

# THE LOGISTICS POINT

YEAR 4 | ISSUE 01 | JANUARY

2023

EXCLUSIVE  
VIDEO CONTENT  
INSIDE



## 2023: WHAT COMES NEXT IS NOT A GUESSING GAME

The future of the industry is not as unclear as we might think. But there are many things to take into account

### PREDICTING LOGISTICS 2023

What is Next for The Industry  
We All Love

### AIRFREIGHT'S NEW WINGS

New Tracking Capabilities  
Enable Better Visibility

### MARITIME'S MURKY WATERS

The Future of The Maritime  
Industry Depends on Data



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MARCH 2023

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# EDITOR'S NOTE

## Happy New Year!

To say 2022 was not easy would be an understatement. Many of the things we experienced in the last year will be present in this one. But don't worry! There is always hope.

In this edition we have gathered some great predictions for the supply chain and logistics industry for 2023 and beyond. You can learn more about the closed-loop supply chains, cash flow problems and others.

## E-bikes

You can also take a look at the future of e-bikes and how the industry is embracing them.

## Thinking Big

And let's not forget the maritime and airfreight sectors. In two great video interviews we explore how they both are reshaping to enable more visibility and better goods flow.



## Warehousing & Fulfilment Hybrid

You might already be aware that 2023 will mark our first In-Person Networking Event. Yes, that is correct! After 4 years of work, we are finally putting together a networking event and you are all invited.

## Get your ticket now!

Our first speakers are Autostore & Parcelly, Hatat Solutions and on the 21st March we will also cover topics around: Private & Public in Warehousing; Energy Consumption and Control; Labour Shortages and How to Overcome them; and more.

We hope to see you there! **So register here!**

Nick Bozhilov  
Editor in Chief  
[nick@thelogisticspoint.com](mailto:nick@thelogisticspoint.com)

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JANUARY 2023

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## **VIDEO**

# **CLOSED-LOOP SUPPLY CHAINS TAKE OVER 2023**

Technology and sustainability go hand-in-hand. The last couple of years were not easy for businesses but things have settled down a bit and more companies are doubling down on their sustainability commitments. We spoke to Niko Polvinen, Business Development & Co-Founder at Logmore, about the sustainability trends and how tech is making them a reality. You can watch the full video interview with Niko below.

**Niko, how would you evaluate what happened in 2022 in the area of sustainability in the supply chain?**

We need to differentiate between three areas of sustainability. There is the most common one - environmental sustainability, but then there are social and economical sustainability as well. I think 2022 in logistics was a lot more about economical sustainability rather than environmental. That doesn't mean there was no focus on the environment, of course. It was quite a big trend and it continues to be a trend for the foreseeable future.

In 2021 we saw such a huge disruption in global supply chains which I think led to the situation where most of the companies managing their supply chains really needed to focus on fixing these challenges and issues.



They've had to make their whole supply chain work from an economical standpoint so they can actually continue their business operations.

**Have organisations overcome this and can they now focus on what we truly perceive as sustainability which is green projects?**

The full container load cost index, for example, returned to pre-Covid rates. Prices have found a way to be more economically sustainable. So I think now we can all really focus on the environmental aspect much more. We are seeing a lot of development now in the area of reusable packaging, for instance, as well as close-loop supply chains.

**Was there a slow down in the technology adoption in 2022 because of the challenges we spoke about above?**

Many of the technologies being implemented in the supply chain vertical, actually help with sustainability and financial certainty. They do not really add costs to the sustainability efforts.

Of course, there are certain investments often needed to implement new processes in the supply chains that might be useful. They tend to be quite complex and might involve subsidiaries and subcontractors, which increases costs. But if we look beyond that, technology usually involves cutting costs.

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**What technology do you think will be highly sought after?**

A lot of it, as I mentioned, will be around sustainable packaging but also data and analytical software. In the field of pharmaceuticals, for example, a huge trend is direct patient deliveries. This requires technology to better execute the logistics process. Instead of full containers, you are not delivering small boxes with personalised medications. Robotics will also continue to pick up.

**Have companies reached a level of maturity where they now know why they need technologies and are looking more at how to make the most out of them?**

Covid, which was devastating on a personal and also business level, made logistics more visible.



NIKO POLVINEN, BUSINESS  
DEVELOPMENT & CO-FOUNDER AT  
LOGMORE

It really brought attention to the supply chain and it is now part of the strategic thinking. But we also need to focus on people and why logistics is interesting. \*





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## **VIDEO**

# **MARITIME 2023: COLLABORATION GOES UP TO FIGHT MURKY WATERS**

The maritime sector experienced a challenging year and is hoping that 2023 will bring more stability. We spoke with Ryan Closser, Director of Project Management, Network Collaboration at FourKites about the state of the maritime sector, the lessons learnt from 2022 and what to expect in 2023.

Ryan notes that smart supply chain leaders will focus on collaboration, predictive intelligence and AI to know exactly where goods are throughout the entire lifecycle of a shipment. Not just when goods are in transit, but into the yard, store, warehouse and beyond. This will help people take proactive steps to avoid disruption or delays.

Uncertainties, caused by Covid and the war in Ukraine have made sourcing for materials and products harder. Many turned to alternative suppliers but this did not solve all of the problems.

### **Visibility & Sustainability**

Due to the problems the industry has been experiencing, a renewed focus on visibility has become a cornerstone for companies.

At the same time, sustainability had to take the backseat, as companies tried to deliver their goods on time and satisfy consumers' demands.

Speaking of consumers' demands, Rayn says that it is unlikely to see a huge change in the way consumers behave. This would lead to less imports and exports, and less goods being shipped around the globe.

