Building the Green Supply Chain - 2014

Research Insights on Corporate Social Responsibility in Supply Chain Management

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Research

This report is based on research conducted by Supply Chain Insights in concert with GreenBiz Group during the periods of January-February 2013 and March-June 2014. The goal of the two studies was to gain an understanding of the current state of corporate social responsibility in supply chain management.

Disclosure

Your trust is important to us. As such, we are open and transparent about our financial relationships and our research process. This independent research is 100% funded by Supply Chain Insights.

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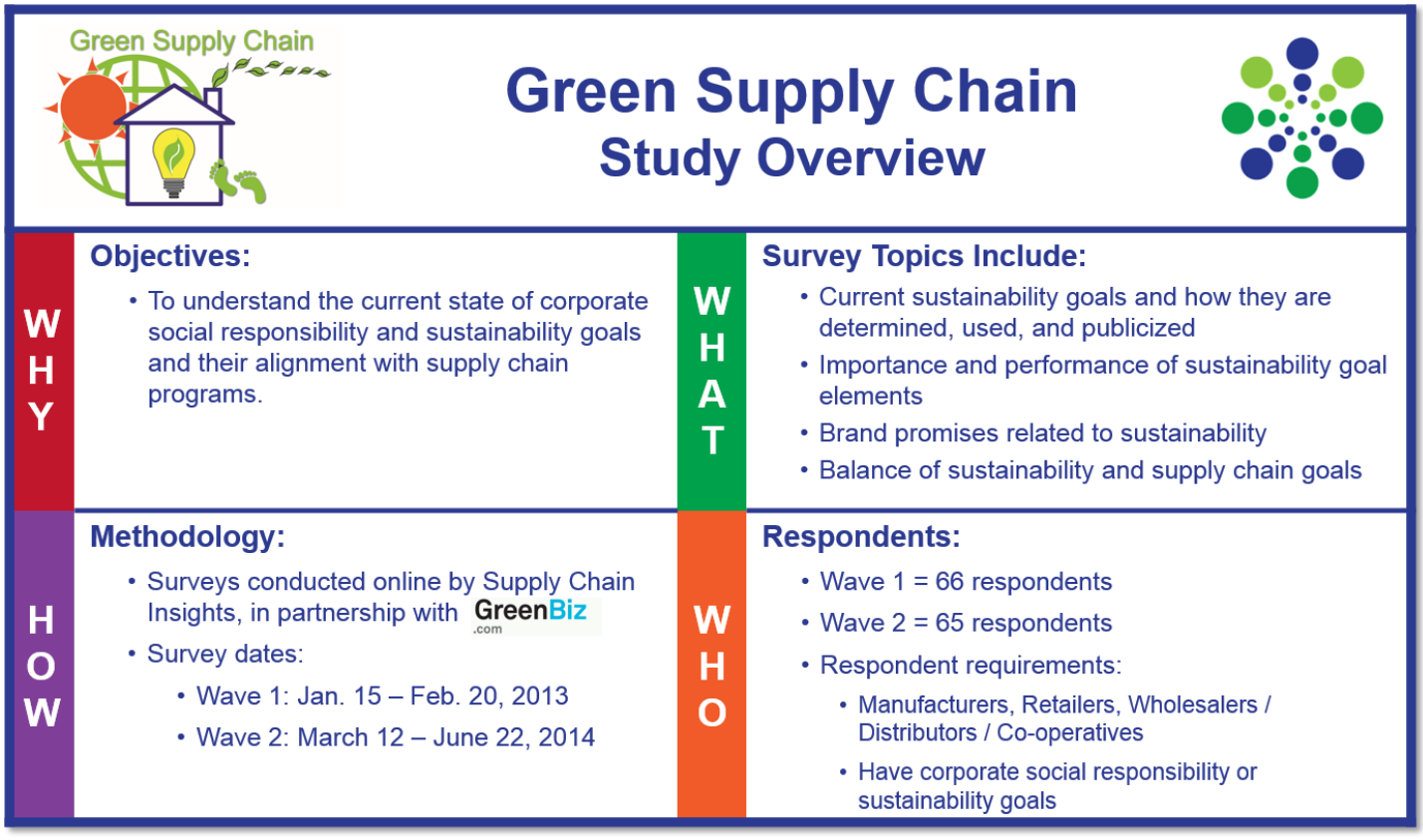
Research Methodology and Overview



Executive Overview

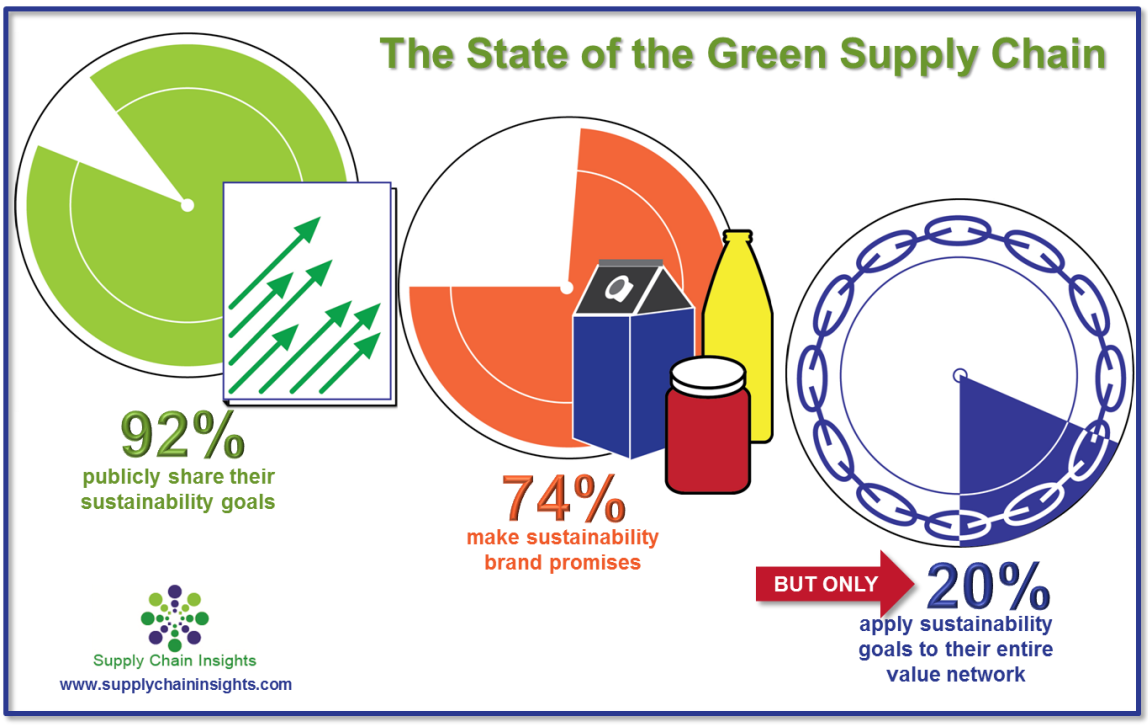
"Supply chain sustainability" is the management of environmental, social and economic impacts and the encouragement of good governance practices, throughout the life cycles of goods and services.

Supply Chain Sustainability (definition) - United Nations Global Compact

Within an organization, supply chain sustainability can be known by many names: the green supply chain, the good citizenship report, Corporate Social Responsibility (CSR) policy, or fair trade. It can be confusing. The programs may have different names, but the goals are focused on creating a better balance between the corporation's efforts to manage profit, people and the planet. For many, this can be a stark contrast to the traditional supply chain goals of the right product at the right place at the right time.

To meet the stated corporate goals for sustainability programs, it is critical for supply chain and corporate sustainability teams to work well together. The success of one is dependent on the success of the other. Over the last ten years, corporate sustainability goals have transformed supply chain objectives causing companies to rethink their definitions of supply chain excellence. Much is in flux. As shown in Figure 1, from our 2013 study, there is a large gap between what companies report and what they measure and manage.

Figure 1. Overview of Scope of Sustainability Work from 2013

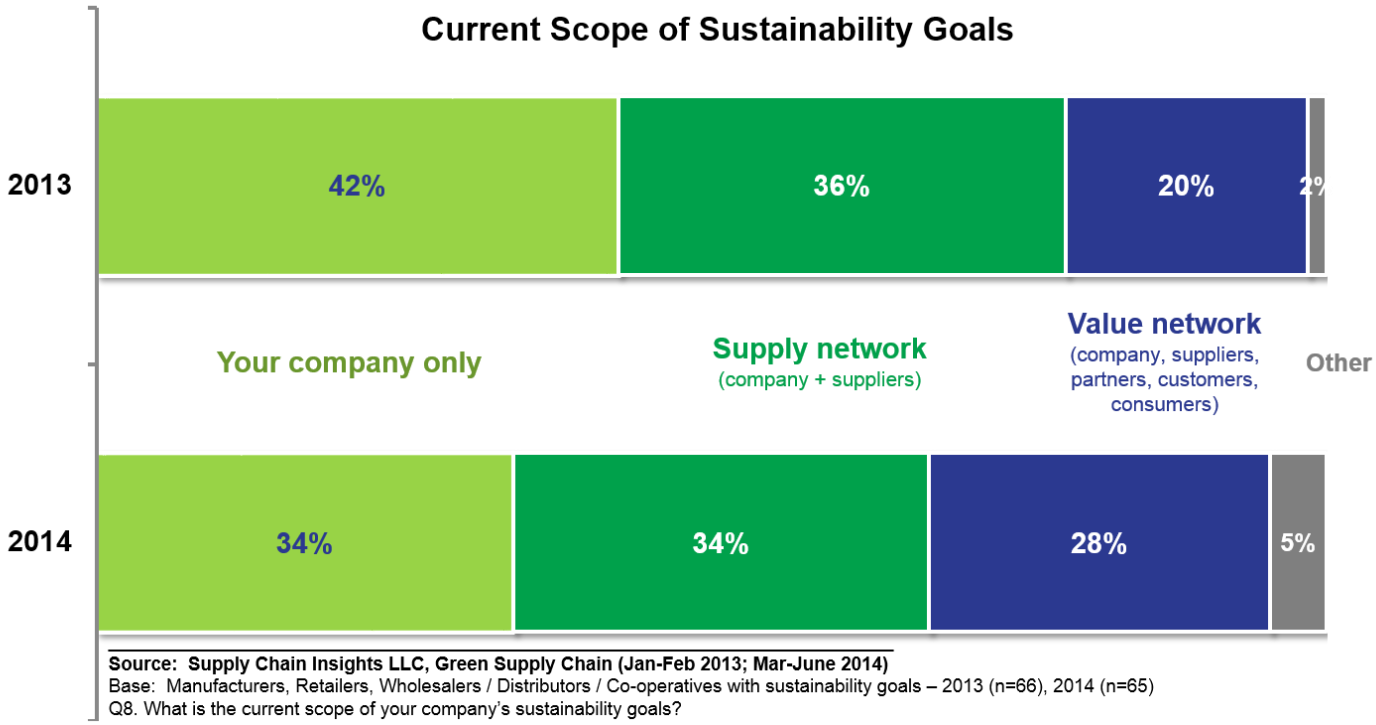


While the importance of these programs has grown over the last decade, in this research we find two disconnects. The first is the company's ability to meet its stated goals based on the scope of activities. As shown in Figure 1, 92% of respondents surveyed in 2013 have a public statement or declaration of goals and policies for corporate sustainability, and it has grown in importance to the definition of the brand promise. In fact, today, 74% of respondents surveyed connect their success in sustainability to their brand statements. For many, the goal is to use sustainability as a brand advantage.

