



## UNDERSTANDING THE CONTEXT



## STRATEGIES TO NAVIGATE COMPLEXITY



## OVERCOMING THE COLLABORATION GAP



# Logistics is ...

The process of **planning, implementing, and controlling** the **flow of goods**, including services, and related information, **from the point of origin to the point of consumption**



## ... a key sector for the European economy



9.2 % of GDP



≈ 13 million workers

### GERMANY



8.7%



≈ 2.5 million

### FRANCE



9.5%



≈ 1.7 million

### ITALY



8.9%



≈ 1.4 million

### SPAIN



8.8%



≈ 1.4 million

### AUSTRIA



9.0%



≈ 0.25 million

### POLAND



10.9%



≈ 1.3 million

### BELGIUM



8.6%



≈ 0.34 million



# Understanding the context

The **context** in which international **supply chains** operate has undergone **profound changes** in recent years



**RUSSO- UKRAINIAN  
WAR**



**INFLATION AND HIGH  
INTEREST RATES**



**BARRIERS  
AT ALPINE PASSES**



**MIDDLE EASTERN  
CONFLICTS**



**RED SEA  
CRISIS**



**RISE IN TRADE  
TARIFFS**



2020

2021

2022

2023

2024

2025

DISRUPTION

STABILIZATION

DISRUPTION

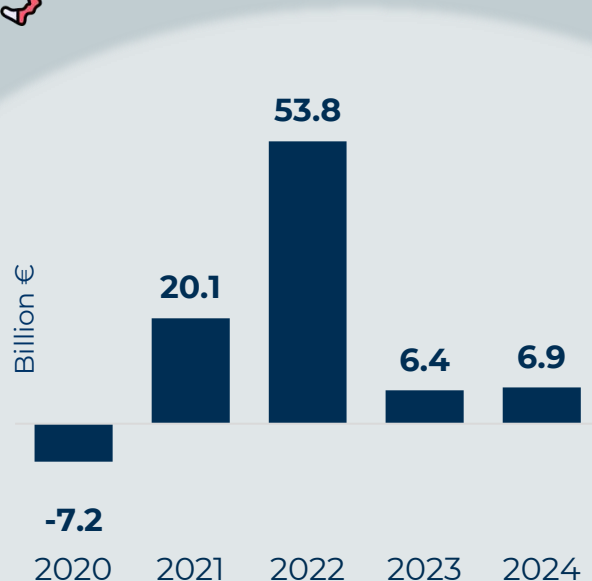


# Understanding the context

The rise in **supply chain pressures** has affected companies' **inventory strategies** and **warehouse carrying costs**



