MARKET UPDATE
UK & International
DECEMBER 2023

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SNAPSHOT

OCEAN:

Ongoing fluctuations in Freight rates continue into December as Ocean Freight carriers keep pushing the boundaries on freight rates to maximise returns. read more].

What appears to be working in the carriers favour at the moment is the introduction of a "Winter Schedule" which has certainly reduced capacity across major trade lanes. [read more]

Ex ISC market volume remains soft due to holiday season in the west but Q1,2024 could see an uptrend as we move into the traditional peak season.

AIR:

Overall Air cargo capacity, demand and rate levels are expected to follow a similar pattern as they have done for the majority of Q4 as we move into December. [read more]

Ex ISC market volumes is seeing an uptick due to ongoing Christmas orders and is expected to remain until Mid-December.

WAREHOUSING & TRANSPORT:

Uniserve won The APL Logistics Retail Supply Chain Excellence Award at the Supply Chain Excellence Awards. This prestigious accolade is a testament to Uniserve's unwavering commitment to innovation, efficiency, and excellence in the ever-evolving landscape of retail supply chain management.

In alignment with our commitment to Net Zero, Uniserve have recently taken delivery of a fully electric HGV on a 3-month trial basis. The HGV will be used to target deliveries across Central London for a number of our core customers to gain a greater understanding of where electric trucks will add value in the future.

EUROPEAN TRANSPORT:

EU proposes new solutions to reduce road transport emissions [read more]

Germany to increase their road toll charges to help to reduce their greenhouse gas emissions. [read more]

ENVIRONMENTAL COMPLIANCE:

Science Based targets Initiative update to the SME route.

CUSTOMS INSIGHTS:

Changes Affecting Northern Ireland Traders: Urgent Action Required for Duty Deferment Accounts.

OCEAN FREIGHT GLOBAL MARKET OVERVIEW

GLOBAL MARKET OVERVIEW

- Ongoing fluctuations in Freight rates continue into December as Ocean Freight carriers continue to push the boundaries to maximise returns. The monthly yo-yo effect on rates from the Far East to EU looks set to continue as carriers look to strengthen their position as we head into 2024 and long-term contract negotiations come to the fore. After similar failed rate hikes in previous months, it remains to be seen if this is at all possible again for December. There appears to be a similar trend on both the US Transpacific and, in particular, the Transatlantic trade lanes with rates continuing to fall. Transatlantic rates are reported to be close to "bottoming out" whilst rates Ex Far East to US East Coast are not far behind.

- What appears to be working in the carriers favour at the moment is the introduction of the "Winter Schedule" which has certainly reduced capacity across most major trade lanes. Whilst there is still a clear lack of demand in the market this is being balanced out against a strategic vessel programme aimed and giving carriers an upper hand. This will continue to raise questions over market forecasts for 2024 with the order of new builds still ongoing with ONE close to agreement of the order of twelve 13K+ TEU methanol powered vessels.

- The race to acquire Korea's flagship carrier Hyundai Merchant Marine is down to just two parties, after the withdrawal of LX International from the bidding. The two remaining parties in talks to acquire Korea's largest shipping company are Dongwon Group, a company with interests in seafood and logistics and Harim Group which controls Korean line Pan Ocean. The target is for a preferred bidder to be announced in early December with the state creditors keen to get the sale completed by the end of the year, however there is significant scepticism regarding the sale with the high acquisition cost seen as the main stumbling block in the deal being complete.

- Panama and Suez Canel Port Authorities look set to introduce levy's for passage through their canals leading to carriers having to look at implementing surcharges to cover the additional costs. With general freight rates already at a low point it further increases pressure on carriers who have been actively looking at ways to keep their margins as high as possible. MSC has announced a $297 per TEU surcharge on shipments transiting the Panama Canal, following the announcement by CMA of a $150 per TEU Panama adjustment factor set to come into effect from 1st January. The Suez Canal Authority has announced a similar hike of between 5%-15% for ships passing through, effective 15th January depending on routing and vessel type.