Many companies are vulnerable. The greatest impact on corporate sustainability (often more than 70% of resources consumed by manufacturers, retailers, and distributors) is outside the company's four walls. Yet, as shown in Figure 1, in 2013 only 20% of companies were taking steps to own their entire value network (from the customer's customer to the supplier's supplier.) While the most common focus is on the enterprise, the greatest corporate risk lies outside the four walls of the enterprise, and companies are staking both their corporate and brand reputations on their abilities to deliver.

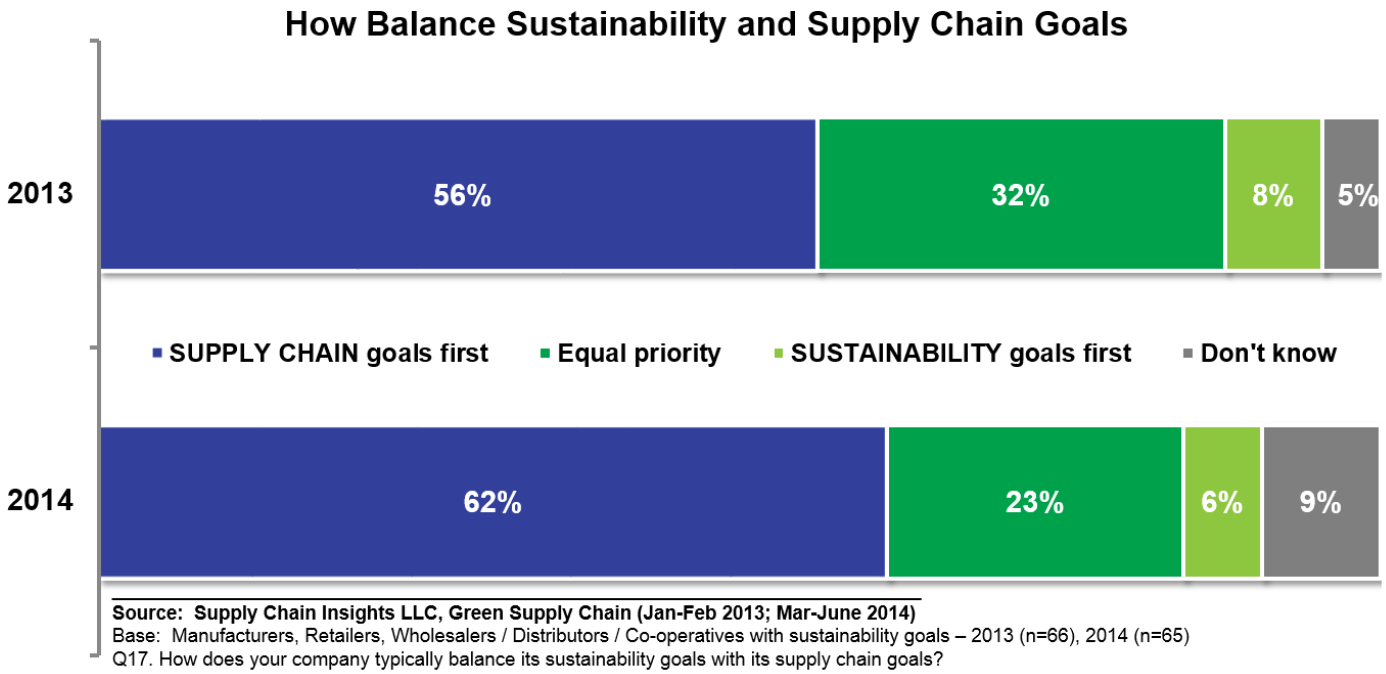
In the 2014 results of the tracking study, as shown in Figure 2, we see a continued focus on enterprise automation with gradual focus on the extended supply and demand networks.

Figure 2: Ownership of the Value Network Across Studies



The second disconnect is decision making. While companies state that corporate social responsibility is important, the two groups (corporate sustainability and supply chain) have different sets of goals and lack common processes and definitions for governance. Many of the decisions are ad hoc and happen quickly to balance customer service and cost. As a result, when given a policy choice between supply chain and corporate sustainability, as shown in Figure 3, more than 50% of respondents will choose the supply chain priorities. In both years of the study, when push comes to shove, the supply chain goals come first.

Figure 3. How Companies Balance Sustainability and Supply Chain Goals



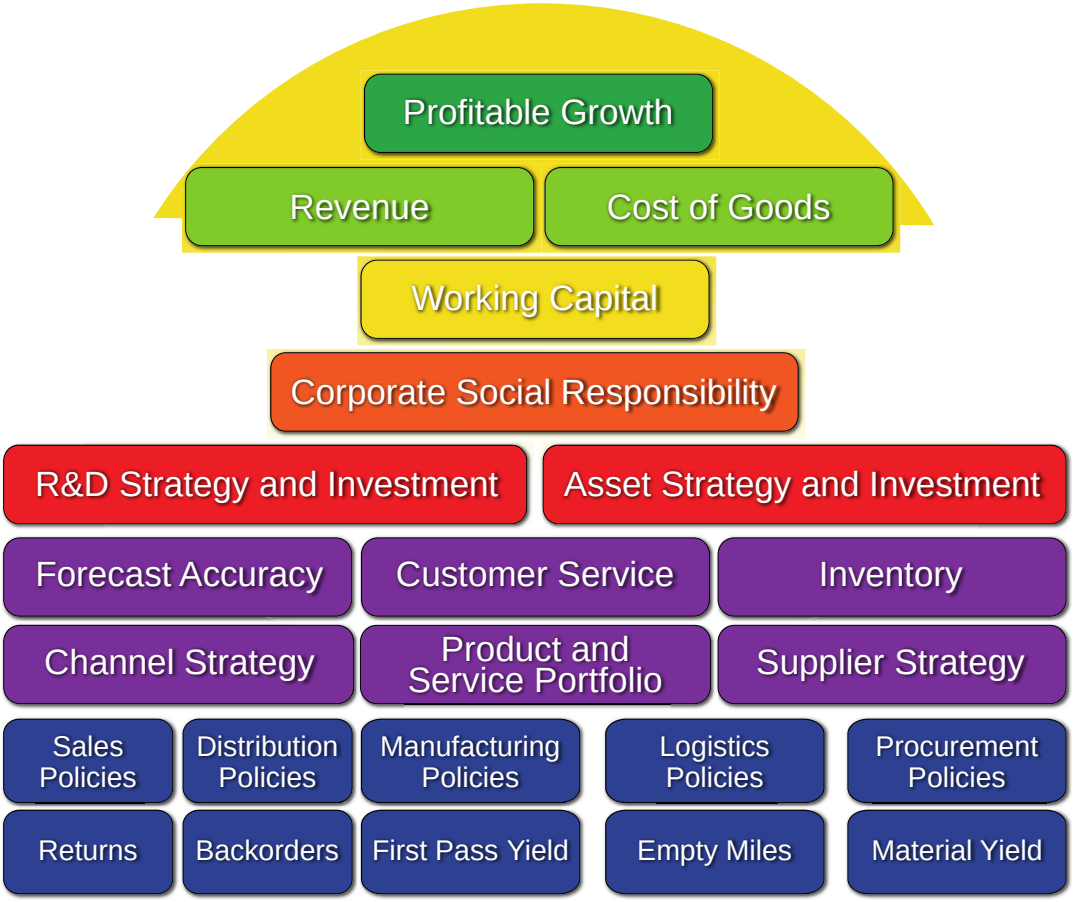
In the two studies we see very little change, if any at all. The patterns year-over-year are very similar. The lack of alignment between CSR and supply chain programs continues to be both an opportunity and a risk.

Moving Forward: Goal and Program Alignment

Within the organization, the two groups—corporate sustainability and supply chain—report to different leaders, and lack alignment. For over 85% of the respondents, the reporting relationship of CSR is not through supply chain leadership. As we see in qualitative interviews, this dual reporting relationship makes it difficult to gain clarity of supply chain strategy, measurement systems, and governance in decision making.