Overall, 2023 promises to be an interesting year. The challenges will continue and both carriers and shippers will have to find ways to collaborate in order for them to get the results they all need.



RYAN CLOSSER, DIRECTOR OF PROJECT  
MANAGEMENT, NETWORK  
COLLABORATION AT FOURKITES

You can watch the full video interview with Ryan Closser, Director of Project Management, Network Collaboration at FourKites now.\*





## **2023: PROCUREMENT STEPPING UP TO BATTLE INFLATION**

2022 had its challenges and the hope is that 2023 will bring more opportunities for businesses. John Piatek, VP Consulting Services at GEP, takes a look at what the new year will bring in the area of procurement and supply chain development as a whole. You can watch a short summary of GEP's report for the state of the supply chain in 2023 below.

'Unfortunately, 2023 looks like another challenging year,' John begins. The writing has been on the wall throughout the last year and many of the problems will persist. These include supply chain instabilities, geopolitical troubles and the war in Ukraine.

Inflation and interest rates will dominate the business outlook and will couple with the fight to protect the planet and limit the environmental damage industrial development has caused. 'This will not be a normal year,' John continues.

### **Light in the darkness**

Not all is lost as companies and individuals have already committed to addressing many of these problems and are actively working towards a better future.

Supply chain and procurement, much like in the two years prior, are set to play a big role. The expectation is that businesses will step up and do what central banks and governments, addressing different challenges, can't.

'Supply chains will be wielded for good to drive forward profit and values,' John explains. 'They will drive forward ESG goals much more than ever before.' Supply chains are also expected to reach a higher level of digitisation, something that has been a theme in the industry for years.

### **New Teams & Metric**

Supply chains will also be able to help with inflation and new metrics will become more important to businesses. At the same time, new talent will also emerge as crucial.



JOHN PIATEK, VP CONSULTING  
SERVICES, GEP

'In many ways 2023 will be the year where procurement and supply chain will switch from propping up the enterprise in times of instability, towards leadership engines that drive the business forward.' \*

# THE LOGISTICS POINT EVENTS' CALENDAR 2023

**WAREHOUSING  
& FULFILMENT  
MAY  
MARCH 2023**

**SUSTAINABLE SUPPLY  
CHAINS  
MAY 2023**

**LAST MILE & E-COM  
NOVEMBER 2023**

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WORLD OF LOGISTICS

Join us this year for many exciting events.  
Both online and in-person, we will bring to  
you great insights from the leading experts in  
the field of logistics and supply chain.

**IN-PERSON  
NETWORKING  
2023**

## **EVENTS' CALENDAR: ONLINE & IN- PERSON NETWORKING TO CELEBRATE LOGISTICS**

In 2023 we are bringing our Online Events with focus on Warehousing, Fulfilment, Sustainable Supply Chains, Last Mile & E-Com.

But we are also organising our first In-person Logistics Networking. You can now learn more about what is to come and who will join us.

### **Warehousing & Fulfilment Hybrid Event**

Join Autostore UK and Parcelly at our first event for 2023. It will be both online and in-person.

The online event is scheduled for 7th March 2023 at 10 am UK time with many discussions on how to improve your warehousing & better use what is already there.

The in-person event will happen on the 21st March at 8:30 in a stylish venue at The Museum of the Home, Shoredich London.

Autostore & Parcelly are our first two special guest speakers.

[You can get tickets for both events here!](#)



### **Delivering Green: Creating Sustainable Supply Chains Hybrid Event**

We all know how much sustainability matters. Join us in May for another hybrid event to talk about energy consumption, EVs, procurement, maritime, strategic planning and more.

The online event will take place on the 16th May. The in-person event will be held in The Museum of the Home on the 24th May.

[You can get tickets for both events here!](#)

### **Last Mile & E-Com Hybrid Event**

Let's get the last mile moving! Join us in November to discover the challenges and opportunities in the last mile and e-commerce space. We will talk about innovative delivery methods and consumers' attitudes.

The online event will take place on the 14th November. The in-person event will be held on the 21st November.

[Tickers will be available for both soon.](#)

# **THE LOGISTICS POINT EVENTS' CALENDAR 2023**

**WAREHOUSING  
& FULFILMENT  
MAY  
MARCH 2023**

**SUSTAINABLE  
SUPPLY  
CHAINS  
MAY 2023**

**LAST MILE & E-COM  
NOVEMBER 2023**

**GET INSIGHTS INTO THE  
WORLD OF LOGISTICS**

Join us this year for many exciting events. Both online and in-person, we will bring to you great insights from the leading experts in the field of logistics and supply chain.

**IN-PERSON  
NETWORKING  
2023**





# 2023 TRENDS AND PREDICTIONS FOR THE E-BIKE INDUSTRY

BY LISA CONIBEAR, GLOBAL COMMERCIAL DIRECTOR, ZOOMO

2023 is going to be an exciting year for light electric vehicles (LEVs). LEVs are at the core of safer, more sustainable cities and they will really come into their own in the coming year. Lisa Conibear, Global Commercial Director, Zoomo looks at what the year holds for e-bikes and urban logistics. In her predictions micro-fulfilment centres take the central stage.

**E-bikes for commercial use will continue to rise and new sectors will realise the benefits.**

We will continue to see companies move towards e-bikes and cargo bikes for commercial purposes. In the past few years, we have seen some delivery companies dip their toes into the e-bike and cargo bike space - Amazon being a notable front runner. As fuel prices continue to rise, at the same time as the ever-present threat of a global recession, we will see more companies look for alternative means of moving people and goods around cities, and this will be across a wide array of sectors.



