。资源再利用：生产涉及含碳原材料多，优

化原材料使用、减少资源消耗成为重要任务。数字化转型：顺应潮流，推进供应链数字化管理，提高生产管理效率。

- The enterprise has adopted sustainability as a cornerstone of factory management, adhering to the philosophy of "Evergreen Home, Healthy Blessing". Energy Decarbonization: With high production energy consumption (over 1 billion kWh annual electricity and 100,000+ metric tons of steam), carbon reduction is critical for both cost reduction and fulfilling social responsibility. Resource Recycling: Production involves numerous carbon-intensive raw materials. Optimizing material usage and minimizing resource waste have become key priorities. Digital Transformation: Aligning with industry trends, the company is advancing digital supply chain management to enhance operational efficiency.
- 在绿色可持续电商领域，国际上因消费者对绿色商品的消费偏好转变，亚马逊推出“气候友好承诺”计划。但绿色认证种类繁多、标准不一，且信息不对称，GS1 与亚马逊探讨的解决方案是以商品条码为抓手关联管理绿色证书。品牌方申请绿色证书时关联商品条码，上架商品提交认证信息，电商平台核查。这一闭环让各参与方受益，目前已有 60 多家认证机构加入该计划部分应用了商品条码，GS1 也呼吁绿色认证机构利用商品条码助力行业发展。

- Internationally, driven by shifting consumer preferences toward eco-friendly products, Amazon launched the Climate Pledge Friendly program. However, challenges persist due to fragmented green certifications, inconsistent standards, and information asymmetry. A solution proposed by GS1 and Amazon leverages GS1 barcodes to manage green credentials systematically: Brands link product barcodes to green certifications during application. E-commerce platforms verify certification details when listing products. This closed-loop system benefits all stakeholders. Over 60 certification bodies have already integrated barcodes into parts of the program, and GS1 is urging more green certification agencies to adopt barcodes to drive industry-wide progress.

四、主旨演讲 **Invited Speech**

1. 《淘天集团逆向物流智能化建设》

   The Intelligent Construction of Reverse Logistics in Taobao & Tmall, Alibaba Group

   邓玉明，淘天集团物流算法部总监

   Yuming Deng, Director, Dept. of Logistics, Taobao & Tmall, Alibaba Group

- 淘天集团逆向物流智能化建设进展，逆向物流业务场景，随着电商发展，消费者对逆向体验诉求提高，旨在挖掘退货链条痛点；智能化工作进展，构建资源规划、在线调度、服务稽核、智能化服务四大板块能力，依赖淘天数据体系，详述各板块工作，如资源规划中的 AOI 划分等；
- With the rapid development of e-commerce, consumer expectations for enhanced reverse logistics experiences have significantly increased. This initiative focuses on identifying critical pain points within the returns supply chain. The Group has established comprehensive capabilities across four core modules: resource planning, real-time scheduling, service auditing, and intelligent service solutions. Supported by Taotian's robust data ecosystem, detailed implementations include AOI (Area of Interest) zoning in resource planning, among other advancements in each module.
- 未来思考与展望，淘天物流要实现降成本、提体验、促增长，愿与各方合作，秉持让天下没有难做生意的目标，为商家和消费者服务。
- Future Vision and Strategic Goals: Taotian Logistics is committed to achieving cost reduction, experience optimization, and sustainable growth. We aspire to collaborate with industry partners, adhering to our mission of "making commerce accessible

and seamless for all," to deliver unparalleled value for merchants and consumers.

2. 《下一代供应链： 提升韧性、自主和可持续能力》

Next Gen Supply Chain & Operations: A route towards Resilient, Autonomous and Circular Supply chain

蔡明翰，埃森哲大中华区战略与咨询

供应链与运营业务资深总监

Benjamin Chua, Senior Director - Supply Chain & Operations, Strategy & Consulting, Accenture Greater China

- 埃森哲对供应链趋势与发展的见解。基于对多行业、多规模企业的调研，发现供应链聚焦创新、敏捷韧性调整、成本控制三大话题。成熟市场重敏捷度，高增长型市场重创新。
- Accenture's Insights on Supply Chain Trends and Development. Based on cross-industry research across enterprises of varying scales, supply chains are increasingly prioritizing three critical themes: innovation, agile and resilient adaptation, and cost optimization. Mature markets emphasize operational agility, while high-growth markets focus on innovation-driven strategies.
- 未来供应链有两大趋势，智能化与自主化。智能化以智能机器人等助力识别和解决问题，自主化则更进一步，网络、运输、生产等环节自动挂钩且能自动生成动作。如自主化供应链像特

斯拉自动驾驶，从纸质地图到数字化地图再到智能建议，最终实现自主决策。

- Future Trends in Supply Chains: Intelligence and Autonomy: Intelligent Supply Chains: Leveraging technologies like intelligent robotics to identify and resolve operational challenges. Autonomous Supply Chains: Advancing beyond intelligence, these systems integrate automated networks, transportation, and production processes, capable of self-generating actions. For instance, autonomous supply chains mirror Tesla’s autonomous driving evolution — transitioning from paper maps to digital mapping, intelligent recommendations,and ultimately autonomous decision-making.
- 企业能力从 2019 年至今有所提升，很多走向先进能力。未来供应链以智能体为核心，数据成产品，靠知识图谱关联数据，不同智能体负责不同决策任务，最终实现端到端自主供应链。如国外某公司用 18 个超级智能体实现每天 1.9 万多个决策自主化。随着 AI 发展，国内相关能力也在逐步构建。
- Evolution of Enterprise Capabilities and Future Vision: Since 2019, enterprises have significantly advanced their capabilities, with many adopting cutting-edge practices. Future supply chains will revolve around intelligent agents—where data becomes a product, interconnected via knowledge graphs. Each agent

specializes in distinct decision-making tasks, enabling end-to-end autonomous supply chains. For example, a global enterprise employs 18 super-agents to autonomously execute over 19,000 daily decisions. As AI technology matures, domestic capabilities in this domain are progressively being established.