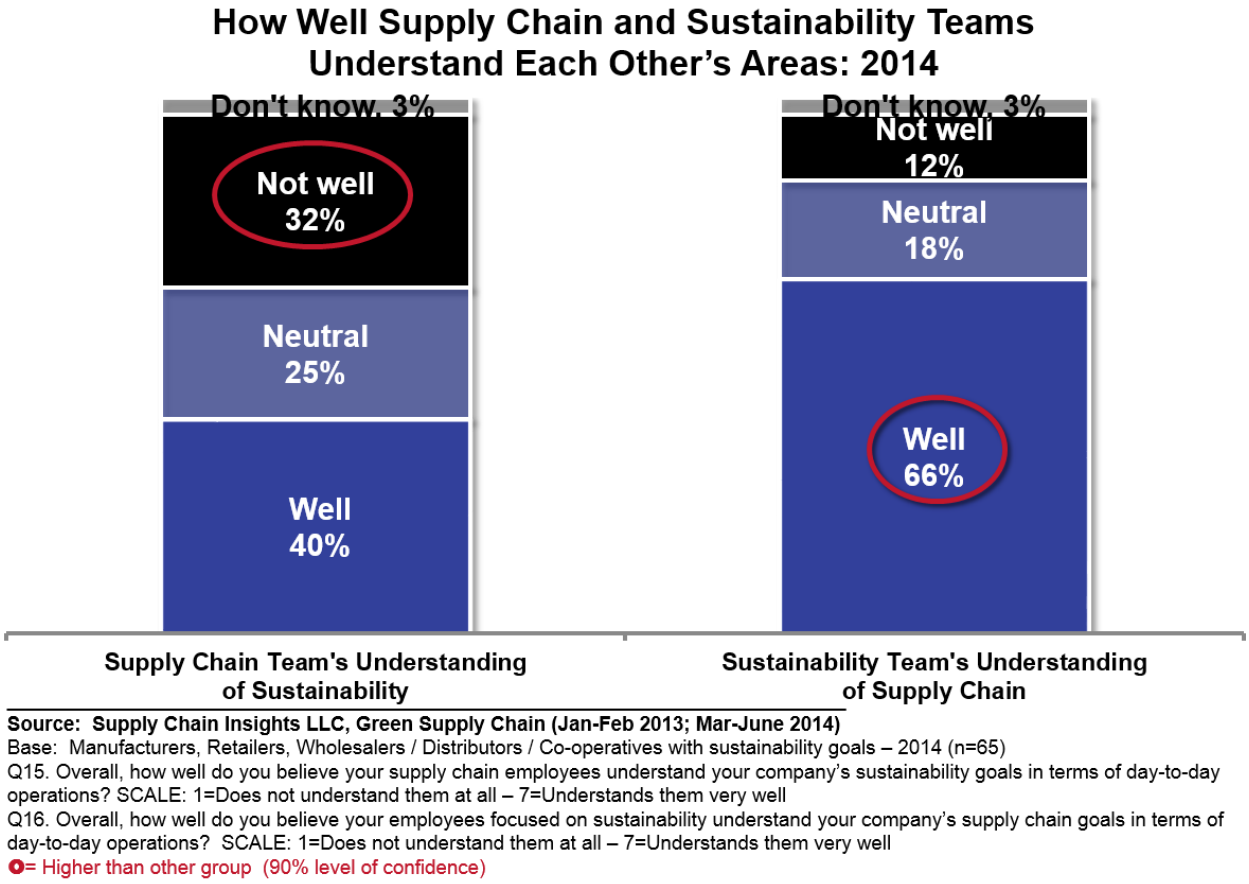
Supply chains are complex systems with increasing complexity. While many executives focus on pieces of the supply chain, the best results happen when it is managed as a whole system. As companies try to make adjustments, they quickly realize that there are trade-offs, as shown in Figure 4. Corporate sustainability is here to stay and needs to be balanced in corporate thinking against traditional supply chain thinking. Companies perform the best when they balance CSR goals as a holistic part of system thinking.

Figure 4. Managing the Supply Chain as a Complex System with Finite Trade-offs



Supply chain processes are now 30 years old, while sustainability processes are less than a decade in maturity. Supply chain processes are three to four times older than CSR processes. While newer, the sustainability teams feel that they understand supply chain goals to a greater degree than the supply chain teams feel that they understand the sustainability goals. This is shown in Figure 5. This trend is present in both studies and the gaps are substantial. The sad reality is that many supply chain leaders lack a holistic understanding of corporate social responsibility goals.

Figure 5. Team Understanding of Goals



Making It Happen

As companies have become larger and more global, aligning these two important teams has become more and more complex. While we have found in other research that 30% of companies have a supply chain center of excellence, a focused effort to bridge the gap between the two organizations exists in less than 10% of these teams[1]. Instead, the groups are being pulled in many directions with an increasing pace of business. Market pressures reign. Other business pressures rank higher than CSR items in day-to-day business pain. The different reporting structures, the lack of actionable reporting in the enterprise, and the immaturity of horizontal, cross-functional processes bring the two groups together on an ad hoc basis which makes it difficult for the two organizations to synchronize and align on a common plan.

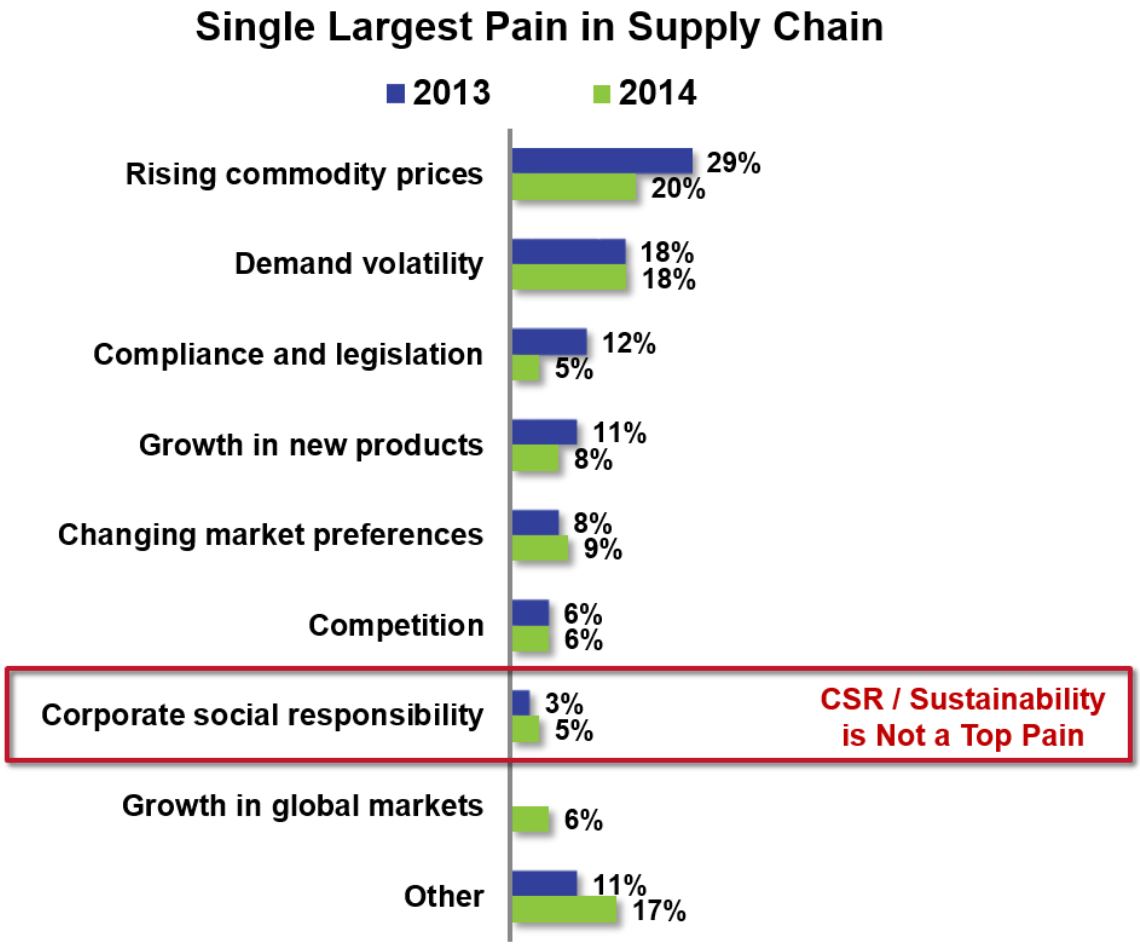
At first, progress is easy. As companies adopt CSR programs, initial results reduce costs and decrease waste; but as the programs become more systemic—especially in the area of supplier development—pressures on program alignment increase. The right decision becomes tougher. For

[1] Supply Chain Insights Report on Supply Chain Alignment

example, the “greenest” decision, given a choice of suppliers, may not result in the lowest cost. Companies are struggling with the right mechanisms to achieve balance and alignment between the two programs.

The right place to start is in the alignment of measurement systems and goals, and to design common processes which drive synergy while recognizing these disconnects. While corporate social responsibility ranks low on the list of business pain, as shown in Figure 6, there is an opportunity to include CSR initiatives as part of a program to reduce commodity prices or improve new product launch. The secret to future success is an ‘AND’, not an ‘OR’, mentality. While the teams believe that CSR goals are important, when compared against the day-to-day issues of the supply chain, they do not rate at the top of the list for either organization.

