

CURRENT AND FUTURE TECHNOLOGIES USED TO MANAGE LAST-MILE ACTIVITIES

Survey of retail executives

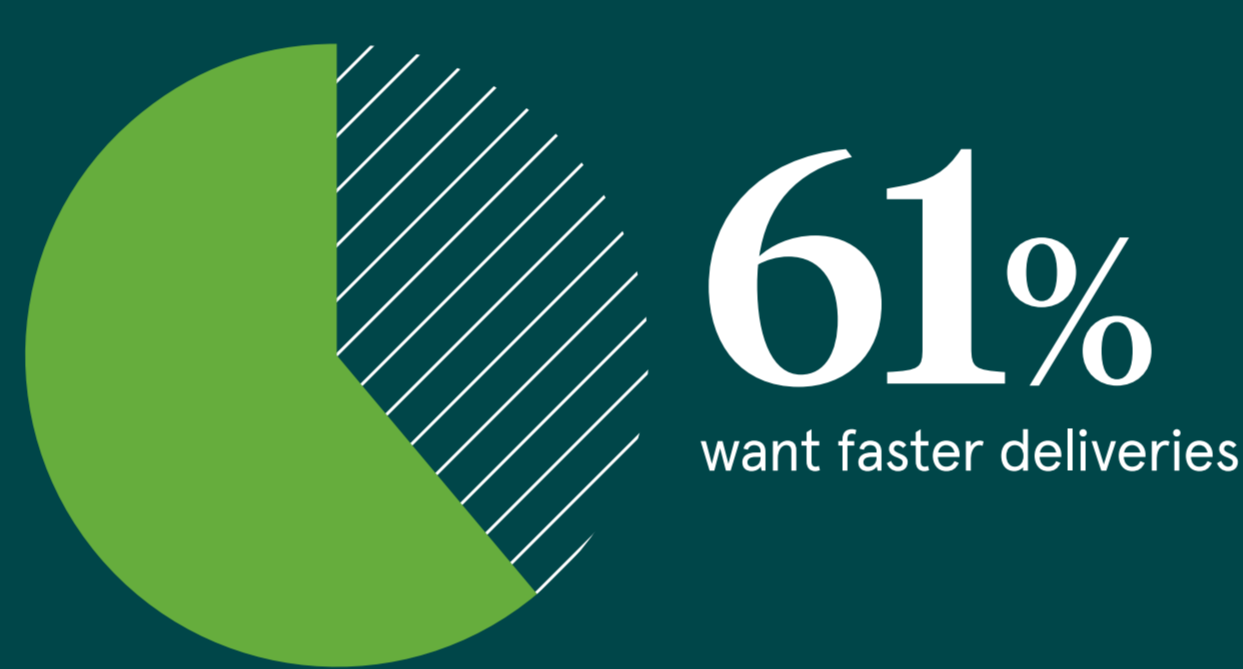
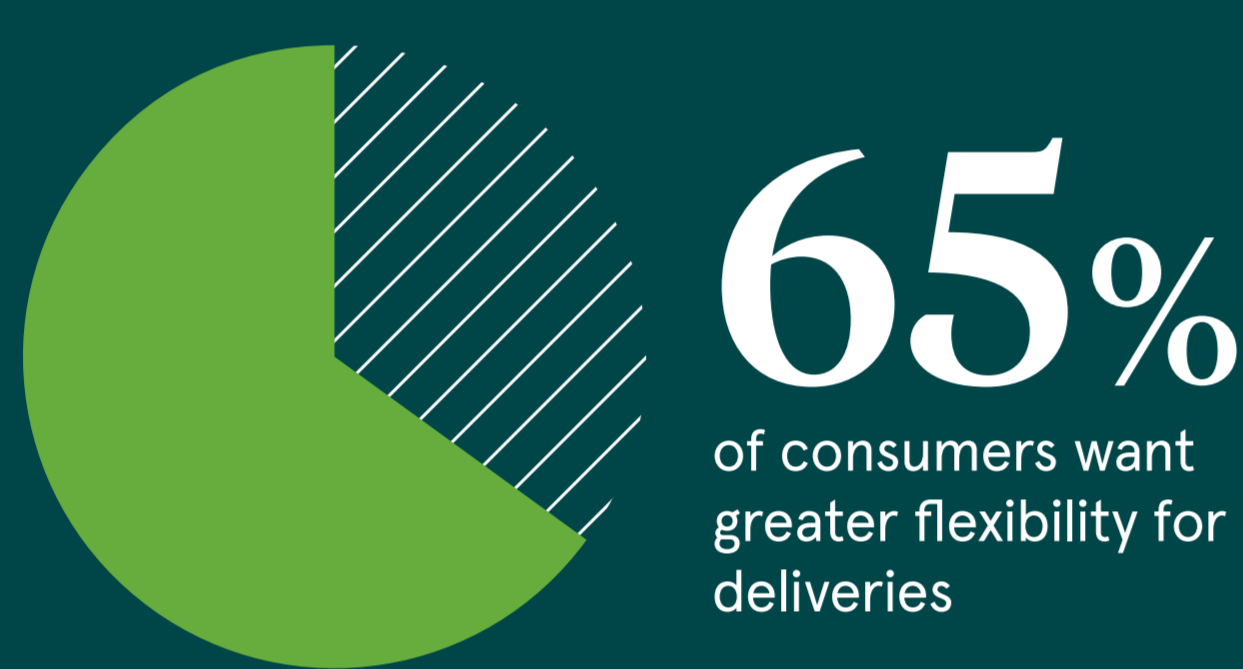
- Use now
- Plan to adopt within 18 months
- No plans to adopt



