

Member survey: **Digitalisation** of temperature- controlled logistics

1 June 2022



Digitalisation in logistics is becoming increasingly important.

Our survey of 32 logistics companies shows that digitalisation is becoming increasingly important, although more than half of the companies do not have a digital strategy. The participants indicated that the lack of suitable employees is the main obstacle to digitalisation. Investments are focused on improving core processes and customer retention. On the other hand, many companies are not yet investing in areas such as real-time data and data analytics.

The results show that digitalisation is an important topic for the respondents. In fact, 87% of them said that digitalisation is one of their top 10 strategic issues. However, 60% also admitted not having a digital strategy.



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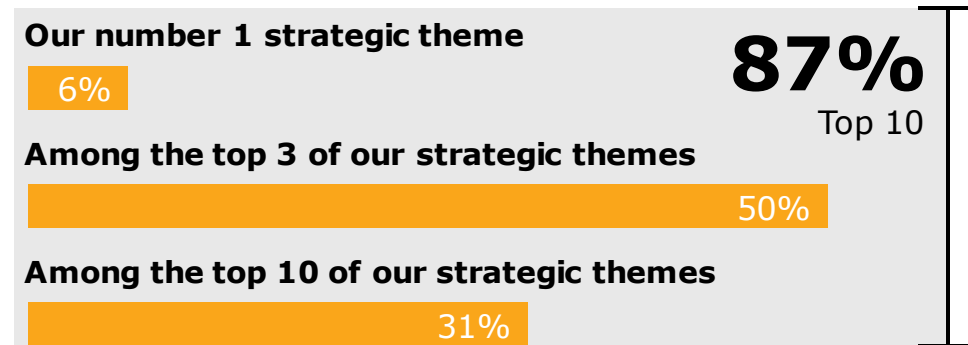
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Digitalisation is a significant topic. However, 60% do not have a digital strategy.

How important is the topic of digitalisation for your company?



One of many topics

9%

No topic

3%

How do we explain this discrepancy between the perception of significance and the lack of digital strategy?

A strong majority finds digitalisation a significant strategic issue. But a majority has no digital strategy.

How does your company strategically address digitalisation?

Company strategy is completely digital

3%

A well-defined digital strategy

38%

Digitalisation is an issue but no digital strategy

38%

Corporate strategy without digitalisation as a theme

9%

No formulated corporate strategy

13%

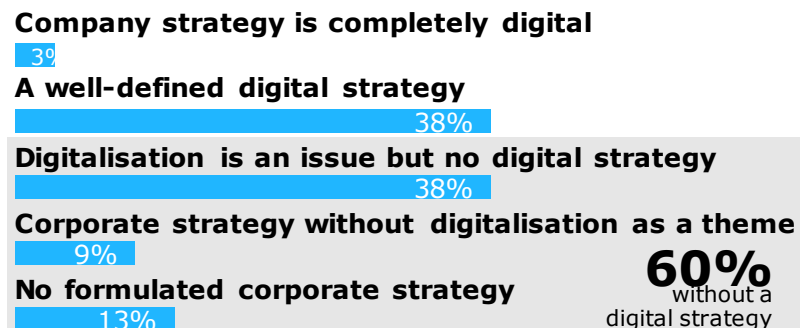
60% without a digital strategy

The majority are still building up their digital skills; they lack suitable personnel for this.

How important is the topic of digitalisation for your company?



How does your company strategically address digitalisation?



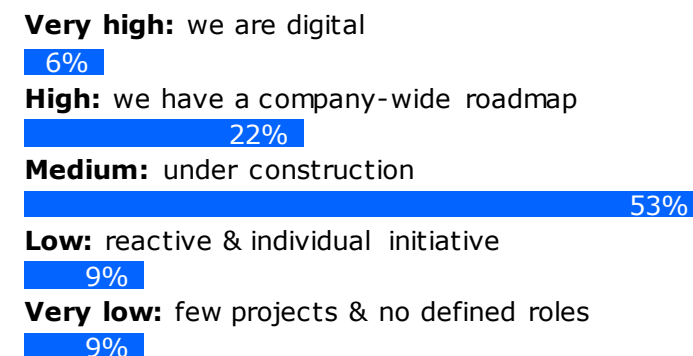
Many companies recognise that digitalisation is important.

They have already undertaken numerous digitalisation projects and have initiated the first explicit processes, roles and instruments to manage digitalisation in their companies.