Figure 6. Supply Chain Pain for the CSR and Supply Chain Groups within the Organization

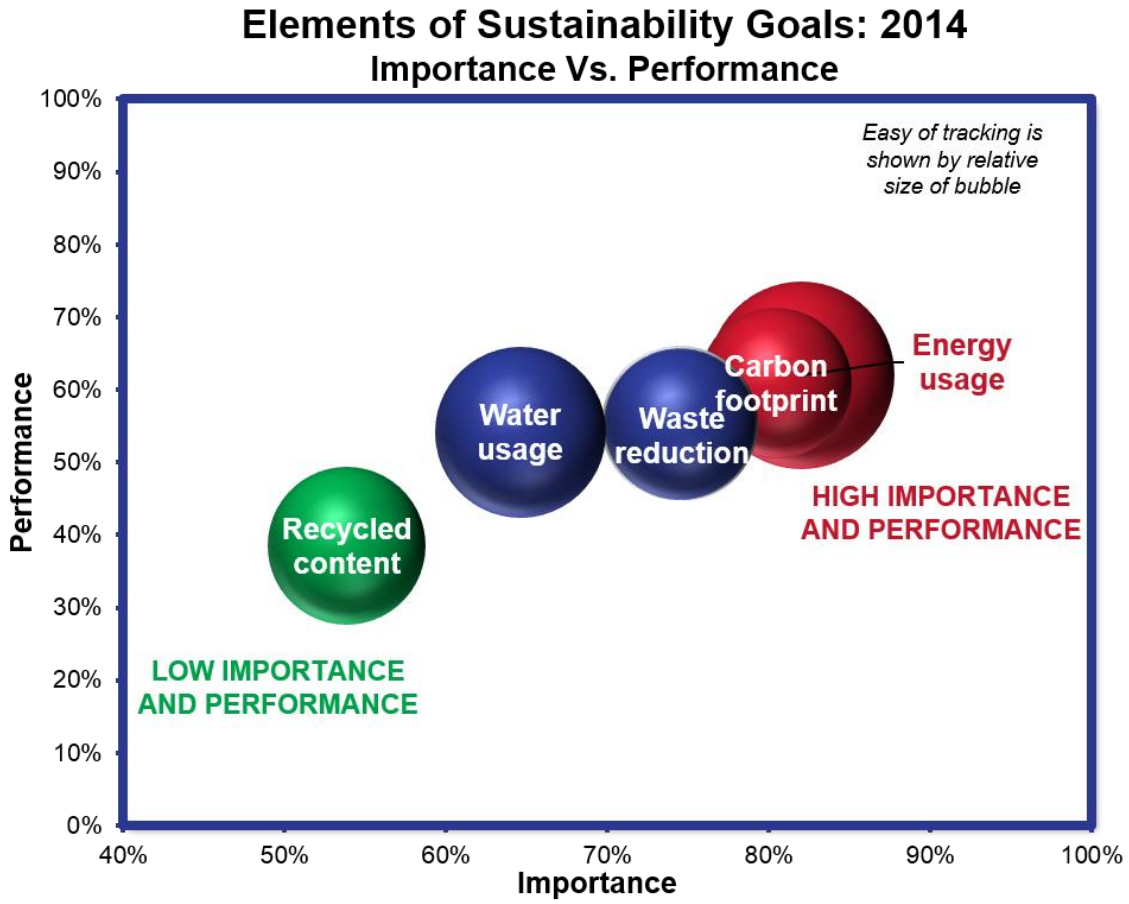


Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q3. What is your company’s single largest pain point in the supply chain, at this point in time?

Metric Alignment

Alignment requires different metrics and changes to reporting analytics. Not all the levers are equal with varying degrees of difficulty for measurement. As shown in Figure 7, while energy tracking and monitoring is the easiest and very important, waste reduction and water usage are important with larger gaps in performance.

Figure 7: Performance versus Importance of Corporate Sustainability Goals



Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals and have specific element within goals
2014: Energy usage (n=50), waste reduction (n=47), carbon footprint (n=46), water usage (n=48), recycled content (n=26*)
Only showing elements with base size = 25+ in both waves; *SMALL BASE SIZE: INTERPRET WITH CAUTION
Q11. How important is each of these elements to your company's overall sustainability goals? SCALE: 1=Not at all important – 7=Very important; Q12. How would you rate your company's performance on meeting your goals for these same elements? SCALE: 1=Poor – 7=Excellent; Q13. Please select up to 3 elements that are easiest for your company to track, in terms of progress.
Showing top 2 box (rated 5-7 on 7-point scale)

Not all companies measure the same things, so the requirements for technology providers vary. The elements measured will vary by value chain. For example, over the last decade the apparel industry championed fair labor standards, while the consumer electronics market is driving the reduction in the use of conflict minerals. The most commonly measured elements are energy, water usage and waste

reduction. As we see in Figure 8, energy and water usage are easier to track while waste and carbon footprint are more difficult. The lack of standards in carbon reporting makes this even more difficult.

Figure 8. Performance versus Importance of Tracking Elements of Social Responsibility

2014 Sustainability Elements: Summary of Measures

Top 3 Elements	Have Goal	Importance* (Top 2 Box on 7-pt Scale)	Performance* (Top 2 Box on 7-pt Scale)	Easy to Track (Top 2 Box on 7-pt Scale)
Energy usage	77%	82%	62%	70%
Water usage	74%	65%	54%	58%
Waste reduction	72%	74%	55%	49%
Carbon footprint	71%	80%	61%	46%
Recycled content	40%	54%**	38%**	50%**
Conflict minerals	32%			
Fair labor	31%			
Green buildings	26%			
Fair trade	14%			

Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2014
*Bases vary by element: energy usage (n=50), waste reduction (n=47), carbon footprint (n=46), water usage (n=48), recycled content (n=26**)
Only showing elements with base size = 25+; **SMALL BASE SIZE: INTERPRET WITH CAUTION
Q4. In which of the following areas does your company have any goals for 2013? Please select all that apply.
Q11. How important is each of these elements to your company's overall sustainability goals? SCALE: 1=Not at all important – 7=Very important
Q12. How would you rate your company's performance on meeting your goals for these same elements? SCALE: 1=Poor – 7=Excellent
Q13. Please select up to 3 elements that are easiest for your company to track, in terms of progress.

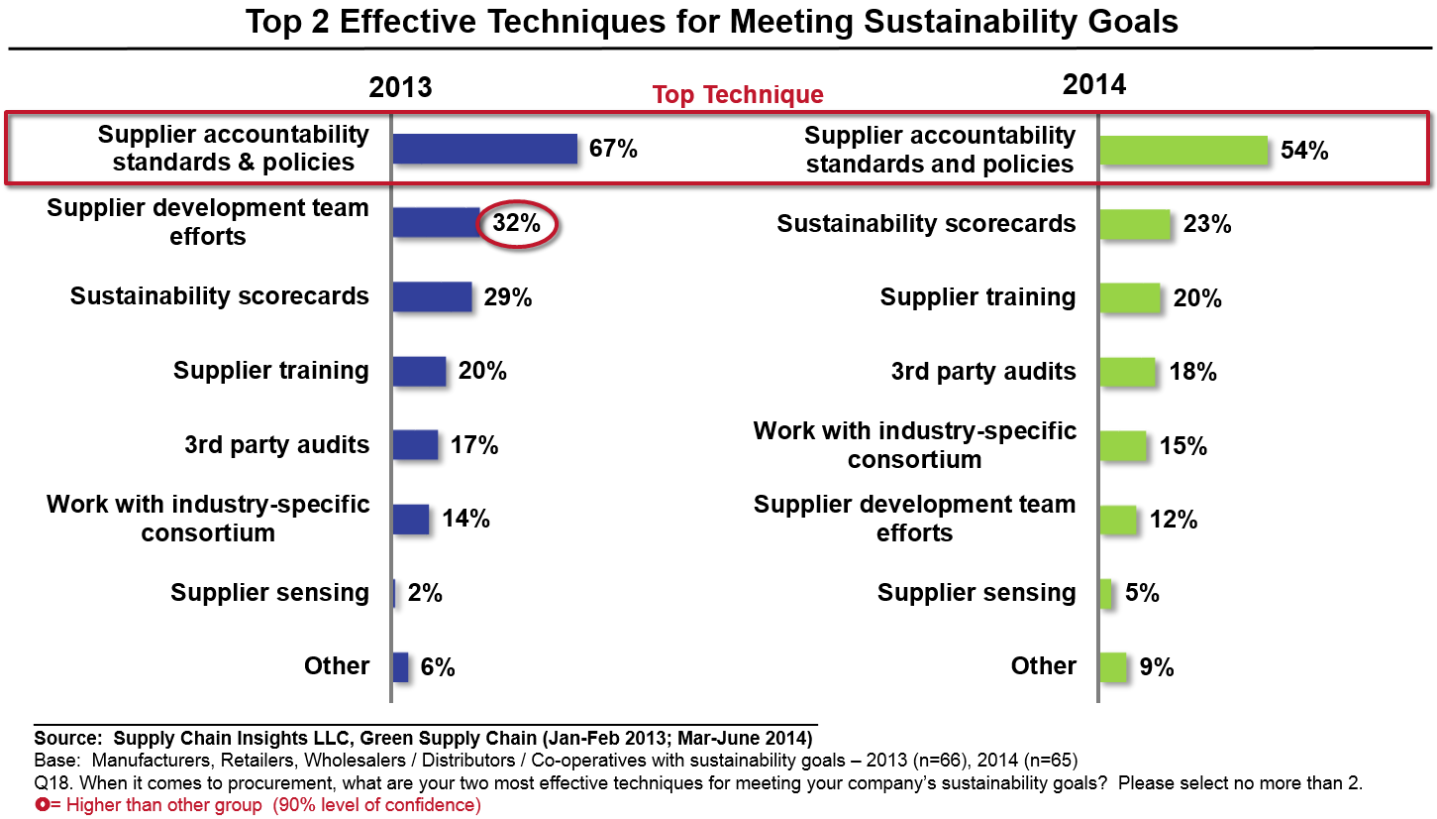
The number one issue for the supply chain leader is a systemic way to track and drive continuous improvement programs against commonly aligned goals and metrics. Today, there is no system of record and these inputs are not currently accounted for in the bill of materials. All leaders queried in qualitative interviews believe that water and carbon reporting systems within the ERP solution needs to be a top priority, but they are disappointed with current system performance.

While this tracking is primarily focused on the enterprise today, increasingly, companies are attempting to track and audit compliance within the supplier network. Progress is more mature in the supply network relationships than those of the channel in demand networks.

However, the management of the supplier base is easier said than done. In the words of one supply chain leader, "The management of the supply base requires us to do hard work in managing the relationship to a greater degree than we have had to do in the last fifteen years." The last decade is riddled with the failures of the audit-based approach. Slowly, companies are gaining an understanding that supplier audits are not sufficient. Increasingly, the management of the supplier

base is happening through principle-based programs. However, the implementation of this principle-based approach requires the redefinition of the procurement program and the building of a robust supplier development program to design, implement and train suppliers on the expectations. It takes cooperation and dedication from both the sustainability and the supply chain sides.

