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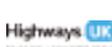
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FUTURE LOGISTICS CONFERENCE & EXPO 2020

magazine
Logistics

A Logistics Magazine supplement | Winter 2020



David Wells

Chief Executive, Logistics UK

Welcome

The logistics sector currently finds itself at a crossroads. Pushed in one direction by the economic fallout from the COVID-19 pandemic and pulled in the other by the fast-approaching end of the Brexit transition period, it must also contend with a range of disruptive issues. Technology and innovation, demographics and decarbonisation are set to challenge our long-held assumptions and transform the transport industry as we know it.

In our fast-changing world, how can we ensure that the industry will be able to harness the latest transformative technologies, embrace the data revolution, comply with ever-tightening clean air regulations and still deliver the goods essential to the smooth running of the UK economy?

Yes, there are undoubtedly challenges ahead, but I believe these are outweighed by the opportunities. These include the opportunity to exploit the potential of big data to optimise routing and slash congestion, to adopt new vehicle design to reduce the impact of transport on the environment, to implement business strategies to change consumer behaviour and to plan communities to manage safety and pollution.

In short, all of logistics – from global supply chains to last-mile deliveries – needs to embrace the opportunities created by transformational technology, demographic changes and the growing drive to decarbonise.

Our Future Logistics Conference on 13 November examined each of these issues in turn, separating the reality from the hype and testing the feasibility of blue-sky thinking. Five sessions, featuring more than 20 leading names from across the industry, offered the opportunity to hear first-hand from those reshaping transport and logistics – the vital ‘life blood that powers UK plc.

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Contents

Welcome	3	Future data.....	10
Future vehicles and future fuels.....	6	Future communities	12
Future business strategies	8	Future borders	14



Leon Daniels OBE

Leon Daniels served as Managing Director, Surface Transport at Transport for London until 2017. Before joining TfL, Leon built and sold his own venture-capital backed bus business to FirstGroup plc, a FTSE 100, multinational transport business. He also held the position of Commercial Director at First UK Bus, overseeing new ventures in UK and international transport. Leon is a Fellow of the Chartered Institute of Transport, an Honorary Fellow of the Institute of Couriers and a Member of the Court of the Worshipful Company of Carmen.

Session 1 – Future Vehicles and Future Fuels

Andy Eastlake

Managing Director, LowCVP
Andy Eastlake was appointed as the LowCVP's Managing Director in April 2012, after serving both on the board and as chair of the members' council for many years. He has a strong background in vehicle engineering and evaluation.

Natasha Patel

Baringa Partners
Natasha Patel is a director experienced in delivering growth, deal and operational strategy. Starting in downstream oil and gas, with a short stint in nuclear power, she is now supporting energy, automotive and financial services clients.

Jo Bamford

CEO, Wrightbus
Jo Bamford is Executive Chairman of Ryse Hydrogen Limited and after buying Wrightbus out of administration in 2019 has been at the vanguard of the hydrogen movement.

Graeme Cooper

Project Director – Transport Decarbonisation, National Grid
Graeme Cooper leads National Grid's work on the decarbonisation of transport. His work helps the government, the energy and automotive transport industry's transition towards zero emission vehicles.

Session 2 – Future Business Strategies

Mike Palmer

Client Development Director, Nexus
Mike Palmer has a background in accountancy and joined Nexus in 2005 as Financial Controller. Following three years as Operations Director, he was appointed to Client Development Director in 2017.

Simon Barnes

Industry engagement, University of Kent
Simon Barnes is currently working at the University of Kent in Canterbury, as Industry Engagement Manager. His role is to create and build links between academics and industry.

Elizabeth de Jong

Director of Policy, Logistics UK
An economist by background, Elizabeth has a strong track record of leading successful policy teams. She has more than 20 years' experience at a senior level in the transport sector.

Tim Campbell

Managing Director, Campbells Consultancy
Tim has over 35 years' experience exclusively working in the light and heavy commercial vehicle sector on a global scale. His consultancy and training company operates around the world offering insights into the various aspects of the commercial vehicle sector.