We are currently seeing this appetite beyond just grocery, food and parcel, with plumbing, real estate and health care companies all expressing interest. They all want to understand how they can integrate e-bikes into their operations. One example is a plumbing company we're in discussions with. Currently each technician drives a van around London, their vans are typically only 20% full of tools and parts.

Many of those tools and parts are often only used as required, they are carried around just in case. We are talking about supplying this company with a fleet of e-bikes, supplemented by a cargo bike which would carry all the tools and parts for a catchment area. The technician uses an e-bike to move efficiently through the city to their site.

When the technician assesses what tools they need, they call the cargo bike who delivers it. These trends are not just confined to the UK. Large and small cities alike are rethinking their urban maintenance and sanitation. We now see LEVs ferrying street cleaners, waste, and cleaning suppliers across small towns in France and big cities in the UK.

Even in Germany, there is a significant shift, with Forbes reporting 100,000 cargo e-bikes were sold in 2020, a 36% growth compared to the previous year. The same article also noted that a Dutch study found that 'e-cargo bikes are a great alternative for some 20% of all delivery vans currently operating in large cities'.



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This shows that we are seeing businesses of all shapes and sizes across Europe cotton onto just how effective it is to have e-bikes as part of their logistics as they realise how this transition could save them thousands per month in insurance, parking fines, time gained and fuel costs. More importantly, moves like this will also have a significant positive impact on our environment.

The most exciting part of this is reimagining the city and returning to what cities used to be about. In the past 40 years we have given up large parts of our cities to cars, and with innovations like LEVs we can think about repurposing streets back to being for people. With safer streets and cleaner air we are seeing an emergence of people socialising together outside. Cars and vans will also be essential parts of city life, but in 2023 we will see the balance shift faster towards LEVs as more and more industries look for efficiency and cost savings – all of this to the benefit of city dwellers.

### **Companies will adopt a hybrid model of gig-workers and full-time employees for delivery**

Labour continues to be an expensive input, and rightly so! Companies want to make sure that they always have the appropriate level of staff. However, on-demand delivery staff levels are often hard to plan. I believe that we will see more companies adopt a hybrid model of using gig workers and full-time employees.

This allows on-demand delivery companies to meet a 30 minute delivery promise, whilst moving towards profitability. We have seen some exciting partnerships lately where new start-ups are partnering with existing courier companies to provide all in one courier solutions to stores that want to run their own delivery operations. This has existed for a long time in the restaurant space, think Uber Eats or Deliveroo. However now we are also seeing it for stores or businesses that want to start same-day deliveries direct to people's homes.

### **Microfulfilment centres and e-bikes will become core to meeting consumer expectations**

Customers will continue to want home delivery and shorter delivery time frames will become the expectation. In 2020, parcel delivery grew by 32% in the UK and 9% in 2021. We expect to see a similar trajectory through 2022 and 2023. This means that delivery companies will need to be innovative on how they can handle the increase in volumes and expectations to deliver faster. Microfulfilment centres, e-bikes and cargo bikes, as well as utilising high street stores for online order fulfilment are all strategies that will be pursued. An exciting innovation will be stores on the high street acting as microfulfilment centres, this will allow brands to more flexibly utilise their real estate footprint to enable same deliveries (and returns!). \*



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MARCH  
21

# IN-PERSON LOGISTICS NETWORKING



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**SEBASTIAN  
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*Hatat Solutions*

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## Autostore UK

Autostore – an automated storage and retrieval system ("ASRS") equipment manufacturer. The AutoStore system uses robotics for collecting stored goods in a warehouse, providing significant improvements in capacity and performance. AutoStore works together with leading distributors in selling and implementing the system in the end users' warehouses. End users include Puma, ASDA, Siemens, Gucci, La Poste and DHL. Softbank acquired 40% of the company in 2021 and more recently AutoStore proudly reached 1000 systems globally.



## Parcelly

Since 2014, Parcelly has been revolutionising the world of urban logistics, resolving first-and last-mile challenges by activating excess space in real estate for E-commerce and logistics through its proprietary mobile app technology. Parcelly is a Pick-Up and Drop-Off (PUDO) solution, integrating retailers and carriers across all industries and of all sizes to a highly scalable and internationally growing platform of 'logistics hubs'. Currently operating in the UK, US and Germany, Parcelly offers a variety of B2B services such as Click&Collect, Hyper-local Warehousing, Returns and Cross Docking, driving operational and cost efficiencies for retailers and carriers of all kinds.



## Hatat Solutions

Hatat Solutions is a consultancy service offering businesses access to independent advice on sourcing the best e-cargo bikes and e-bike fleets from across the world, particularly those suited to last-mile delivery operations. We have a network of manufacturers, distributors and retailers that can be leveraged to provide unbeatable pricing and fast delivery times.

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# AGENDA

Some of the topics we will be discussing both online & in-person

Speaker	Topic	When
 AutoStore	Energy Efficiency for The Electric Revolution	Online & In-person
	Hyper-Local Warehousing as the Ultimate Solution for Urban Logistics	In-person
	E-Cargo Bikes How-To Guide	In-person
TBC	Labour Shortages: How to Work Around Them	Online & In-person
TBC	Location! Location! Understanding The Warehousing Market	Online & In-person

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## Graph View



## Temperature

Max  
21.2 °C  
11/16/2022, 7:59 PM

## Light

Max  
100 Lux  
11/16/2022, 7:59 PM

### SPONSORED CONTENT

## VIDEO AIR FREIGHT: SMOOTHING THE BUMPY SKIES WITH SMART TRACKING

Uncertainty is never good news for logistics operations. The air freight industry has battled with many challenges and more information is needed to create a real-time, accurate picture. We spoke to Lena Haartje, Key Account Manager Smart Solutions at Hellmann Worldwide Logistics, about an innovative solution the company offers that combines real-time visibility of air freight and tracking goods conditions. You can watch the full video below and learn more about the [\*\*SmartAir! platform here.\*\*](#)

### Lena, what are the problems with monitoring goods in air freight?

All the uncertainty and challenges we have been experiencing lately mean that companies have a real need to know where their goods are. This is so they can plan better around ETAs and even production capacity. It's important to know if there are any delays or if there has been a split of the shipment.

