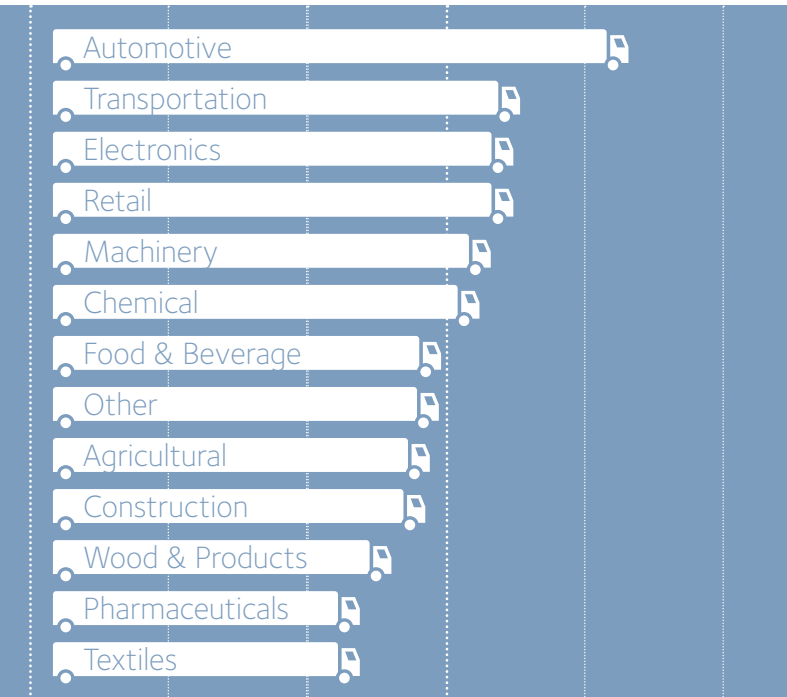


Market Report

Based on a survey of customer needs in relation to smaller palletised shipments between 35 kg and 3,500 kg within Europe



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Introduction

This report is an analysis of answers from 1,370 logistics professionals from more than 12 different industries in 21 different countries.

Together with a robust network infrastructure, agile workflows enable logistics companies to develop products that are more efficient, more reliable and thus more effective. The question, however, is how to design a new product that satisfies the real transportation needs of European businesses.

To answer this question we decided to involve logistics professionals in Europe by asking them what was most important for them when selecting a supplier for palletised shipments between 35 kg and 3,500 kg.

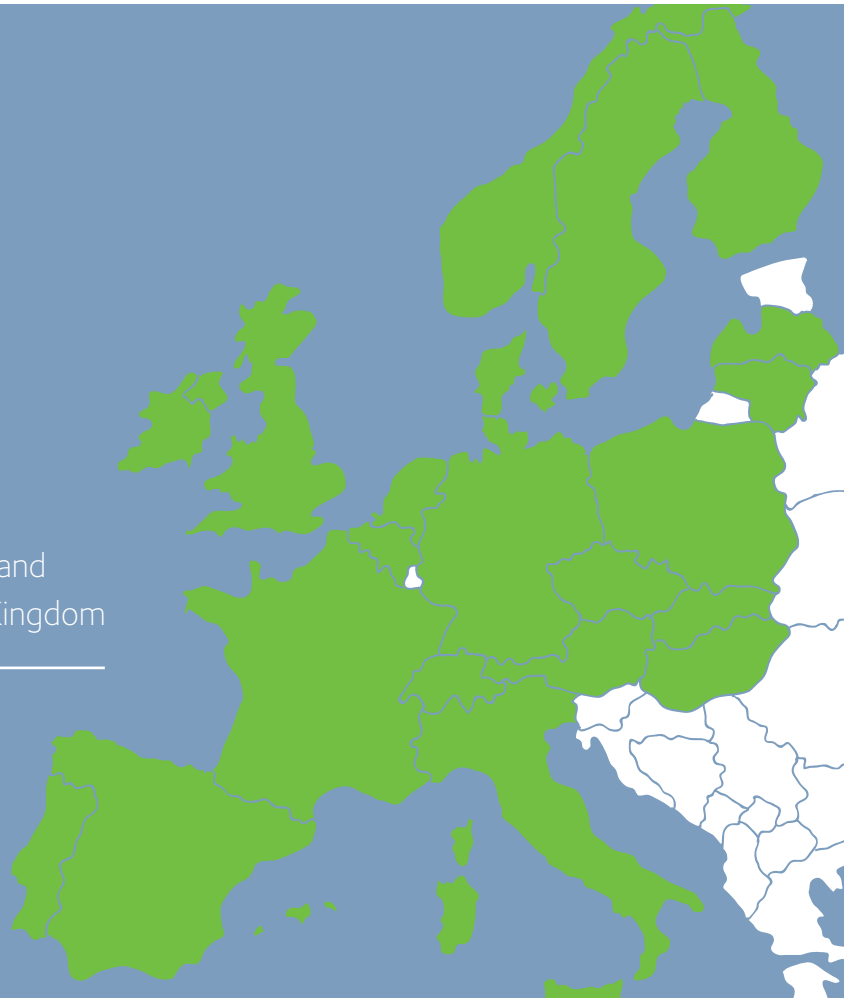
Please note that in the following, palletised groupage shipments between 35 kg and 3,500 kg are referred to as “small shipments”. The total number of respondents varies slightly, since not all questions were mandatory.