## INCREASE IN INVENTORY



## Global Supply Chain Pressure Index



## WAREHOUSE COSTS

2019

2024

+182%

Interest rates

+13%

Labour cost

+26%

Warehouse rental fees

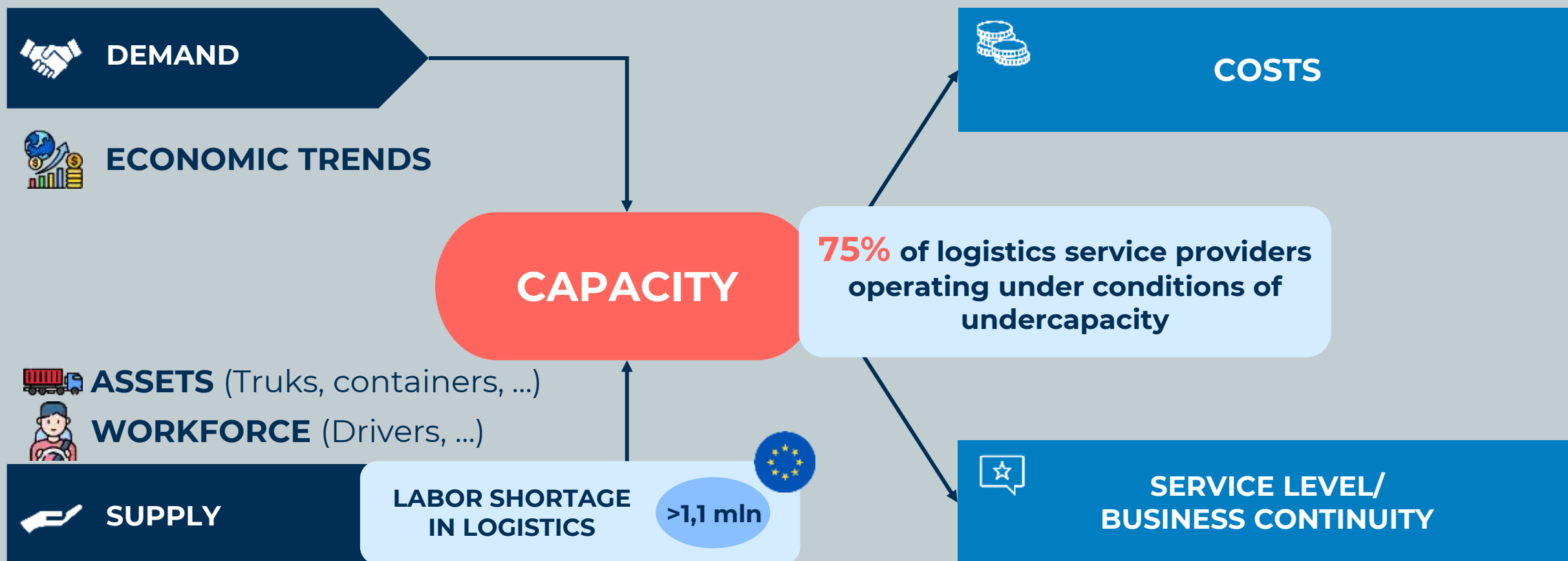
+31%

Electricity



# Understanding the context

The **transport