Session 3 – Future Data

Richard Skidmore

Head of Connectivity, Mercedes-Benz Trucks UK
Richard Skidmore leads the Connectivity team at Mercedes-Benz Trucks UK. He and his team are responsible for sales, support and development of Daimler's connectivity solutions in the UK.

Stuart Lester

Data Innovation Lead, Transport for West Midlands
Stuart Lester is the Strategic Lead for Transport Intelligence at Transport for West Midlands. Currently he is tasked with innovatively using data to support the Transport for West Midlands' aims and objectives.

Ron Oren

Principal Strategy Analyst & Strategic Initiative Lead, Connected Places Catapult
Ron Oren is an innovation specialist with 10 years' experience in supporting innovation in a range of sectors. His current role at Connected Places Catapult focuses on societal and technologic trends.

Phil Roe

Chief Customer Officer & Strategy Director UKI, DHL Supply Chain
Phil Roe is Chief Customer Officer, DHL Supply Chain with responsibility for leading the Sales, Marketing and Customer Experience agenda for the UKI.

Session 4 – Future Communities

Guillaume Fleuti

Managing Director, Head of Infrastructure & Large Corporates Europe, Commercial Banking, Lloyds Bank
Guillaume Fleuti joined Lloyds Bank in 2009 and has over 18 years of experience in Capital Markets. Since September 2013, he has led the Infrastructure team in Capital Markets.

Elliot Shaw

Executive Director, Strategy and Planning, Highways England
Elliot Shaw is the Executive Director of Strategy and Planning at Highways England, the government company that operates, maintains and enhances England's 4,300-mile strategic road network (SRN).

Rubina Singh

Lead e-Mobility Technologist, Centrica
Rubina Singh leads on e-mobility technologies and innovation at Centrica. She is also an Advisory Expert to the Solar Impulse Foundation. Her previous roles span across technology development, setting up a new EV division and running cleantech innovation programmes.

Session 5 – Future Borders

Alex Veitch

General Manager – Public Policy, Logistics UK
Alex Veitch is responsible for Logistics UK policy positions, advocacy and influencing campaigns across all policy areas, leading a team of policy specialists. He has worked at Logistics UK since 2015.

Sandra Strong

Managing Partner of Strong & Herd
Sandra Strong has over 30 years' experience in international trade and is the Managing Partner of Strong and Herd LLP. Sandra is heavily involved in the day-to-day activities of the S&H Shipping Office Services and OneCall client support services.

Richard Greening

Global Technical Director, The DDC Group
Richard Greening possesses a combination of technical expertise and deep industry knowledge in logistics and supply chain. He has developed and deployed systems for freighter networks, freight forwarders, airside ground handling facilities and bonded warehouses.

Richard Christian

Head of Policy & Communications, Port of Dover
Richard Christian joined the Port of Dover in 2000 and has held a variety of external facing roles across corporate affairs, policy, media and communications. During that time he has been responsible for elevating the Port's national and international profile.

Dafydd Williams

Humber Head of Communications, Associated British Ports
Head of external and internal communications for the Yorkshire and Humber Region as well as all corporate and policy issues, Dafydd Williams is the key lead on all partnership working, influencing and public affairs engagement.

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UK Marketing Manager,
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Richard Greening
Global Technical Director,
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Alan Thornton
Commercial Director,
The Malcolm Group



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★ gov.uk/transition-haulage



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Future vehicles and future fuels

FUTURE LOGISTICS

CONFERENCE & EXPO 2020 13 November

LOGISTICS UK

There are so many options for new vehicles being developed, particularly around alternate fuels, that the choices faced by fleet managers can be bewildering. This session looked at what transport operators need to factor into their decision making before procuring their next fleet of vehicles.

SPEAKERS

Andy Eastlake

Managing Director,
LowCVP

Natasha Patel

Baringa Partners

Jo Bamford

CEO, Wrightbus

Graeme Cooper

Project Director
- Transport
Decarbonisation,
National Grid

In this lively opening session, conference chair Leon Daniels had to referee between panellists who believed in an all-electric future and those who proclaimed the future was hydrogen.

