



UNDERSTANDING THE CONTEXT



STRATEGIES TO NAVIGATE COMPLEXITY



OVERCOMING THE COLLABORATION GAP

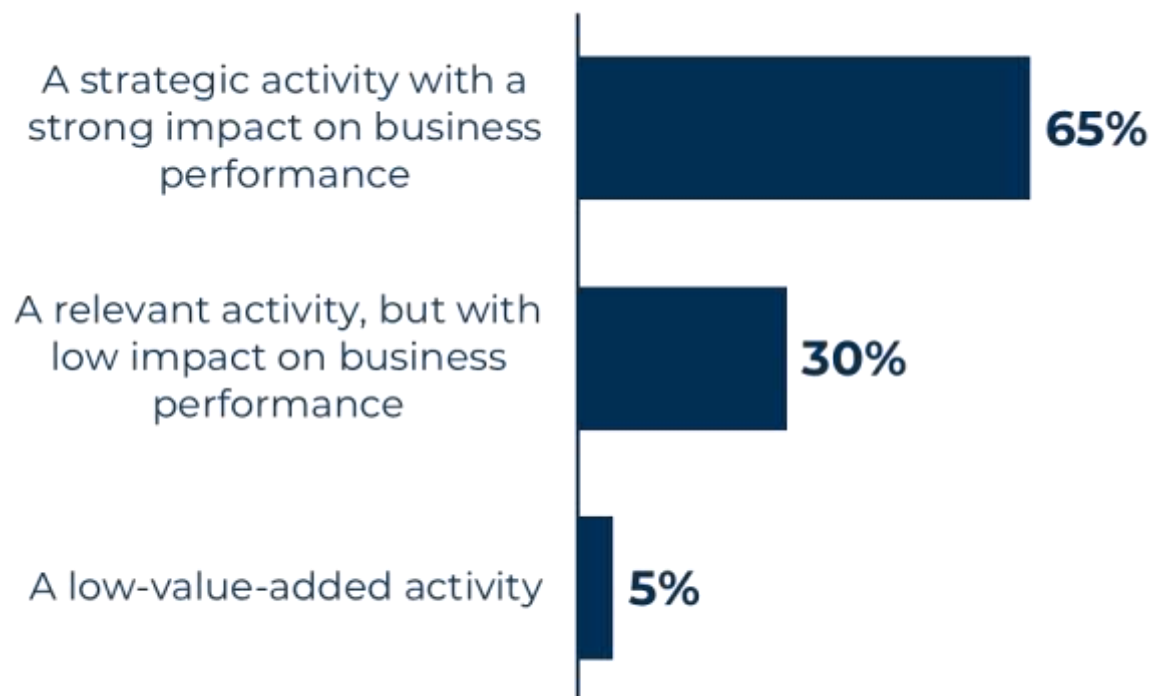




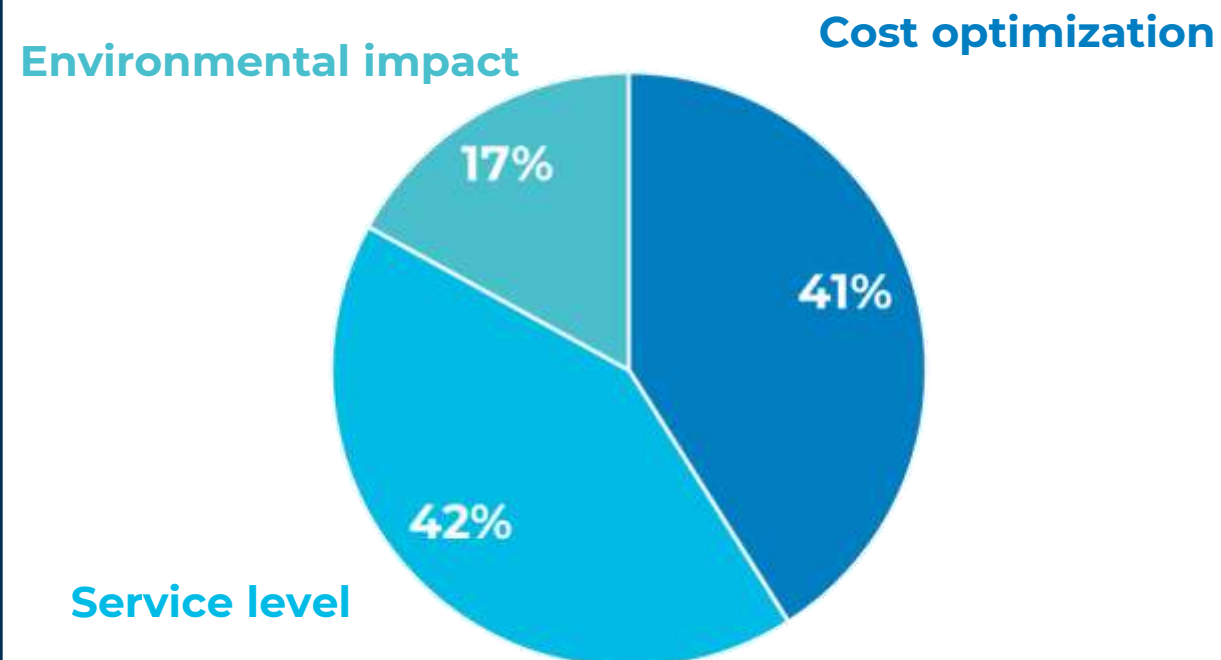
The **key role of logistics** is **confirmed** in a context where **solutions** must be provided **on multiple fronts**



