

Reimagining logistics: business models of tomorrow

Foreword

India's logistics landscape is undergoing a transformative shift, fueled by technological advancements, evolving customer demands, and strategic government initiatives. The country's logistics industry—estimated at \$288 billion in 2023—is projected to grow to \$380 billion by 2025 and surpass \$500 billion by the next decade. This growth trajectory has been facilitated by the industry's agility in responding to the implementation of the Goods and Services Tax and the E-Way Bill along with navigating the challenges of the COVID-19 pandemic.

However, more challenges remain. The country is striving to reduce logistics costs as a percentage of GDP to align with global standards. Meanwhile, government initiatives such as the National Logistics Policy (NLP), Unified Logistics Interface Platform (ULIP), and Open Network for Digital Commerce (ONDC) are driving the industry toward greater collaboration and openness. Yet, it remains the responsibility of logistics service providers to evolve and be the catalysts for change.

In this report, titled *Reimagining logistics: business models of tomorrow*, we delve into the multifaceted nature of the logistics industry and the new business models that are emerging to address the challenges. We focus on themes such as customers' ever-changing needs, internal regeneration, and emerging business and technology trends. Through a mix of global case studies and Indian market exemplars, we aim to provide a comprehensive understanding of the challenges and opportunities available to the logistics ecosystem in India.

This report highlights the following:

- The need to leverage government initiatives such as the National Logistics Policy (NLP) and the Open Network for Digital Commerce (ONDC) to bolster Indian logistics competencies and promote public-private collaborations
- Strategies that logistics service providers can deploy to enhance customer value, including promoting data-driven logistics platforms, specialized services, and offering infrastructure-as-a-service to diverse customers
- The opportunities to unlock premium value with innovative business models through a confluence of shifting expectations, technological innovations, and sustainability goals

This report is the result of a collaboration between Kearney India and the CII Institute of Logistics. By combining our expertise and insights, we hope to facilitate meaningful discussions and inspire practicable strategies to shape the future of logistics in India.

Our sincere appreciation goes to all contributors, stakeholders, and industry leaders for making this report possible by sharing their valuable insights and experiences. Our collective effort and commitment to innovation will fuel the continued growth and success of India's logistics industry.



The industry is undergoing a transformation, fueled by new technology, evolving customer demands, internal business needs, and government initiatives. This report explores India's complex landscape and the business models that are emerging to address the challenges.

Logistics, encompassing both transportation and warehousing, is a dynamic industry in India with an estimate value of \$288 billion in 2023. By 2025, the industry is projected to grow to \$380 billion and is expected to surpass \$500 billion by the next decade. This robust industry serves a diverse consumer base across a variety of other industries, including retail, automotive, telecom, pharmaceuticals, and heavy industries.

Logistics accounts for 8 to 9 percent of the country's GDP. The market is characterized by high fragmentation, with more than 1,000 large and local logistics service providers (LSPs). The dominant mode of transportation is by road, constituting 78 percent of shipments, followed by rail (14 percent), water (7 percent), and air (1 percent). Notably, 70 percent of the market remains unorganized.

The road segment has exhibited substantial year-over-year growth of 8 to 9 percent, driven by higher demand from e-commerce, fast-moving consumer goods (FMCG), retail, chemicals, pharmaceuticals, and industrial goods. Other segments, such as rail freight, witnessed a 4 percent year-over-year increase in the first eight months of FY24. Port and air cargo traffic also experienced growth rates of 5 percent and 4 percent year-over-year, respectively.

Warehousing, a crucial component of the logistics ecosystem, is experiencing robust growth with a compound annual growth rate of 15.6 percent. By 2027, the industry is anticipated to reach about \$34 billion, reflecting the growing importance of efficient storage and distribution in the supply chain.