However, most of these are still under construction and only partially implemented.

A lack of digital strategy is not the main obstacle to digitalisation. Much more problematic are the lack of human resources.

Please carry out a self-assessment of your company's digital maturity level.

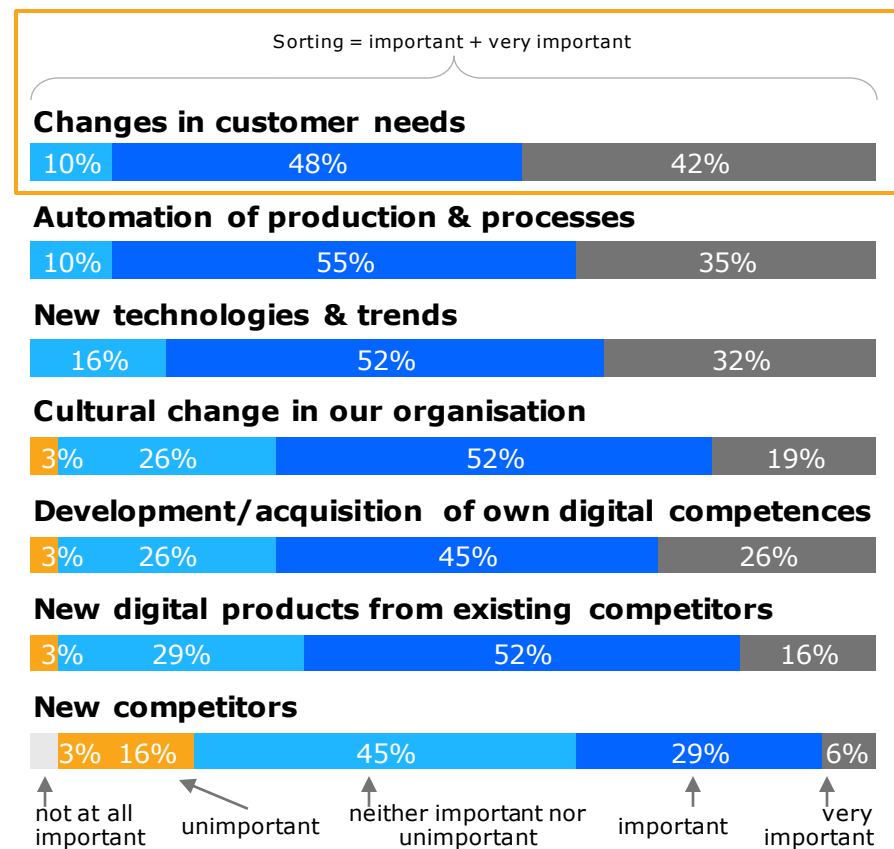


What issues are holding back your company's digitalisation?



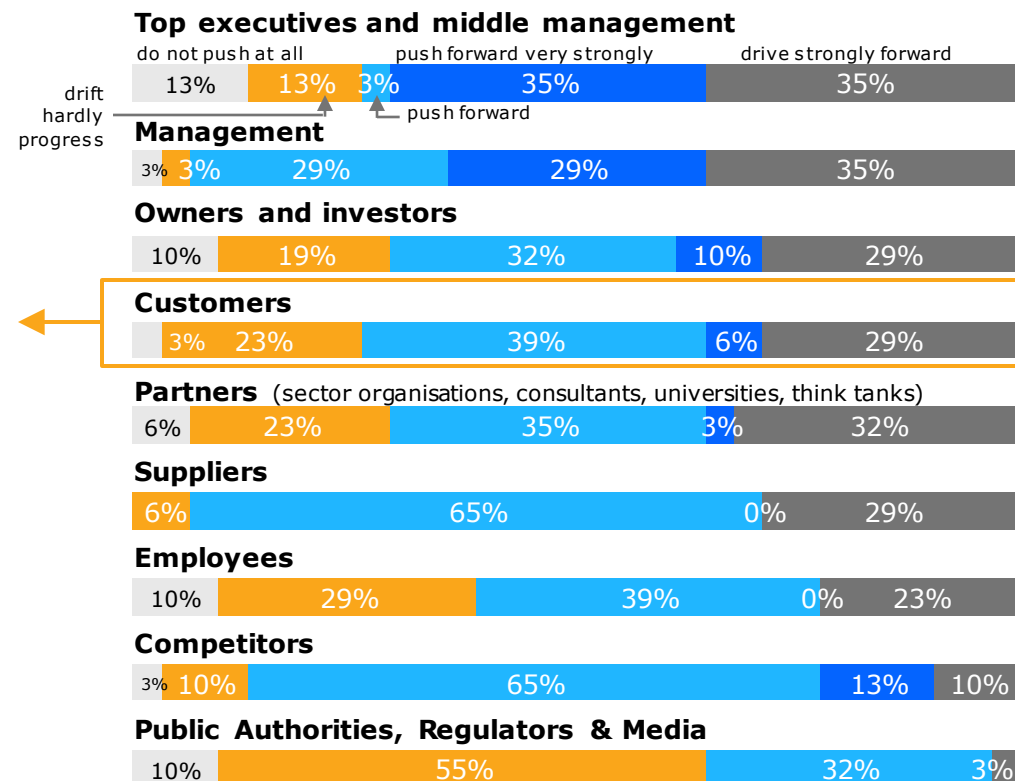
Customers are the most important strategic challenge but not the most important driver.