The main focus is usually around optimisation. This often means choosing between multiple airlines and trying to find the best one. That is quite hard as you don't have the information in one place and have to go from a website to a website all the time.





## SmartQR can be scanned with your smartphone and all the data is displayed instantly.

The condition of the cargo is another critical point. You often need to know what the temperature is, the humidity, etc.

It is all very hard to follow and often, if you have detected a temperature breach, you wonder where it happened and why. As there are many supply chain parties involved, it is difficult to find the responsible one. Overall, there is a huge lack of visibility in the sector.

### **Have companies managed to return to pre-Covid levels of service?**

I would say that things are back to normal. But Covid showed us how important transparency is. Due to the number of delays and problems, organisations have realised the need to have that visibility.

### **What solutions are companies using to monitor their air freight?**

Currently many rely on the airlines' websites and manually check the status of the cargo.

This takes a lot of time. And when it comes to the condition of the cargo, there are two ways

The first is what we call active loggers, where you can receive the data in real-time and can track the progress. These types of solutions are very cost intensive. The other solution is Passive Tracking where you receive the data at the end of the trip. They certainly are cheaper but provide no location information at all. You can detect a problem but can't find where it happened and who was responsible.

### **What has Hellmann Worldwide Logistics created to solve these problems?**

We have a Smart Solutions Team that works at creating different tracking solutions across our supply chain. One of them is our platform SmartAir!. With it you have all milestones in one place and do not need to go from website to website to find what is happening.

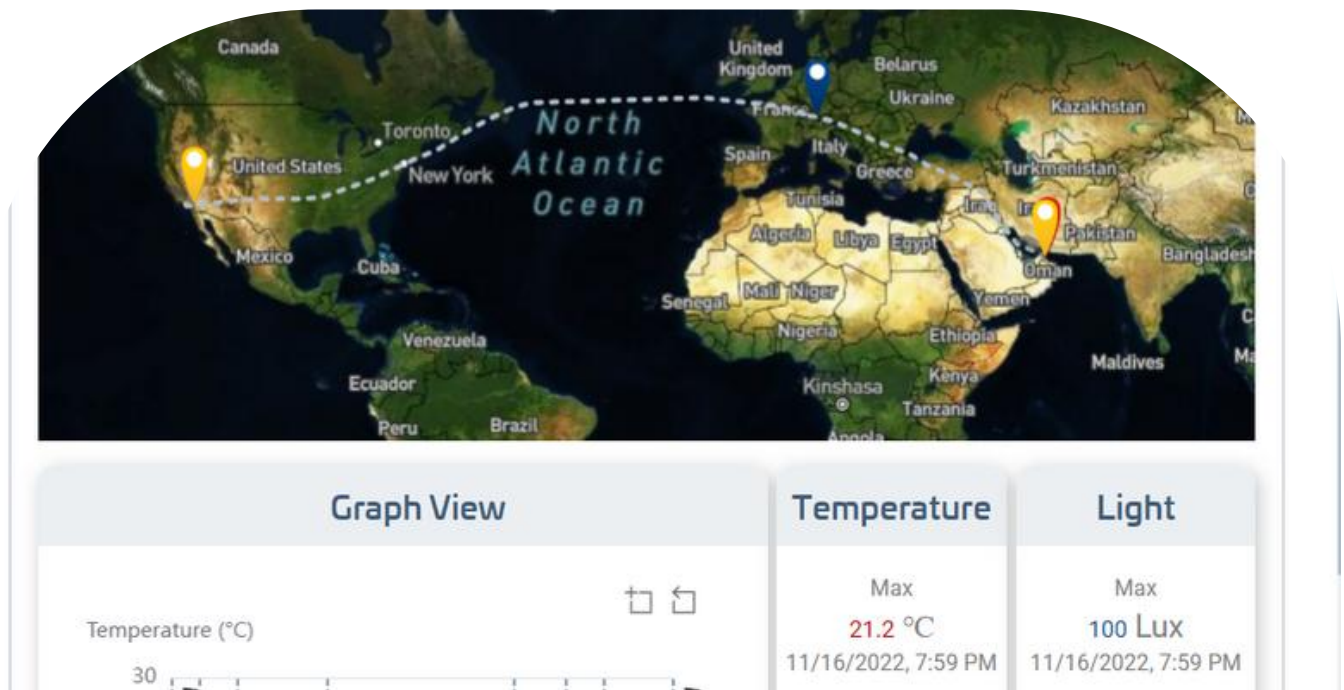
The platform allows monitoring departure and arrival dates, whether there has been split shipment or not. In addition, with the help of different reports organisations can compare different airlines and are not dependent on what someone claims.

As a next step, we extended our portfolio with a new Passive Logger which we call Smart QR. The measured data is received after the transport by scanning the dynamic QR code on its screen with a smartphone. Compared to other loggers, there is no need to use a USB and transfer the data to a computer and share it via mail.

Your phone works as the transmitter of the data and in the same second it scans the QR code, the data is sent to the cloud. Other parties in the supply chain, like the origin, can instantly see the report. This functions simply save a lot of time in operational processes.

But this was not enough and this is why we combined our real-time air freight tracking platform with the Smart QR. Each location point from SmartAir! is now connected to the logger's data and any temperature breaches along the route are displayed. Instantly, people can tell where the problem was and who is the responsible party. This changes the whole passive logger market as it's now a nearly active tool with the price of a passive one.