Figure 9. Driving Compliance through the Supplier Value Network



Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q18. When it comes to procurement, what are your two most effective techniques for meeting your company's sustainability goals? Please select no more than 2.
= Higher than other group (90% level of confidence)

In qualitative interviews, the ability to track these elements and align metrics in the supplier network remains a major opportunity. Many companies like **Wal-Mart Stores, Inc.** and **The Procter & Gamble Company** are trying to bring accountability to these metrics through sustainability scorecards. However, this has had limited success due to:

- **Lack of Availability of Supplier Data.** Tracking this data is new for all supply chain partners. As a result, while the scorecards may be filled out, the data may not be accurate.
- **Not Being Tied to Buying Behavior.** At this point, the scorecards are largely a formality. Things will get more serious when the scorecard performance is tied to the buying decision. It is when companies put their money where their mouth is that performance will accelerate.
- **Lack of Standards and Consistent Metric Definitions.** The definitions of good metrics to improve corporate sustainability programs are still in their infancy. What is clear is that the standard supply chain definitions are not sufficient. What is not clear is how to move forward and what to replace

them with. Many sustainability leaders are actively experimenting with alternatives, but there is no common industry-standard set of definitions.

Why It Matters

Being a good corporate citizen is the right thing to do, but today there are two primary drivers increasing the need to improve CSR goals: financial investors and the impact on the brand.

In the 2014 study, 78% of respondents publicly communicate their sustainability or CSR goals, such as in an annual report or on their website. This is not a new statement to the market. These companies have had sustainability goals for over six years on average. One of the original goals was to influence the financial trading funds targeted at investors that want to improve the sustainability of the planet.

Figure 10. Brand Promises and the Intersection with Corporate Sustainability Goals

Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q14. In marketing your products, what brand promises does your company currently claim, if any, based on your sustainability goals? Please select all that apply.
O= Higher than other group (90% level of confidence)

There is also a growing market for sustainable, good-for-the-planet products and companies are eager to seize upon new market opportunities. As a result, corporate sustainability has increasingly been tied to product marketing. As shown in Figure 10, in our 2014 study, 77% of respondents report that their company makes brand promises based on their sustainability goals. On average they market three distinctive claims: energy usage, recyclable product and recycled content. It is ironic that

the most common brand claims center on the use of recycled materials, but the worst performance in measurement is in the area of tracking recycled content.

Direct Quotes from Qualitative Interviews:

To make progress on corporate sustainability goals, we have to redesign the organization to do the "hard work" in customer and supplier relationships. It requires taking ownership for the network and building an organization to ensure relationship alignment.

One of the largest stumbling blocks to goal attainment is resource tracking and reporting in manufacturing processes. We have to redesign our bill of materials to account for water, energy, recycled materials, etc. It is the toughest with smaller suppliers.

Operational reporting is an opportunity. A stumbling block for resource accounting will be the tracking and reporting of the major supply chain inputs of carbon and water.

We are early in understanding our environmental impact. Our earlier work has been on labor policies.

We are what we measure. It requires tracking across all suppliers and down all categories of spend. We are not there yet.

To close the gap, capability building is essential. It cannot happen from just compliance reporting.

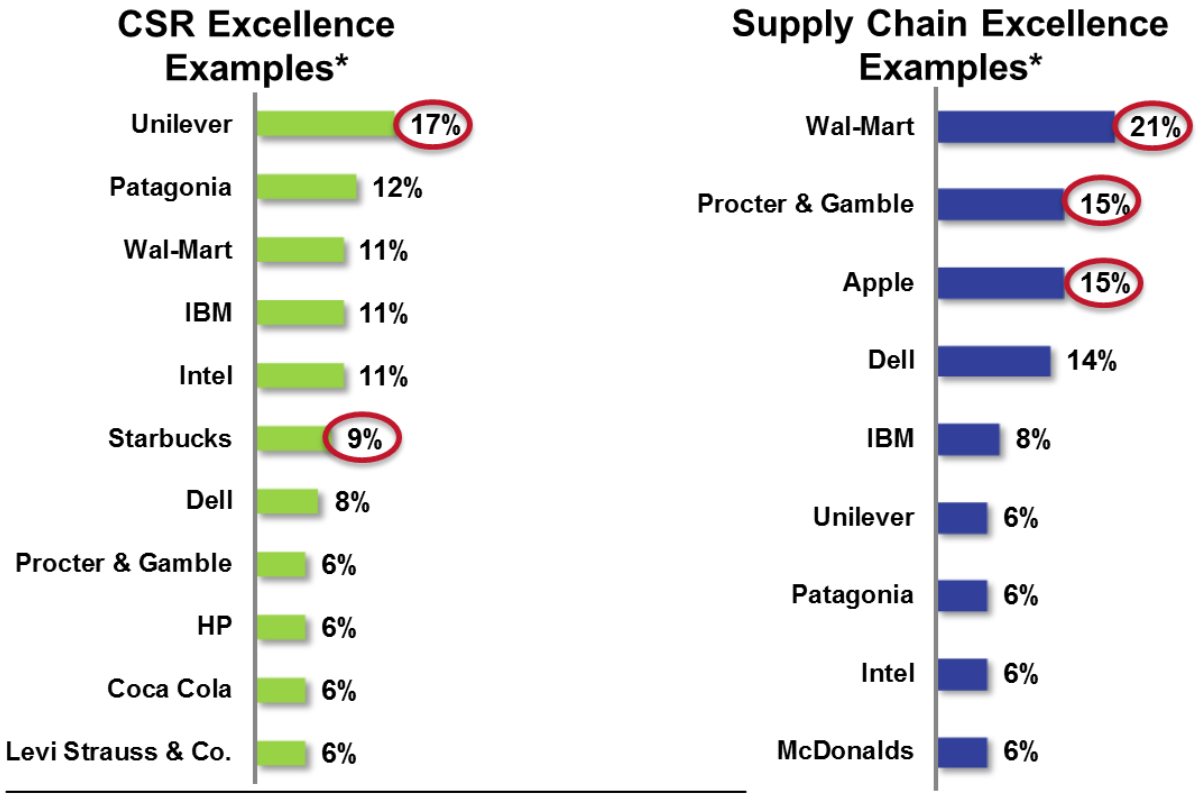
The focus needs to be on value. While early alignment in programs can happen on cost-reduction, the tougher discussions are those on value-based outcomes that balance profit, people and the planet.

Who Does It Well?

Companies are competitive. They want to be recognized for superior supply chain and sustainability performance. To gain an understanding of current performance, we asked survey respondents to tell us which companies they admire for leading supply chain and sustainability performance.

Based on survey responses in our first study, **Wal-Mart Stores, Inc.** is seen as doing both supply chain and corporate sustainability well. **Unilever NV/PLC** and **Patagonia**, **Inc**. are seen as sustainability leaders while **Procter & Gamble** and **Apple Inc.** are seen as leaders in supply chain. As shown in Figure 11, there is significant overlap in the two lists indicating the coalescence of sustainability and supply chain excellence. The capability building that has happened in supply chain processes is being carried into sustainability programs to drive continuous improvement.

Figure 11. Who does It Best?



Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – Total (n=66)
*Only showing companies with over 5% mentions
Q20. When you think of corporate social responsibility or sustainability excellence in the supply chain, what companies do you think do it well?
Q21. When you think of supply chain excellence, what companies do you think do it well?
= Higher than other group (90% level of confidence)

Recommendations

Today, companies are vulnerable. They are focused on their enterprise processes. They market performance in the green supply chain that they cannot measure. They lack an end-to-end focus and struggle with the evolution of programs for the value network. The work within the enterprise is easier, but the risk in the management of the network is greater. To help companies move forward, we offer the following suggestions:

- **Focus on Metrics Definition and Alignment with a Goal in Mind.** When programs start, sustainability becomes synonymous with reducing costs. In these first stages of maturity, manufacturing and operations executives quickly get onboard to save water, energy and material waste. It is good for both groups and alignment is easy. However, as the program shifts from costs to value, and from the enterprise to the value network, the scope becomes more complex. It can be overwhelming. Focus systematically with a goal in mind of reducing corporate vulnerability and improving goal attainment.

- **Align the Supply Chain Center of Excellence on Capability Building. Actively Bridge the Gap.** Use the supply chain centers of excellence in cooperation with the corporate sustainability team to build organizational capabilities. Make the CSR strategy a part of Sales and Operations Planning (S&OP) and actively measure the impact of network redesign activities on the elements and measurement of sustainability.
- **Actively Network with Other Thought Leaders.** This is one of the fastest changing areas of supply chain management. As a result, active networking with other corporate sustainability leaders is paramount. Budget time and resources to ensure that your organization is learning at the pace of the industry.
- **When a Problem Happens, Act Quickly and Responsibly.** Network failures happen. To prevent a crisis, try to align reporting and brand promises to build capabilities and conservatively report based on what can be measured with confidence. However, if a problem happens, act quickly and responsibly. The last decade is rife with stories of sustainability failures and corporate denial.

Social responsibility is about much more than *green*. Its impact is more pervasive. Companies in the first stages of supply chain maturity will adopt corporate sustainability initiatives; but under the covers, it will only be about cost reduction and compliance. To align teams, it needs to become holistic and part of the corporate fabric.

In these first stages of maturity, manufacturing and operations executives quickly get onboard to save water, energy and reduce material waste. The decisions on carbon footprint, the reduction of waste, and the redesign of the network for value require greater maturity in organizational alignment between the CSR and supply chain teams. It is beyond the scope of the average company's current efforts, but not beyond their marketing claims and commitments to shareholders.

Conclusion

Sustainability is growing in importance. To align teams, organizations need to use corporate initiatives like cost and new product launch to initially design CSR initiatives to become part of the corporate fabric. Over time, it requires building capability deep in the organization and making it part of measurement and decision processes. It needs to become the new way of doing business.

