

NEW BUSINESS MODELS AND FLOWS – THE FUTURE OF TRANSPORT

BRUSSELS, MAY 9, 2018

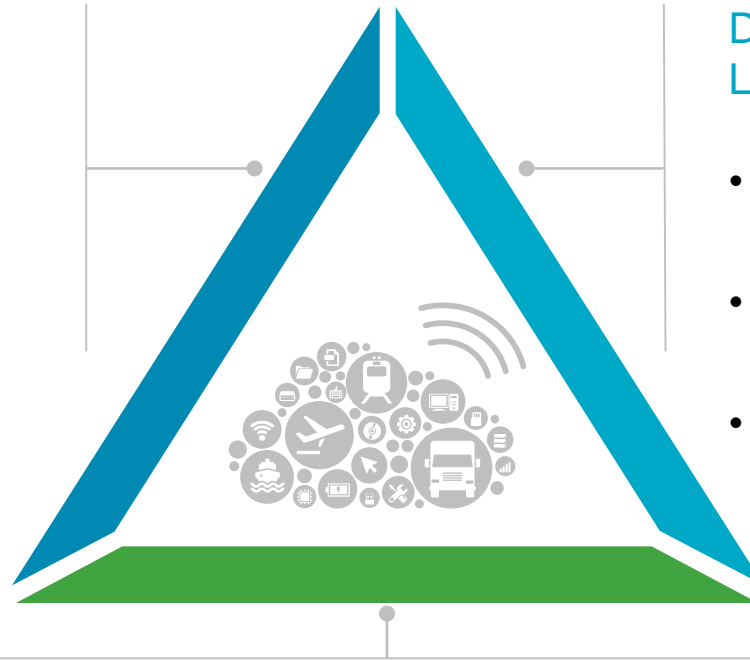


Multimodal Year 2018 – The Future of Transport

The logistics industry is under pressure

INCREASING CLIENT DEMANDS

- Cost pressure
- Accuracy
- Predictivity
- Transparency
- Flexibility



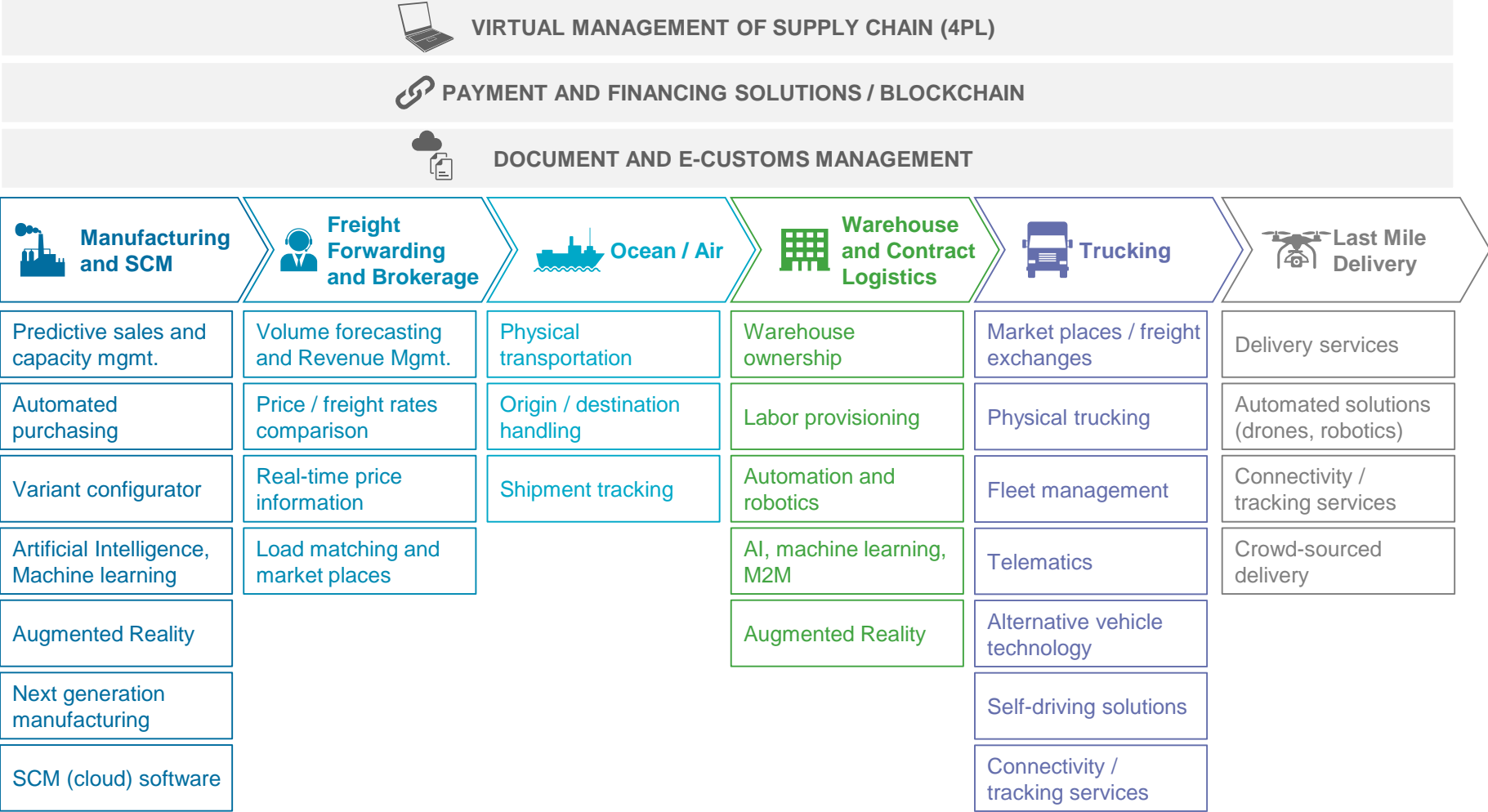
DYNAMIC COMPETITIVE LANDSCAPE

- Forward integration of carriers
- E-Commerce giants build logistics capabilities
- Start-ups disintermediate logistics value creation

NEW TECHNOLOGIES

- Big Data, Artificial Intelligence
- API and platform technology
- Automation and robotics

Digital disruption is happening along the entire logistics value chain – Competition increasingly with “asset light” players



Source: Oliver Wyman analysis

We are standing at the beginning of an innovation wave of digital business models

EXAMPLES



DIGITAL FREIGHT EXCHANGE

- Matching
- Optimization of utilization and routing
- Additional services for truckers



E-FORWARDING

- Optimized UI/UX
- Automation of processes



DATA-BASED SERVICES

- Data infrastructure for third parties
- Connecting physical and financial flow
- Specific applications