## SmartAir! Demo Below



With these Smart Solutions Hellmann Worldwide Logistics can offer not just logistics services but also innovative tracking.

**Can you walk us through the installation process?**

The first thing is to add the shipment to SmartAir! which is done by the AWB number. Loggers are activated by a button on the side and then a QR code is displayed. This QR code is dynamic and changes every 15 minutes to update the information. Whoever is the responsible party can scan the QR code with their phone and a link directs them to the page with the measured information.

SmartAir! provides all flight data in real-time, including CO2 emissions. You can track the flight and now add loggers to a shipment.

Then you can see all of the temperature, light, humidity and shock data. If, for example, your goods should not exceed 6°C then you can check the whole journey for a possible breach. With the integration of the logger, you do now see the location information of airports or scans combined with the sensor information (A full demo of the platform is on page \*\* in a video.)

With these Smart Solutions Hellmann Worldwide Logistics can offer not just logistics services but also innovative tracking.



That is also for customers who do not use our logistics services. Another unique role we are taking over is that we are now the exclusive distributor of the product in South Africa, Mexico, Australia, and New Zealand.

**Where do you think air freight tracking will go in the future?**

I think that with our solution we are making the first step towards a cost efficient tracking as saving money is always a main goal. I also believe that in the future it will really be necessary for companies to have a tool like SmartAir! to provide a fully transparent picture to their customers



LENA HAARTJE, KEY ACCOUNT MANAGER  
SMART SOLUTIONS AT HELLMANN  
WORLDWIDE LOGISTICS

You can watch the full video interview with Lena Haartje, Key Account Manager Smart Visibility at Hellmann Worldwide Logistics, below. [You can also learn more about how Hellmann can help you with your air freight tracking here.](#) \*



## **CAREER DEVELOPMENT IS A COMPANY MIND. IS YOURS ON THE RIGHT TRACK?**

Training and career development is something organisations are actively looking at but many are worried that their budget is not fit to produce results. However, companies should focus on the quality and not get stuck behind the lack of money. Training is not about finances and can be done in multiple different ways. We spoke to Conor Walsh, People Development Officer at DCV, about career progression and how organisations can support new and old employees.

**Conor, many companies would say they do not have a budget for training and that is out of their scope. How to convince them to spend more time making their employees better? And is it just about a budget?**

When I hear companies talk about not having the budget for Training & Development (T&D), my first question is always how much they spend on recruitment. The financial investment that needs to be put into continuous T&D can be significantly less than the investment into continuous recruitment.

The cost to replace, recruit & train good talent will often outweigh the cost of nurturing and developing existing employees. Training does not always have to come at a high cost either, you don't always need expensive training seminars or an external trainer to come in.

Often the employee just wants to feel like they are being invested in and they can see how it will improve their career. This can come in the form of internal training. You don't necessarily need a specialist for this. Often a cost-effective type of training is shadowing. Get a junior employee to shadow someone senior who wants to move into a similar role, the company saves money, and the employee feels like they are progressing.

**When we speak about training at the workplace, we often look at the initial stage. But career development is a long process. What steps do you recommend?**

Whilst training at the initial stage is important to get a new employee up to speed, this should never stop when they complete their onboarding period or probation. Candidates often state their reason for staying with a company is the investment into their continued development, a clear career path and being given the tools and direction to move along this path.

Training does not always have to come at a high cost either, you don't always need expensive training seminars or an external trainer to come in.



CONOR WALSH, PEOPLE DEVELOPMENT  
OFFICER AT DCV

Therefore, when it comes to employee retention, looking at long term career development is very important. When it comes to long term career development short, medium and long term goal setting is key. The employee needs to know what their goals are and how to achieve them. Regular catch ups to review, adjust and keep on top of these goals is crucial.

I would recommend setting short term goals to hit over the next month, medium goals for the next 6 months and long-term goals to hit over the next 2 years. They need to know what the outcome will be if they hit these goals (career development, promotion, financial rewards, etc) and what steps they need to take in order to hit these goals. These need to be maintained with monthly or quarterly catches up that continue through the employee's time at the organisation



**How do you make sure this does not feel as if the employee is just being monitored because the leadership team does not trust them?**

It is really important to manage expectations on both sides and you should make clear from the outset what these meetings are all about. Often with such meetings people might feel like it is about them justifying what they are doing. Giving as much information from the start and making it clear it is not something that is being done to target the employee is key.

Additionally, just evaluating whether goals have been met is not enough. If the employee has not managed to achieve their targets, we shouldn't just tell them off. You need to understand the reasons behind it and ask if they need more support and training. Also, look at the goals themselves and evaluate them as you go. They should not be set in stone and you need to adjust them because sometimes they are not quite right.

**How to choose which employees are best suited for continuous development when resources might be limited?**

Initially every employee should be considered for continuous development and invested in as if they will be with the organisation for the next 20 years, because that will be what keeps them there for the next 20 years. When I say invested in, that doesn't necessarily mean financially either. This could be an investment of time, training or belief.



After 12 months you will see the individuals likely to go on and progress within the organisation and those are the ones to further invest in. However, the non-selected should still be given some career development through internal training and time given by senior staff.

**Who is responsible for T&D and what are the KPIs to measure success?**

Training & career development is not down to just a singular person (although it can be!). Often it is a whole team effort. This can be a line manager or a colleague in the same department who has been in situ for longer. It can come from HR individuals or as previously alluded to there can be someone in the organisation who takes the lead role in training & development along with other elements to their role (if you are worried about budget).

