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18 Executive Summary
As a partner in business growth of nearly 150,000 clients, from local SME companies to multinational corporations, GEODIS is fully aware that building an efficient supply chain management structure is a daily challenge, particularly in the current environment of geopolitical and economic uncertainty. After our first successful global survey on Supply Chain, which we carried out in 2015 and the findings of which we used internally, it has been decided to publish for general public consumption the results of this second edition. Through this initiative, we wish to share the latest insight about Supply Chain challenges that face market stakeholders and to show where they feel the potential for improvement could be found.

We sincerely thank all the respondents to this survey for their valuable input, an analysis of which we now present in this white paper.
GENERAL OVERVIEW

The 2017 Supply Chain Worldwide Survey has been led from October to December 2016 by an independent research institute, collecting 623 professional feedbacks from 17 countries, split in 3 geographical areas:

AMERICA
- Brazil
- Canada
- Mexico
- United States of America

EUROPE
- France
- Germany
- Italy
- Netherlands
- Spain
- United Kingdom
Respondents have been selected from the research institute database for their knowledge of Supply Chain challenges and their level of responsibilities.

- Australia
- China
- India
- Indonesia
- Japan
- Singapore
- South Korea

**ASIA PACIFIC**
35%

**INDUSTRIES**

- Chemical, Pharmaceuticals, Biotech
- Consumer goods, FMCG
- Aerospace, Defense
- Energy, Utilities
- High-tech, Electronics

**COMPANIES SIZE**

- 250-500
- 500-1,000
- 1,000-5,000
- Above 5,000

**COMPANIES SIZE**

- 100-200
- 200-500
- 500-1,000
- 1,000-5,000
- Above 5,000
- No answer
A STRATEGIC FIELD…

Not long ago, Supply Chain was mostly about delivering products on-time and in-full. Today, it covers a larger range of objectives, dedicated to enhancing firms’ growth and competitiveness.

Thus, the Supply Chain function has started its mutation to position itself as a crucial lever for business performance.

67% of Supply Chain leaders are positioned either at Top-Management or Corporate level

57% of firms consider their Supply Chain as a competitive advantage, enabling the development of their company

66% of firms dedicate between 5% and 15% of their turnover to Supply Chain spends

All of the Top 5 technology priorities for Supply Chain are related to data management (data analysis, Internet of Things, cloud computing, info security, predictive analytics).
... BUT A COMPLEX ONE

70% of firms consider their Supply Chain as very or extremely complex.

74% of firms use 4 or 5 different transportation modes among their Supply Chain. The top two are Road Full Truckload and Air Freight.

The Supply Chain is mostly organized at a regional (46%) level or decentralized to Business Units (27%), multiplying the number of stakeholders and intermediaries.

81% of firms are using 1 to 3 KPIs to assess their Supply Chain performance.

Full visibility over Supply Chain (from suppliers of suppliers to clients of clients) has progressed from the 6th SC strategic priority in 2015 to the 3rd position in 2017, but only 6% of firms have reached this target.
SUPPLY CHAIN TRENDS & CHALLENGES
STAY COMPETITIVE AND ON TOP OF CUSTOMERS’ DEMAND: TWO MAJOR CONSTRAINTS THAT SUPPLY CHAIN NEEDS TO TACKLE

Over the last few years, developments such as volatile market conditions, globalization of exchanges or radical transformation in demand patterns and consumption behaviors have gained influence.

- In this context, survey respondents emphasize their need to stay competitive. Their concern is primarily the containment of their costs (32%), which is a necessary requirement as they are increasingly called upon to face global competition (28%).

- On the other hand, they must cope with the challenges of a dynamic market environment: adapt to changeable customer expectations on quality (27%) and improve their capability to reduce delivery times to customers (26%).

- As a consequence, respondents also position the need to develop a reliable logistics infrastructure (24%) as a major business requirement.

- Supply Chain is directly impacted by these restrictions, which highlights the necessity to investigate Supply Chain optimization levers and/or opportunities.

- Companies want to implement a reliable Supply Chain where quality and compliance are guaranteed.

- In addition to this solid organization, they also strive for flexibility and cost efficiency, both items directly related to specific market constraints.