“We got into the scrap between electric and hydrogen, which I’m going to say is halfway down the story,” Daniels said. “I keep reminding myself there’s that sun and that wind which is free, and these wheels which need to rotate. The story is about how do we get that free energy to make things go.”

Daniels does not think it worth expending too much energy on this VHS versus Betamax debate.

“Nothing will ever be as easy to store, transport and squirt than oil,” he said. “In the case of a diesel engine, provided

you squirt it at roughly the right time, and ignite it at roughly the right time, it makes you go along.”

If we will never have a fuel like diesel that doesn’t care whether it’s in an urban environment or a long-distance environment, where does that leave us?

“That leaves us with the fact that battery electric is ahead of the game and is already available, but is most suited to vehicles that come back home at night and don’t stray too far away from base,” Daniels said. “Whereas hydrogen, of course, is much more suitable for longer distance and longer

range and longer duration. But on the other hand, the science of hydrogen isn’t quite as far advanced as electric and it has its other issues too.”

Even in both these cases, he said, it is important to

remember that if fossil fuels are used to make electricity for batteries or hydrogen, the zero tailpipe emissions of your vehicle are potentially misleading.

“But the science is improving,” Daniels said, “and the level of renewable energy in the UK is improving significantly, so we’re on a journey where renewable electrical energy will predominate.” ■

“Ultimately my view is that hydrogen is going to be the future”

Jo Bamford, CEO, Wrightbus

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Future business strategies

FUTURE LOGISTICS

CONFERENCE & EXPO 2020 13 November

LOGISTICS UK

The business models of top logistics companies have traditionally been built around speed, reliability, customer service and shaving margins. But what business models will be essential in the future with new types of customers and services? Will logistics companies need to redesign their strategies and innovate to survive?

at an almost exponential rate and environmental concerns move to the forefront of both government and consumers' attention, logistics companies will likely have to adapt to new and innovative strategies in order to survive.

Panellist Elizabeth de Jong, Director of Policy at Logistics UK, said: "Organisations that can invest to be flexible and resilient will succeed. Future logistics companies need to be able to adapt to the changing nature of society, consumption, manufacturing, production and trading. COVID-19 has tested the flexibility and resilience of the logistics industry in ways in which it is unlikely to be tested again, and companies are diversifying their business, scaling back operations and taking work back in-house – spreading risk and reducing risk."

Other organisations judged likely to succeed in the future are those that promote and deliver a positive reputation, judge their path to zero negativities and focus relentlessly on efficiency.

Elizabeth de Jong continued: "There are more opportunities to really differentiate oneself from one's competitors with new systems and choices for business models around more environmental forms of transport and degrees of automation. The potential for business process redesign is immense and companies who invest in it will be the most successful." ■

SPEAKERS

Mike Palmer

Client Development Director, Nexus

Simon Barnes

Industry engagement, University of Kent

Elizabeth de Jong

Director of Policy, Logistics UK

Tim Campbell

Managing Director, Campbells Consultancy

For Leon Daniels this session on business strategies raised an interesting question, although it wasn't specifically referred to.

"The buzz word at the moment is optimisation and we have it for passenger and freight," he said. "But there's another big question: optimised for who?"

Business models could be optimised for the customer, for the supply chain or the logistics provider and they are not all necessarily the same thing.

"I think we have to be a little bit careful in these business models because there is a trade off between price, speed, reliability and so on," Daniels said. "There's a sweet spot clearly, and I think what this discussion touched on was how we plot the route to that sweet spot, otherwise it's very difficult."

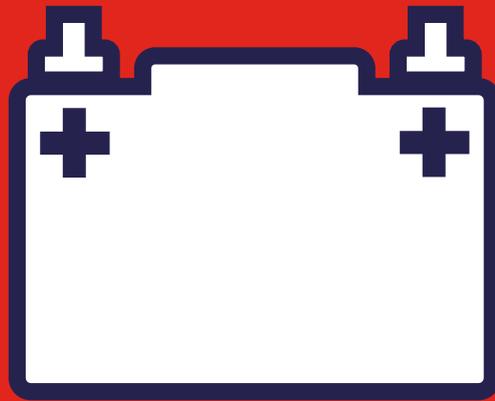
This session showed that as technology continues to advance

"The biggest disruption in the whole of the logistics industry is happening now."