Respondents

21

EUROPEAN COUNTRIES

Austria	Hungary	Poland
Belgium	Ireland	Portugal
Czech Republic	Italy	Slovakia
Denmark	Latvia	Spain
Finland	Lithuania	Sweden
France	Netherlands	Switzerland
Germany	Norway	United Kingdom



7 out of 10 respondents were logistics or procurement professionals

1,370

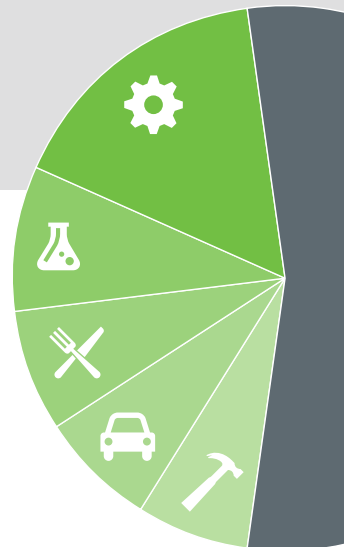
LOGISTICS PROFESSIONALS

12+

INDUSTRIES

Top 5 industries

Machinery	16.2 %
Chemicals	8.6 %
Food & beverage	7.3 %
Automotive	6.9 %
Construction	6.7 %



Shipping expenditure

Within Europe

57.9% of companies interested in small, high frequency shipments each spent a total of more than €100,000 on transport services in 2011



€ 100,000 - 199,999

14.6 %

More than € 500,000

28.2 %

€ 200,000 - 499,999

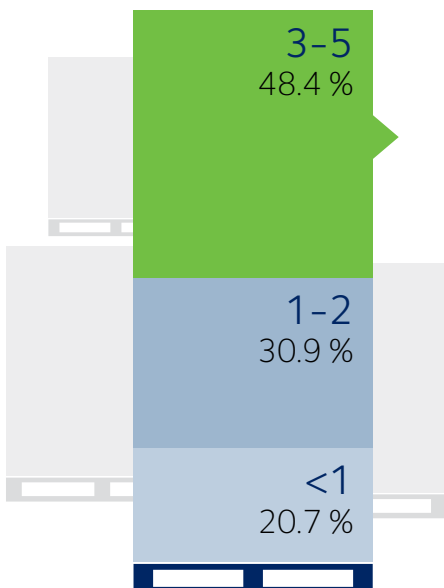
15.1 %

Total turnover of EU road freight transport in 2012 was €292 billion

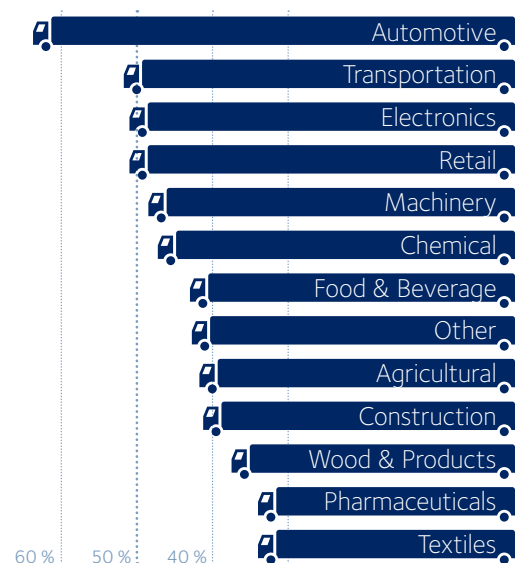
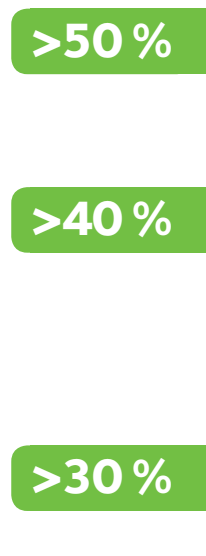
European Road Freight Transport 2012. Transport Intelligence