What's the perception of Logistics within your company?



On which dimension does Logistics in your company have the most challenging goals today?





The increasing **complexity** and **uncertainty** in supply chains have prompted **companies** to **rethink** their **long-term logistics approach**





Six new logistics strategies of manufacturers and retailers have been identified



**LOGISTICS
RECONFIGURATION**

18%
Of companies



**SMART
LOGISTICS**

30%
Of companies



**OMNICHANNEL
LOGISTICS**

21%
Of companies



**INDUSTRIAL
LOGISTICS**

11%
Of companies



**GREEN
LOGISTICS**

20%
Of companies



**CIRCULAR
LOGISTICS**

20%
Of companies





20% of companies have made the **green transition** one of their primary focus



GREEN LOGISTICS



Focus on **packaging**: reducing **quantity**, optimizing **space usage**, and increasing the use of **reusable materials**



Fleet renewal and **intermodal transportation**



Logistics network design: focusing on the **reduction of transportation distances**

20% of companies



Green building development



Environmental impact measurement



Client-provider collaboration for **redesigning processes** (e.g., delivery slots, etc.) and implement **shared investments**



A potential **tension** between the **operational challenges** caused by a constantly changing context and the **increasing needs of manufacturers and retailers** emerges

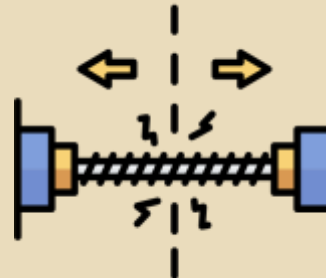
CONTEXT



COMPLEXITY



UNCERTAINTY



CHALLENGES



**AMBITIOUS
STRATEGIES**



**INCREASE IN THE
SERVICE LEVEL**



A strong **collaboration along the supply chain** is a **key ingredient** to effectively **implement** the **new logistics strategies**

CONTEXT



COMPLEXITY



UNCERTAINTY



COLLABORATION

CHALLENGES



**AMBITIOUS
STRATEGIES**



**INCREASE IN THE
SERVICE LEVEL**



The **growing awareness** of the **centrality of Logistics** and of the **importance of investing in new technologies** is accompanied by an **evolution in the role of logistics operators**

Scale
economies



Learning
curve advantages



Innovation
capabilities



Skills
development



In which areas does collaboration with logistics service providers generate the greatest value?

Source: 800 European manufacturers and retailers



INCREASED FLEXIBILITY

44%



OPTIMIZATION OF THE
COST/SERVICE STRUCTURE

34%



STREAMLINING OF THE
INTERNAL STRUCTURE

33%



GREATER RESPONSIVENESS TO
CHANGES

21%



RISK REDUCTION / INCREASED
BUSINESS CONTINUITY

20%



ENVIRONMENTAL TRANSITION

12%



PRODUCT/SERVICE INNOVATION

12%



DEVELOPMENT OF NEW ACTIVITIES
(ADVANCED SERVICES)

9%



DEVELOPMENT OF NEW BUSINESSES
(EXPORT, OMNICHANNEL)

6%



DIGITAL TRANSITION

5%



5 categories of mechanisms to **make collaboration more effective** have been identified



COLLABORATION



RELATIONSHIP:
characteristics



TECHNOLOGIES:
characteristics



**PLANNING AND
CONTROL**



**RISK AND
BENEFIT
MANAGEMENT**



**PROJECT
MANAGEMENT**



An **effective collaboration** is the **key** to **combine economic objectives, service level goals**, and the **reduction of environmental impact**



COLLABORATION



Positive result



COST



SERVICE



SUSTAINABILITY



COLLABORATION AS A PATHWAY TO SUCCESS, NOT THE DESTINATION



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