sector** has been significantly **affected** by **supply chain vulnerabilities**, particularly from rising **fuel costs** and **capacity** shortages on both national and international levels

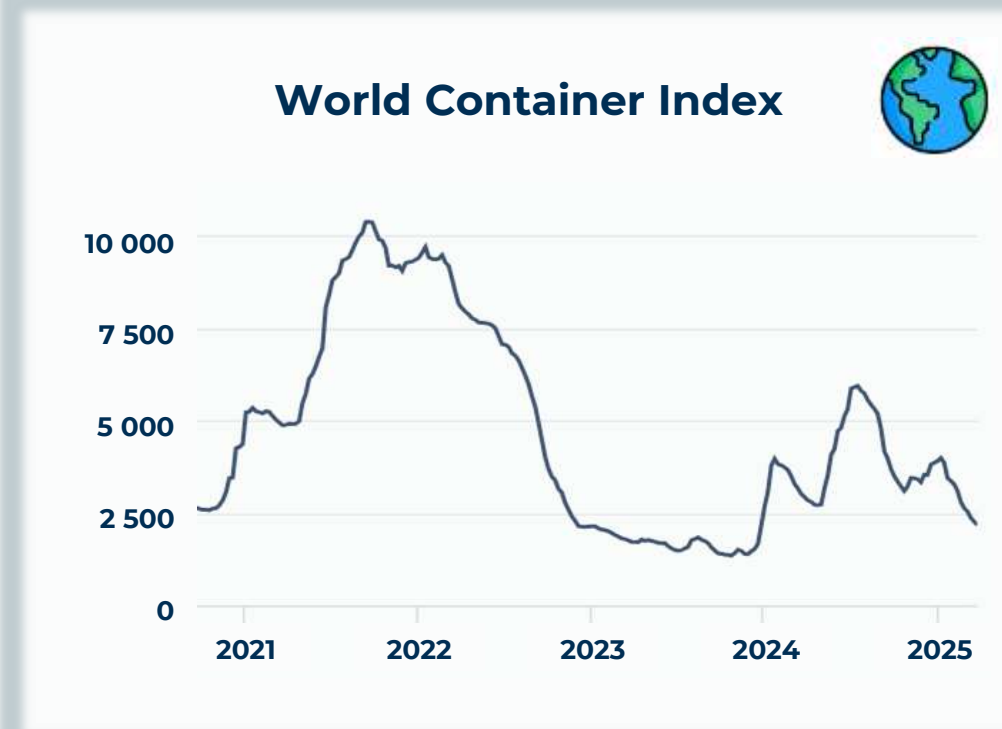
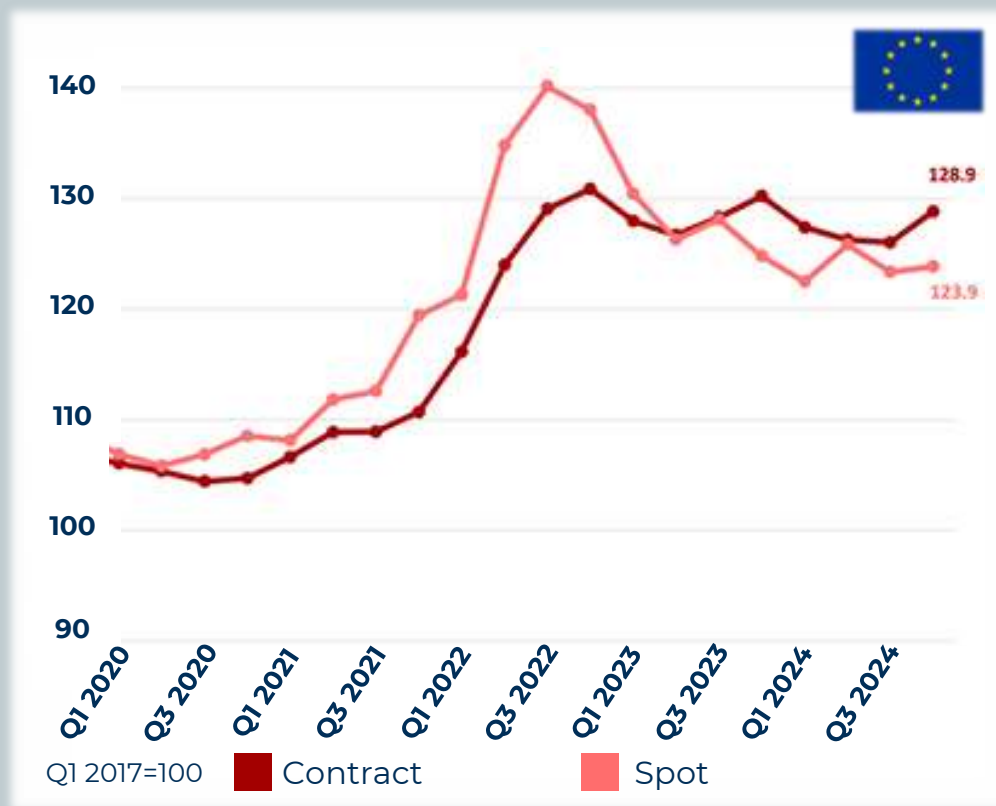