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Customers' evolving needs are reshaping the logistics industry

Traditionally, customers have relied on maintaining a large amount of inventory to compensate for long delivery lead times, often several days. This approach became the norm, with businesses strategically stockpiling large quantities to meet customer demands. However, a noticeable shift occurred: customers initiated a trend toward minimizing inventory to reduce carrying costs and free up capital previously tied up in stock, all while ensuring that products remained readily available to meet demand. This changing dynamic spurred a demand for faster delivery and strict adherence to promised delivery times. Moreover, the rise of e-commerce introduced a new dimension to end customers' expectations, with an emphasis on same-day and next-day delivery, which accelerated the pace of change in the industry.

In this dynamic landscape, customers' needs are continuing to shift. Staying ahead of the curve will require exploring the external and internal factors that are contributing to this environment:

External drivers

Evolving customer needs. In an era of heightened expectations, customers in the logistics industry voice distinct needs and requests to enhance their overall experience (see figure on page 5). Primarily, they are seeking accelerated response times in vehicle placement and strict adherence to transit schedules, followed by continuous visibility throughout the logistics process. Addressing concerns related to consistent and on-time deliveries, along with offering customization options, has become pivotal.

Changes in government policy. The government has invested in digital infrastructure such as the Goods and Services Tax and the E-Way Bill, which has enhanced traceability in logistics. The electronic toll collection system FASTag has helped shorten the wait time and facilitated seamless passage of vehicles through highway toll points. The ongoing development of the digital public infrastructure, exemplified by the Unified Logistics Interface Platform (ULIP), requires LSPs to strategize on leveraging these infrastructures to enhance their business offerings. In light of these forward-thinking initiatives, service providers need to meticulously consider adopting digital technologies and upgrading their legacy systems. A robust IT infrastructure is essential to capitalize on the marketplace opportunities that ULIP offers. Concurrently, LSPs must also establish capabilities for a marketplace presence and refine their supply chains to ensure efficient service delivery.

Internal business regeneration

Rethinking core capabilities to stay relevant. There is a growing need for LSPs to stay pertinent and become integral to their customers. A growing focus on running a profitable business is driving a shift toward asset-light business models, which involves transferring capabilities such as people, process, and technology to “better owners” to enhance agility and allow a focus on core capabilities. An evolving asset pool is driving this push toward asset-light and flexible business models. Remaining relevant will require a strategic reassessment of core capabilities.

Navigating cost pressures. LSPs will need to strike a balance between competitive pricing and service quality. Customers’ cost pressures are trickling down to LSPs, prompting LSPs to rethink their operations. To address the dual challenges of cost pressures and service quality, LSPs must proactively evolve their business models. This evolution involves embracing innovative strategies, technologies, and operational efficiencies to streamline processes and reduce costs without compromising on service standards.

LSPs need to go beyond conventional transportation and warehousing roles and craft strategies to enhance their integration with customer supply chains to stay relevant.

Figure

Customers have a variety of needs when it comes to logistics services

Customer needs

Logistics service provider solutions

<p>“I need to ensure consistent delivery of goods to meet my customer’s expectations. Can my service provider guarantee on-time delivery?”</p>	<p>Quality performance An enhanced commitment to service-level agreements and an ability to consistently deliver goods without damage</p>
<p>“I need multiple delivery options across modes. Can the service provider also offer customization, especially in packaging, delivery services, card on delivery, and easy returns?”</p>	<p>Customization Tailoring services to meet customers’ specific needs and preference for unique requirements</p>
<p>“I must maintain competitive pricing compared with my peers while upholding quality standards. My customers expect low-cost or free shipping. Can I reduce the delivery costs to ensure a lower margin impact?”</p>	<p>Cost-effectiveness Competitive pricing without compromising on service quality</p>
<p>“I must give real-time updates to my customers.”</p>	<p>Transparency and predictability Clear and timely communication regarding the status of shipments, highlighting delays or issues, and proactive updates on changes in schedules or routes</p>
<p>“I need to use sustainable logistics solutions while also measuring emissions.”</p>	<p>Sustainability Comprehensive solutions to track and reduce transportation emissions while also identifying and implementing effective emission reduction measures</p>

Source: Kearney analysis

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To meet these needs, businesses are focusing on innovation

Shifting paradigms: from third-party logistics to supply chain partner

Reevaluating core competencies is essential for staying relevant in an ever-changing environment. It is crucial to go beyond conventional transportation and warehousing and formulate strategies to seamlessly integrate with the customer's supply chain. Shifting from a conventional LSP to a central component in the supply chain is vital, and it can be enabled by transitioning to fifth-party logistics (5PL). With this approach, customers entrust their entire supply chain—material sourcing, inbound, warehousing, and delivery to a 5PL service provider.

