

# THE LOGISTICS POINT

YEAR 4 | ISSUE 08 | SEPTEMBER 2023

EXCLUSIVE  
VIDEO CONTENT  
INSIDE

## WHERE HAVE ALL THE WORKERS GONE?

The search for labour in logistics continues. How can we fix the shortage?

### ULEZ HAS ARRIVED. NOW WHAT?

Understanding the impact of ULEZ on logistics

### LOGISTICS FOR PHARMA OPERATIONS

How the industry supports this vital sector

### GREEN TRANSITIONING & SUPPLIERS

How companies help their suppliers become greener



**THE LOGISTICS POINT**

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# EDITOR'S NOTE

## **Labour in focus**

The logistics industry has been struggling with labour shortages for quite a while now. In this edition we are taking an in-depth look at what organisations around the sector are doing to make the industry more appealing. We spoke to different companies and experts with different views in our first Features.

These extended pieces will take a deeper look at key events and trends in the industry. You can also read more about how companies support their suppliers when it comes to green transitioning.

## **Video interviews**

We have prepared two great video interviews for you this month. One is on how logistics helps pharmacies and the other takes a look at the global economy as a whole and where the maritime sector is heading towards.



## **November Networking**

We are bringing our networking and roundtable event on 28th November in London.

This time we will be talking about Last Mile & E-Com with focus on the post-purchase experience, customer loyalty, being brand loyalty through logistics operations and how cities are changing.

**You can register now [here!](#)**

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# COMBATING LABOUR SHORTAGES IN LOGISTICS

The logistics industry has struggled to find enough people to fill out available positions for a while. In the following pages we explore how leading organisations from the sector are combating labour shortages, what more can be done, why people should be interested in the sector and why they are not.



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*Labour generally accounts for 50% to 70% of a company's warehousing budget, so it's important to use this limited, expensive resource wisely*



Grace's journey with Asda started as an industrial placement student between her second and final year of university, which she discovered on the Asda careers website. She then moved onto the Asda Logistics Services graduate scheme as a direct entry.

"I am currently working in the Non-Food Transformation Team which is my second rotation of the three I will complete".

Grace works alongside the team to support the relocation of online General Merchandise operations into a new warehouse.

Grace's is one of the stories Generation Logistics, an industry-led, government-backed initiative to increase industry awareness and find the next generation of logistics industry talent, shares with those who they want to convince about a career in logistics. Is it working?

Phil Roe, Executive Sponsor, Generation Logistics, speaks to The Logistics Point about the role of the initiative in tackling labour shortages. 'In the first year of the campaign we have generated over 650,000 visits to the Generation Logistics Hub, and over three million engagements on social media such as TikTok, Snapchat, Instagram and Facebook,' Phil explains.

### **Overall State**

Asked how serious the labour problems in the industry are, a consensus appears very quickly. There are simply not enough people working in the warehouses where goods are kept, organised, and loaded nor are there enough people driving, piloting, or captaining the various forms of transportation needed to get goods from point A to point B. The impact on the economy has been significant as there are supply shortages, cost increases, and less on-time deliveries.

Consumers are feeling the pain as well in-terms of higher prices for goods or shortages of food, medicine, or technologies that are critical to their livelihoods.

'Tackling these shortages across the industry will be business critical; failing to fill roles could leave companies at risk of collapse.

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*Women comprise just 19% of employees in transport and storage and 45% of HGV drivers are set to reach retirement age in the next 10 years.*

However, there are proactive steps that businesses can take to make roles more attractive to prospective talent, as well as opportunities to consider supportive technologies with the capacity to fulfil certain tasks,' says Dave Howorth, Executive Director at SCALA.





# TOP INSIGHT

Comment by Ron Farr, Director Warehouse Sales - EMEA for Yale

Labour generally accounts for 50% to 70% of a company's warehousing budget, so it's important to use this limited, expensive resource wisely. In today's environment, a severe labour shortage and high turnover all necessitate higher wages and competitive benefits in order to hire and retain employees, says Ron Farr, Director Warehouse Sales - EMEA for Yale.

These conditions are driving operations to carefully evaluate how they utilise labour, allocating workers only for responsibilities that make the most productive use of their time and considering alternatives, such as robotic materials handling solutions, for lower-value, repetitive tasks.



### **Inclearing diversity**

The workforce is rapidly ageing and that underlines a problem that has been visible for a long time - many of the workers in logistics are men. Women comprise just 19% of employees in transport and storage and 45% of HGV drivers are set to reach retirement age in the next 10 years. The median age of an HGV driver is 55, and a recent LMI for All report showed that almost half are set to retire by 2027.

In August 2022, Generation Logistics carried out a research and discovered only 7% of young people, and 15% of career switchers were considering a career in logistics, with just over a fifth of respondents not knowing what a career in logistics could offer.

### **Skills' gap**

The solution will come from different angles. 'The logistics industry has become more technologically advanced which means there is a need for more workers with the right technical skills. Unfortunately, there is a gap between the skills current employees have and what companies need,' explains Greg Barnett, Chief People Scientist at Top Workplaces.

This skill gap is also noticed in other areas like manufacturing. 'Labour generally accounts for 50% to 70% of a company's warehousing budget, so it's important to use this limited, expensive resource wisely,' says Ron Farr, Director Warehouse Sales – EMEA for Yale.



In today's environment, a severe labour shortage and high turnover all necessitate higher wages and competitive benefits in order to hire and retain employees. These conditions are driving operations to carefully evaluate how they utilise labour, allocating workers only for responsibilities that make the most productive use of their time and considering alternatives, such as robotic materials handling solutions, for lower-value, repetitive tasks.

### **Investing in Technology**

The rise of automation in logistics suggests a potential light at the end of the tunnel for the sector, but staff shortages are a long-term issue that will not be fixed within the next year. Tackling this challenge requires continued investment, and we will only start to see the benefit of this over the course of five years. Dave Howorth at SCALA is one of the people who believes that the rise in automation can serve as a solution.