KPIs can be tough to measure when it comes to training and development but some areas you can look at are employee retention, self-submitted employee satisfaction ratings, number of employees promoted into senior roles and employee outputs.

**How do you motivate someone to support a less experienced colleague and make it not feel like they are babysitting?**

The first thing is looking at the culture that is being set around T&D. This should be a company wide ethos that everyone gets involved in. It comes all the way from the director of the company to the newest employee. Senior members need to show that shadowing is something that happens on all levels of the organisation and everyone is doing it.



This also includes delegating tasks to less experienced employees and helping them get used to the tasks they will be performing. \*

# WAREHOUSING & FULFILMENT: CHALLENGES & OPPORTUNITIES

**21ST MARCH 2023**  
**8:30AM**

**IN-PERSON**  
**LOGISTICS**  
**NETWORKING**

**ROUNDTABLE**  
**DISCUSSIONS ON:**  
**WAREHOUSING & BREXIT**

**LABOUR SHORTAGES**

**TECH FOR WAREHOUSES**

**FULFILMENT FOR THE CITY**

THE LOGISTICS POINT



## **SUPPLY CHAIN IN 2023 – CASHFLOW AWARENESS IS ESSENTIAL**

Supply chain disruptions came in hot in 2022. This brought new challenges for businesses as manufacturers struggled to meet demand and find enough workers to fill production needs. Automakers such as GM were forced to close for weeks because of a lack of chips, and grocery store shelves went barren.

Transportation problems also developed, including a backup of shipping traffic in global ports and a shortage of truckers to haul freight. Who can forget the Suez Canal blockage that impacted 2022 supply chains starting in 2021?

The disruption continues to severely impact the global economy and fuel inflation, with transportation companies raising prices to offset higher shipping and labor costs. In fact, diesel prices in 2022 hit one of the highest U.S. national averages at around \$6 a gallon in June.

While we all hoped these issues would start to subside in 2023, it's now clear the Russia-Ukraine war will not end soon, putting even more pressure on supply chains and making them even more vulnerable to geopolitical forces.



Where does that leave us in 2023? There are many serious unknown factors we need to consider, including the ongoing war impacting energy and shipping costs, along with the ability to fill inventory; a turbulent global economy, which could impact access to credit, defaults and the labor market; and the semi-truck shortage, as the U.S. requires an estimated 200,000-250,000 new vehicles to maintain an appropriate fleet.

Here are some of my predictions regarding what will impact the supply chain the most in the coming year:

- As in most years, the upcoming Lunar New Year will affect global supply chains, but this year is different in significant ways. First, it arrives 10 days earlier than in 2022 (running January 22 through February 5), so enterprises need to have contingency plans in place sooner. Second, if millions of people in Asia travel for the festival, we could see increases in Covid infections — particularly in China, where in recent weeks Beijing has ceased ordering Covid-related shutdowns.
- During “normal” times, Lunar New Year results in a manufacturing shutdown and major supply chain delays. In-transit times commonly are pushed back three to four weeks. But given the continued uncertainty over Covid, businesses should have emergency plans in place to mitigate even longer delays.
- We expect regular gasoline prices to remain roughly where they are now for the near term, which is on par or slightly lower than they were a year ago. However, diesel prices are still in question with reports finding that prices are expected to fall from the 2022 highs, but remain relatively higher than previously experienced, as US distillate inventories stay low following the Russian sanctions. Businesses should account for fluctuating prices to impact their bottom line.

The economy likely will continue to be volatile in 2023, but we don’t foresee a massive 2023/2024 global recession. However, global growth will slow, particularly relative to explosive growth in 2022.

- In 2023, we'll see the amount of inventory units return to normalized levels, but the average price-per-unit will be significantly higher. Warehouse rent sits at all-time highs, so vacancy rates will remain low on that front. We do expect to see continued investments in warehouse automation, which will likely make shipping go more smoothly in the years to come and inventory be filled faster.
- The economy likely will continue to be volatile in 2023, but we don't foresee a massive 2023/2024 global recession. However, global growth will slow, particularly relative to explosive growth in 2022. We do expect more defaults and bankruptcies to shake up 2023 because interest rates will continue to rise, and banks will tighten access to capital.