TOP 5 MOST IMPORTANT MARKET CONSTRAINTS

<table>
<thead>
<tr>
<th>Constraint</th>
<th>2017</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contain cost increases (raw material cost, labor cost...)</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Face global competition</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Adapt to changes in customer expectation on quality</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Meet customer expectation on reduced transit times</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Develop reliable logistics infrastructure</td>
<td>24%</td>
<td></td>
</tr>
</tbody>
</table>

TOP 5 BIGGEST FUTURE CHALLENGES OF SUPPLY CHAIN

1. Develop a long-lasting and consistent Supply Chain
2. Improve quality and compliance
3. Improve Supply Chain flexibility
4. Realize costs savings
5. Deal with innovation and technological disruption
Due to increasing constraints, supply chain has been moving from cost-oriented to demand and value-oriented objectives.

- The historical Supply Chain standard goal, OTIF (On-Time, In-Full) remains the first choice of respondents. Similarly, cost reduction has been a traditional Supply Chain ambition.

- However, with the multiplication of challenges, the primary goals are becoming more diversified and are progressively moving towards a full menu of items contributing to operational efficiency and a capability to respond effectively to customer demand.

- To a lesser extent, respondents pointed out the need for technological innovation as a significant target of their Supply Chain.

- The wider range of objectives now asked of Supply Chain explains the desire of companies to develop extended visibility.

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**TOP 5 OBJECTIVES ASSIGNED TO SUPPLY CHAIN (INDEX 2017 VS 2015)**

<table>
<thead>
<tr>
<th></th>
<th>2017 RANK</th>
<th>2015 RANK</th>
<th>SHARE OF RESPONDENTS EVOLUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure OTIF (On-Time, In-Full) deliveries</td>
<td>#1</td>
<td>#1</td>
<td></td>
</tr>
<tr>
<td>Improve product availability or delivery</td>
<td>#2</td>
<td>#2</td>
<td></td>
</tr>
<tr>
<td>Improve end-to-end Supply Chain visibility</td>
<td>#3</td>
<td>#6</td>
<td></td>
</tr>
<tr>
<td>Optimize inventory costs</td>
<td>#4</td>
<td>#7</td>
<td></td>
</tr>
<tr>
<td>Reduce transport and warehousing costs</td>
<td>#5</td>
<td>#4</td>
<td></td>
</tr>
</tbody>
</table>
Top Objectives Assigned to the Supply Chain (Index)

Among these propositions, which ones are the main objectives of your Supply Chain?

<table>
<thead>
<tr>
<th>2015</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ensure OTIF (on-time, in-full and no error) deliveries</strong></td>
<td><strong>Ensure OTIF (on-time, in-full and no error) deliveries</strong></td>
</tr>
<tr>
<td>Improve product availability or delivery</td>
<td>Improve product availability or delivery</td>
</tr>
<tr>
<td>Optimize Cash flows</td>
<td>Optimize inventory costs</td>
</tr>
<tr>
<td>Reduce transport and warehousing costs</td>
<td>Reduce transport and warehousing costs</td>
</tr>
<tr>
<td>Adapt to volume growth, new product launches</td>
<td>Adapt to volume growth, new product launches</td>
</tr>
<tr>
<td>Improve end-to-end Supply Chain visibility</td>
<td>Optimize inventory costs</td>
</tr>
<tr>
<td>Optimize inventory costs</td>
<td>Optimize inventory costs</td>
</tr>
<tr>
<td>Manage more frequent deliveries &amp; new consumption models</td>
<td>Reduce sourcing risks</td>
</tr>
<tr>
<td>Innovate and anticipate technological disruptions</td>
<td>Respect ethical, societal and security rules</td>
</tr>
<tr>
<td>Reduce sourcing risks</td>
<td>Manage more frequent deliveries &amp; new consumption models</td>
</tr>
<tr>
<td>Transform fixed costs into variable costs</td>
<td>Handle legal, customs and regulation changes</td>
</tr>
<tr>
<td>Respect ethical, societal and security rules</td>
<td>Support globalization</td>
</tr>
<tr>
<td>Handle legal, customs and regulation changes</td>
<td>Transform fixed costs into variable costs</td>
</tr>
<tr>
<td>Support globalization</td>
<td>Reduce carbon footprint</td>
</tr>
<tr>
<td>Reduce carbon footprint</td>
<td>Reduce carbon footprint</td>
</tr>
</tbody>
</table>

**Strategic orientation**
- Operational efficiency
- Demand
- Costs
- Risks
- Regulations
As its perimeter broadens, Supply Chain has naturally become a key component of companies’ activities. And the most profitable companies have not ignored this fact.