Ron Farr at Yale supports that. 'Robotic trucks allow logistics operations to perform repetitive tasks, such as moving pallets and loading and unloading, in a more cost-effective way - saving valuable time and money.'

Converting to a semi-autonomous labour force frees up workers and resources while fostering a predictable and productive operation. With the operational benefits and savings achieved through robotics, companies can focus on business growth and innovation.'

A SCALA research revealed that two fifths (42%) of businesses across manufacturing, retail and 3PL are planning to take this jump and invest equal to or more than their annual warehousing costs on automation in the next five years. Options can include warehouse retrieval automation and full pallet putaway, with these systems reducing the demand for operatives and enabling those already in post to focus on strategic decision-making.

## **Investing in people**

Tony Player, Domain Principal, Anaplan shares a different view. 'More and more organisations are seeking employees with transferable skills, but manufacturers should prioritise forecasting future staffing needs over the shift to new technologies which only makes the search for the right talent even more challenging.

Business leaders must consider how they can pair the investment in emerging technologies, like AI with investment in their employees that can use it, giving employers an opportunity to upskill their current staff, instead of hiring new talent.'

In today's economy, logistics companies should be investing in developing a deeper understanding of their employees' experiences from the day they join to the day they leave. They should understand and improve upon training, on-boarding, performance management, and leadership so that those who are at the company see it as a great place to work.





'It is equally important for companies to reinforce or otherwise shape their cultures so that employees have more compelling emotional reasons to stay committed and engaged. Many companies believe that their only lever to retention is compensation, and while this can help to keep people around longer, pay alone does not tend to drive higher employee engagement,' continues Greg Barnett at Top Workplaces.

Meanwhile, within the first year at Asda, Grace has had the opportunity to travel to all 27 of the business's distribution sites, gaining knowledge from colleagues throughout the network who have years of experience in the industry.

It is still unclear how much all campaigns will truly benefit the industry, how much automation will be able to solve and if the sector will become more attractive. The leaders we spoke to agree the industry has much to offer but it would need to be more proactive, clear its image and invest in new ways of doing business that can entice younger people to join in.

The Logistics Point would like to thank the organisations which participated in this feature: Yale Lift Truck Technologies, Generation Logistics, SCALA, Anaplan. Top Workplaces. \*



## **SMART FACTORIES: CHANGING PEOPLE AS MUCH AS TECH**

The way factories operate has changed dramatically. New technologies and software solutions are reshaping what we understand as a modern factory. We spoke to Simon Jacobson from Gartner for Supply Chain about Smart Factories, how different organisations improve their production methods and what this means for the overall supply chain excellence.

'The way we define Smart Factory is a way of combining modern technologies and standard work to innovate how a factory operates,' says Simon. It's a concept because no two companies will approach things the exact same way or take the same path to get there. And that's a challenge for a lot of organisations who don't realise this is not as straightforward as an ERP deployment, for example.

Plenty of examples about successful deployment of such a framework exist within the automotive sector, consumer goods and more. The organisations that excel in the field have a distinct characteristic to them and focus on building capabilities that converge digital and continuous improvement to simultaneously boost responsiveness while removing constraints.

This requires much more than projects and integration and for most organisations they view a smart factory initiative as a project versus an initiative.

### **Leading On All Levels**

You need to involve all aspects of the manufacturing hierarchy from the workers whose day you'll be improving, all the way up to leadership levels who will benefit from much more efficient operations and better information.

It has to also be viewed as part of an overall digital transformation within an organisation and that involves partnering outside of the manufacturing function. In some cases, it might require tightening the relationship with the supply chain. In other instances, you might see companies where the CIO (Chief Information Officer) or a dedicated digital organisation plays a significant role.

'You can't overlook the role of HR, especially in terms of skills development, and Talent Management,' Simon explains. 'We see a lot of companies under estimating initial investments and efforts.' One of the bigger things that companies unfortunately overlook is the cultural complexity and it comes in two forms. The first is aligning and converging the IT and OT (Operational Technology) domains but also the engineering technologies. Engineering needs to be clearly involved in the process.

### **Smart and Sustainable**

Simon is adamant Smart Factories are critical to the overall sustainability movement. Utilising the data better can deliver savings in energy usage, for example. However, Simon admits that a lot of the data in factories remains unused. One of the reasons is that such a project requires a change in thinking. That change is harder to happen for people and it takes longer, regardless of what digital tools are in place. \*

You need to involve all aspects of the manufacturing hierarchy from the workers whose day you'll be improving, all the way up to leadership levels who will benefit from much more efficient operations and better information.





## **VIDEO**

# **AS PHARMACIES DISAPPEAR LOGISTICS FILLS THE VOID**

As the number of pharmacies in the UK is going down and the number of patients increasing, home deliveries will most likely grow. This would mean that pharmacies would need to better understand their delivery strategy and control costs better. We spoke to Graham Smith, Strategic Account Director at Gophr, about the changing market and how logistics providers can help pharmacies with inefficiencies and add value to the customer service.

**Graham, what problems do pharmacies experience when it comes to deliveries?**

They provide unique solutions in almost every case, whether it's their own driver or an outsourced driver, taxis or in-house staff. There's a real plethora of options, but I think that there's much room for improvement and advancement on how they operate and why they offer it and the value that they can add by bringing logistics partners.

Because the number of pharmacies are decreasing, how they deliver is going to become increasingly important. Courier companies already have extensive networks and can easily plug into pharmacies' operations and lower costs.



**What examples can you give us on how logistics operators, like Gophr, help pharmacies?**

Recently we worked with a client who was offering deliveries every day. They did not have a huge amount but it took them around 4 hours each day, so about 20 hours per week. We decided to move to a three day delivery solution, which brought the hours down and improved costs, reliability and more.

**Does this not limit customers' choice?**

In most cases delivery is a free service and pharmacies are starting to ask how they can control it better. The costs are high and they often build extensive networks and fleets. I am sure consumers would like to have unlimited choice but they also need to realise that the service can't sustain itself.