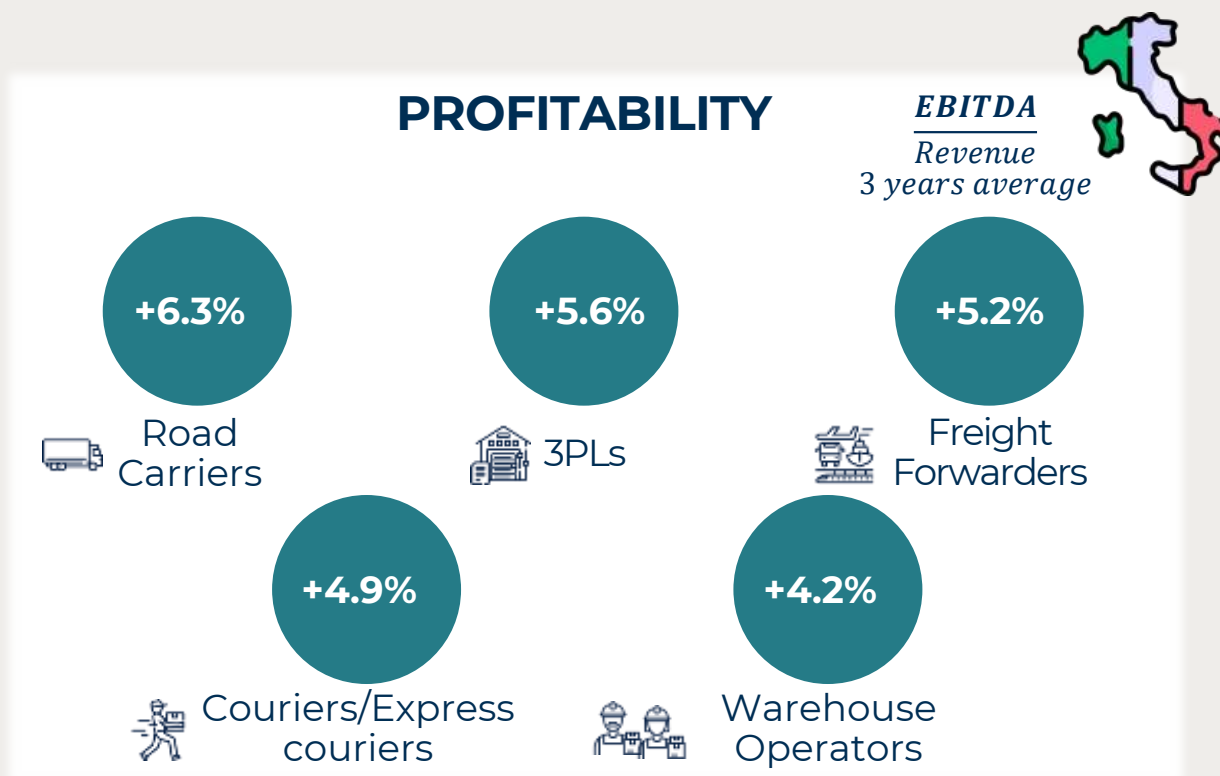
# Understanding the context

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The **significant rise** in **operational costs** is particularly **challenging** in a **sector** historically characterized by **low profitability**

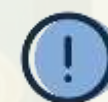




In **recent years**, the **Contract Logistics** sector has experienced **significant growth**, accompanied by a **reduction in the number of logistics service providers** in the market

## 2024 CONTRACT LOGISTICS REVENUE IN ITALY

**117,8 billion di €**

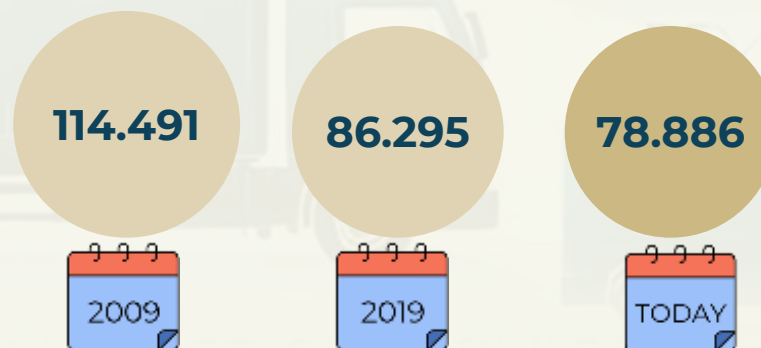
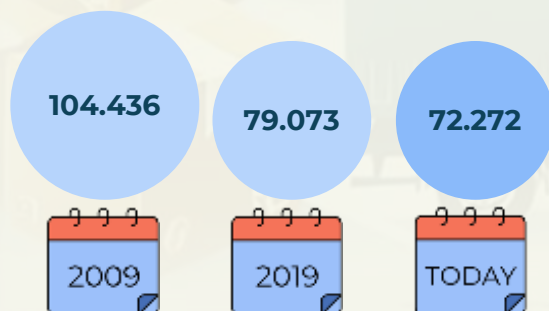


In 2019 the value was  
**87 billion €**

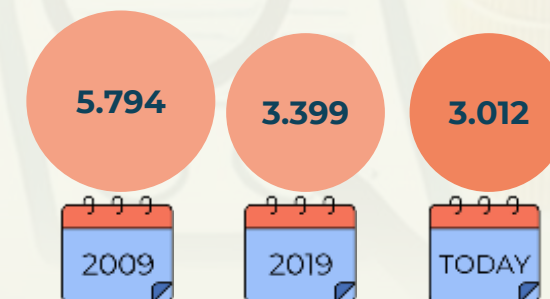
## NUMBER OF LOGISTICS SERVICE PROVIDERS IN ITALY



### Road Carriers



### Warehouse Operators







RISKS



Possible **challenges** concerning **business continuity**



**Constraint** on **logistics potential** to **support economic growth**



**Impact** on the **European economy's competitiveness** (and thus on logistics flows)