- **77%** of companies dedicate more than **5% of turnover** to Supply Chain (43%, more than 10%).

- From a management perspective, **67%** of Supply Chain leadership positions are held by Top Management or at C-Level. Having a senior sponsor makes it easier to align companies’ strategic objectives with those assigned to Supply Chain.

- This choice seems to correlate with the profitability of companies. Those that have chosen to appoint a Supply Chain leader as board member are more likely to see their EBIT level rise (see top adjacent chart).

- Meanwhile, companies with a head of Supply Chain as a middle manager seem less profitable.

- **57%** of firms perceive Supply Chain as a competitive advantage, enabling the development of the company and not only as an opportunity to optimize cost.

- This positive mindset surrounding the value creation role of Supply Chain appears beneficial to firms’ profitability (see bottom adjacent chart).
THE MULTIPLICATION OF ROLES AND OBJECTIVES TO BE ACHIEVED HAS LED TO THE GROWING COMPLEXITY OF SUPPLY CHAIN

● 70% of respondents have assessed their Supply Chain as very or extremely complex.

● This complexity occurs at all levels of Supply Chain as a result of various factors, such as:
  - Global exchanges (see bottom adjacent chart)
  - Multiplication of flows: 74% of firms use more than 4 transportation modes within their Supply Chain
  - Decentralized organizations; devolving control to Regions or Business Units
  - Multiplication of inbound/outbound partners
  - Extensive use of external logistics service providers: on average, 79% of firms work with one or several external suppliers along their Supply Chain. Outsourcing to multiple players is an increasing trend
  - Diversity of national regulations
  - E-commerce & same day delivery demands
  - Emergence of reverse logistics and circular economy
  - Merger & Acquisition activity

● The Aerospace industry is an illustrative example of this growing complexity: with an average of 3 million parts by plane and four levels of suppliers ranging from raw materials to aircraft manufacturers. This complexity is due to multi-sourcing policies; 24/7 spare parts availability; the proliferation of regulations; cabin customization and frequent M&A activity. The pressure on each player’s Supply Chain is intense in a market that doubles in size every 15 years.

SUPPLY CHAIN HAS A WIDE DIVERSITY OF INTERLOCUTORS WITHIN COMPANIES’ ORGANIZATION

SUPPLY CHAIN DEPARTMENT

Teams in relation with Supply Chain decision makers

SUPPLY CHAIN COMPLEXITY IS INCREASED BY ITS WORLDWIDE ORGANIZATION

Example: Shipping locations of North American Supply Chains (Supply, manufacturing or distribution)

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>88%</td>
</tr>
<tr>
<td>South America</td>
<td>22%</td>
</tr>
<tr>
<td>South Korea - Great China - Japan</td>
<td>30%</td>
</tr>
<tr>
<td>Other Asian countries</td>
<td>19%</td>
</tr>
<tr>
<td>Western Europe</td>
<td>43%</td>
</tr>
<tr>
<td>Eastern Europe (incl. Russia)</td>
<td>16%</td>
</tr>
<tr>
<td>Middle East - Africa</td>
<td>12%</td>
</tr>
<tr>
<td>Australia</td>
<td>9%</td>
</tr>
</tbody>
</table>

For example, 22% of North American companies have exchanges with South America through their Supply Chain processes.
TO COPE WITH THE COMPLEXITY OF THEIR SUPPLY CHAIN, COMPANIES SHARE AN AMBITION TO INCREASE END-TO-END VISIBILITY

77% of the firms asked have either no visibility or a restricted view. Only 6% have complete visibility.

In the experience of GEODIS, full visibility of a Supply Chain incorporates a wide range of flows (physical, logical, financial) throughout both the entire supply and value chains. In addition, real-time monitoring has also become a crucial asset in achieving this visibility.