- Uniserve attend the 9th GLA network conference (Global Logistics Alliance) in Hainan, China. Two representatives from Uniserve's Regional Global Management Team joined the conference alongside 2000 + participants from over 100 different countries. The conference which took place over 2 days from 16th to 18th November gave Uniserve staff the opportunity to meet with global logistics partners to expand partnerships, gain valuable insights from within the logistics industry and the chance to work on potential new sales lead and rate enquires.

OCEAN FREIGHT GLOBAL MARKET OVERVIEW

GLOBAL MARKET OVERVIEW...CONTINUED

INDIAN SUBCONTINENT

Ex-India

- For ISC no major uptrend in volumes is expected in December,2023.
- Capacity is constrained due to blank sailings to the U.S. East Coast and high utilization to the U.S. West Coast, but the market volume remains soft due to holiday season.
- On the Asia-Europe trade lane ultra large vessels with 24,000 TEU capacity have been received from shipyards and at the same time demand on this trade lane has dried up, since carriers have taken delivery of such large ships and their attempt to phase into Asia-North Europe loop will have a big challenge.
- It is expected that India would ship more grape volumes compare to last year due to favourable weather conditions. If the grapes volumes do perform and volume increase, then we anticipate FAK rates, and first quarter contracts might have increase in rates & space would be a challenge.
- Shipping lines further are looking ahead to few blank sailings in the first quarter of 2024.
- **Ex-Bangladesh-** Chittagong port witnessed a 30% decline in ship arrival in recent weeks as dollar & order crisis strangles imports & exports.

Ex-Sri-Lanka

- Space available with all main carriers and weekly vessels are available in IEX service in December.
- Equipment availability has no issue. ICDs are operating as normal.
- Terminal productivity has been dropped due to labour shortage issues since last week of October.
- Bad weather conditions prevailing and forecasted to be back to normal during December.
- Average 1 day delay in vessel berthing and sailing.

AIR FREIGHT MARKET OVERVIEW & REGIONAL REVIEW

AIR FREIGHT SUMMARY

- December is likely to see no let-off in higher rates and restricted capacity from China, Hong Kong and parts of Southeast Asia into UK, Europe, and North America. It is felt that rates into Europe may have 'peaked' though they are not likely to reduce until the fourth week at earliest, with some predicting the higher rates will run through to Chinese New Year. The market from India has seen an increase this month, driven by congested hubs with serving carriers and some transhipment freight from China as people have looked for alternative capacity solutions.

- Looking to next year, carriers are starting to issue contract rate indications. Rate levels being proposed imply an expectation that the market will continue to be strong going in to 2024. There are a lot of uncertainties globally with respect to geopolitical factors - possibility of continued high interest rates; high government borrowing; bank stability; war in Ukraine and the ongoing military action in Israel. Despite these factors, capacity and rates have been challenging for the last 2 to 3 months in many markets, so well managed capacity is likely to keep costs stable next year.

CHINA & SOUTHEAST ASIA

- Overall Air cargo capacity, demand and rate levels are expected to follow a similar pattern as they have done for the majority of Q4 as we move into December. Whilst the high-tech goods "boom" which had a significant impact on rates Ex-China and North Vietnam through Q4 appears to be coming to an end the demand for E-Commerce cargo particularly Ex the Asia-Pacific region is seen as a driving factor with higher than average month-on-month rates almost certainly holding out till the end of 2024 across the Far East. This has led to capacity issues on some trade lanes with shippers advised to book up to one week in advance where possible. While e-commerce demand may be surging and rates on the up, overall cargo volumes remain weak.