FAST & FREE

Consumers are increasingly demanding free deliveries when it comes to online shopping. But when last-mile deliveries account for such a large portion of supply chain costs, retailers and logistics companies must innovate to be able to offer this service without sacrificing profits. So how can technology make the whole process more seamless, efficient and most importantly within budget?

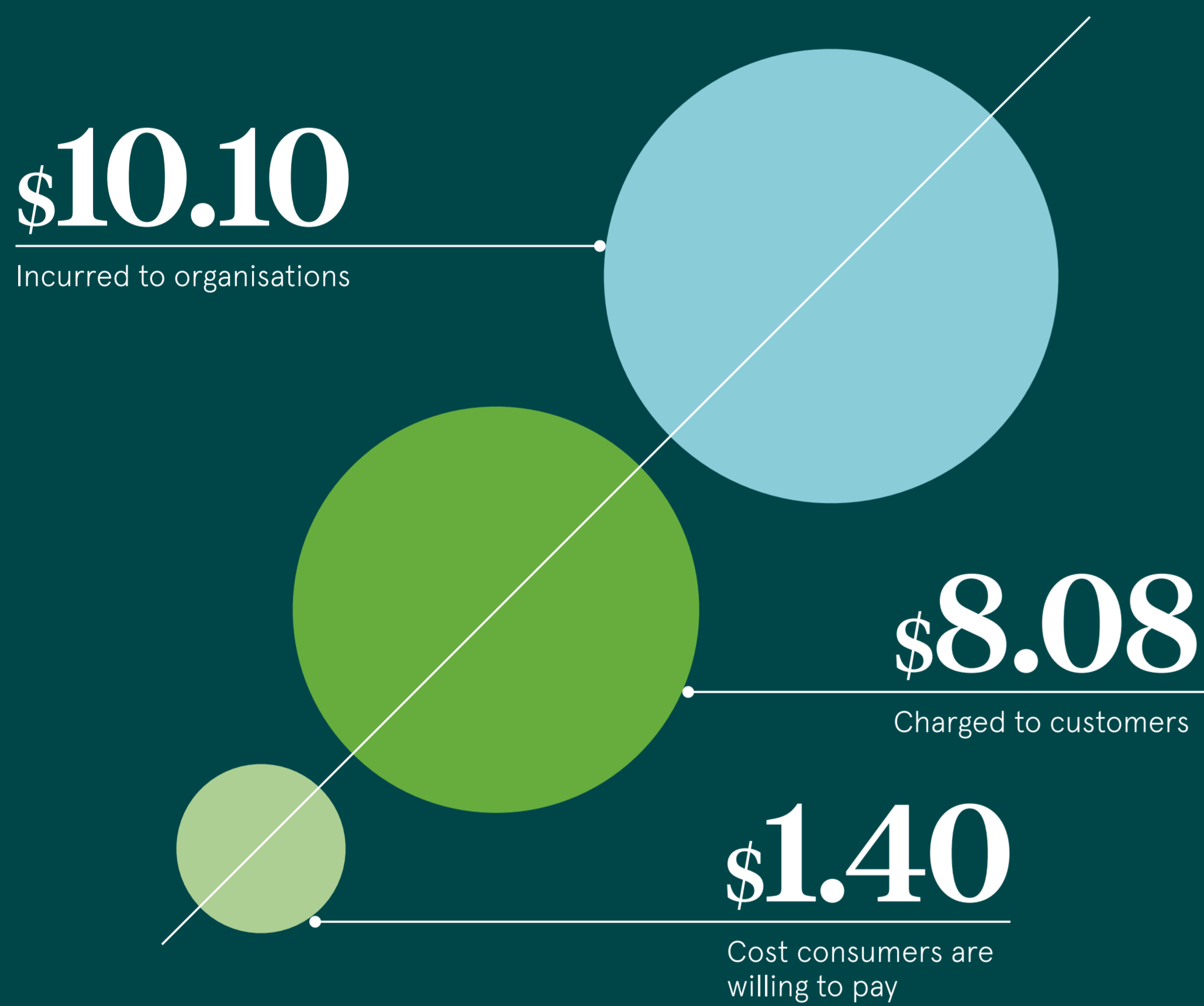
Retail TouchPoints/Oracle 2018



Retail TouchPoints/Oracle 2018

RETAILERS ABSORB A SIGNIFICANT PORTION OF LAST-MILE COSTS

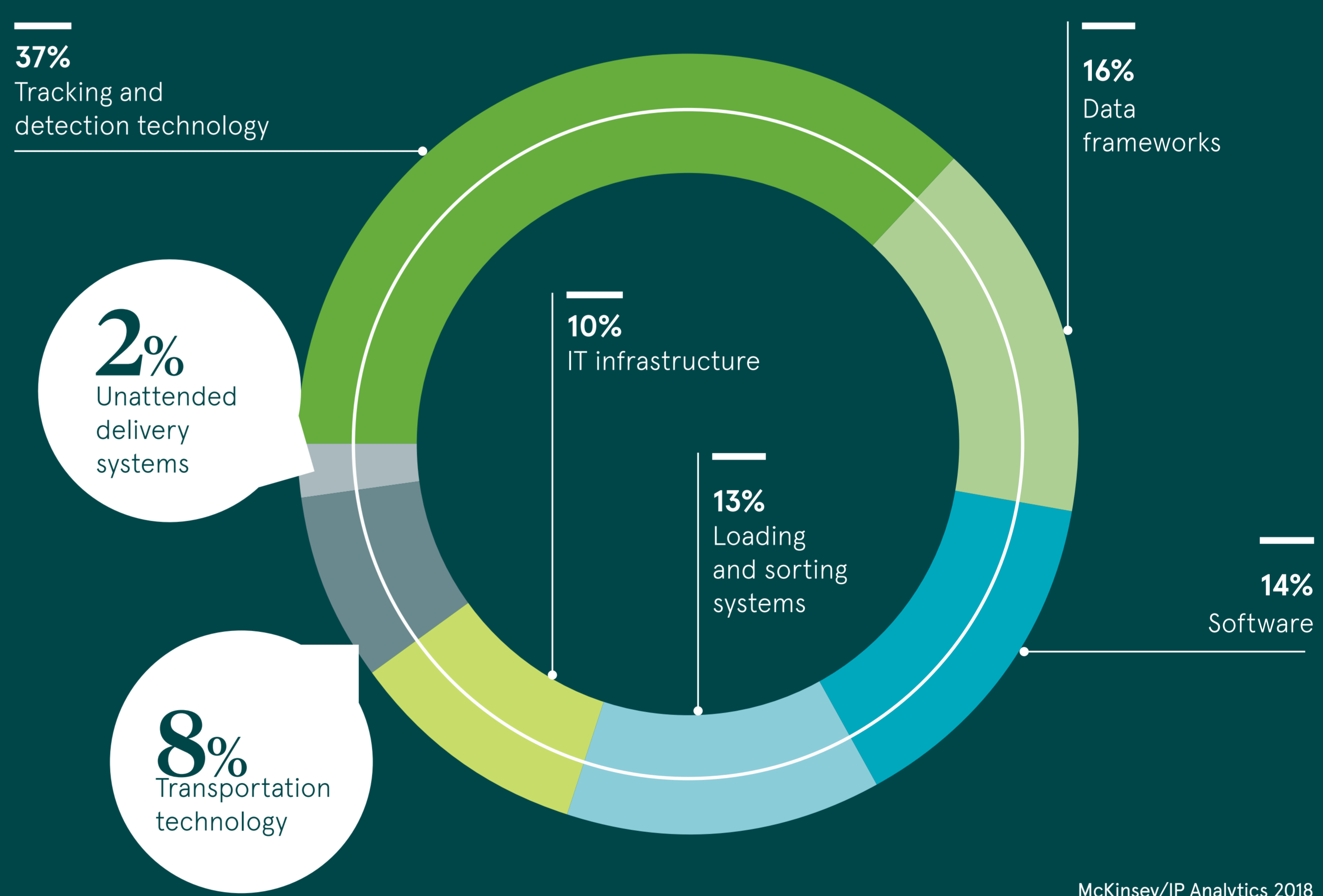
Average cost incurred to different parties in last-mile deliveries