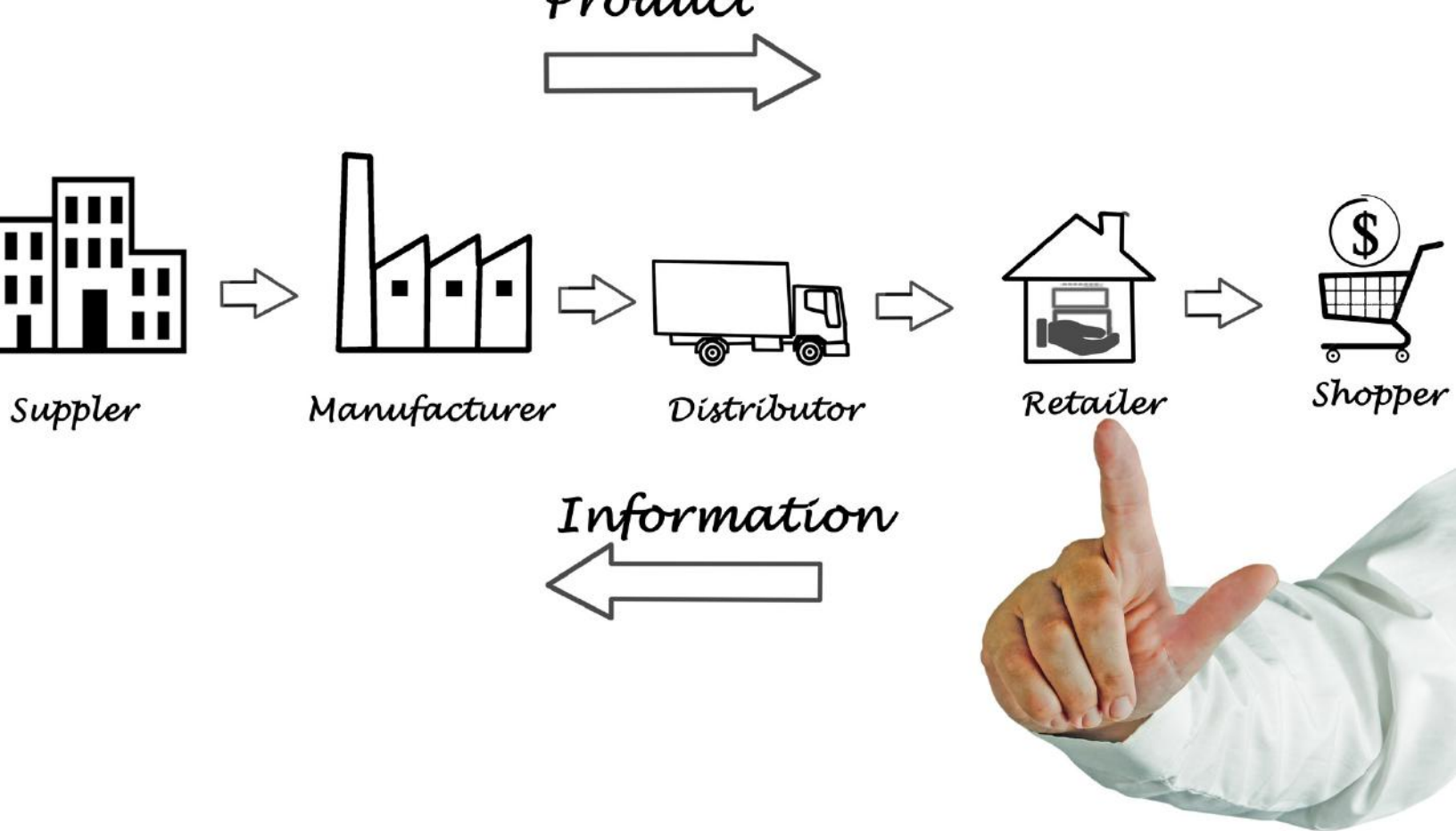
We expect regular gasoline prices to remain roughly where they are now for the near term, which is on par or slightly lower than they were a year ago.



MICHAEL ROFMAN, LEADER OF THE  
TRANSPORTATION AND LOGISTICS  
GROUP AT MAZARS

- We anticipate seeing continued consolidation of trucking companies. Shippers will prioritize sending business to larger firms with adequate capacity. However, the truck shortage will remain a challenge because haulers' ability to finance new equipment will be limited. We see equipment prices remaining high as demand outpaces supply. Companies can look at pulling cash from operations or other business lines to finance equipment.

All in all, prioritizing awareness of cashflow will be the name of the game in 2023 because we can expect things to normalize only slightly. Working with a trusted advisor to determine which investments are best for the business and how to navigate all the unknowns will be essential to success in the new year. \*



## **EASING THE FLOW OF PRODUCTS: HOW TO MINIMISE SUPPLIER RISK IN THE FOOD AND DRINK SUPPLY CHAIN**

**BY DONATO MASI, SENIOR MANAGER AND SUPPLY CHAIN EXPERT  
AT EFESO CONSULTING**

Supply chain professionals in the Food and Beverage (F&B) sector are facing an unusually difficult set of challenges. F&B supply chains are highly complex, bringing together not only primary producers and manufacturers but also logistics service providers, wholesalers, retailers and food service providers.

The interaction between these players relies on physical, digital, economic, and human infrastructures. Disruptions arising in any of these interconnected infrastructures can have consequences for the whole system and compromise the supply of food, so the recent combination of COVID-19, the Russia-Ukraine war, and high levels of inflation have shaken this infrastructure and put F&B supply chains under an unprecedented level of pressure.

One particular area of vulnerability is the flow of products and raw materials from suppliers. With Russia and Ukraine among the largest suppliers of wheat, oil seed, barley and corn, “choke points” have appeared in supply chains. Adding to this, the war has also disrupted the supply of fertilizers.



In response to the sanctions, Russia stopped the exports of fertilizers such as ammonia, urea, processed phosphate, and potash which are exported worldwide to countries including Brazil, China, the US, and India. As a result, prices of related foods have risen to record levels - at a time when consumers are demanding lower prices.

From our experience of working with clients in the F&B supply chain, we have identified three ways to address this vulnerability by minimising supplier risk.

### **1. Take great care when selecting your suppliers**

This may sound obvious, but when companies are under pressure there can be a temptation to sign up new suppliers as quickly as possible to address shortages. It's essential to look beyond a potential supplier's ability to fulfil a need, and to take into account other factors such as their financial robustness, their managerial maturity and their level of environmental and social sustainability. In the current climate, one additional factor that supply chain professionals will be acutely aware of is the need for political and social stability in suppliers' home countries.



DONATO MASI, SENIOR MANAGER AND  
SUPPLY CHAIN EXPERT AT EFESO  
CONSULTING

### **2. Monitor and develop them**

After the selection process, it's essential to develop best practices that promote both resilience and productivity for supplier development and supplier integration. For the focal company this can mean adopting incentives and knowledge transfer programmes in order to develop a supplier's team.

It should also involve close monitoring of the working practices of the supplier, including the working conditions of its employees. An effective communication channel between suppliers and the focal company will allow any "red flags" that might indicate an unacceptable risk to be spotted early, and action taken if required.