**How about returns? What solutions are there?**

We do a very thorough doorstep check in the same way it is done in pharmacies. Most of the time this is very easy and everything goes as planned. Sometimes we can't find the right person or they do not want the item. We then return the items to the pharmacies so they have a full inventory check at the end of the day.

**How much data do you need to make the delivery? Some of the data is highly sensitive.**

We don't need any data around the actual prescription. The more information there is the better, as it helps us to better plan routes, improve efficiencies and lower overall costs.

You can watch the full interview with Graham Smith at Gophr now. \*



# **PATIENT-CENTERED APPROACH ELEVATES PHARMA SUPPLY CHAINS**

Patient-centricity has become a buzzword in discussions around pharmaceutical supply chains. This approach emphasizes prioritizing patients in all decisions related to the provision and accessibility of medical resources and services. Contrary to traditional supply chains, where consumers often come last - making purchases through digital or physical stores - patient-centricity aims to consider an individual's needs right from the beginning. David L. Buss, CEO of DB Schenker, takes a detailed look.

Navigating the intricacies of supply chains can be challenging, with extended delivery times, price fluctuations, and limited visibility into the chain's workings. However, in the context of pharmaceutical supply chains, personal preferences are just one among several considerations, particularly when health outcomes hang in the balance.

By placing patient-centricity at the heart of their operations, organizations can tailor their strategies to effectively meet individuals' unique needs. This requires suppliers and manufacturers to have up-to-date, actionable data and the agility to promptly respond to changes in demand while maintaining rigorous safety protocols throughout the entire supply chain process.



### **Improving Patient-Centricity**

For a healthcare system to truly embody patient-centricity, there needs to be a concerted effort from healthcare providers and logistics experts to ensure that certain key elements are integrated at every stage of the supply chain. These elements include:

#### ***Patient-Oriented Guidelines and Protocols***

To genuinely place patients at the heart of care, healthcare providers must establish guidelines and protocols prioritizing patient welfare. This means constructing care pathways and procedures that consider the patient's well-being.

For instance, encouraging shared decision-making where patients actively participate in their healthcare decisions and developing tailored treatment plans that account for each patient's unique needs and preferences.

By integrating such patient-oriented guidelines, healthcare providers can make patients feel appreciated, respected, and empowered throughout their healthcare journey.

#### ***Enhanced Accessibility***

One of the hallmarks of patient-centricity in healthcare is an emphasis on accessibility. Healthcare professionals must ensure that services are available to all patients, regardless of location, language barriers, or physical constraints. This can be realized by offering telehealth services when appropriate or by extending operating hours.

#### ***Compliance with Regulatory Standards***

Adherence to regulatory standards is a cornerstone of prioritizing patient needs. These standards ensure the protection of patient information and mandate that healthcare providers adhere to best practices in patient care.

Compliance with regulations such as HIPAA and GDPR underlines a strong commitment to maintaining patient privacy and cultivating a trustworthy patient-provider relationship.

### ***Cross-Functional Collaboration***

A patient-centric approach to healthcare necessitates effective collaboration among all stakeholders. This involves physicians, nurses, pharmacists, administrators, and logistics personnel working in tandem across various roles to continually enhance the performance of the pharmaceutical supply chain.

By encouraging open communication and teamwork, healthcare providers can deepen their understanding of patient needs. This cooperative approach results in more efficient care coordination and improved patient outcomes.



DAVID L. BUSS, CEO OF DB SCHENKER

### **Maintaining the Right Mindset**

Despite the growing complexity of healthcare and pharmaceutical supply chains, organizations can maintain a patient-focused approach by leveraging various strategies. By demonstrating their commitment to safety, quality, and patient satisfaction, pharmaceutical supply chains can greatly benefit patients while streamlining services and optimizing costs.

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For a healthcare system to truly embody patient-centricity, there needs to be a concerted effort from healthcare providers and logistics experts to ensure that certain key elements are integrated at every stage of the supply chain.





## **SLOW LANE: IS THE GREEN TRANSPORT TRANSITION HAPPENING TOO SLOW?**

Raising awareness of the possibilities of cargo bikes and sustainable transportation is hard work. One of the people who knows how hard this can be is Daniel Bianco, Transport Planner in the Transport Behaviour Change Team for Brighton & Hove City Council. We speak about the initiatives the city has undergone, how hard it is to change people's minds and what positive steps have been made so far.

'Most people do not think about how their deliveries are reaching them,' says Daniel and recalls an instance when a famous coffee company claimed to serve from a cargo bike for it to only transpire that the bike was fake and delivered by a diesel van. The conversation immediately moves to greenwashing and the role of councils and organisations when it comes to green, sustainable and emission free deliveries.

The change needs to be led by everyone and people should be more aware about the impact their choices have on their immediate environment. The team Daniel is part of is actively working on changing how Brighton and Hove citizens deliver and receive goods and services. The council has invested in a program where local businesses can receive a subsidy for a cargo bike. Some are already whizzing around the streets of the seaside town.

Replacing car journeys with active and sustainable travel journeys can bring financial and health benefits to the council and the city, although some people are hard to convince.

### **Up the hill**

But getting there was not easy and there is way more work to be done. Daniel admits a lot of his time is spent trying to convince shop owners, small businesses and even teams in the council on the benefits of bikes, ebikes and ecargo bikes. 'You need to be in it for the long run,' he goes on saying. On the surface the change that has so far been achieved is relatively small but successes have been achieved.

E-cargo bikes, however, are becoming more popular and those who use them often say they would not return to their old ways of delivery.

Internal challenges also slow down progress. Sometimes this could be due to budget constraints, although Brighton and Hove in particular are investing relatively well. On different occasions departments within the council do not understand the value of moving towards a less polluting type of transport or have other priorities. 'We take ideas and inspiration from what other cities are doing and adapt it to our situation,' Daniel says, claiming cooperation is the key to success.