Tim Campbell, MD, Campbells Consultancy

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Future data

FUTURE LOGISTICS

CONFERENCE & EXPO 2020 **13 November**

LOGISTICS UK

Data is changing the way we live, work and manage our businesses, but what role does data play in the freight, passenger and energy sectors? Panellists drawn from a range of sectors shared their expertise and vision.

SPEAKERS

Richard Skidmore

Head of Connectivity,
Mercedes-Benz Trucks UK

Stuart Lester

Data Innovation Lead,
Transport for West
Midlands

Ron Oren

Principal Strategy
Analyst & Strategic
Initiative Lead,
Connected Places
Catapult

Phil Roe

Chief Customer Officer
& Strategy Director UKI,
DHL Supply Chain

Shortly after chairing the Future Data session, Leon Daniels said that he had learned two things from the discussion.

“One is the sort of geeky end of it,” he said, “where some very clever people know quite a lot about how all this stuff works and so on.”

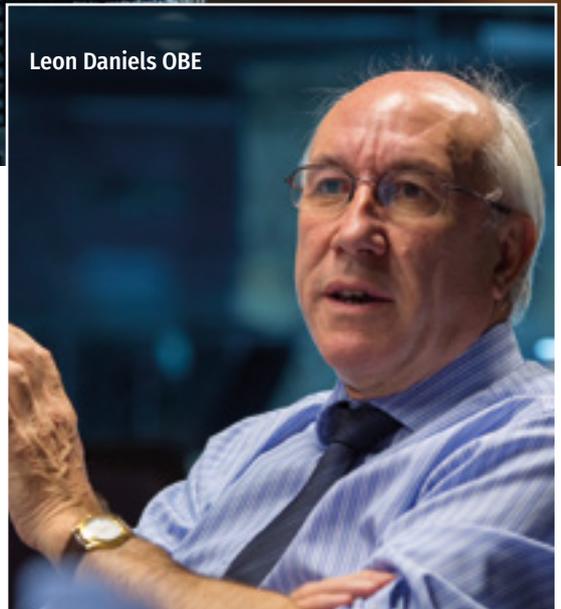
But by far the more important part of it, he thought, raised questions like: ‘Are you a haulier using data?’ or ‘Are you a data company using lorries?’

“That is a very powerful question. And the example we had [in the session] is that Amazon is in fact just like that, because Amazon is really a data processing company.”

As one of the biggest providers of cloud-based space, Daniels argues that Amazon is really a data data company that is

“We’ve used big data to move people and resources between operations and developed the wherewithal to do that”

Philip Roe, Strategy Director, DHL Supply Chain



Leon Daniels OBE

simply matching supply and demand, or as he puts it, “Customers asking for things and suppliers wanting to sell things.”

The fact that its goods are transported to the end customer is really just a by-product of this data-driven relationship between buyer and seller.

“So Amazon is a good example,” Daniels concludes, “of effectively a data company that happens to use a number of things including lorries.” ■



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Future communities

FUTURE LOGISTICS

CONFERENCE & EXPO 2020 13 November

LOGISTICS UK

Changes in demography, technology, and how we organise our lives and business activities, all impact on the type of infrastructure we will need in the future. Panellists drawn from the finance, road infrastructure and energy sectors discussed our future infrastructure needs and what will make these investments possible.

SPEAKERS

Guillaume Fleuti

Managing Director,
Head of Infrastructure
& Large Corporates
Europe, Commercial
Banking, Lloyds Bank

Elliot Shaw

Executive Director,
Strategy and Planning,
Highways England

Rubina Singh

Lead e-Mobility
Technologist, Centrica

This session touched on a range of interesting demographic trends. Daniels believes that one of the most interesting trends in recent years is the repopulation of city centres. This includes lots more people choosing to live in the centre of cities in converted warehouses and industrial buildings and new build apartments.