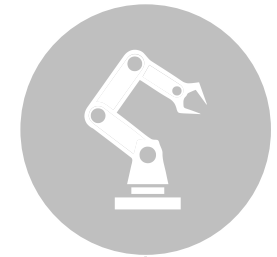
ASSET-LIGHT DISTRIBUTION

- “Uber for Freight”
- Intermodal distribution



AUTONOMOUS TRUCKING

- Booking platform for Platooning
- Fleet management for autonomous trucks

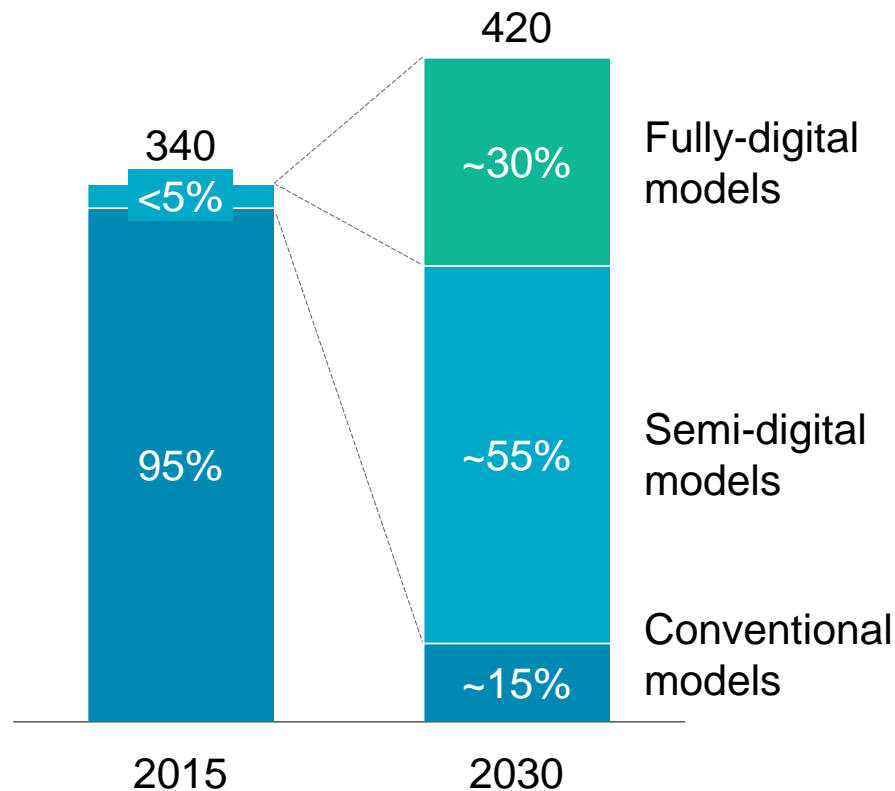


DIGITAL WAREHOUSE

- Capacity management in/across multiple warehouses