The need for smaller, high-frequency shipments

Number of departures per week



Need for 3-5 departures per week per industry

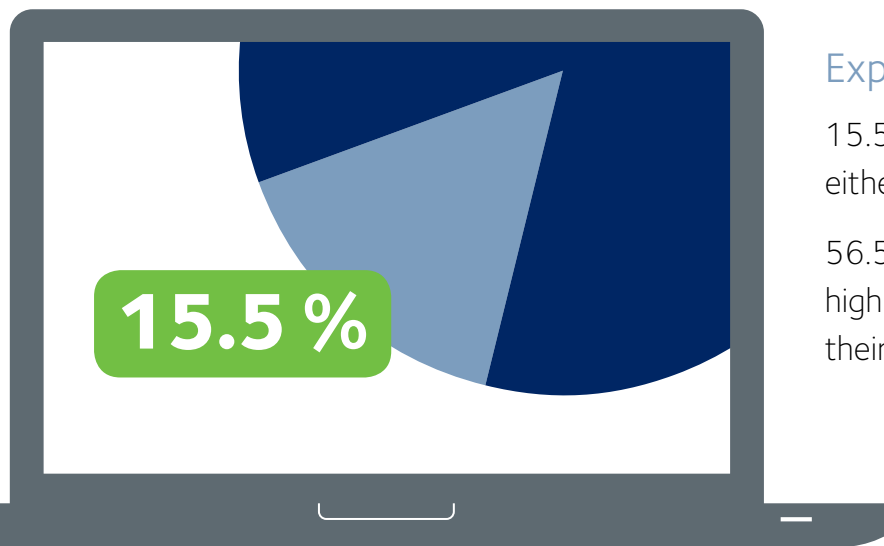


Online booking

The majority of respondents in 8 out of 12+ industries stated that online booking affects their choice of transportation supplier



Industries: Retail, Agricultural, Textiles, Construction, Wood & Products, Electronics, Automotive, Machinery



Experience with online booking

15.5 % experienced difficulties booking either exports, imports or both.

56.5 % said online booking had a high or very high impact on their choice of supplier.

A majority of respondents in 13 out of 21 European countries stated that online booking affects their choice of transportation supplier

Countries: Czech Republic, Denmark, Finland, France, Latvia, Lithuania, Netherlands, Norway, Poland, Slovakia, Spain, Sweden, United Kingdom

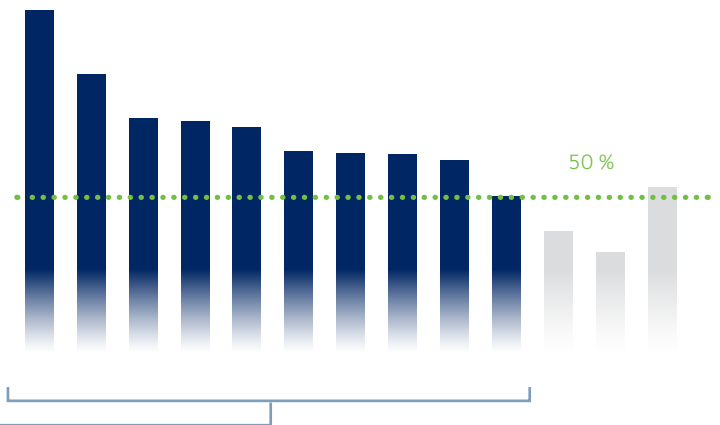


On-time delivery

More than 50% of companies in 10 industries experience daily problems with getting on-time delivery.