# **Next In-person**

## LONDON LOGISTICS NETWORKING BY THE LOGISTICS POINT



**28TH  
NOVEMBER**

## Changing mindsets

Replacing car journeys with active and sustainable travel journeys can bring financial and health benefits to the council and the city, although some people are hard to convince.

Disused car parks can be turned into community centres, hubs for SMEs and more. Examples exist in the UK and abroad. 'People are starting to think outside the box and trying to look at how the city can adapt to the changing environment.'

Getting local communities onboard is critical. Daniel points at the School Streets Project in Brighton and Hove which closes school streets for traffic during peak times.



This has been welcomed by residents and made access easier and safer. He admits that more remains to be done and sometimes progress can seem painfully slow. The positive is that his team is constantly being contacted and the interest keeps growing. \*

# SUPPORTING SUPPLIERS THROUGH GREEN TRANSITIONING

The green revolution is everywhere but how ready is the logistics and supply chain industry? There are many things that need to be done and one of them will include supporting suppliers. The task is not easy and in this feature we are exploring how companies can help their suppliers understand the costs and benefits of becoming greener.





Historically logistics and supply chain managers have been focused on cutting costs down and improving efficiency. While these two are still key priorities they might clash with the trend towards greening up operations and becoming more socially responsible.

The story behind ESG is one that took a long time to develop but has finally reached a point of no return. Organisations across the supply chain are focused on their ESG journey and invest heavily both financially and by supporting their extensive network of suppliers.

### **Costs' problems**

'The senior leadership teams of our suppliers have historically been focused on optimising cost and service, rather than addressing decarbonisation and other ESG objectives,' admits EVRi, one of UK's leading logistics companies. The organisation is becoming an industry leader when it comes to green initiatives and ESG. 85% of their suppliers have signed up to their code of conduct and the company works with them to better understand and control Scope 3 emissions. But problems persist.

'Transitioning to greener operations often requires a significant upfront investment, such as new equipment, infrastructure, research and development and training. For many suppliers, especially smaller ones, these initial expenses can deter them from pursuing sustainable practices,' explains Todd Simms, VP, Industry Strategy, Manufacturing at FourKites.

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*Outside of monetary assistance, it's crucial for those looking to drive sustainability across the supply chain to find the right technology partner that can guide them through the transformation process.*

Due to the current economic situation companies are pressed against the wall and some have to make hard decisions. Costs is what many industry leaders start speaking about when sustainability comes into the conversation.

But financial performance and sustainability must not be pitted against each other. It doesn't have to be either/or. That's why the most forward-looking companies will continue to lean into sustainability initiatives, albeit with a slightly different mindset. 'The question will become, how can we best combine our environmental aspirations with an economical target?,' believes Serge Schamschula, Head of Head of Ecosystem at Transporeon, a Trimble Company.

The point is fair but that does not mean solutions are easy to come. The ESG team at EVRi has noticed that often companies will slow down or give up on their commitments if an immediate answer to the cost problem is not found. 'They're certainly keen to address these issues but if 'easy' or 'obvious' options for going greener aren't operationally cost effective they're not necessarily researching alternative (more creative) solutions.'

### **Not just about the costs**

Outside of monetary assistance, it's crucial for those looking to drive sustainability across the supply chain to find the right technology partner that can guide them through the transformation process.

'The most significant carbon savings can be made when optimising the existing machines that suppliers are using to store and transport goods, and thanks to advances in technologies such as the Internet of Things, hardware can be digitally upgraded without the need for a complete and expensive overhaul,' says Edward Porter, Director of IoT Solutions at IMS Evolve.



Many organisations are now offering granular emission tracking with focus on Scope 3, which for most is not easy to understand. 'Setting clear, achievable goals provides direction and purpose, ensuring that efforts are channelled effectively. Prioritising easy wins in the initial stages can build momentum, fostering a culture of success and encouraging further innovation,' believes Todd Simms at FourKites.

This is one of the things companies like EVRi have focused on. Over the last year the organisation has been gaining a better understanding of the carbon footprint, decarbonisation maturity, and resources available to their suppliers through a number of workshops and supplier assessments. This has helped to understand what actions and support will have the most significant impact in driving forward their decarbonisation plans.

'Financial support is essential to identify where money could be saved or invested elsewhere,' says Serge Schamschula at Transporeon but is also careful to underline that there is not a single solution or type of support that will contribute the most.



The support that is most beneficial for suppliers transitioning to greener operations can vary depending on their specific circumstances and challenges. 'In many cases, a combination of different types of support is the ideal, however financial support including grants, subsidies, loans and incentives, will be a critical part of transitioning to a greener supply chain to lower the upfront costs and risks for adopting organisations,' adds Edward Porter from IMS Evolve.

### **Data & tech**

What all ways to reach decarbonisation have in common is the need for more data and the careful measurement of where the supply chain is now. It will take a combination of cost-efficient technologies with a low barrier to entry and clear ROI, as well as government investment and effective training to ensure a smooth transition to greener operations for suppliers.

The first step should always be education. Making the shift to greener operations often requires specialised knowledge and expertise in areas such as renewable energy, sustainable supply chain management, and eco-friendly design.





Suppliers may lack the necessary in-house skills and knowledge in order to make informed decisions about sustainable practices.

'We have the benefit of a strong ESG team who help us to understand the impact different choices will make on our business. Many of our suppliers don't have that, so the first step is helping them to understand what's important and what they can practically do to drive change,' EVRi explains.

The training and education include not just seminars and careful evaluation but also driver training and upskilling. Driver training is particularly beneficial support for aiding suppliers in transitioning to sustainable approaches and saving cost in parallel. If backed by a good FMS (Fleet Management System) data, it can reduce fuel / energy consumption as driver behaviour can impact vehicle fuel efficiency, for example.

The Logistics Point would like to thank the organisations which participated in this feature: EVRi, IMS Evolve, Transporeon, FourKites.\*



## **ULEZ! HOW THE NEW EXPANSION IS AFFECTING LOGISTICS OPERATIONS**

The expansion of ULEZ in London has dominated the news for the last couple of months. With it many businesses have struggled to understand how it will impact their operations and most importantly, what changes they would need to implement. We spoke to Peter Golding, Managing Director at FleetCheck, about ULEZ, how companies are responding and what could happen in the future with the increase of ultra-low emission zones in general.