Overall, improving end-to-end visibility enables complexity in Supply Chain to be tackled as it leads to:
- A closer collaboration with partners and a reduction in disputes
- Better risk anticipation
- Enhanced flexibility
- An extended degree of control over processes
- Elevated customer satisfaction
- Higher profitability

IMPACT OF VISIBILITY ON EBIT RESULTS
- No or restricted visibility (On production to 2 steps visibility)
- Full visibility (From suppliers of suppliers to customers of customers)

25% of firms with a full visibility on their Supply Chain have an EBIT over 25% of turnover

VISIBILITY OVER SUPPLY CHAIN

* 1 Step ex: From Production to clients - 2 Steps ex: From Suppliers of suppliers to production

EBIT (% turnover)
- 0% to 5%
- 5% to 10%
- 10% to 15%
- 15% to 25%
- > 25%

13% 8% 25% 26% 20% 20% 4% 25%
**Extended visibility** in Supply Chain is for respondents a **growing ambition** (from 6th on the list of primary objectives in 2015 to 3rd in 2017). To achieve this end-to-end visibility, respondents’ main focus remains on the inbound process.

- Most companies (44%) have **transversal visibility between suppliers and clients**.
- Top areas of improvement in visibility are before and after the production stage:
  - Suppliers: 39% of firms considered these areas a priority in 2015 and 41% in 2017
  - Clients: 18% of firms considered them as a priority in 2015 and 22% in 2017
- Regarding strategic focus related to each specific stage, respondents have underlined a will to **establish more fluidity** along the value chain:
  - For Supplier-focused (inbound), priority is given to the availability and quality of products
  - For Production-focused, the main objective is to improve distribution within production facilities
  - Customer-oriented respondents (outbound) mostly value reactivity and agility as well as OTIF delivery
- In addition to simplifying processes, there is a strategic challenge for the Supply Chain function to have **complete transparency in the product lifecycle**, a clear view at all stages from the suppliers of suppliers to the final consumer. Achieving this is a decisive advantage to reach operational and cost efficiency.

### PRIORITY FOR THE VISIBILITY IMPROVEMENT

Given the opportunity to improve visibility for one stream of your Supply Chain (inbound, outbound, production), which would be your top priority?

- Suppliers/Inbound: 41%
- Your production: 37%
- Clients/Outbound: 22%

### STRATEGIC VISIBILITY FOCUSES

<table>
<thead>
<tr>
<th>Suppliers</th>
<th>Production</th>
<th>Clients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secure quality and availability of products</td>
<td>Improve provisioning among the production facilities</td>
<td>Optimize agility of the Supply Chain distribution to meet OTIF</td>
</tr>
<tr>
<td>44%</td>
<td>34%</td>
<td>41%</td>
</tr>
<tr>
<td>Improve traceability of flows</td>
<td>Improve traceability of flows</td>
<td>Optimize forecasts and information sharing</td>
</tr>
<tr>
<td>26%</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Secure costs</td>
<td>Decrease production time</td>
<td>Reduce costs</td>
</tr>
<tr>
<td>16%</td>
<td>20%</td>
<td>19%</td>
</tr>
</tbody>
</table>

**GEODIS - 2017 SUPPLY CHAIN WORLDWIDE SURVEY**

13
A LOW EFFICIENCY OF SUPPLY CHAIN MONITORING SEEMS TO HINDER THE EXTENDED VISIBILITY AMBITION

The diversity of KPIs used to monitor Supply Chain is associated with its increasing number of strategic objectives to be reached. Supply Chain can no longer be monitored from a single perspective.

- Therefore, a wide range of indicators is now used to track operational efficiency (OTIF, lead time), financial performance (return on investment, cost reduction) or customer satisfaction (return rate) in accordance with individual companies’ strategic priorities.

- Meanwhile, firms still seem to have a restricted perception of their Supply Chain performance, as only 1 to 3 KPIs are usually tracked (41% of respondents even use 1 single KPI). This is obviously not enough to produce a reliable assessment of their performance and then make the appropriate decisions.