>50%

Transportation	68.8 %
Wood & Products	62.3 %
Agricultural	57.9 %
Construction	57.6 %
Food & Beverage	57.0 %
Electronics	54.5 %
Automotive	54.3 %
Chemicals	54.2 %
Retail	53.6 %
Pharmaceuticals	50.0 %



More than 95% of respondents consider a transport service arriving on time to have a high or very high impact on their business

Effects of on-time delivery

The respondents across all industries consider the following effects of on-time delivery to be high or very high:

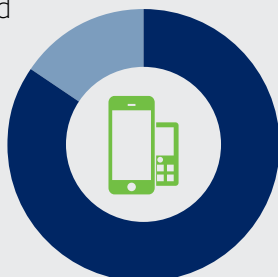


87.7% IMPROVED SERVICE FOR THEIR CUSTOMERS	75.5% REDUCTION OF ADMINISTRATION	60.3% REDUCTION OF TOTAL SHIPMENT COST	43.4% REDUCTION OF BUFFERS AND SECURITY STOCK
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Other services

Pre-alerting

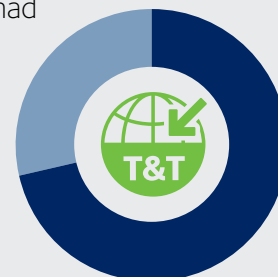
84.7% said pre-alerting had a high or very high impact on their choice of supplier



84.7%

Track & Trace

71.5% said Track & Trace had a high or very high impact on their choice of supplier



71.5%

Money-back guarantee

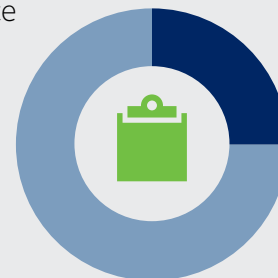
48.0% said money-back guarantee had a high or very high impact on their choice of supplier



48.0%

Proof of delivery

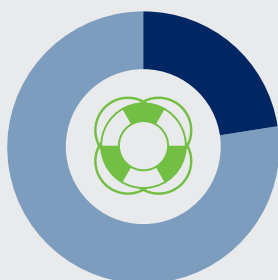
23.8% said they experience difficulties with POD



23.8%

Insurance

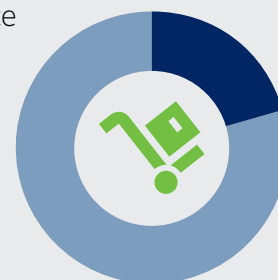
22.5% said insurance of cargo had a high or very high impact on their choice of supplier



22.5%

Pick-up and collection procedures

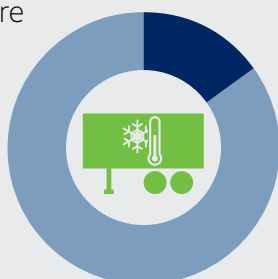
20.8% said they experience demanding pick-up and collection procedures



20.8%

Temperature controlled services

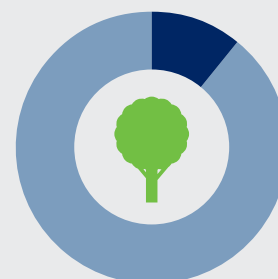
15.1% said that temperature controlled services had a high or very high impact on their choice of supplier



15.1%

CO₂ footprint report

10.9% said that CO₂ footprint report should be part of standard service



10.9%

Conclusion

An agile transportation organisation is based on the realisation that customer needs and customer satisfaction are its very reason for being. Its success is based on 4 cornerstones:

- **Efficient response to evolving customer needs**
- **Easy-to-use solutions that require a minimal effort from the customer**
- **Fast and predictable service – every time**
- **The combination of speed, ease of use, predictability and reliability – with quality service all the way from the initial order to final delivery**

DSV Daily Pallet is an agile groupage service that addresses needs known to be important for the business success of road transportation customers across Europe.

DSV would like to thank all of the logistics professionals from 21 different countries who enabled us to define these needs by responding to the survey.

“ 1,370 logistics professionals from 21 European countries have helped to design DSV Daily Pallet as a new option tailored to their most important needs.

Morten Sloth Madsen, DSV Road Network Manager

About DSV

DSV is a global supplier of transport and logistics services

We have offices in more than 70 countries all over the world and an international network of partners and agents, which makes DSV a truly global player offering services worldwide. By our professional and advantageous overall solutions, the approx. 22,000 DSV employees recorded a worldwide annual revenue of approx. 6 billion euro for 2012.

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