- Automation of contract logistics processes

Digital AND hybrid business models define new success factors

DIGITAL FORWARDING REVENUES in € Bn



FUTURE SUCCESS FACTORS

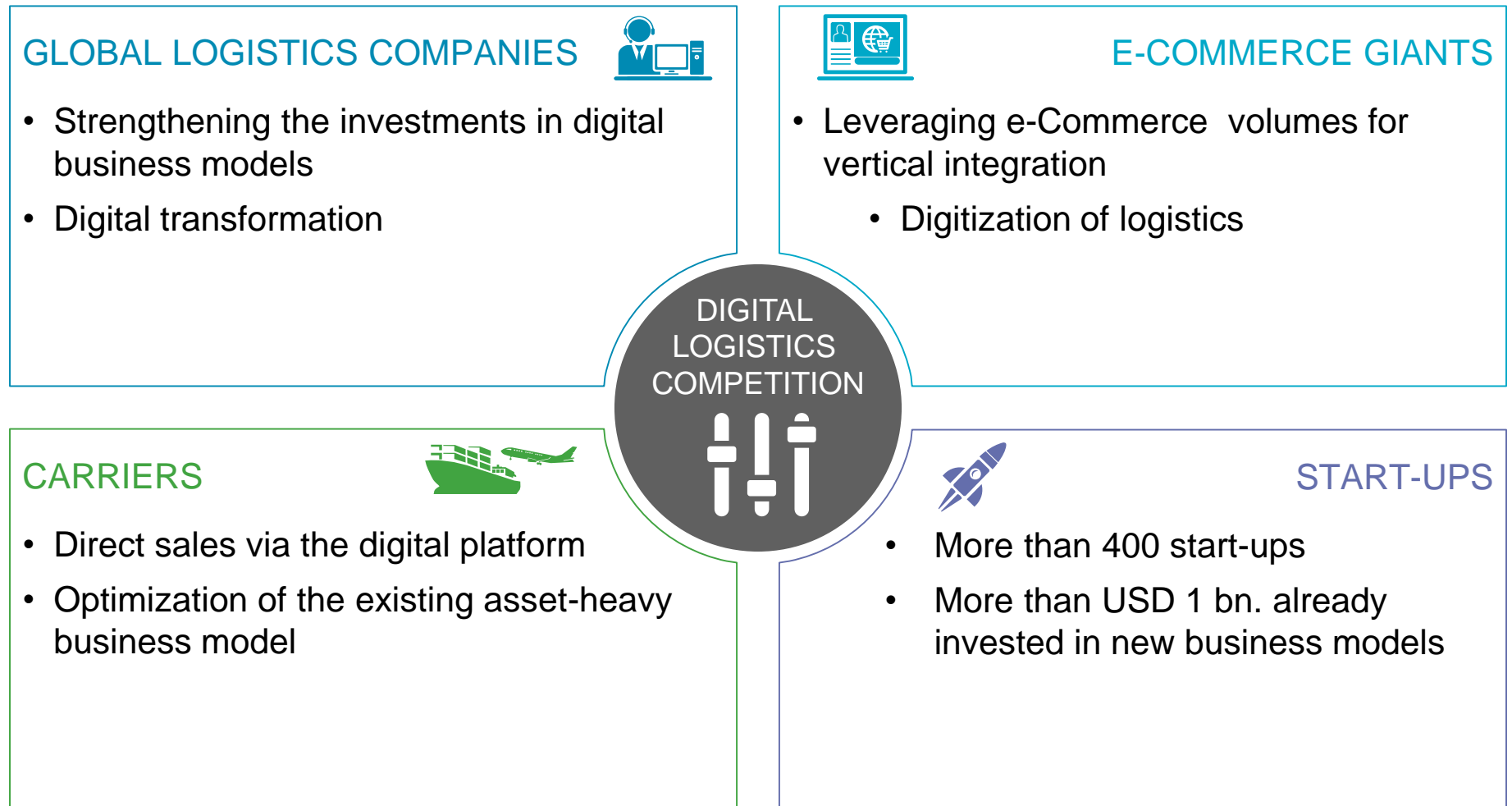
- Customer Journey
- Speed and scalability
- Integration of players along the value chain
- Short release cycles for new applications and continuous innovation