Capgemini 2018

ARE LOGISTICS COMPANIES NEGLECTING LAST-MILE TECHNOLOGY?

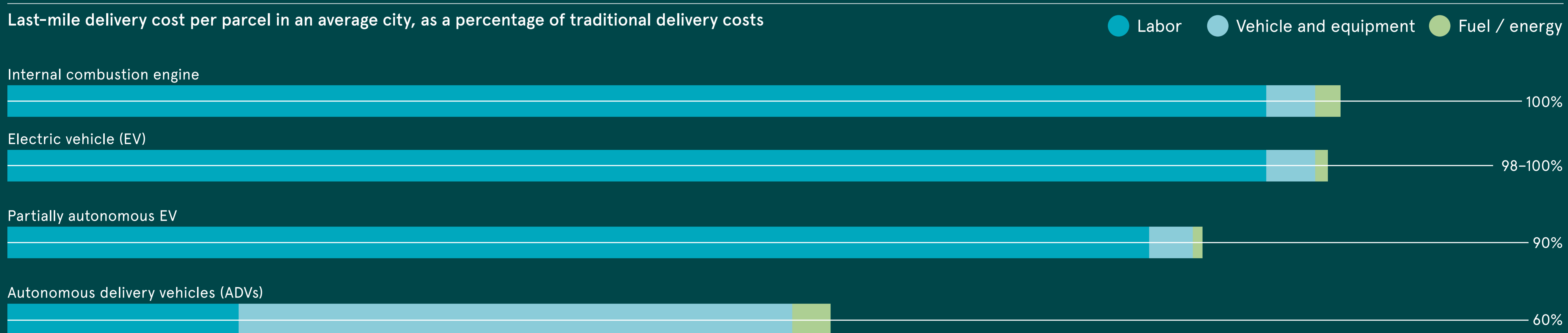
Analysis of patents filed by the 20 largest parcel companies after 2014



McKinsey/IP Analytics 2018

AUTONOMOUS TECH PROMISES MASSIVE COST SAVINGS

Last-mile delivery cost per parcel in an average city, as a percentage of traditional delivery costs