- The lack of homogeneity in Supply Chain measurement methodologies can also generate operational complexity and issues. For instance, different measurement methodologies could be applied in distinct regions or Business Units within a single firm, making corporate management inefficient.

- According to the survey, the use of numerous KPIs correlates directly with profitability in a positive way (see adjacent chart). Thus, 28% of companies with an EBIT level over 15% use at least 4 KPIs.

- This observed lack of monitoring leads to a misperception in Supply Chains’ self-evaluation. Firms are indeed systematically positioning themselves at or above the market level for each KPI.

### KEY PERFORMANCE INDICATORS (KPI) USED TO MONITOR SUPPLY CHAIN

- Delivery performance (OTIF) 40%
- Cost reduction 35%
- Production service rate 29%
- Inventory turn 28%
- Production time 27%
- Lead time 27%
- Return rate 25%
- ROA (Return of assets) 22%

### NUMBER OF KPIS USED DEPENDING ON EBIT LEVEL

- Less than 2 KPIs
- Between 2 and 4 KPIs used
- 4 KPIs and above

<table>
<thead>
<tr>
<th>EBIT (%)</th>
<th>Less than 2 KPIs</th>
<th>Between 2 and 4 KPIs</th>
<th>4 KPIs and above</th>
</tr>
</thead>
<tbody>
<tr>
<td>0% to 5%</td>
<td>11%</td>
<td>46%</td>
<td>38%</td>
</tr>
<tr>
<td>5% to 10%</td>
<td>14%</td>
<td>38%</td>
<td>34%</td>
</tr>
<tr>
<td>10% to 15%</td>
<td>22%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>15% to 25%</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
IN THIS DEMANDING ENVIRONMENT, DATA MANAGEMENT IS IDENTIFIED AS THE TECHNOLOGICAL PRIORITY BY SUPPLY CHAIN STAKEHOLDERS

Ensuring agility in an increasingly more complex Supply Chain may look like an unsolvable equation but to do so, technology could be a strong asset for Supply Chain stakeholders.

- When asked about the next technological “big thing”, respondents have emphasized their need to manage data in a multitude of ways.

- Data analysis (41%) and Internet of Things (39%) head the list. They allow both a live and broad picture of Supply Chain to be drawn through many features: from real-time flow management to parcels track & trace and financial control. In this transparent environment, via constant monitoring, optimization as well as improvement decisions are facilitated.

- To support their desire to master reliable and robust processes, respondents also highlight Cloud Computing (39%) and Info security (31%) as key technologies. As the scope of Supply Chain activity is becomes wider and more strategic, the nature of information to be managed is indeed more sensitive.

- Respondents have also expressed their wish to develop Predictive analytics (29%). This field aims at reducing uncertainties and helping companies to optimize inventory and allow more accurate forecasting of demand peaks.

- It is key to appreciate that the information created by data management will be only fully effective, if shared efficiently with internal and external partners throughout the Value Chain.

- Moderate attention has been paid to other forms of innovation (around 20% of respondents), such as additive manufacturing (22%), mobile production units (19%) or blockchain (18%). These are however still not considered as must-have for Supply Chain players.

<table>
<thead>
<tr>
<th>GAINING GROUND TECHNOLOGIES IN THE COMING YEARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data analysis</td>
</tr>
<tr>
<td>Internet of Things</td>
</tr>
<tr>
<td>Connected devices</td>
</tr>
<tr>
<td>Cloud computing</td>
</tr>
<tr>
<td>Info security</td>
</tr>
<tr>
<td>Predictive analytics</td>
</tr>
<tr>
<td>Apps</td>
</tr>
<tr>
<td>Additive manufacturing (3D printing)</td>
</tr>
<tr>
<td>Robots</td>
</tr>
<tr>
<td>Drones</td>
</tr>
<tr>
<td>Mobile production units</td>
</tr>
<tr>
<td>The blockchain storage system</td>
</tr>
<tr>
<td>RPA/Cognitive robotic</td>
</tr>
</tbody>
</table>
AGILITY AND ACTIVE INNOVATION STILL HAVE A MODERATE IMPACT ON SUPPLY CHAIN PROCESSES

Improving and optimizing processes are identified positively as drivers of innovation and change. But the path to the goal of widespread agility in Supply Chain is still seen as a long one.