'The ULEZ is a huge problem for commercial vehicle fleets as they are not only obligated to serve the areas where it applies but also because it is extraordinarily difficult to upgrade vehicles at the moment,' begins Peter. Costs for upgrading vehicles away from diesel are causing headaches for many logistics operators. On top of this, even those who can afford it are struggling with the lead times.

The limited supply and other costs, contributed by the war in Ukraine, inflation, Brexit and more, are making it nearly impossible for fleet operators to find financing ways. For many two grim options exist. One is to abandon their contracts in a city like London or to close down.

Peter admits that many business owners were uncertain whether ULEZ will be enforced and decided to wait. Could this be causing their problems now? For Peter the whole topic has been turned into a political conversation and there are conflicting messages from local and central governments.

### **Fines as costs**

Can they not just factor in the fines as needed expenses? 'Fines are prohibitively expensive and designed in a way that they can't be factored-in,' Peter explains. With the Congestion Charge companies could include them in their operational costs. The ULEZ fines are a different thing.

Some larger fleet owners will move one type of vehicle away from London and into an area with fewer rules. 'This is not good for the overall idea of limiting pollution as we are just exporting the problem,' Peter comments. Small to mid-size companies will struggle.

Peter admits that many business owners were uncertain whether ULEZ will be enforced and decided to wait. Could this be causing their problems now? For Peter the whole topic has been turned into a political conversation and there are conflicting messages from local and central governments.

### **Finding solutions**

One solution will be electric vehicles but the problems with infrastructure and access to charging points is not going to be solved on time. It is possible to see the rise of other transportation methods like cargo bikes.

'At the end it is important to underline that logistics businesses are not against cleaner air or better vehicles,' Peter continues. He argues that the zone's expansion has been too overwhelming. It would take some time to see the business effects and how the industry has adapted. However, he is certain that the industry is resilient enough and a solution would be found. \*





## ***EVS ADOPTION DEPENDS ON A COLLABORATIVE APPROACH***

The transition to EVs is one of the biggest challenges the logistics industry has faced. It seems to be slow but organisations are determined to make it work. What is the role of logistics operators, software providers, retailers and the government? We spoke to Will White, Global Head of Sustainability at last-mile delivery specialist, Stuart, about how EVs are taking over the logistics landscape and what the challenges are.

### **Will, how can carriers help partners with their fleet and the transition to EVs?**

Consumers are calling for more sustainable delivery options, a sentiment that our clients echo. The switch to EVs is a crucial step. Within cities, EVs help to reduce emissions caused by combustion engines, as detailed in the Net Zero section of our recent Sustainability Report. Along with efficiency improvements (such as order stacking and route maximisation), the transition to EVs also helps reduce the number of vehicles on the road in urban areas, easing traffic congestion and creating more sustainable cities.

Urban, last-mile logistics experts can also provide unique data and insights to support charging infrastructure providers as they establish a network of charging stations in urban areas.





## Retailers are an essential part of the solution. They can set sustainable delivery standards, including eco-friendly delivery options such as low-emission or EV deliveries.

Convenient and reliable access to charging points is essential to making EVs feasible business solutions and ultimately to making last-mile deliveries more sustainable.

### **What about private couriers, who often use vehicles which are quite old?**

We are aware that for many independent couriers, especially those who rely on older vehicles, transitioning to EVs may be more challenging due to steep upfront costs.

At Stuart, we proactively address this situation in several ways. We have partnered with an electric moped provider to set up an affordable, low-commitment rental service for independent couriers.

To date, 85+ courier partners have utilised this offering. We've also established partnerships with electric bike providers, which will improve access to affordable e-bike purchases and provide rental deals to independent couriers across the country. Secondly, by working with EV providers, we have introduced programmes that encourage independent couriers to voluntarily retire older, more polluting vehicles in favour of cleaner alternatives – including onboarding more bicycle couriers for short journeys. Finally, we provide ongoing technical support and guidance on maintaining and servicing EVs.

# Convenient and reliable access to charging points is essential to making EVs feasible business solutions and ultimately to making last-mile deliveries more sustainable.

## **Who should foot the bill? Isn't it easy to bring operations in-house?**

It is not down to one person, sector, or organisation – various stakeholders must share the responsibility for funding the transition to EVs. Collaboration is key. Last-mile tech logistics businesses like Stuart can allocate resources to support electrification and offer financial and technical assistance to their partners and independent couriers. Businesses can choose to work with partners who prioritise sustainable delivery options. However, small businesses are already struggling with inflation, supply chain issues, and rising running costs. The government can alleviate this pressure while encouraging more sustainable practices by offering incentives, tax breaks, or subsidies for electric vehicle adoption and investing in EV infrastructure.

While bringing operations in-house may seem straightforward, it is not feasible for many companies.

Operating a fleet requires significant capital investment, expertise in fleet management, and dealing with the complexities of vehicle maintenance and charging infrastructure. Partnering with last-mile logistics businesses offers flexibility and scalability, making it a more viable option, and many will already be taking steps to encourage EV use for deliveries.

## **What is the role of retailers in this?**

Retailers are an essential part of the solution. They can set sustainable delivery standards, including eco-friendly delivery options such as low-emission or EV deliveries. Furthermore, they can offer sustainable delivery solutions to their customers, such as consolidated or scheduled deliveries, which can reduce the number of delivery trips and, therefore, overall emissions.