Snowman Logistics, a prominent Indian cold chain logistics company, has evolved into a comprehensive 5PL service provider. Going beyond conventional transportation and warehousing roles, the company now engages in supplier development and negotiates prices for raw materials and packaging materials on behalf of its customers. The service provider not only qualifies suppliers but also engages in supplier development by working collaboratively with critical and high-potential suppliers to improve their capabilities. Snowman has also introduced a new service for its quick-service restaurant (QSR) clients. These companies often buy similar products from suppliers such as Veeba, Bectors, Kissan, and Cremica. However, individual QSRs have limited bargaining power because of their smaller scale. 5PLs such as Snowman can act as aggregators to help these companies get better prices by consolidating demand. They also offer expertise in handling raw materials and can use the clients' shipment data to better understand demand trends, which helps in planning and discovering the best prices.

This strategic metamorphosis exemplifies a third-party logistics (3PL) supplier's transition from a conventional LSP to a vital link in the supply chain, akin to a supplier of raw materials. By extending their services to encompass supplier relationships and pricing negotiations, LSPs can develop a comprehensive and integrated approach that adds significant value to their clients' supply chain operations.

Simplified pricing with comprehensive solutions

Small and medium-size business brands often rely on multiple logistics partners to fulfill various supply chain requirements, including warehouse storage, last-mile deliveries, and managing return orders. As a result, e-commerce businesses are charged separately for each logistics service provided, which creates a complex billing process. In this environment, customers are seeking cost-effective and simplified pricing options as well as a single provider for their fulfillment requirements.

To address fragmented billing issues in the logistics industry, Maersk is introducing the One Country, One Price solution in India. This initiative aims to eliminate the need for shippers to engage with multiple partners such as warehouse, mid-mile, and last-mile providers. Maersk is bundling all these services, providing a comprehensive wrap-around solution for customer convenience at a unified charge of INR 80 (\$1) per order. The simplified pricing model covers a range of services, including warehousing, last-mile deliveries, and return order management for e-commerce fulfillment. This customer-focused strategy ensures end-to-end visibility throughout the supply chain, encompassing 18,000 PIN codes in India with a 48-hour delivery turnaround. Maersk's solution features a 60-day storage period and 20 percent returns to origin, without imposing fixed monthly costs or minimum order requirements. This innovative approach aims to simplify billing and give businesses flexibility and transparency in managing their logistics expenses.

Efficiency and sustainability: driving green logistics

In the drive toward sustainable logistics, maximizing efficiency and minimizing emissions are paramount objectives for shippers. There is a growing emphasis on efficient on-time delivery solutions, requiring strict adherence to transit schedules through real-time route optimization. This optimization not only reduces fuel costs but also helps lower carbon emissions, aligning with companies' climate and sustainability objectives. Consequently, there is a growing demand for intelligent tools that accurately measure, monitor, and mitigate emissions across supply chains. Continuous visibility throughout the logistics process is a crucial secondary customer requirement, highlighting the need for comprehensive solutions that address both efficiency and sustainability concerns.

Pidge, an Indian logistics technology provider, is fostering digital transformation in the unorganized sector, offering a low-code and self-serve logistics software-as-a-service (SaaS) platform. Pidge's Route Planning Software, powered by the Multiple Optimization Route Recommendation Engine (MORRE), is a pragmatic solution for efficient route planning and delivery management. By analyzing key parameters such as order location, real-time traffic data, delivery windows, and historical patterns, the software identifies optimized delivery routes. Using AI-powered algorithms that consider factors such as traffic, weather, delivery windows, and multiple destinations, Pidge's system minimizes fuel costs and enhances delivery performance. Beyond efficiency, Pidge prioritizes sustainability by reducing fuel consumption and carbon emissions, ensuring ecofriendly and sustainable delivery operations.

