

2021 NACS North American CEO Strategic Issues Summit

Park Hyatt / Chicago, IL

Tuesday November 2, 2021

Sessions to be held in Grand Salon

Park Hyatt Chicago, lower level

1:00 pm – 2:30 pm

Government Relations Issues Briefing & Open Discussion**Lyle Beckwith** Senior Vice President, Government Relations, NACS**Doug Kantor** General Counsel, NACS

An optional session prior to the start of the Summit, attendees will be given an update and opportunity to discuss the topics below:

- Age verification requirements for age restricted product sales
- Swipe fee reforms
- Labor shortages

2:45 pm – 3:00 pm

15 min

Strategic Issues Summit Welcome & Introductions**Antitrust Policy****Henry Armour** President & CEO, NACS

3:00 pm – 4:00 pm

45 min

How to Deliver Consumer-Resonant and Immersive Retail**David Bell** Professor, Wharton School of Finance, University of Pennsylvania and Founder, Idea Farms Venture

Seamless integration of the physical store experience with digital discovery and technology enablers is the cornerstone of new retail. Bottom up product innovation and the direct-to-consumer revolution are therefore core drivers shaping successful retail innovation. Increasingly, new products that "win" are created organically, in response to needs that align with macro-factor trends (e.g., elimination of single use plastic in packaging, authentic and functional ingredients in food and beverage, etc.) and solve a ubiquitous consumer pain point--typically one felt keenly by the brand founder. In this session we develop a framework for illuminating how to succeed in this environment and explain the four key pillars of a breakout retail strategy. Key examples of success (and failure) are broken down and discussed.

4:00 pm – 4:15 pm

Networking Break

4:15 pm – 6:15 pm

120 min

Retailer Roundtable

Our retail leaders will each give their perspectives on key trends and factors impacting their businesses and the industry, particularly those that occurred during COVID and that will endure in the post-pandemic environment, as well as their outlook for the industry over the next 12 to 24 months.

6:15 pm – 7:00 pm
45 min

Harnessing the Voice of the Industry to Tell the Industry's Philanthropic Story
Stephanie Sikorski Vice President of Marketing & Director of The NACS Foundation

In 2019, convenience retailers donated more than \$1 billion to charity and yet our industry gets very little credit for the support we provide our communities. The reimagined NACS Foundation is focused on uniting and amplifying our industry's voice telling this story. The Foundation's five programs have been strategically designed to support and strengthen your existing philanthropic efforts while helping communities overcome threats to success in five key focus areas by: Delivering Disaster Relief, Fighting Hunger, Supporting Children's Health, Funding Education for Future Industry Leaders, and Building Sustainable Environments. Hear about how we expanded our successful 2019 24/7 First Responders Recognition program in 2020 and our plans to leverage and coordinate our industry's philanthropic activities in the other four focus areas over the next several years.

7:00 pm – 9:30 pm

Networking Cocktail Reception & Dinner

NoMI Kitchen, 7th Floor

9:30 pm – 10:00 pm

After Dinner Drinks

NoMI Kitchen, 7th Floor

Wednesday November 3, 2021

Sessions to be held in Grand Salon
Park Hyatt Chicago, lower level

7:00 am – 8:00 am

Breakfast available in [Grand Salon Foyer](#)

8:00 am – 9:15 am
75 Min

Supplier Roundtable

Our supplier leaders will each share briefly key disruptive topline trends, if any, in their categories, relevant activity in competitive retail channels that has the potential to significantly impact our channel, and opportunities or threats of particular relevance to our business. The goal is to share insights that are useful or thought provoking with their most important customers (and not be a company specific marketing pitch).

9:15 am – 10:00 am
45 min

Opportunities and Barriers to Profitable On-The-Go EV Charging
Phillipp Kampshoff Senior Partner, McKinsey Center for Future Mobility

As outlined in a recent [article](#), McKinsey analysis indicates that 'on-the-go' charging can be an attractive business for Roadside Retailers. However, given the very uneven growth of EV penetration between, and within countries, the timing and location of selection is of the utmost importance. In addition, companies face important strategic choices around investment and asset ownership, partnerships, and business models.

E-mobility has reached a tipping point. More than 250 new models of battery electric vehicles (BEV) and plug-in hybrid electric vehicles (PHEV) will be introduced in the next two years alone, and as many as 130 million EVs could be sharing roads the world over by 2030. To support these numbers, significantly expanded charging is required— which will require an estimated \$110 billion to \$180 billion investment from 2020 to 2030 to satisfy global demand for EV charging stations, both in public spaces and within homes.

In our session with McKinsey, we will explore which segments within the EV charging space are growing, the charging landscape and density today in global regions and what we can learn from leading players and countries. We will also discuss: What is the value chain / what is the value at play in eV charging? What are incumbents doing to tap into this value chain? What are the successful business models today and what will they be in the future?

10:00 am – 10:15 am	Networking Break
10:15 am – 11:00 am 45 min	<p>What's Wrong with Our Supply Chain and How Can We Fix it? Achal Bassamboo Charles E. Morrison Professor, Kellogg School of Management, Northwestern University</p> <p>The disruptions associated with the coronavirus pandemic dramatically impacted supply chains around the world. What had been skillfully assembled, uber efficient, just-in-time architecture came very close to collapse, and in some cases did collapse, from the exogenous shock.</p> <p>This session will examine the key factors causing the current supply chain disruptions across a number of industries and will highlight factors to consider in designing more resilient supply chains for the future.</p>
11:00 am – 11:45 am 45 min	<p>The Customer is King, Loyalty is the Kingdom, and Few Companies have the Keys Duncan Avls Partner, Customer Strategy & Growth Practice, KPMG LLP</p> <p>Today's consumers are more informed, impatient and in control than ever. A company's next customer or competitor is just one click away, and the fate of a brand can be diverted by a single tweet. In this dynamic era of elusive consumers and innovative offers, earning —and keeping— customer loyalty can be a company's greatest challenge—and opportunity.</p>
11:45 pm – 12:00 pm 15 min	<p>Closing Remarks & Next Steps Henry Armour President & CEO, NACS</p>