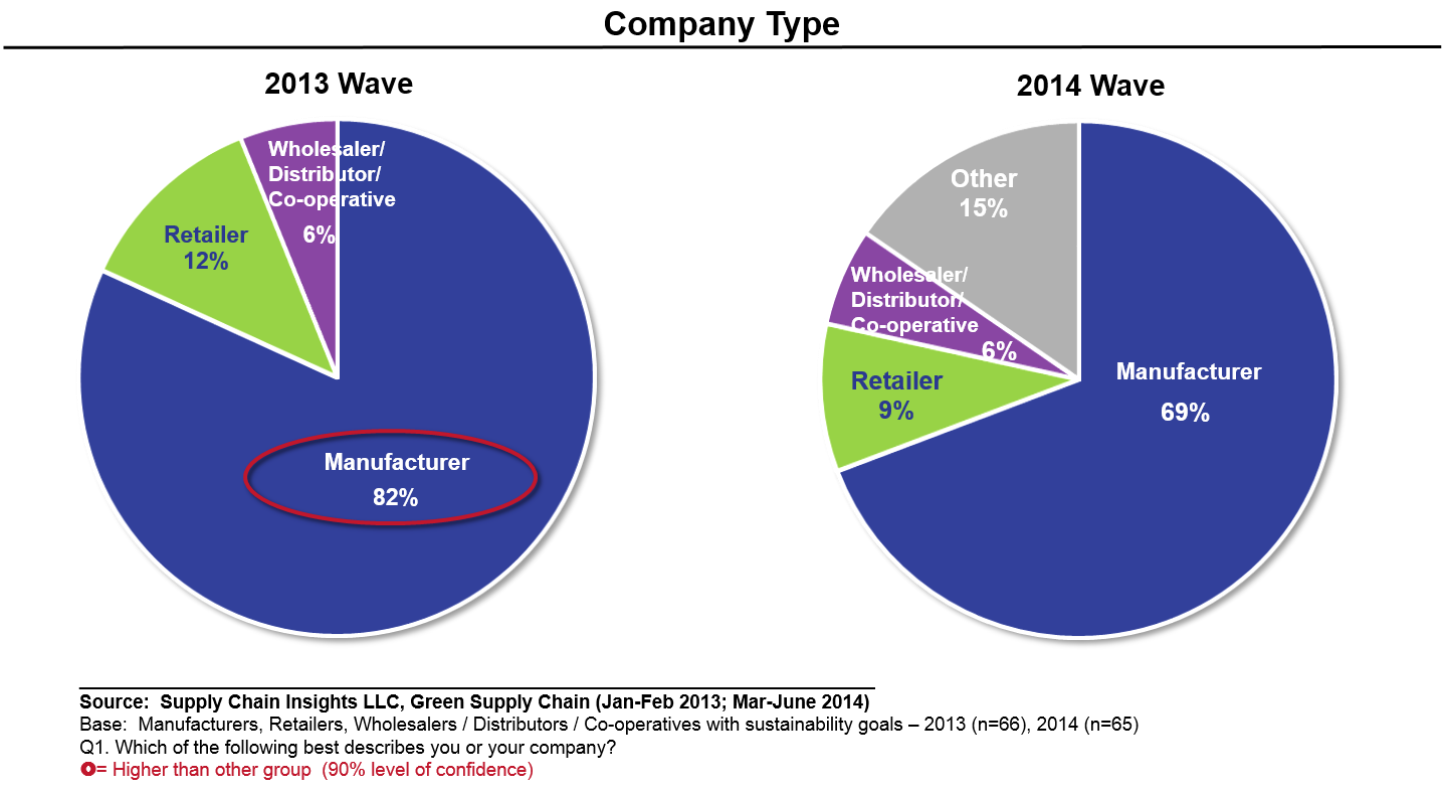
Today, until this happens, companies are exposed. Their promises in corporate statements and brand promises are larger than they can track and measure. This is primarily due to the focus on CSR initiatives in the enterprise versus a more holistic focus for the value network. Closing this gap will not be easy. It will be forged first by the sustainability leaders like HP, Dell, Kroger, Patagonia, Unilever and Walmart. The pace of change is fast and the impacts are large. Supply chain leaders cannot afford to wait. The gaps are both a major opportunity and a risk to the corporation.

Appendix

The quantitative data in this report was sourced from a survey fielded by Supply Chain Insights in the winter of 2013 and the spring-summer of 2014. These surveys were conducted online. The respondents answered the surveys of their own free will. The only offer made to stimulate a response was to share the results in the form of Open Content research at the end of the study.

The names of those that completed the surveys are held in confidence, but the demographics are shared to help the readers of this report gain perspective on the respondents. The demographics supporting these data are found in Figures A-I. In each figure, we contrast the demographics between the two studies.

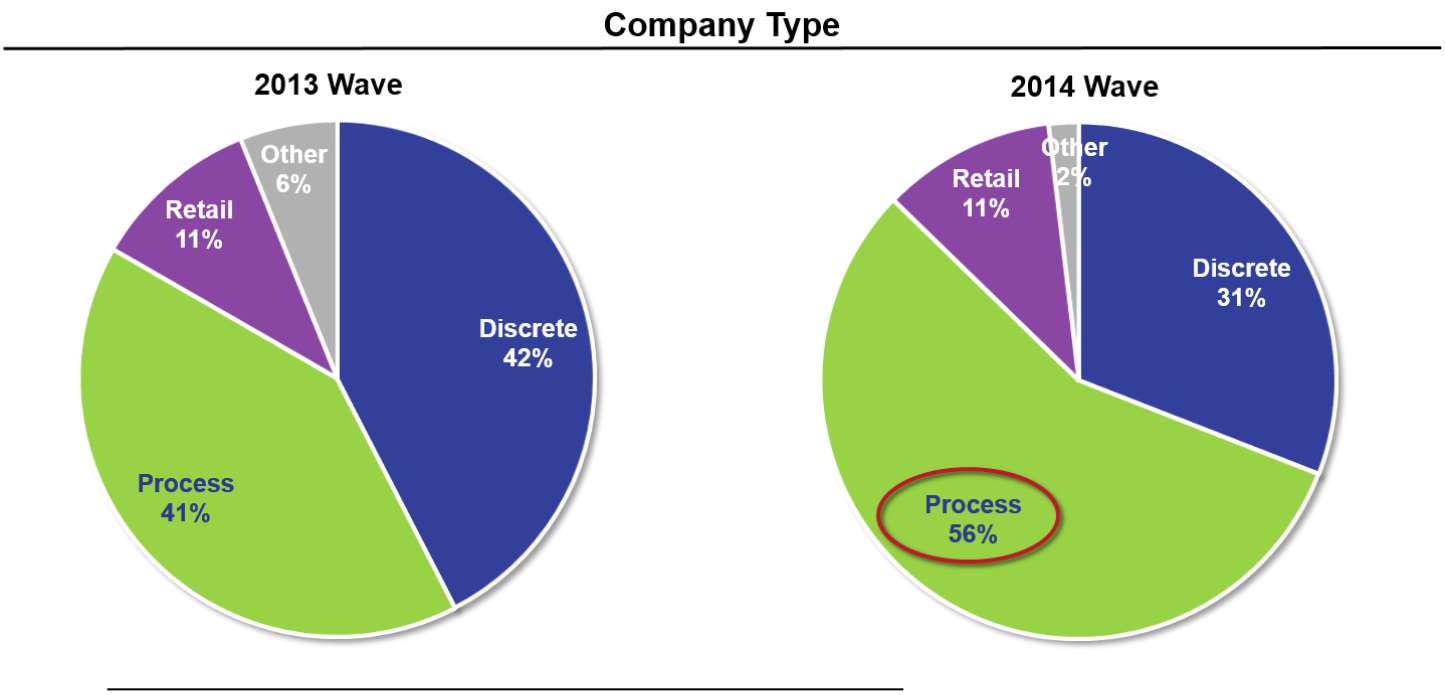
Figure A. Study Demographics by Industry



Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q1. Which of the following best describes you or your company?
O= Higher than other group (90% level of confidence)

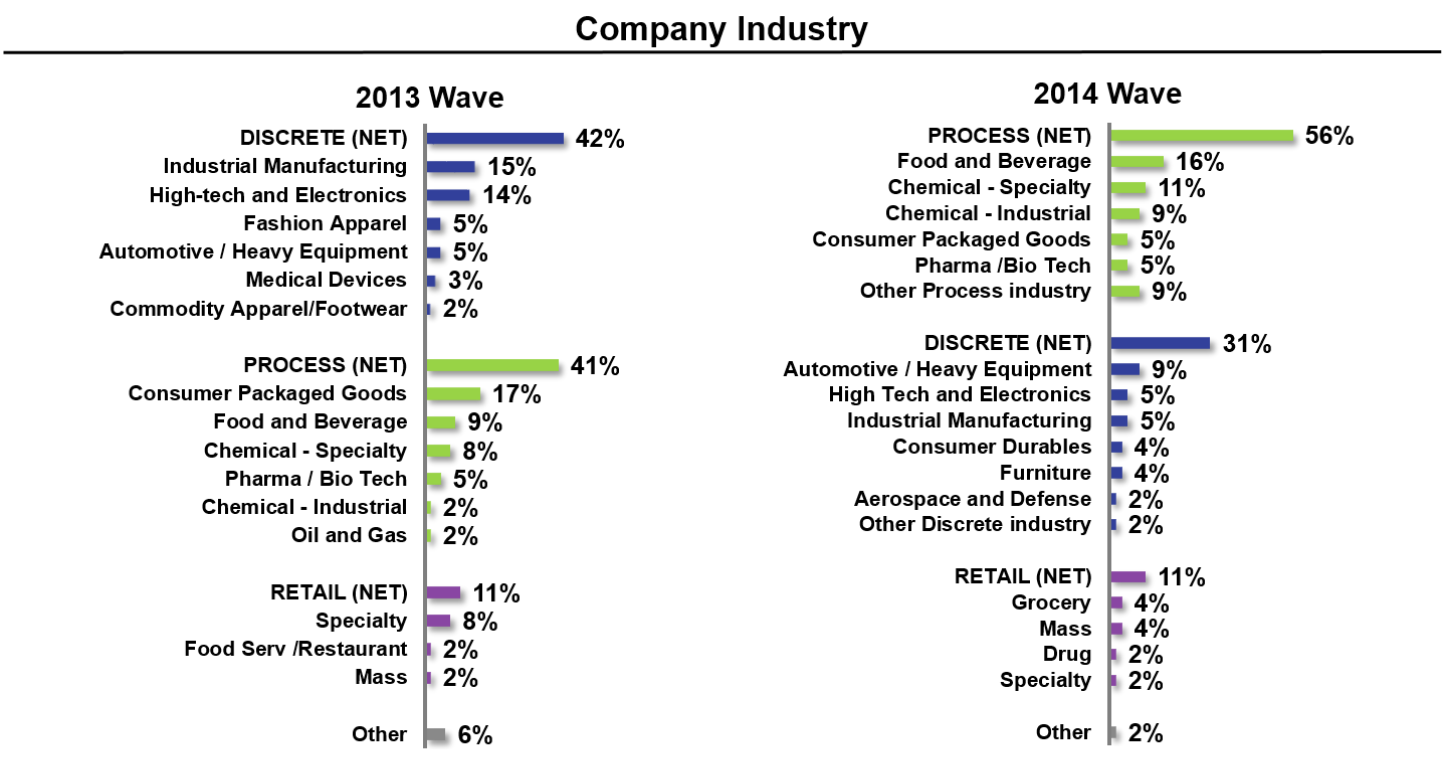
The study respondents were primarily from manufacturing in the process industries.