- Looking ahead to 2024 and there might be some hope around the corner with the return of "classic seasonality" a possibility according to Xeneta. Whilst overall volumes and growth rate for 2024 is expected to remain low there is at least a possibility that volume patterns may return to the overall Air sector in 2024. One major issue remains, with the majority of volume being bought by forwarders on the spot market whilst in contract shippers are buying from forwarders on long term contracts. There certainly needs to be common ground found between forwarders and airlines to help provide stability in the market. Alongside that the Air Freight market is heavily dependent on the reliability of Ocean Freight which also faces its own challenges in 2024 and due to the volumes moved via Ocean any disruption Ocean services would provide a significant upshot to the Air Freight sector.

- A meeting of more than 100 countries at the UN aviation meeting in Dubia has agreed to an interim goal for emissions reductions from global aviation by 2030 by using less-polluting fuels, however the likes of China and Russia aired concerns about the impact on their economies. The goal, which came after five days of U.N.-led talks in Dubai, called for 5% lower carbon emissions through the use of cleaner energies like sustainable aviation fuel (SAF) by 2030, according to the International Civil Aviation Organisation (ICAO).

AIR FREIGHT MARKET OVERVIEW & REGIONAL REVIEW

AIR FREIGHT SUMMARY...CONTINUED

INDIAN SUBCONTINENT

HOT TOPICS

- **Ex-India:** Due to Christmas rush there was high demand during end November and will continue up to Mid-December. Space to LHR and US being in high demand, the rates too have increased. Cargo from Far- East, mainly China has increased so all hubs are full of this cargo and allocating space for these shipments due to higher revenue. Capacity change from India as per below:

    1. Ex-DEL: QR will be operating daily flights from 19th December from 3 flights per weekday 2,4,6; AI has announced a new service DEL AMS on day 1,3,4,7; BA has now a double daily to LHR.

    2. Ex-BLR: Lufthansa has introduced 3 Pax Flights a week from BLR to MUNICH in addition to their daily flight to FRA.

    3. Ex-MAA-QR: Frequently cancelling their freighters week after week; EY: Likely to increase the Freighter capacity from 2 to 3 per week; UL: Operation of flights has increased from 3 to 4 per day.

- **Ex-Bangladesh:** The air freight market demand in Dhaka remains stable. However, there is an impact on the overall RMG sector in Bangladesh due to dollar crises. Despite this, the space demand and air freight rate levels are steady. Transit times to both the EU and the US are regular.

- **Ex-Sri-Lanka:** Demand is increasing but there are no capacity issues now. UL has doubled the frequency of CMB/LHR flights on SAT & SUN. SQ has increased the frequency to daily flights and MH is going to upgrade two wide body aircrafts twice a week in addition to their narrow body operation. EY will downgrade from wide body operations to narrow body from 1st week of December.

AIR FREIGHT MARKET OVERVIEW & REGIONAL REVIEW

AIR FREIGHT SUMMARY...CONTINUED

INDIAN SUBCONTINENT

GENERAL

- With the increase of minimum wage and appeal from the Prime Minister, unrest of apparel labours settled down and all shuttered apparel factories reopened and revived their operation. However, garments manufacturer association (BGMEA) estimates, over USD 100 million worth of garments work orders been postponed with the three weeks spell of labour unrest.
- The apparel apex body BGMEA urged EU again to extend GSP transitional period to six years from 2026 for smoother LDC graduation. Bangladesh exported 24 billion euro to EU in 2022.
- The Bangladesh economy, already strained by the prolonged impact of the Covid-19 pandemic and the Russia-Ukraine war, now faces exacerbated challenges, including a sharp rise in commodity prices, a 35% devaluation of the taka, and disruptions due to ongoing political unrest ahead of national elections. The economic repercussions include a significant decline in export-import volumes.
- Pakistan's economic prospects have been hit with uncertainty as the International Monetary Fund (IMF) Executive Board has not scheduled a review of the country's $6 billion Extended Fund Facility (EFF) through December 14. This decision comes despite earlier expectations of a critical meeting that could determine the release of a $700 million tranche to Pakistan.
- Middle East Conflict Risks Reshaping the Region's Economies. The conflict in Gaza and Israel is causing immense human suffering. In addition to the direct impact, the conflict will also have consequences for the broader Middle East and North Africa region, with impacts on both people and economies. This comes at a time when economic activity in the region was already expected to slow, falling from 5.6% in 2022 to 2% in 2023.