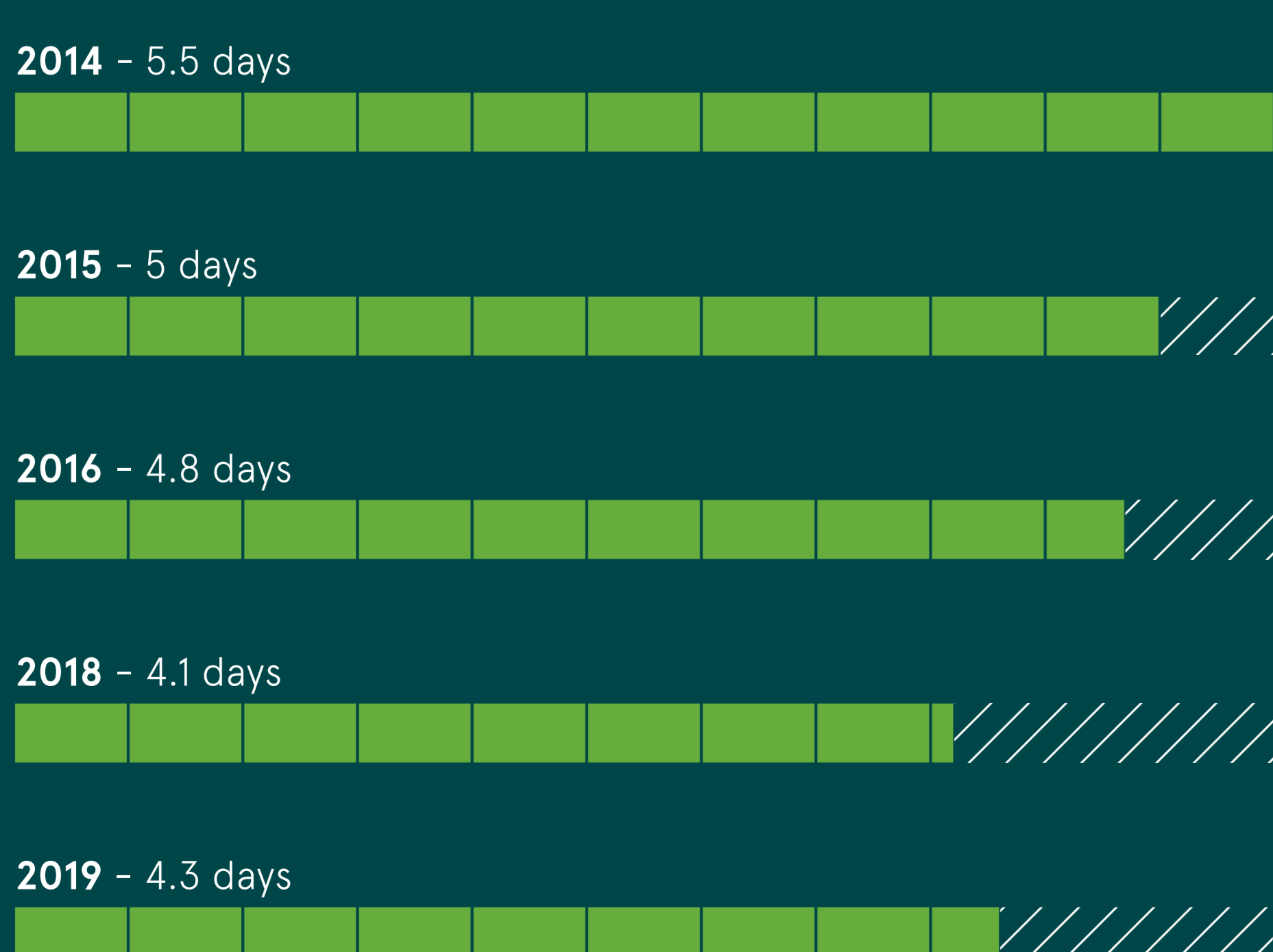


*Analysis assumes labour costs of €20 an hour, average city-network density, and energy consumption of 0.3kWh/km for electric vehicles and 12 l/km for internal-combustion-engine vehicles