BUT ALSO...

- Strong solution competency for complex transport services

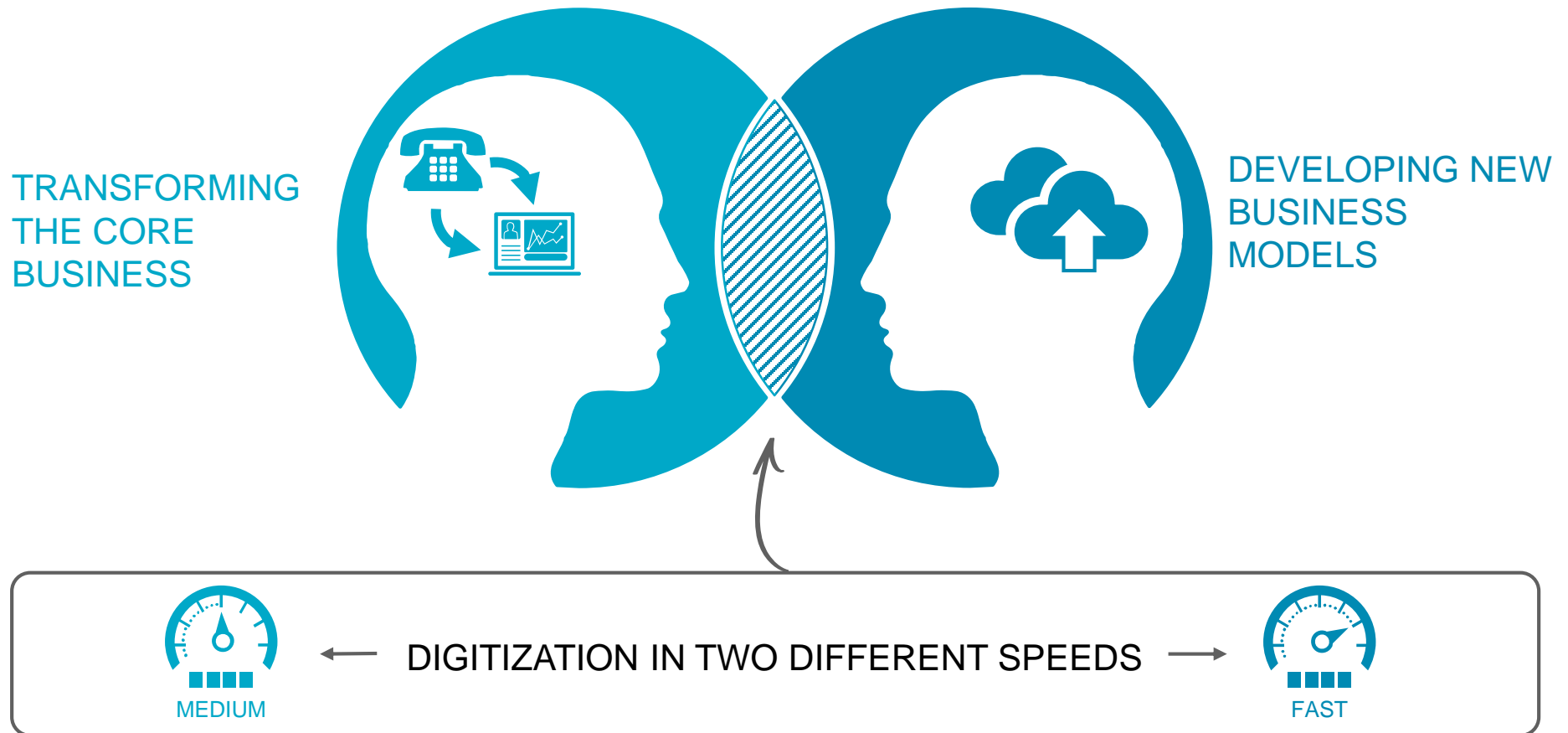
Source: Oliver Wyman

Competitive landscape is rearranging



Source: Oliver Wyman

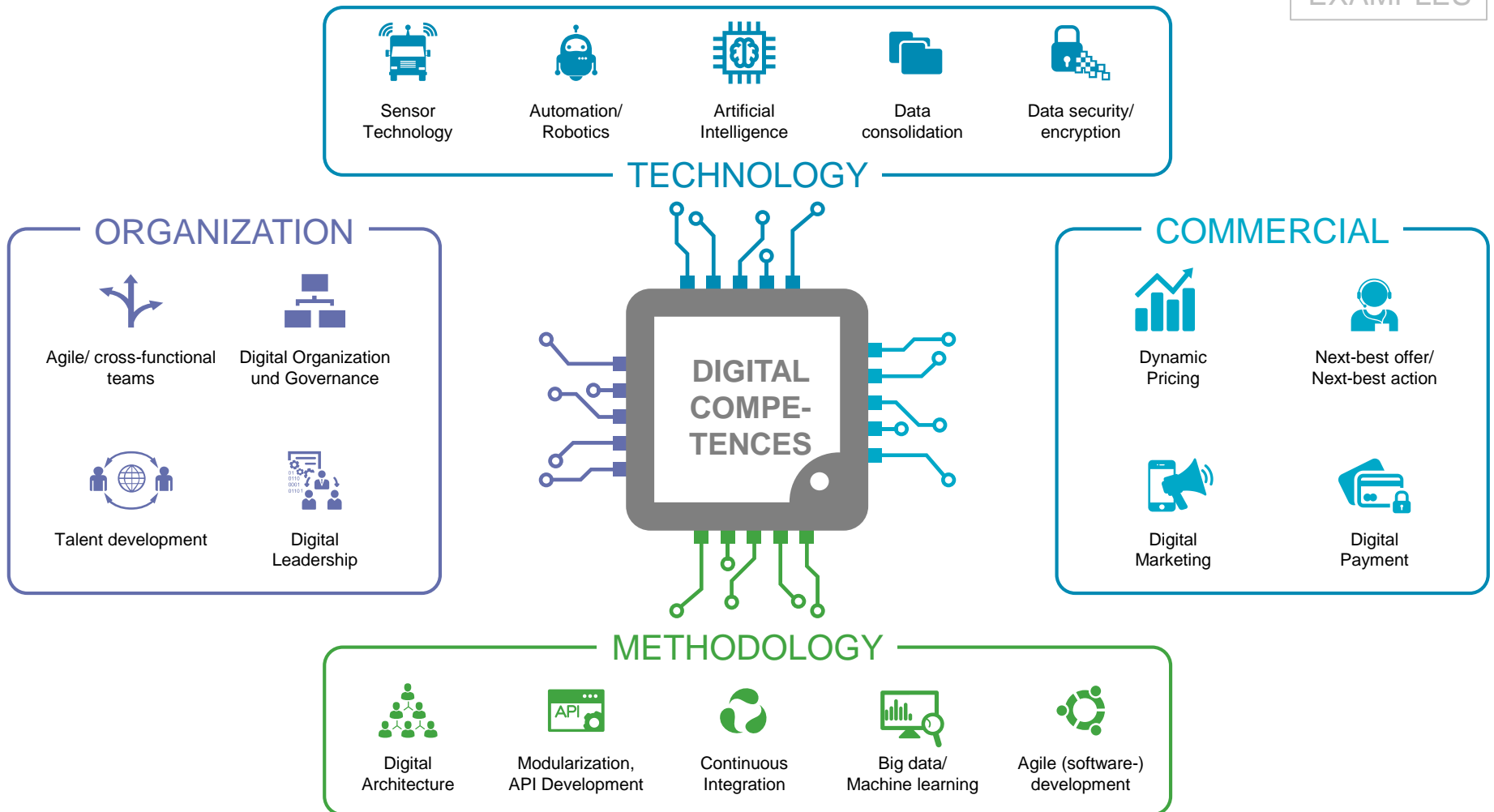
The challenge for logistics players: Digitizing the core business while at the same time developing new business models



Source: Oliver Wyman

Digitization requires developing new competences

EXAMPLES



Source: Oliver Wyman

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