WAREHOUSING & TRANSPORT UPDATE

THE ROLE OF ARTIFICIAL INTELLIGENCE (AI) IN LOGISTICS

SUPPLY CHAIN EXCELLENCE AWARDS

- Uniserve has been bestowed with The APL Logistics Retail Supply Chain Excellence Award. This prestigious accolade is a testament to Uniserve's unwavering commitment to innovation, efficiency, and excellence in the ever-evolving landscape of retail supply chain management. Uniserve's success in securing this award underscores its dedication to delivering solutions in a highly competitive market.

- Uniserve's approach to supply chain management aligns seamlessly with the evolving demands of the retail industry.

- The award recognises Uniserve's commitment to fostering innovation in our supply chain and warehousing solutions. We have consistently demonstrated a forward-thinking mindset, embracing new methodologies to enhance operational efficiency within our warehouses and meet the diverse needs of our retail clients.

- The Retail Supply Chain Excellence Award also commends Uniserve's customer-centric approach showcasing the company's ability to understand and tailor solutions that prioritise efficiency, cost-effectiveness, and reliability to our Warehousing Customers. With the rise of e-commerce, customers are demanding faster shipping times, accurate order fulfilment, and transparent communication all of which

- Uniserve have showcased to our customers in order to be the winners of this prestigious award.

- Uniserve works closely with Customers which has enabled us to design and implement a robust and agile e-com returns process at our Tilbury Mega Distribution Centre. This encompasses, but is not limited to, dedicated space, sorting, grading, refunds, and packaging, effectively streamlining the returns process and minimising disruptions.

- Uniserve is able to integrate with the customers own IT systems to manage returns, enabling faster processing and reintegration into customers networks, which in turn shortens lead times in getting items back into stock.

- In conclusion, Uniserve's success in The APL Logistics Retail Supply Chain Excellence Award is a testament our outstanding contributions to the logistics and supply chain landscape. As we continue to set benchmarks for innovation, sustainability, and customer satisfaction, Uniserve stands as a shining example of excellence in the dynamic and ever-evolving world of warehousing and retail supply chain management.

WAREHOUSING & TRANSPORT UPDATE

WAREHOUSE...CONTINUED

ELECTIC VEHICLE TRIAL TILBURY

- The UK's Transport Decarbonisation Plan (TDP) will set a pathway to achieving net zero emissions across every single mode of transport by 2050. In alignment with our commitment to Net Zero, Uniserve have recently taken delivery of a fully electric HGV on a 3-month trial basis. The HGV will be used to target deliveries across Central London for a number of our core customers to gain a greater understanding of where electric trucks will add value in the future.

- We have recently carried out some upgrade works to our electrical infrastructure at Tilbury to facilitate a rapid charger (60kw) to ensure that we can charge the truck quickly to improve utilisation.

- Electric trucks offer several advantages over traditional diesel trucks to include:

1. Lower Emissions and expenses – Electric trucks produce zero emissions, reducing the transport industries impact on the environment.

2. Quieter, smoother engines – reduced noise levels ensure that those living on busy roads are not affected by engine noise as well as providing a more comfortable experience for the driver.

- Uniserve recognise that the demand for sustainable transport solutions is rapidly increasing, incorporating electric HGV's into our fleet will be a huge step towards reducing our carbon footprint and shaping the future of the haulage industry.