3SC Solutions, originally focused on truck transportation, is now offering sustainability solutions such as Carbonex. Using AI and data-driven analytics, Carbonex helps organizations measure, reduce, and monitor their greenhouse footprint in supply chains. The company uses analytics to offer consulting solutions on efficiency improvement. These analytical tools facilitate the development of decarbonization road maps, guiding strategic choices to expedite the transition toward sustainability. As a one-stop sustainability solution, it helps companies make data-driven decisions to minimize their carbon footprint and align with their sustainability goals.

Accelerate last-mile delivery using fulfillment-as-a-service

Facing intense competition, direct-to-consumer brands are striving to deliver orders faster. Brands that rely on warehouses located outside urban areas are spending disproportionately on last-mile logistics to expedite deliveries. Micro-fulfillment centers offer a solution to this challenge by strategically positioning compact warehouse facilities in densely populated urban zones to improve delivery times and reduce last-mile delivery costs. Micro-fulfillment centers typically stock inventory for short durations, usually 24 to 48 hours, necessitating more frequent restocking than traditional fulfillment centers.

For example, Shadowfax, which was originally a last-mile food delivery service, has expanded to offer last-mile delivery to e-commerce companies. It strategically embraced backward integration, concentrating on establishing micro-fulfillment centers. Using unconventional spaces such as vacant parking lots and office basements, the company transforms urban areas into micro-fulfillment centers. This unique model places warehouses closer to customers, creating a competitive advantage. The approach not only reduces fulfillment costs but also aligns with environmental sustainability by minimizing the travel distance for order.

In a parallel move, logistics aggregator Shiprocket has entered the fulfillment domain, supporting more than 2,500 stores across more than 40 brands for store fulfillment, facilitating same-day and next-day deliveries within and between cities.

Maximizing efficiency and minimizing emissions are paramount objectives for shippers.

Platformization evolution: transition from broad to specialized services

Aggregation platforms have been pivotal in the logistics industry, creating transparent ecosystems that efficiently connect supply with demand. There is a significant trend toward moving from broad aggregation to more focused specialization. Establishing a specialized marketplace requires a minimum threshold of demand and supply to operate successfully, which was initially a challenge that specialized logistics providers faced. However, growing demand for specialized solutions has led to the achievement of scale, enabling aggregators to achieve business viability. Rigorous process controls ensuring temperature regulation, traceability, and efficient stock movement, as demonstrated by specialized industry players, have played a significant role in earning trust and scaling these specialized services. Specialized aggregators address a key customer need for tailored services.

Exemplifying the shift of the logistics industry toward platformization in specialized services is Celcius, a prominent online cold chain marketplace. Going beyond basic demand and supply matching, Celcius integrates live location tracking and real-time temperature monitoring into its platform, offering a comprehensive solution for booking refrigerated trucks and cold storage. This approach not only streamlines logistics processes but also gives companies unprecedented visibility and control over their supply chain, enhancing overall efficiency and reliability.

Similarly, Carrier Transicold's Lynx Fleet contributes to this digital evolution by providing advanced monitoring capabilities for refrigerated trucking operations, connecting the cold chain to the cloud for real-time visibility and insights throughout the cargo journey.

**Collaborative
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Opportunity exists to develop innovative models that can reshape the logistics landscape

Service-line specialization: crafting logistics solutions for specific needs

Service-line specialization refers to the strategic approach of tailoring logistics services to meet the specific needs and requirements of a particular industry or customer group. Rather than offering generic or one-size-fits-all solutions, logistics companies focus on understanding the unique challenges and demands of a specific sector or client base. This enables them to offer effective solutions that address specific pain points and requirements of their target market, allowing logistics companies to differentiate themselves.