**With Russia and Ukraine among the largest suppliers of wheat, oil seed, barley and corn, “choke points” have appeared in supply chains. Adding to this, the war has also disrupted the supply of fertilizers.**

### 3. Have more suppliers than you need

Creating redundancy in the supply base can be a major factor in building resilience. This of course entails additional investment, and balancing resilience against cost is not straightforward. With carefully executed modelling, however, it's possible to determine the optimal trade-off between resilience and other KPIs. In this way you can plan for the strategic and selective use of spare capacity and multiple suppliers to cope with future disruptions as and when they arise.

#### Putting it into practice

While measures such as these make sense from a theoretical point of view, putting them into practice can be less obvious. Any development, such as supplier integration, that will directly impact the human dynamics of an organisation, has to contend with the resistance that people always feel in the face of change.

When we work with F&B companies to achieve this type of change, we find that the best way to ensure long-term sustainability of new strategies is to work in close synergy with the client's team in order to develop their own capabilities. For example, when recently helping an F&B buying company to recruit new suppliers and implement a new collaboration and review strategy, we not only identified suitable suppliers and modelled efficiency savings but developed a new negotiation strategy and conducted this alongside the client's team.



In this case the optimised trade terms alone created a benefit of around £8m, while the intangible benefits included fully trained teams able to conduct modelling and negotiate with suppliers.

Managing global supply chains will always be a complex art, and there is no simple answer to the many challenges that currently face the F&B sector. With current levels of disruption in so many key countries, however, there's no doubt that finding ways to minimise your supplier risk is a very good place to start. \*



## **VIDEO** **DELIVERY** **INCREASES LOYALTY** **- SO WHY ARE** **MERCHANTS NOT** **FOCUSING ON IT?**

Consumers' expectations are a hard thing to get right, but when we do the benefits are many. Delivery is becoming a key differentiator for retailers, and more should focus on the emotions created by a great delivery experience. We speak to Mike Richmond, Chief Commercial Officer at Doddle, about how emotions drive profitability in e-commerce and what it means to create a positive customer experience.

### **Mike, what is the role of emotion when it comes to e-commerce orders?**

It's obvious that if you have a good experience, you're more likely to repeat that behaviour and if you have a bad experience you're less likely to do it again. What we think is less understood is how that emotional experience works in the last mile, where deliveries can be stressful and uncertain: when will it arrive, where is it now, will it be in time, et cetera.

If I'm a merchant, I need my customer to be feeling confident and happy after they spend their money – before and after they receive the products I'm selling. If I'm unable to provide positive emotions for a consumer, then they are not going to be valuable to my business. Consumer emotions are really important in retail and the delivery process can have a significant effect on the overall experience.



## How can logistics companies navigate all of these and make sure that whatever they deliver produces satisfaction and happiness?

What I don't currently see in the delivery sector is a focus on the impact (on the merchant particularly) of positive or negative customer experience. If you ask a merchant about the customer's value by delivery option, customer satisfaction rating or the average basket size they very often don't have access to this information. Many retailers do not investigate loyalty in the context of delivery.

Working with one of the UK's leading online merchants, we found that 70% of customers who use PUDO are twice as valuable as home delivery customers. They are a more valuable customer segment and have a higher basket value and a higher order frequency. The conversation around this is not something we have enough in e-commerce.



## Turn the delivery experience into your competitive advantage.



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Last Mile Mandate  
eBook

**Some of this data is relatively easy to collect and analyse. But the part around consumers' emotions is much harder to access. How can companies collect it and understand it better?**

We can see what the value of a specific customer segment is, but understanding why is much harder.

We hypothesise that customers who order online often prefer PUDO because they don't want the anxiety of needing to be at home to receive a delivery, and they often have many orders on the go at once – hence their higher value to merchants. Investigating that hypothesis is much more difficult, but the best way to do it is by asking your customers. It can be done by post-purchase survey emails or a more general insight survey.

**Once a retailer disappoints a consumer, they are unlikely to return. But how can companies bring back those customers who have already been disappointed?**

If you have had a bad experience because it was costly or difficult, it's unlikely that you'll return to that company. In addition, we need to consider peer-to-peer messaging. A disappointed consumer will share their bad experience with at least another 3 to 5 people.

How to re-attract those customers is a very difficult question. It costs a lot of money with promotional activities. But depending on the scale of the issue, customers might also forgive after a period of time, and might be willing to come back to the same retailer.



MIKE RICHMOND, CHIEF COMMERCIAL  
OFFICER AT DODDLE

**By relying on PUDO don't merchants give away the most valuable part of the experience and rely on someone else's network?**

Retailers are already giving away the control to a carrier. If you buy something from ASOS, for example, it will be delivered by Yodel. Yes, potentially there is another partner in the supply chain like a post office or a pickup store. Regardless of that, the end-to-end delivery experience has already been outsourced to somebody else.

We should also look at control from the consumers' perspective. When you buy something online you may get an order confirmation email but you don't know where the item is until it arrives at your door. If you get the order shipped to a PUDO point, you have significantly more certainty because it's going to be delivered to your chosen location, and you can pick it up at a time that is convenient for you.

What type of questions and answers should be there so companies can deliver the best possible value to their customers? It depends on what you want to get out of the survey. Companies should know what the consumer experience was like so they can compare it to other delivery options. But they should also look at the data on how the consumer got to the PUDO. We need to understand why consumers are using a PUDO.

That data allows you to build a picture of emissions. At its core PUDO is more efficient for carriers as they deliver more parcels to a single location. But if 40 people drive to that location, that does not make it more environmentally friendly.



You can watch the full interview with Michael Richmond from Doddle below. \*



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