3. 《构建全程可视/协同的数字化订单履约系统》

Invited Speech 3:Building a Fully Visible / Collaborative Digital Order Fulfillment System

居明，康师傅方便面事业供应链中心系统规划组主管

Ming Ju, Head of System Planning Section, Master Kong Instant Noodles Supply Chain Center

- 重点介绍从供应商到工厂生产这一上游环节的协同。方便面制造属离散型，原物料品类多且管控要求严。我们从上下游协同、合规生产、可视化追溯三个方面开展工作。整体架构秉持控股系统中心顶层设计，涵盖智慧供应链订单系统、产销智慧化协同、采购协同、智能制造协同管理及仓储运输等，最终形成管理决策报表。
- Synergy in Upstream Supply Chain: From Suppliers to Production

  The instant noodle manufacturing process, characterized as discrete production, involves diverse raw material categories with stringent control requirements. Our efforts focus on three pillars:

cross-chain collaboration, compliance-driven production, and visualized traceability. Aligned with the holding group's centralized system architecture, the framework integrates intelligent supply chain order systems, production-sales smart collaboration, procurement coordination, smart manufacturing management, and warehouse-transportation integration, culminating in actionable management decision reports.

- 采购环节基于数字化系统搭建履约结构，MRP 将需求转换为物料采购计划，借助 SRM 或 SNC 协同平台做采购订单响应，保证从供应商到工厂环节的可追溯与透明化，实现闭环管理。采购协同平台从物料需求计划 MRP 发起，形成采购订单经 SRM，供应商响应后回传。
- Digitized Procurement Collaboration: MRP-Driven Planning: Material Requirements Planning (MRP) translates production demands into procurement schedules. Platform-Based Execution: Leveraging Supplier Relationship Management (SRM) or Supply Network Collaboration (SNC) platforms, purchase orders are generated, validated, and tracked, ensuring end-to-end traceability and transparency from suppliers to factories. Closed-Loop Workflow: Procurement orders initiated via MRP flow through SRM/SNC, with supplier responses fed back into the system for real-time alignment.

- 在入场物流方面，通过订单协同、采购协同平台及 TMS 生态圈，实现自动预约、排队、访客登记、快速过磅交付，解决了传统送货中的诸多问题。同时，利用电子锁与 TMS 绑定，确保物料运输安全，做到从人防到技防再到硬件硬控的闭环管理。
- Intelligent Inbound Logistics Management: The inbound logistics ecosystem integrates order collaboration, procurement platforms, and Transportation Management System (TMS) to resolve traditional delivery inefficiencies: Automated Scheduling: Seamless integration enables automated dock appointments, queuing, visitor registration, and rapid weighing/delivery. Hardware-Enabled Security: Electronic locks synchronized with TMS ensure cargo safety, transitioning from manual oversight to technology-hardware hybrid control (e.g., real-time monitoring of loading/unloading, temperature, and route deviations).

(2025 年 ECR 春季联合工委会会议合影)

(Group photo from the 2025 ECR China Spring Jointed Committee Meeting)

五、企业参观 \ ECR 沙龙 Company Visit / ECR Salon

- 康师傅形象馆，该形象馆划分为品牌历史区、产品展示区、生产流程区和互动体验区等多个板块，是品牌展示、消费者体验及沟通互动的重要空间。
- Master Kong Brand Image Pavilion: Comprising sections such as Brand History Zone, Product Display Zone, Production Process Zone, and Interactive Experience Zone, this pavilion serves as a vital space for brand presentation, consumer engagement, and interactive communication.

(康师傅形象馆参观）

（Master Kong Brand Image Pavilion）

- 会议前一晚（3 月 19 日），ECR 委员会举办了沙龙活动。
- On the night before the meeting (March 19th), the ECR Committee hosted a salon event.

六、参会企业 Participating Enterprises

- 淘天集团、京东、联合利华、SPAR（中国）、宝洁、雀巢、惠氏、青岛啤酒、伊利、科赴、费列罗中国、菜鸟、路凯、贝泰妮集团、西门子（中国）、励元科技、码尚科技、杉数科技、观远数据、零眸科技、班牛科技、用友网络、兆信科技、先达物联网科技、辰达物联网科技、埃森哲、安永咨询、恒流管理咨询、上海齐炫、康翊企业管理、实物互联网联盟、朗博斯特、金红叶、浙江省质量科学研究院、上海市质量和标准化研究院。
- Taotian Group, JD.com, Unilever, SPAR (China), Procter & Gamble (P&G), Nestlé, Wyeth, Tsingtao Brewery, Yili Group, Kenvue, Ferrero China, Cainiao, Loscam, Betty Group, Siemens China, Liyuan Technology, Marsun Technology, Shanshu

Technology, GuanData, Retail Eyes, Bytenew, Yonyou Network, Zhaoxin Technology, Xianda IoT Technology, Chenda IoT Technology, Accenture, EY, Hengliu Management Consulting, Shanghai Qixuan, Kangyi Enterprise Management, Physical Internet Consortium, Longboth, Gold Hongye Paper, Zhejiang Institute of Quality Science, Shanghai Institute of Quality and Standardization.