Retailers can support sustainable logistics practices by preferentially partnering with logistics providers with robust sustainability practices and utilising EVs. They can also invest in their last-mile logistics partner's sustainability initiatives, such as offering grants or subsidies to facilitate the electrification of delivery fleets. Moreover, by setting sustainability requirements for their suppliers and logistics, retailers can encourage the adoption of low-emission delivery practices and EVs throughout the supply chain. This collaborative, whole-systems approach will be essential to meeting Net Zero targets. \*



## **VIDEO**

# **MARITIME ENTERS A MEDIocre GROWTH PERIOD WITH LOWER SPENDING**

The condition of the maritime sector can be seen as a mirror to where the whole global economy is going. Would we see a crazy boom during the upcoming Peak Season? How are retailers getting ready and what are their expectations? We spoke to Glenn Koepke, VP & GM Network Collaboration, at FourKites, about how consumer spending is affecting the sector. You can watch the full video interview below.

**Glenn, how would you evaluate the maritime industry's performance in the beginning and the middle of 2023?**

It was a double edged sword. There was a lot of good but also a lot of challenges too. Overall the service metrics (such as on-time delivery and dwell times) have been very good but there is a reason for that. Demand is low and pricing is at rock bottom.

The costs of operating are the same but profits have gone down and in some cases pricing has gone down by up to 50%. Shippers have reaped the benefits of significant cost reduction and better on-time service.



### **How is this going to impact the rest of 2023 and beginning of 2024?**

Spot freight rates have started to go up slightly as pricing has hit its bottom. We will see pricing rise at the end of Q3 and beginning of Q4. We will see dwell time increase slightly but nothing that would cause problems. General demand will also increase a little bit.

### **We are nearing the Peak Season. Are supply chains ready for it?**

From a consumer perspective spending is slowing. A lot of US and European retailers have enough stock. They are anticipating around 2 to 4% growth but it will generally be slow. For the maritime sector this means a steady increase in volumes for the next 2-3 months without any major swings.

There will be niche cases like discount retailers that may buy a specific product at the last minute. In general the low consumer spending will translate into mediocre volume increase in both Europe and the U.S. but if we translate that to the end consumer, there will be more products available on shelves and online during the peak buying season which is a big change from the last two years.

You can watch the full video with Glenn Koepke, VP & GM Network Collaboration, at FourKites, now to learn where global supply chains are moving to, what trends will reshape the maritime sector in the coming years and more. \*





## **One sizes not for all**

'A lot of organisations try to look at a one-size-fits-all strategy but it is no longer suitable for the modern era.' Different regions and suppliers would need different approaches. Often organisations sourcing from multiple locations would have one, global framework they follow. The problem with that comes when certain criteria can't be met. On occasions companies would choose to ignore their own framework in order to find a supplier.

Kimberly suggests a more flexible approach where suppliers are evaluated based on more local factors. 'We have moved to a more diverse network of suppliers and companies have started to understand the benefits.'

Problems persist because even today many organisations have not mapped their supply chains accurately. They rely on their suppliers and do checks but without having a clear view of the whole chain. This means that they might miss a point of failure that has been left hidden.

Suppliers can be approved based on the type of products they provide, the region and more. At the same time risks assessments are dynamic and need to be updated. 'For most of the industry there are product system certification in place. That is an expectation and companies have the basic controls in place,' Kimberly explains. The steps that she recommends include mapping the supply chain thoroughly, think holistically and include risks sitting across the supply chain, proactively manage change and use your systems to transform your business when needed.

## **Why do it?**

For Kimberly the reason for companies to optimise the way they work is very simple. 'What is the value of a brand? Are you willing to lose the value of your brand?' she asks at the end of the conversation. Costs for change might be high but what would happen if a customer is hurt because of poor supply chain practice? \*

**Problems persist because even today many organisations have not mapped their supply chains accurately. They rely on their suppliers and do checks but without having a clear view of the whole chain. This means that they might miss a point of failure that has been left hidden.**





# **BOOSTING THE EFFICIENCY OF LOGISTICS COMPANIES WITH FINANCE SOFTWARE**

Recent economic uncertainties, alongside the impacts of Brexit and the pandemic on supply chains, have highlighted that these practices may not be entirely sufficient to cope with logistics instability. As a result, non-core, back-office functions have become business critical to the support and flexibility they offer business decision-makers. One such function is accounting software. Simon Kearsley, CEO of bluQube, takes a look at the importance of finance software.

There is often a misconception that accounting software only handles billing and invoices. However, modern accounting systems are dynamic tools that can provide greater insights and efficiencies for businesses. By using interoperable finance software, logistics companies can transform how their business is run by allowing all third-party suppliers to interact and share information smoothly.

All third-party systems including supply chain and logistics management technology can be connected to the interoperable system to provide visibility of the entire business' finances. Interoperability means that information only needs to be input once, then it can be replicated across all systems automatically.



Interoperable systems reduce the risk of an entire breakdown of functionality. Any issue or outage is quickly compartmentalised, allowing other areas of the business to function as normal.

With greater visibility and understanding of the business and its pain points, comes more strategic decision-making. This is becoming increasingly necessary as the cost of doing business continues to rise and instability appears here to stay.

### **Flexible reporting**

With prices across warehousing, fuel and transport charges continuing to increase, coping with the costs can be difficult without an effective accounting software system. Interoperable systems allow for financial reporting across the business, considering all costs. This helps the company to make data-driven decisions, that not only enable greater stability, but also foster adaptability in the face of changing market conditions. In the absence of such a system, rising costs could quickly disrupt the operational and financial stability of logistics operators.

Additionally, manually producing, and analysing reports requires substantial human resource and is unlikely to be entirely accurate. By introducing an automated system, the reporting process is sped up significantly. Once again, freeing up the finance team's time to focus on other meaningful tasks.

### **Debt management and automated invoicing**

Effective cash flow management is another factor that allows for greater agility during tough trading conditions. To aid smooth cash flow, cloud-based accounting software allows for automated invoicing and debt management.

Systems can integrate with a company's bank account and automatically generate a sales invoice that can be emailed to the customer. Notifications of due payments then can be automatically systemised to remind the customer of pending costs by email. Or if the customer is a regular supplier, software systems can set up direct debits that generate BACS files that banks use to automate the payment process. This gets money swiftly and efficiently into the businesses account, avoiding unmanageable debts and late payment penalties.