How important are these strategic challenges for the digitalisation of your company currently?



Although management and the executive board are responsible for the strategic direction of a company and the implementation of this strategy, we would still have expected customers to play an almost equally important role in digitalisation.

To what extent is digitalisation in your company driven by these stakeholders?



Digitisation is becoming increasingly important and was not slowed down by recent economic crises.

Where does your company place its strategic focus in the context of digitalisation?

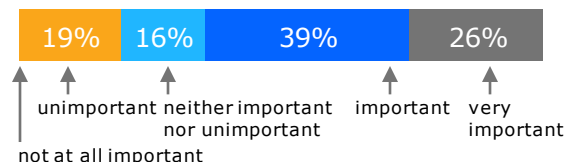
Digitalisation: internal processes



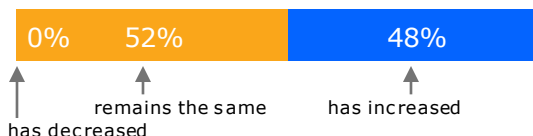
Digitalisation: interface to the customer



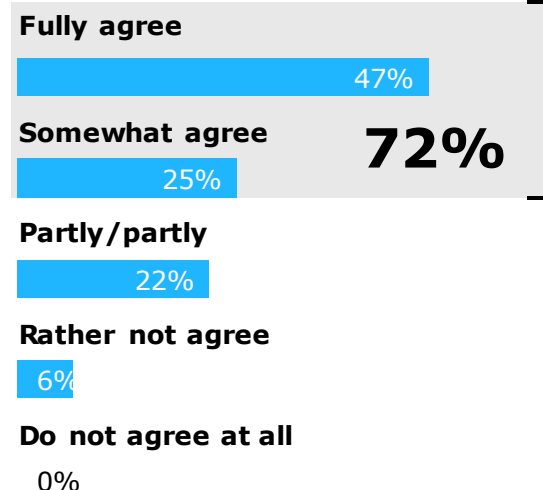
Development of digital products, services & business models



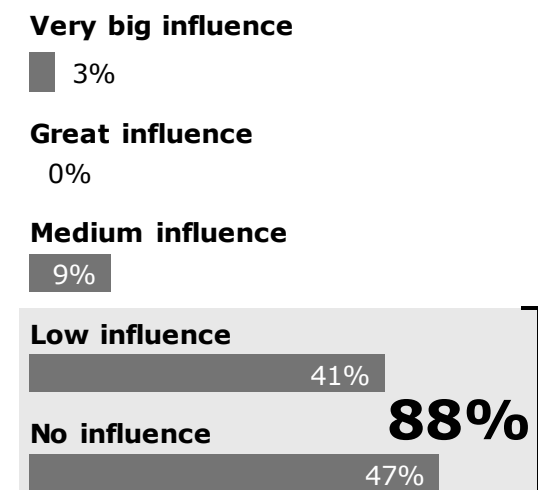
To what extent has the importance of these priorities changed as a result of the economic crisis of the last two years?



In the last two years, the topic of digitalisation has become even more important for us



To what extent have the economic crises of the last two years led you to stop digitisation projects?



The digitalisation of internal processes and customer interfaces are most important.

Where does your company place its strategic focus in the context of digitalisation?