McKinsey 2018

CONSUMERS ARE BECOMING LESS PATIENT

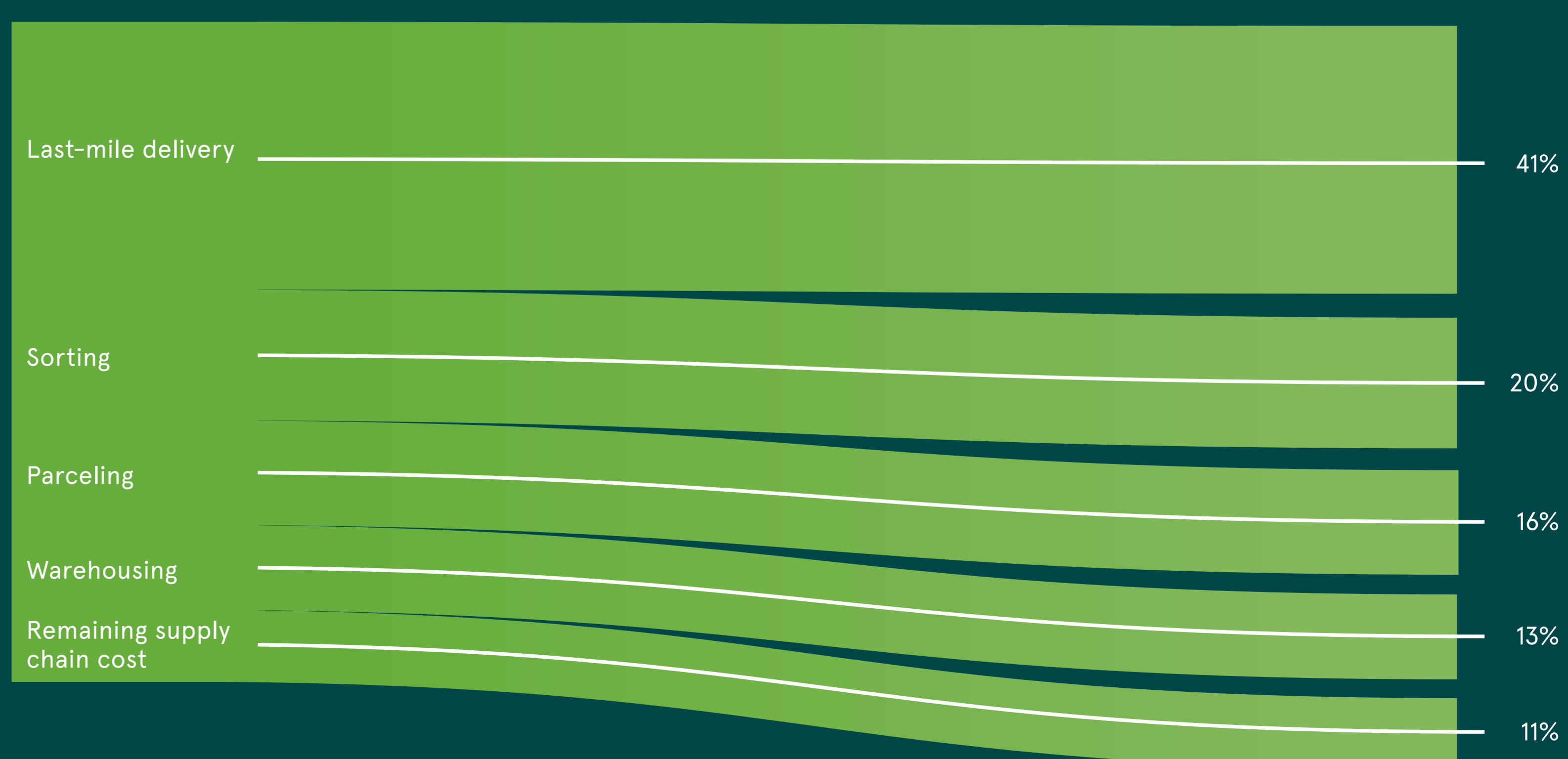
Maximum acceptable time consumers are willing to wait for free delivery; survey of consumers across the United States



Alix Partners 2019

LAST-MILE DELIVERY IS THE BIGGEST COST BY SOME WAY

Average cost breakdown of delivery supply chains



Capgemini 2018

Percentages do not equal 100 due to rounding