Zipline Logistics, a leading 3PL provider based in the United States, specializes in servicing the consumer-packaged goods sector. The company has developed specialized expertise to fully grasp the unique challenges that retailers face. This focused approach not only guarantees customized solutions but also reflects LSPs' commitment to providing superior service and value to its customers. This idea of focusing on specific needs and challenges is what makes service-line specialization a key theme in logistics, making companies such as Zipline Logistics stand out for their targeted expertise.

Collaborative logistics: unlocking efficiencies

Multiuser warehouses are common in India, typically operating independently with separate storage spaces, operations, outbound docks, and resources allocated to each user. Collaborative logistics involves the sharing of not only warehouse space but also transportation resources and operations among multiple companies. Logistics providers offer shared services to customers, allowing them to achieve synergy effects across metrics such as reduced logistics costs, higher fill rate of transport vehicles, better utilization of warehousing space, and lower carbon footprint in supply chains. This collaborative approach is gaining more importance in today's globalized and competitive business environment, where companies want innovative solutions to enhance their supply chain performance and achieve cost-effectiveness.

This is exemplified by the Sphinx Pool project developed by FM Logistic, a French LSP. Several FMCG manufacturers, being potential competitors in the consumer market, share FM transport and warehousing capacities to mix their products and conduct joint deliveries to supermarkets and hypermarkets in European retail distribution networks. FM Logistics has enabled seven companies—Intersnack, Banania, Lustucru, Master Blenders, Kellogg's, Kimberly-Clark, and Heinz—to deliver products to retail chains together. The companies decided to consolidate shipments to achieve full truckloads, leading to high utilization and reduced costs.

Kimberly-Clark has also pursued a collaborative logistics approach by partnering with its retail customers. In the same trucks, the company combines light freight that "cubes out" (physically fills the trailer) with its customers' heavy freight that "weighs out" (meets the maximum legal weight limit). This slashed empty miles, transportation costs, and the number of trucks. Creative cooperation agreements are also expected to emerge across industry borders along the value chain.

Parcel shops and lockers: transforming last-mile delivery

Parcel shops and lockers are revolutionizing last-mile delivery, offering convenience to both consumers and delivery firms. These locations, often situated in existing businesses such as convenience stores and pharmacies, reduce costs for delivery companies by facilitating bulk deliveries to local hubs instead of individual homes. While parcel shops require minimal capital investment, parcel lockers involve initial setup costs but boast lower operating expenses. The predetermined locations of parcel lockers enable delivery drivers to optimize routes, saving time in congested urban areas.

China, led by SF Express designating lockers as delivery points for unsuccessful attempts, has seen widespread adoption. When customers are unavailable to receive their deliveries, parcels are securely stored in lockers, with recipients receiving access codes via SMS. Prominent Chinese networks include Cainiao Stations, Best Express Stores, JD partner locations, JD Locker, and Hive Box, showcase the diverse landscape of evolving last-mile delivery solutions. In India, Delhi Metro Rail Corporation offers commuters the option of renting personal digitally accessible temporary storage lockers at metro stations. A logical progression of this service could involve private service providers installing lockers where customers may opt to have their parcels delivered to these lockers for a delivery fee that is lower than that for traditional home delivery.

Selling sustainable logistics services to customers

In the air cargo sector, DHL India's partnership with Aargen Life Science, leveraging DHL's GoGreen Plus service, reflects a commitment to reducing emissions. Aligned with Aargen's goal to minimize carbon emissions in international shipments by 2032, this collaboration incorporates sustainable aviation fuel (SAF) in air freight, empowering customers to decrease their scope 3 emissions. Similarly, German airline Lufthansa is also making strides in sustainability efforts within the aviation industry. The company has recently reached a memorandum of understanding with energy company VARO to procure large volumes of SAF, aiming to reduce its carbon emissions. This initiative underscores major air cargo companies' commitment to environmental sustainability.