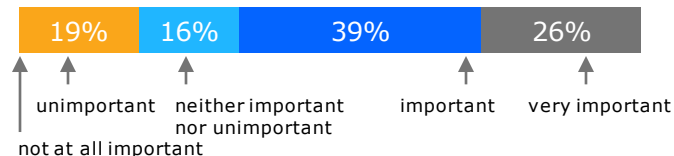
Digitalisation: internal processes



Digitalisation: interface to the customer



Development of digital products, services & business models



Clear cut: the digitalisation of internal processes and the interface to the customer are much more important than the development of digital products, services & business models.

In which digitalisation areas are you currently making the biggest investments?

Automation and/or optimisation of logistics and transport processes



Development of customer and/or service portals



Digitalisation of customer service



Digitisation of the interfaces



Digitalisation of sales and marketing



Digitisation of the support processes



Complementing existing products with digital features



New digital products and services

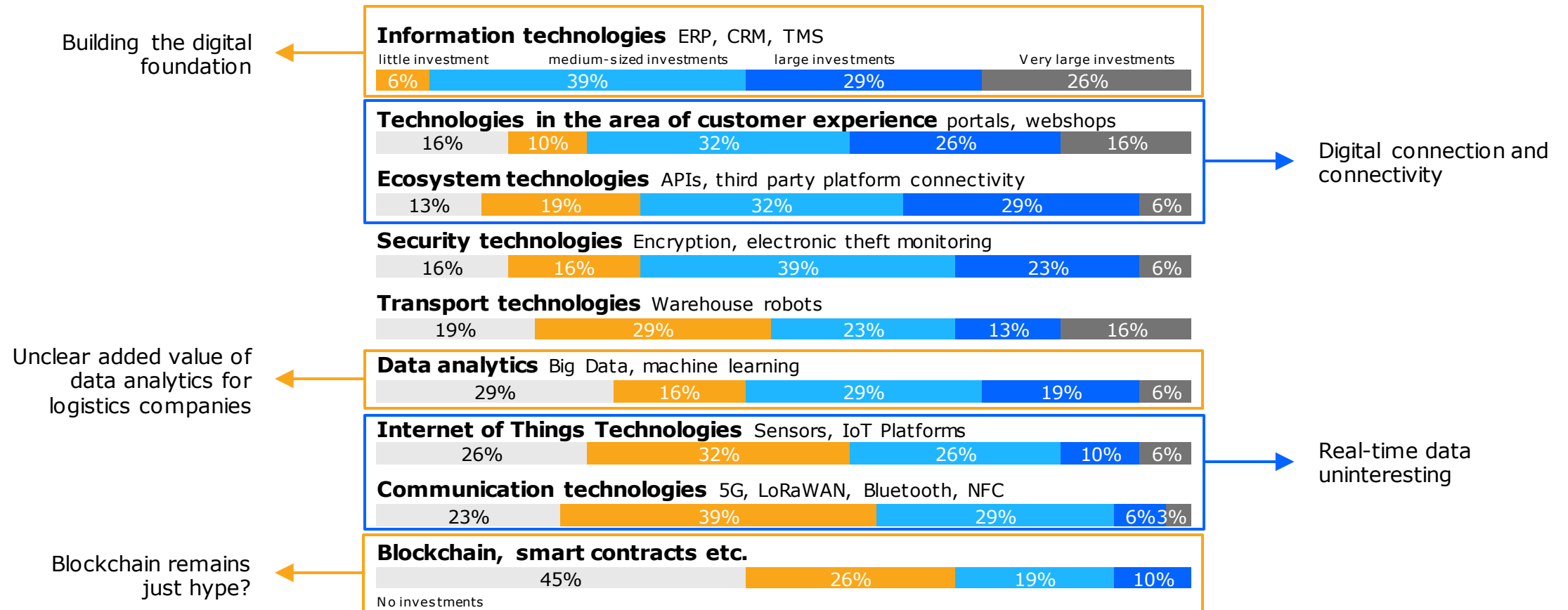


Introduction of new, digital business models



Technology investments focus on the digital foundation and connectivity.

To what extent is your company currently investing in the following technologies?



Who took part in our survey?

> 5000 employees

6%

1000-5000

22%

250-999

19%

50-249

34%

10-49

16%

1-9

3%

Employee

0%

Team leader

0%

Head of Department

28%

Management

72%

Members of the SVTL

78%

Supporting members

9%

Non-members

13%

32 participants.

The SVTL has 35 members and 37 supporting members