“People love the idea of not having their own car, getting a load of stuff delivered, occupying a smaller space,” he said. “That does change the world.”

In France, there is currently a lot of progress in building communities designed so that you are no more than 15 minutes from shop, school and place of work.

In the UK, owing to an ageing population, the demographics are shifting and becoming more polarised. With the continued needs of fit and unfit older people to consider, Daniels said it is important to remember that future communities must cater

for all its members, particularly when it comes to technology.

“It’s no good asking my Auntie Mary, who’s 98, to do her shopping online,” he said, “She still has two copper wires coming into her house and a phone on the end of it. We do have to keep remembering that we have to serve all of the community.”

When it comes to local amenities, nine out of ten people if asked the right question will say they patronise the village shop, but if pressed shop at the supermarket because it is cheaper.

“Low emissions zones and congestion zones can play a key role in changing behaviour”

Guillaume Fleuti, MD, Lloyds Bank

“We are finding people are becoming more sensitive and discriminating about how they make their transactions. A big chunk of the population is probably self-ish and gets the cheapest deal because it suits them.”

On the other hand, a growing number of people, particularly the young, are beginning to question and interrogate the practices of the supply chain.

“People are interested in their green credentials, like what supply chain looks like, how they treat their suppliers, how they treat their staff, what their ethical sourcing looks like,” Daniels said. “So we’ve got a more discriminating younger audience for sure.” ■

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Future borders

FUTURE LOGISTICS

CONFERENCE & EXPO 2020 13 November

LOGISTICS UK

With the EU Exit around the corner and the government finalising its Future Borders Strategy, the conference was the perfect time to discuss and develop the borders of the future. This session heard from leaders and experts in this space to help delegates understand what the next phase of borders will need to deliver for business.

SPEAKERS

Alex Veitch

General Manager –
Public Policy, Logistics UK

Sandra Strong

Managing Partner of
Strong & Herd

Richard Greening

Global Technical
Director, The DDC Group

Richard Christian

Head of Policy &
Communications, Port
of Dover

Dafydd Williams

Humber Head of
Communications,
Associated British Ports

What came through from this session, Leon Daniels said, was the clear lack of preparation at many levels.

“There’s quite a lot of preparation in anticipation of the clarity, but there’s not much clarity,” he said. “So in the absence of the clarity there’s some things you just can’t do.”

While preparations are already being made for the approaches to borders and crossings, reports from Felixstowe, the UK’s largest container port, suggest that it has so many containers that there is no longer the room to move them to ensure that they are loaded on the right HGVs and trains to their destinations.

Daniels attributes this partly to the volume of extra PPE equipment that is coming into the country, but also to the fact that businesses are trying to beat the 31 December deadline.

“We heard a lot in conference about the preparations people are taking,” Daniels said, “but it includes people taking warehouse space in France to act as a buffer to compensate

for the protection in the delays for crossing.”

While logistics operators have been assured there will not be a return to the pre-EU paper-based system, there is a large degree of nervousness owing to the slick, just-in-time supply chains that have developed over the last few decades.

Daniels said there was a real concern that all the benefits of a just-in-time operation will be lost, because of the potential variability in clearance times at the docks.

There was a strong set of arguments that more use should be made of the ports in the north of the country. This was firstly to help level up the economy of the North and secondly to ensure the UK has adequate port capacity. As sea crossings are very much longer to these ports than from Calais to Dover, it is also vital that Dover is ready for the potential demand.

All panellists shared a concern that simple matters like the availability of heat-treated pallets was still not resolved in November 2020.

“It’s inconceivable that after a referendum in 2016,” Daniels concluded, “that we find ourselves at one minute to midnight, where some of the fundamentals relating to the prosperity and trade of this country are still uncertain and in jeopardy.” ■

“What are you going to be in a post-Brexit world?”

Richard Greening, Global Technical Director,
The DDC Group



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