As DHL and Lufthansa explore innovative approaches to sustainability, the question arises: can they develop a dedicated product, translating these advancements into a service for customers seeking sustainable logistics solutions?

In a parallel move, a growing demand for sustainable logistics in shipping is expected. Leveraging government subsidies for sustainable logistics becomes a strategic move that aligns with environmental goals and financial incentives. For instance, the Indian government provides a 30 percent subsidy for hydrogen, green fuels, and port digitalization. Logistics companies can use these subsidies to invest in sustainable fuels, paving the way for ecofriendly shipping solutions. LSPs can use these subsidies to offer services at an affordable price, or they can provide advisory services to shippers, assisting them in accessing these government subsidies.



Big moves from the government are expected to revolutionize the logistics industry

India's logistics landscape is undergoing a significant transformation, driven by the introduction of strategic government initiatives to use technology and foster an inclusive and competitive marketplace. In this dynamic environment, LSPs have a unique opportunity to reshape their business models, enhance operational efficiency, and stay ahead in a rapidly evolving industry.

National Logistics Policy

The National Logistics Policy (NLP) is a pivotal initiative that sets the stage for a comprehensive overhaul of India's logistics industry. With objectives focused on enhancing logistics efficiency and promoting multimodal transportation integration, the NLP provides a strategic road map for stakeholders. Underpinning the NLP is the Comprehensive Logistics Action Plan, which delineates eight action areas to implement the policy effectively.

A central component of the NLP, ULIP stands out as a technological game-changer. Designed as an open-source platform with a three-tier structure, ULIP acts as a bridge between stakeholders, empowers policymakers, and serves as an interface with end customers developed by the private sector. ULIP's aims to significantly improve logistics visibility, reduce costs, and enhance overall enterprise efficiency. The benefits are far-reaching for logistics stakeholders. The platform enables the identification of cost-efficient logistics modes, simplification of customs and import-export procedures, prevention of delays through automated workflows, real-time monitoring of cargo movement, just-in-time inventory management, and the streamlining of complex documentation processes. By offering unparalleled visibility and streamlining processes, ULIP can be a catalyst for operational excellence and customer satisfaction.

Open Network for Digital Commerce

In tandem with the NLP, the Open Network for Digital Commerce (ONDC) is a revolutionary initiative to transform digital commerce in India. ONDC is designed to create an open, inclusive, and competitive marketplace that challenges the dominance of existing platform-centric models. Notably, several leading logistics service providers, including Delhivery, Shiprocket, Dunzo, eKart, Ecom Express, Loadshare, XpressBees, DTDC, and Grab, have embraced the ONDC platform.

ONDC's core characteristic lies in unbundling services that are traditionally unified on a single platform. It encourages multiple participants to deliver their respective components in the value chain, allowing for individual margins and profitability. This approach necessitates each participant to uphold high standards, fostering healthy competition and innovation.

The benefits of ONDC to logistics stakeholders are substantial. ONDC facilitates improved demand aggregation, digitization of transaction history to streamline financing, integration of insurance, and multimodal deliveries to achieve cost efficiency.

ONDC promises improved price visibility and discovery across the value chain, leading to improved asset efficiency.

Infrastructure development

To boost logistics efficiency, the government is investing in infrastructure projects, including multimodal logistics parks (MMLPs), dedicated freight corridors, and Gati Shakti Cargo Terminals.

MMLPs are crucial freight-handling facilities developed through public-private partnership. They feature mechanized warehouses, specialized storage, and container terminals, aiming to reduce logistics costs and streamline freight distribution. Similarly, dedicated freight corridors are high-speed railway corridors dedicated to freight transportation. They integrate superior infrastructure and technology to enhance logistical efficiencies by enabling faster transit times for freight trains. Furthermore, the government's Gati Shakti Cargo Terminals policy aims to develop multi-modal cargo terminals nationwide, facilitating the seamless transfer of goods between different modes of transport. This initiative is expected to promote a modal shift toward railways, reduce logistics costs, and simplify trading processes for businesses.