### **Disaster recovery**

For a logistics company, a disruption to its software could result in the temporary collapse of operations, which will impact the entire supply chain. If the company is relying on an integrated system and it suffers an issue, outage, or external threat the business is running the risk of their entire system shutting down.

Interoperable systems reduce the risk of an entire breakdown of functionality. Any issue or outage is quickly compartmentalised, allowing other areas of the business to function as normal. \*



# **PREDICTING CUSTOMERS' ACTIONS WITH DIGITAL TWINS**

Digital Twins have been around for some time now, but a new interest is being shown by large organisations throughout the supply chain. Large quantities of data is needed to make Digital Twins worthwhile and advancement in different technologies has made this more possible than ever. We spoke to Beth Coppinger, Senior Director Analyst in Gartner's Supply Chain Practice, about the future of Digital Twins of the customer.

## **Beth, is it too complicated to implement a Digital Twin?**

Digital twins are not new technology. Companies have been developing twins of a variety of products and processes for several years. The rapid acceleration in the development of digital twins has been fueled by technology developments in areas such as IoT, cloud computing, open standards, AI, and digital reality technologies. And of course, the models require a large amount of data.

For digital twin of the customer (DToc), this data may come from CRM systems, VoC systems, customer data platforms, and directly from the customer themselves. As such, digital twins do require considerable investment in technology platforms.

The interesting point from our research is that most companies told us it was not the technology that was the largest barrier – it was the people, from both a skills perspective and the massive cultural change required. The next barriers cited were gaining the required data from customers and adhering to privacy standards.

### **Why is it bad that companies are not planning to do so?**

Consider the impact of not being able to properly forecast customer expectations for new products or services, predict upside or downside demand variations or align supply to demand risk. One solution to these challenges is to leverage a DToC.

In the same way that a digital twin of a product enables organizations to anticipate how that product will perform or will need to be maintained in different conditions, organizations can use DToCs to simulate how a customer will react, given a specific set of ecosystem parameters, conditions and control or input signals.

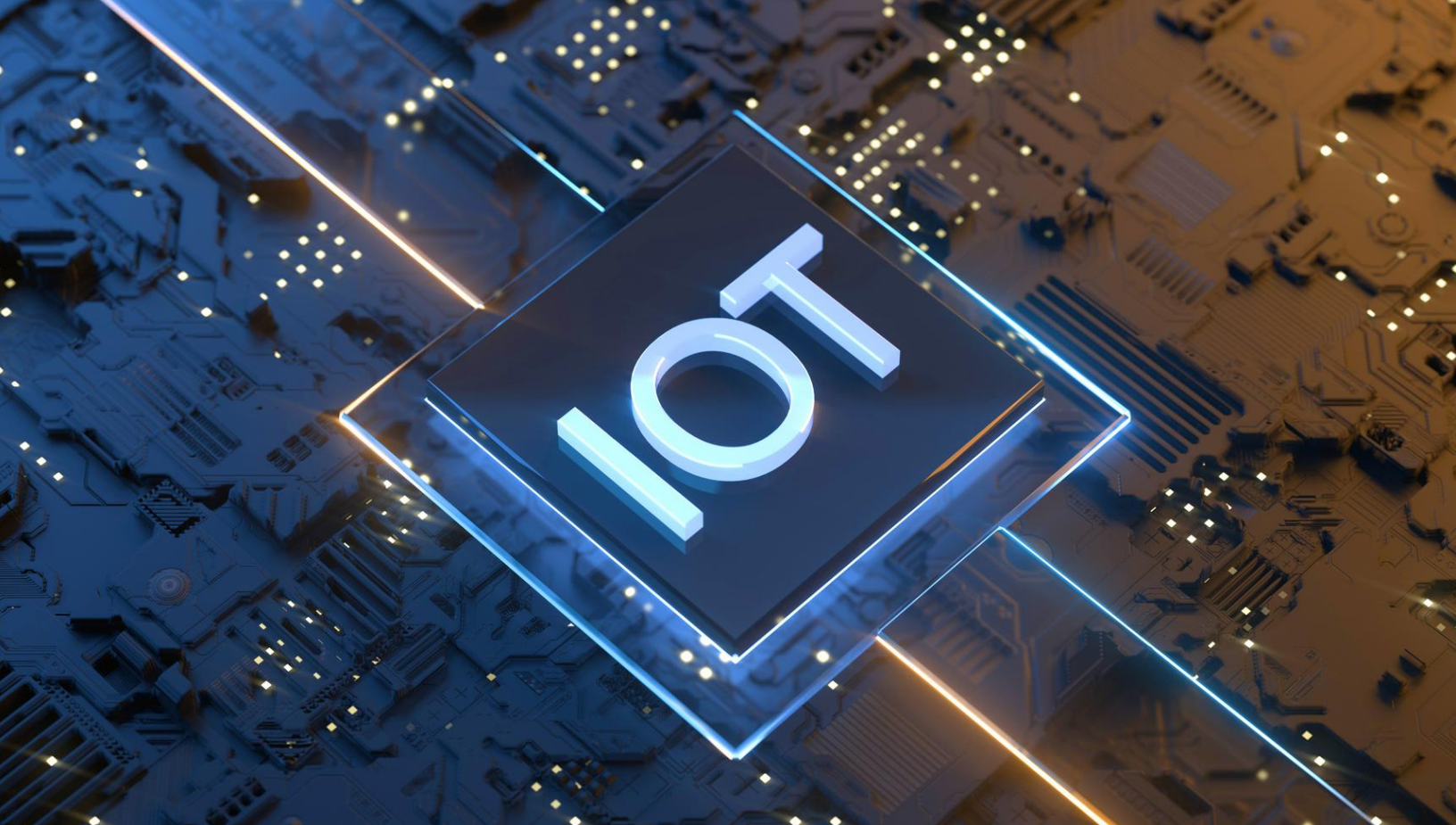
This ability to simulate customer reactions in real time will allow supply chains to better sense changing customer demands, predict scenarios for response and accelerate the time to value for new products and services. This will offer significant competitive advantage in understanding customer expectations, and enhancing the customer experience to drive growth. \*



## SHARING DATA

The customer must be willing to share certain aspects of their information with the supplier on an ongoing basis to initially create, and then maintain the ‘reality link’ between the physical customer and the digital twin. This is key – the models require constant maintenance to ensure the twin accurately reflect their physical counterpart. Note here that customers can be people, personas, companies, groups of companies – it really depends on the use case for that specific digital twin. The supplier must be able to demonstrate that they have the proper safeguards in place to guard the security and confidentiality of the customer’s information.