- Only a small majority of respondents declared they were advanced in innovative practices within their Supply Chain. Problem solving & continuous improvement warranted a score of 62%. With the exception of Process mapping (60%), the other elements of process optimization obtained no more than 55% of positive responses.

- Surprisingly, even specific Supply Chain practices such as Process mapping (60%) or Lean management (55%) are far from being universal.

- These moderate results could be explained by the fear of implementing uncertain practices, particularly while the current growing necessity of ensuring a reliable Supply Chain exists.

- However, first-in-class companies are agile and ready to invest in order to implement optimization of their Supply Chain. Thus, firms with an EBIT level above 10% are in a systematic way, more advanced in these fields than firms with an EBIT level under 10% (average gap of 12 points).

The potential for innovation however actually exists: Bimodal Supply Chains are currently gaining ground as they allow firms to innovate within specific strategic themes through “small steps” policies, without endangering the operational robustness of the whole organization.
THE NECESSARY DEGREE OF SPECIFIC KNOWLEDGE REQUIRED TO TACKLE SUPPLY CHAIN ISSUES INDICATES OUTSOURCING AS A SOLUTION

This whole analysis highlights a skill gap between what firms are and what they want (and need) to be in order to perform better.

- The large number of issues highlighted and the necessary degree of specific knowledge and competencies required to tackle them, suggests outsourcing as a possible solution to balance a lack of specific operational expertise.

- Supply Chains are open to outsourcing
  - 84% of respondents outsource their transportation services, 65% do so for warehousing services
  - On average, across all transportation modes, 48% of companies use several external suppliers

- It is noted that 21% of respondents who do not currently rely on outsourcing have tested the option in the past but failed to find the appropriate supplier.

- These findings highlight the challenge for the Supply chain function to attract and retain talented people among their ranks.

- Above all, firms demand combined IT & Tools management, as well as an operational, expertise.

### REQUIRED EXPERTISE FOR SUPPLY CHAIN OUTSOURCING

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT &amp; Tools</td>
<td>33%</td>
</tr>
<tr>
<td>IT and human expertise</td>
<td>26%</td>
</tr>
<tr>
<td>Some specific services</td>
<td>22%</td>
</tr>
<tr>
<td>Human expertise</td>
<td>18%</td>
</tr>
</tbody>
</table>
Now almost universally considered as a source of competitive advantage enabling companies to grow, the best performers have positioned Supply Chain management at a strategic level.

At the crossroads of Strategy, Marketing, Sourcing, Manufacturing, Business Development and Customer services, Supply Chain has become the key strategic "hub" of companies’ activities.

In the wake of globalization and rampant digitalization, commercial trade flows have evolved dramatically. Both the volume and the scope of services managed within Supply Chain have reached unprecedented levels.

The objectives and operational priorities of Supply Chain are moving from a cost-oriented approach to a more demand and value-oriented approach, in order to maintain the high level of service increasingly demanded by customers.
Supply Chain complexity has been growing due to the multiplication of players, sourcing channels, transportation modes and the geographical areas involved. In addition, specific local regulations or the varying levels of maturity exhibited by suppliers result in increased operational difficulties.

It is undeniable that this visibility is still blurred and incomplete being focused as it is, mainly on direct partners relationships. A restricted measurement of internal performance also limits the overall outlook.

In the meantime, each player affects the chain’s performance and is progressively more dependent on the performance of both its direct and indirect partners. To gain efficiency, flexibility and to be able to answer customers’ needs in real-time, companies share the common ambition to achieve true end-to-end visibility and transparency along the entire Supply Chain.

Companies with agility and innovative approaches appear to be more profitable in this very volatile environment. The strategic and tactical imperatives highlight a need for specific operational expertise, that in some cases could be filled by outsourcing.

Overall, companies know where the pain points are and the objectives they wish to attain but the ways in which to move forward are still many and long.
Further information about our Supply Chain Optimization expertise on www.geodis.com

If you have any question on this white paper, contact us at supplychain-survey@geodis.com

Find us on LinkedIn: GEODIS | Supply Chain Optimization