These infrastructure projects demonstrate the government's commitment to modernizing India's logistics ecosystem and driving economic growth.

Government initiatives serve as transformative catalysts for LSPs to evolve their business models. LSPs must fully leverage ULIP and ONDC, integrating these platforms into their operations to capitalize on the wealth of data and streamlined processes they offer. The open and inclusive nature of ONDC encourages collaboration among logistics stakeholders, prompting LSPs to pursue strategic collaborations to unlock synergies and drive mutual growth. ULIP's focus on transparency and ONDC's emphasis on demand aggregation present avenues for LSPs to elevate the customer experience through timely updates, competitive pricing, and customized solutions tailored to individual needs. Ultimately, these initiatives can help LSPs differentiate themselves in the market and drive sustainable growth.

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Imperatives for shippers

In navigating the evolving logistics landscape, shippers play a pivotal role in shaping the efficiency and sustainability of supply chain operations. Embracing digital integration is crucial, urging shippers to adopt platforms such as ULIP and ONDC for enhanced visibility and communication. These platforms offer unparalleled visibility and communication channels, empowering shippers with real-time insights into their shipments and fostering smoother collaboration with logistics partners.

Sustainability should be at the forefront, with a demand for ecofriendly solutions and collaboration with logistics providers offering green initiatives. By prioritizing sustainability, shippers not only contribute to environmental preservation but also enhance their brand reputation and appeal to conscientious consumers. Shippers are encouraged to explore multimodal opportunities for flexible and cost-effective transportation modes. By leveraging a combination of road, rail, air, and sea transport modes, shippers can navigate diverse logistical challenges while maintaining flexibility and resilience in their supply chains.

Collaborative logistics models are another imperative for shippers seeking to streamline their operations and reduce their environmental impact. Shared services, such as collaborative warehousing and transportation arrangements, enable shippers to optimize resource utilization and minimize their carbon footprint. By pooling resources with other stakeholders, shippers can achieve economies of scale and improve efficiency across the supply chain. Last-mile delivery solutions such as parcel shops and lockers offer efficiency gains and cost reduction, aligning with the imperative to stay agile and informed. Furthermore, transparent billing solutions are paramount for shippers seeking end-to-end visibility and cost control. By embracing transparent billing practices, shippers can foster trust and accountability within their supply chains while facilitating smoother transactions with logistics partners.

Ultimately, customization and flexibility are paramount for shippers as they navigate the complexities of the modern logistics landscape. By seeking tailored services and remaining open to collaborative innovation with logistics partners, shippers can adapt to evolving industry trends and position themselves for sustained success. This proactive approach positions shippers to not only meet today's logistical needs but also anticipate and adapt to future industry trends.

Shippers play a pivotal role in shaping the efficiency and sustainability of supply chain operations.

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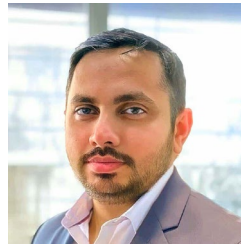
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The authors wish to thank Tushar Kumar, Devashree Maskar, and Pranav Jain for their valuable contributions to this paper.

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CII is a non-government, not-for-profit, industry-led and industry-managed organization with more than 9,000 members from the private and public sectors, including SMEs and MNCs, and an indirect membership of more than 300,000 enterprises from 286 national and regional sectoral industry bodies.

The CII Institute of Logistics (CII -IL), established by the Confederation of Indian Industry as a center of excellence, serves as a driving force in propelling the growth and competitiveness of the logistics and supply chain sector.

Through its array of services, CII -IL acts as a catalyst, elevating the performance of Indian supply chains to unprecedented levels by establishing a sustainable ecosystem through active stakeholder participation and a global network. This ripple effect not only empowers industries to garner deeper insights into emerging trends, but also enables them to tackle industry-specific challenges of national significance while adopting globally recognized best practices in the logistics and supply chain sectors.

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