Figure B. Study Demographics Industry Overview



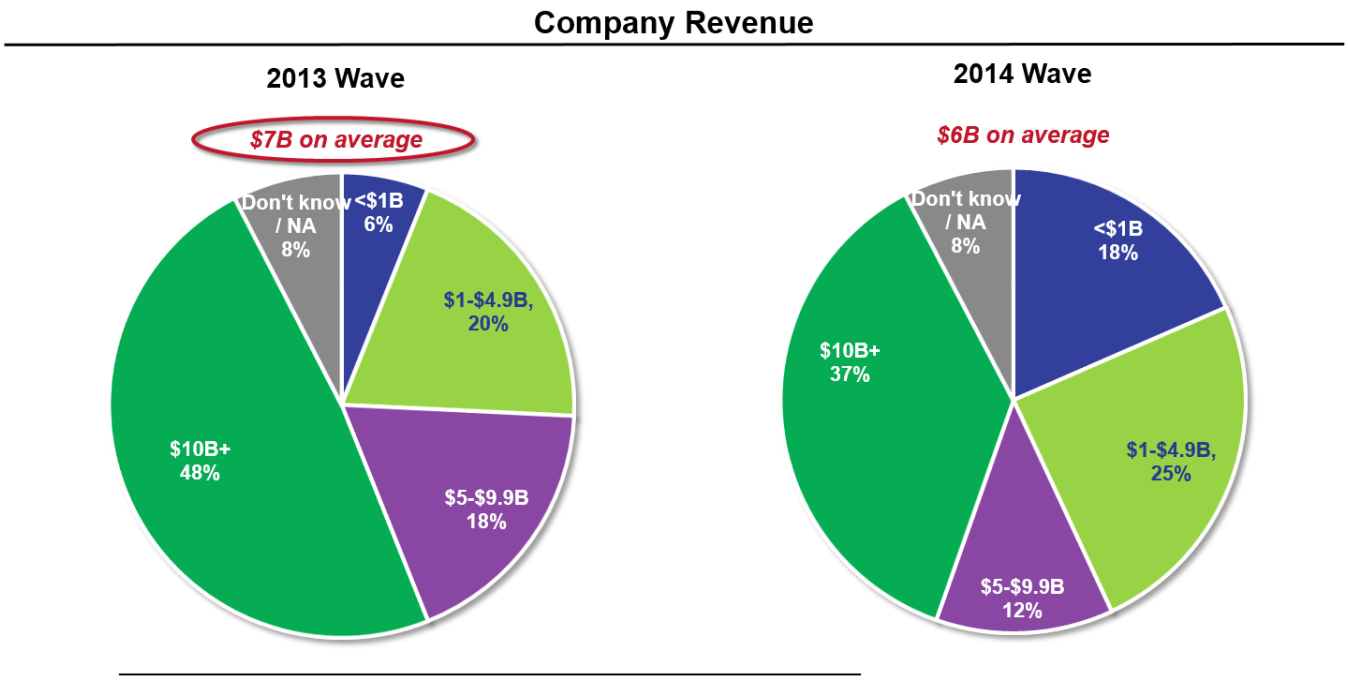
Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q2 series. Which industry grouping best defines your company?
O= Higher than other group (90% level of confidence)

Figure C. Specific Industry Demographics



Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 excluding 'other' company type (n=55)
Q2 series. Which industry grouping best defines your company?

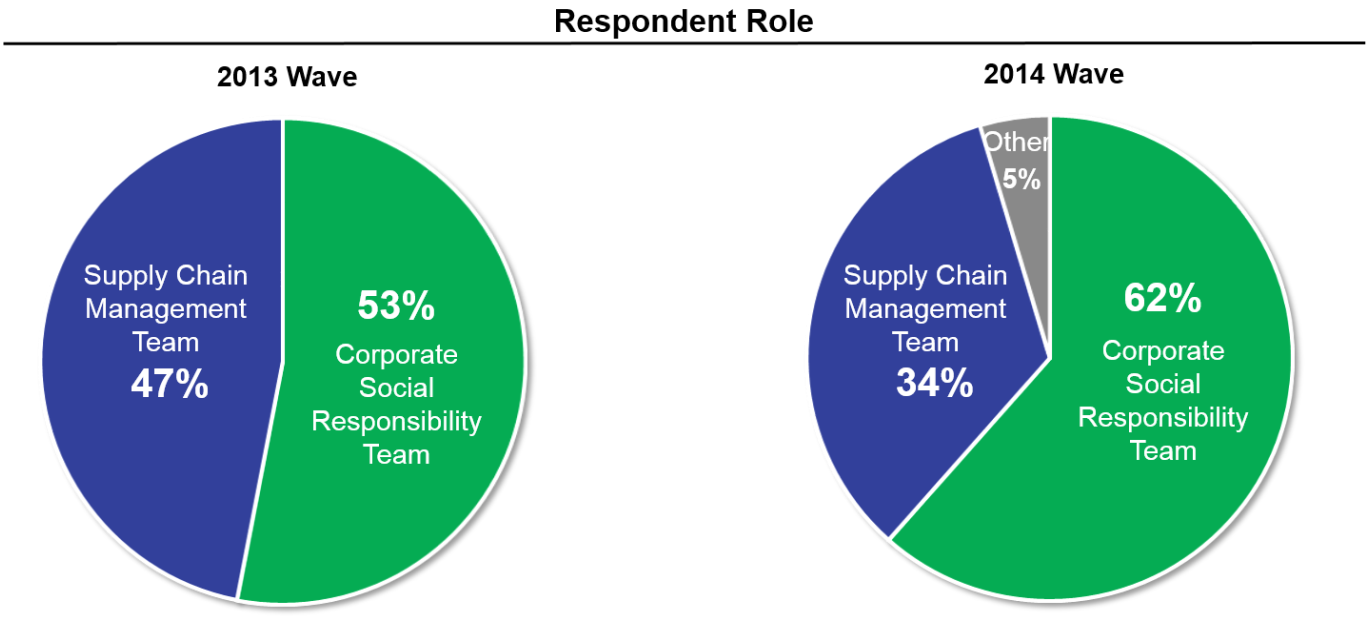
Figure D. Respondent Demographics: Company Size



Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q28. Approximately, what was your company's last fiscal year revenue?
= Higher than other group (90% level of confidence)

As a requirement to get into the survey, all respondents work at companies who currently have corporate sustainability goals. In each study, we tracked the number of supply chain and corporate social responsibility managers by role.

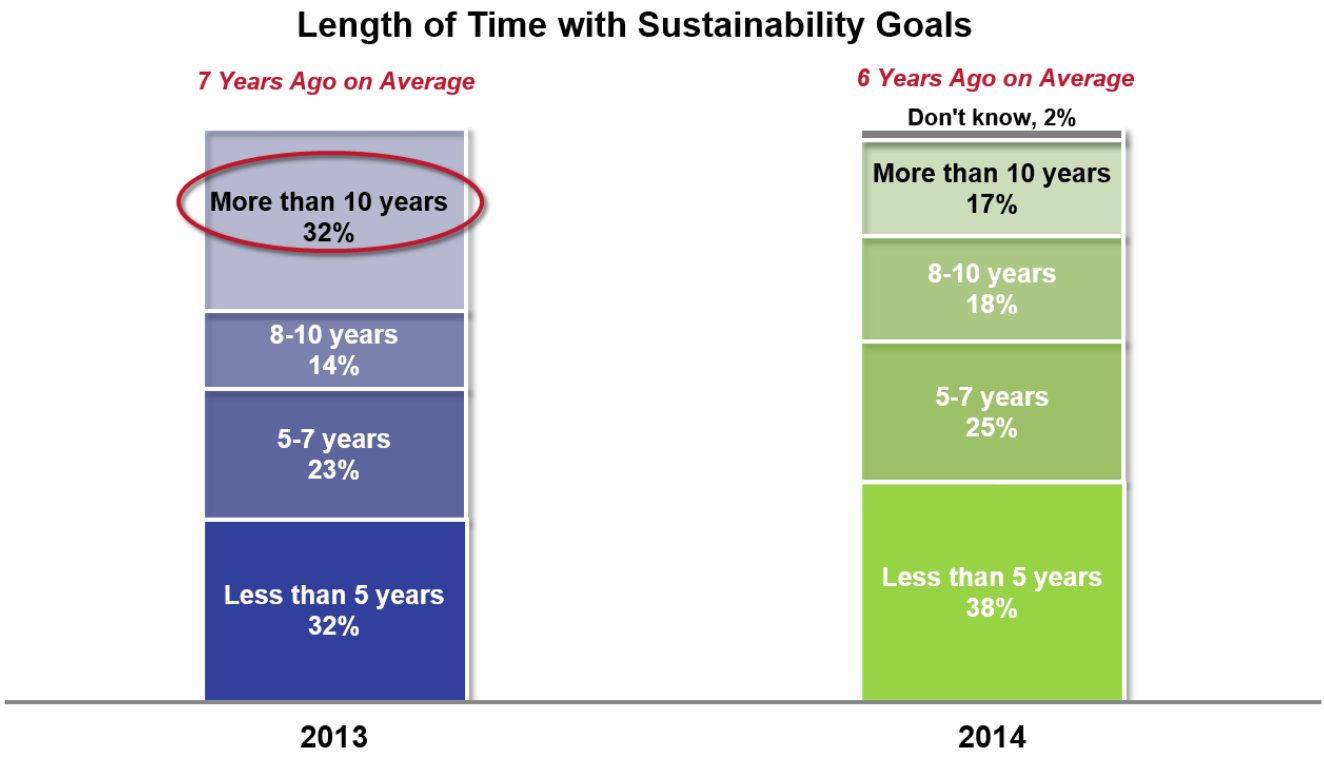
Figure E. Study Respondents by Role



Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q31. Which of the following best describes your current role within your company?