***WITHOUT  
CONVERGED IOT  
NETWORK  
STANDARDS, IS  
DIGITALISATION  
HINDERED; CAN 5G-  
WAN BE THE  
ANSWER?***

The Internet of Things (IoT) has transformed businesses over the past decade. It has enabled a step change in automation, efficiency, and new business development. Theoretically, by 2025, IoT could have an economic impact of up to \$12.6 trillion, according to McKinsey. Yet major constraints still remain, especially for those organisations feeling hindered by inconsistent network availability or wanting to use IoT for traceability across wide geographic areas.

Where is the single, reliable, pan-European sub-gigahertz network that can support cross-region and cross-border connectivity and enable mobile IoT at scale? Where is the connectivity solution essential for multi-network redundancy? Where, critically, is the single data standard that can accelerate innovation in device design and multi-network access?

To realise the full potential of mobile IoT will require a collaborative industry approach, using a single data standard to bring together the multiple sub-gigahertz networks into a single, reliable, connected pan-European environment, optimised specifically for low power IoT applications. Patrick Griffin, Chief Product Officer, Heliot Europe, the largest Sigfox network operator in the EU, expands on the importance of the working group and proposed OG-WAN standard to deliver the network redundancy, reliability and scale required to support a rapid expansion of mobile IoT across Europe.



PATRICK GRIFFIN, CHIEF PRODUCT OFFICER, HELIOT EUROPE

### **Mobile IoT Demand**

The mobile IoT marketplace is already firmly established, with millions of devices connected across the licenced cellular and unlicensed sub-gigahertz radio bands. The problem for the vast majority of companies, however, is that these devices are not linked to multiple different networks. While every low power wide area network (LPWAN) provides the cost-effective solution required for

IoT deployments – unlike the expensive, complex and energy sapping cellular alternatives – they do not operate together. Each operates to different data standards – from transmission volumes to frequency. As a result, it is technically and contractually challenging to achieve unrestricted roaming across a wide area, limiting mobile IoT deployments to small geographic areas, such as smart cities.

To realise the full potential of mobile IoT will require a collaborative industry approach, using a single data standard to bring together the multiple sub-gigahertz networks into a single, reliable, connected pan-European environment, optimised specifically for low power IoT applications.

This is hugely frustrating for those industries with a powerful business case for active asset monitoring across Europe. Food producers need to expand product tracking across the cold chain to improve safety. Knowing goods are at the correct temperature when in chilled transport is great – but how long are the items sitting in the sun after being unloaded? What about pooling companies wanting to embrace the reusable packaging requirement to meet European Union demands for digital labels to deliver traceability on all reusable transit packaging used more than 10 times?

To achieve these compelling business cases, organisations need true pan European connectivity – and that cannot be achieved without a densified LPWAN network.

Organisations need 100% reliability as assets pass through different regions and different countries. They need redundancy to ensure communications availability, even if one of the networks has an issue. And they require scale.

### **Standard Imperative**

Today there is only one sub-gigahertz network, Sigfox, that can offer true pan-European connectivity with unrestricted roaming between countries. Cellular alternatives not only lack 100% coverage and may encounter issues when transferring between cell towers but are also too expensive and power hungry to make a financially viable solution for the majority of mobile asset applications. Even Sigfox, however, cannot provide the limitless coverage demanded by

# **Next In-person**

## **LONDON LOGISTICS NETWORKING**

**BY**

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many IoT applications, and there is no likelihood of any vendor coming to the market with a single pan-European network alternative.

Collaboration is, therefore, essential if organisations are to achieve their digitalisation goals. 2023 marks the year when the vision of a truly densified pan-European IoT network is becoming a reality. Underpinned by the Sigfox network, but in collaboration with a cross section of other technologies that can include Helium, LoraWAN and Mioty, a Zero G WAN (OG-WAN) working party has come together to create the standard using converged network devices that will enable applications to operate across all collaborative sub-gigahertz networks.

The recent decision to make publicly available the proprietary Sigfox device code, for developers, will drive this network convergence and multi-network capability.

Key to this model is the creation of a common standard for data specification to ensure specific information and data volumes can be transmitted, irrespective of which network is being used. By defining the amount of data sent across a network to 12 bites and 140 messages per day, the IoT application will be able to run across any of the available sub-gigahertz networks across Europe. The plan is to agree this OG-WAN standard with global standards organisations, including GS1.

## **OG-WAN Progress**

The underpinning goal of the OG-WAN initiative is to achieve industry commitment and collaboration. Current OG-WAN working party members include semi-conductor manufacturers, tower companies, logistics providers, global pooling companies, device makers and reusable transit packaging manufacturers. Future members will include European wide retailers and industrial companies.

With widespread industry support and collaboration, progress has been significant. Device manufacturers are already creating OG-WAN devices with multiple network technology stacks on one chip to provide a single device solution for both static and mobile assets to add network redundancy. Three of the working party members already agreed to trial devices in their customer supply chains. Their findings will be shared with the rest of the OG-WAN community, underlining the collaborative mindset of this initiative.

This collaborative model is accelerating innovation. It is bringing together the entire sub-gigahertz community to deliver a single, unified approach to enable the affordable, effective deployment of IoT based traceability across Europe. And the pace of change is exciting: it is expected that the OG-WAN standard will be agreed during 2023, with widescale deployments commencing early in 2024. \*



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