As shown in Figure F, in this study, the average time for having CSR Goals is 6-7 years. The average time of a supply chain organization is 20-30 years. Therefore, the supply chain organization is roughly three times older than the corporate social responsibility organization.

Figure F. Length of Time of the Sustainability Program



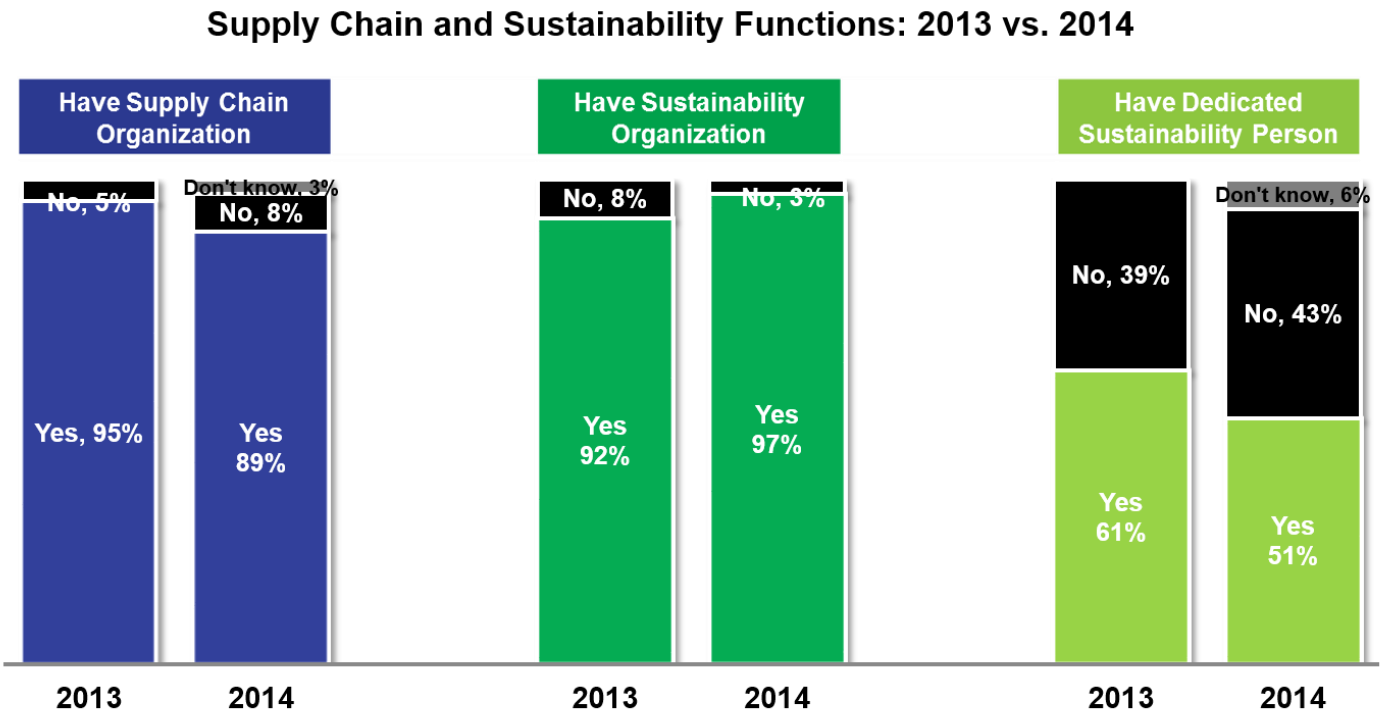
Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q7. How long ago did your company first have any sustainability goals? Your best estimate is fine.
O= Higher than other group (90% level of confidence)

The primary focus area for corporate sustainability goals are in the area of manufacturing. While vital to the design and implementation of overall supply chain processes, the corporate social responsibility organization reports directly to the supply chain organization less than 15% of the time.

Figure G. Reporting Relationships

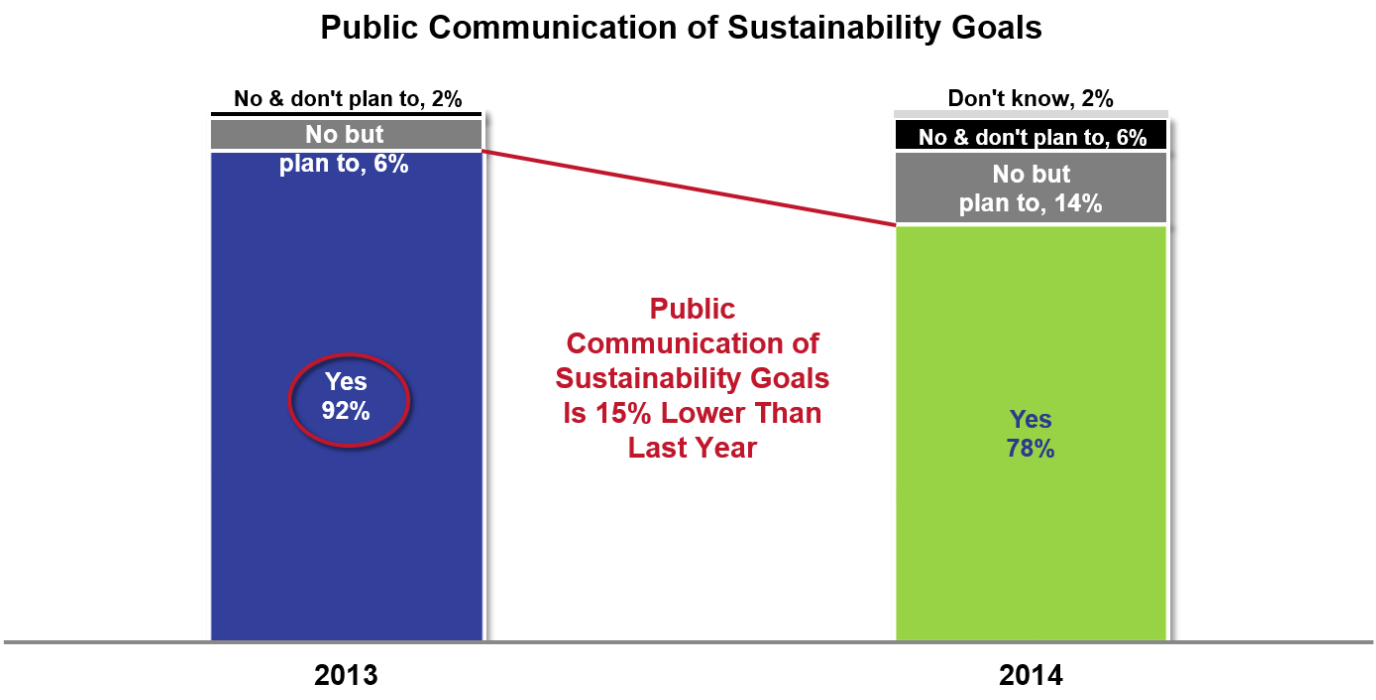
Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q25. To which function does your sustainability organization report?

Figure H: Supply Chain and Sustainability Organization Overview



Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q22. Does your company have a supply chain organization?
Q25. To which function does your sustainability organization report?
Q26. Is there a dedicated person within your supply chain who is focused on sustainability?

Figure I. Presence of a Public Corporate Social Responsibility Statement



Source: Supply Chain Insights LLC, Green Supply Chain (Jan-Feb 2013; Mar-June 2014)
Base: Manufacturers, Retailers, Wholesalers / Distributors / Co-operatives with sustainability goals – 2013 (n=66), 2014 (n=65)
Q6. Does your company publicly communicate any of its corporate social responsibility, sustainability, or citizenship goals – such as on your website, in a report, etc.?
O= Higher than other group (90% level of confidence)

Other Relevant Supply Chain Insights Reports

Questions about corporate sustainability have also been asked in other Supply Chain Insights reports. To gain additional insights in specific areas, check out these studies:

Conquering the Supply Chain Effective Frontier

Building the Green Supply Chain

State of Transportation: Where Are We on the Vision of Automation?

Packaging Artwork: An Important Value Chain Process

About GreenBiz Group

GreenBiz Group provides clear, concise, accurate, and balanced information, resources, and learning opportunities to help companies of all sizes and sectors integrate environmental responsibility into their operations in a manner that supports profitable business practices.

About Supply Chain Insights, LLC

Founded in February, 2012 by Lora Cecere, Supply Chain Insights LLC is focused on delivering **independent, actionable and objective advice for supply chain leaders**. If you need to know which practices and technologies make the biggest difference to corporate performance, turn to us. We are a company dedicated to this research. We help you understand supply chain trends, evolving technologies and which metrics matter.

About Lora Cecere

Lora Cecere (twitter ID @lcecere) is the Founder of Supply Chain Insights LLC and the author of popular enterprise software blog Supply Chain Shaman currently read by 5,000 supply chain professionals. She also writes as a Linkedin Influencer and is a a contributor for Forbes. Her book, ***Bricks Matter***, (co-authored with Charlie Chase) published on December 26th, 2012. She is currently working on a second book, *Metrics That Matter*, to publish in 2014.

With over nine years as a research analyst with **AMR Research, Altimeter Group, and Gartner Group** and now as a Founder of Supply Chain Insights, Lora understands supply chain. She has worked with over 600 companies on their supply chain strategy and speaks at over 50 conferences a year on the evolution of supply chain processes and technologies. Her research is designed for the early adopter seeking first mover advantage.