UNIEUROPE OVERVIEW

EUROPEAN TRANSPORT

Global Truck Driver Shortage

- The International Road Transport Union (IRU) highlights a current global shortage of 3 million truck drivers, constituting 7% of total positions in 36 countries. Projections indicate a potential doubling of this shortage by 2028. Notably, Europe and the U.S. experienced slight easing in 2023 due to softer transport demand.
- Challenges encompass an aging workforce, a "school-to-wheel" gap with minimum driving age issues, and high training costs. Urgent government action is urged, emphasizing the need to lower the minimum driving age and subsidise qualification costs.
- Consequences are already felt in communities and economies, with 50% of road transport operators facing hiring difficulties. The IRU stresses the importance of immediate action to prevent the forecasted escalation, recommending measures such as facilitating access for qualified third-nation drivers. The report underscores the industry's vulnerability, with only 12% of drivers below 25 years old and 6% being women.

EU Truck and Bus CO_2 Vote and Mandatory Purchase Targets

- The European Parliament's recent vote on CO_2 emission targets for heavy-duty vehicles has set ambitious goals but faces criticism for being disconnected from practical realities. The targets aim for a 45% reduction by 2030, escalating to 65% by 2035 and 90% by 2040. The lack of infrastructure for zero-emission vehicles and high costs are cited as challenges.
- The Parliament rejected an immediate and effective consideration of carbon-neutral fuels but vaguely recognised their potential. Additionally, the adoption of mandatory purchasing targets for transport operators is criticised as an unacceptable breach of European rights to property and freedom to conduct business. The industry sees a slim hope in the anticipation of a review clause from 2028 to 2027 but emphasises the need for a balanced approach.

UNISERVE MARKET UPDATE: DECEMBER 2023

UK TRANSPORT OVERVIEW

UK TRANSPORT

- Container Volumes arriving in the UK through November continued to drop as the festive volumes are well and truly finished.
- Forecasts for December are suggesting that this trend is set to continue as the UK Economy remains flat and the public confidence with spending remains low due to high energy and food costs.
- Capacity in all sectors of the Transport industry remains high with many companies struggling to find consistent weekly volumes.
- Diesel prices have reduced over the month of November but still remain circa 7% higher than those at the beginning of July.
- James Kemball remain active in the market place and continue to strive for new business.

OCEAN FREIGHT

AIR FREIGHT

WAREHOUSE & DISTRIBUTION

EUROPEAN ROAD FREIGHT

ENVIRONMENTAL COMPLIANCE

CUSTOMS

ONE WORLD

james kemball

ENVIRONMENTAL COMPLIANCE AND CONSULTANCY

BEYONDLY

Science Based targets Initiative update to the SME route

- The Science Based Targets initiative (SBTi) is a framework which promotes best practice in emission reduction and net-zero targets in line with the latest climate science. Since its establishment in 2015, over 1,000 companies have joined this global initiative.

- Previously, the route for Small and Medium Enterprises (SMEs) had less stringent requirements for target setting than the standard route, meaning organisations with less than 500 employees could pursue a streamlined option. However, the criteria for this SME route have now been adapted to increase the number of companies adopting the standard (non-streamlined) route, which will contribute to scaling up the impacts of SBTs globally.

- As of 1st January 2024, the SBTi will consider a Small & Medium enterprise (SME), if all the following are true:

1. Have <10,000 tCO2e across scope 1 and location-based scope 2 emissions.
2. Do not own or control maritime transport vessels.
3. Do not own or control power generation assets.
4. Are not classified in the Financial Institution Sector or Oil & Gas Sector.
5. Are not a subsidiary of a parent company whose combined businesses fall into the standard validation route.

- And two or more of the following must be true:

1. Employ <250 employees*
2. Turnover of <€40 million* (£34,676,200)
3. Total assets of <€20 million* (£17,335,947)
4. Are not in a mandatory Forest, Land and Agriculture (FLAG) sector

- The fees for SME SBTi validation will also increase from $1,000 to $1,250. These changes only affect companies looking to register through the SME targeted validation route for the first time or those wishing to resubmit targets as part of a recalculation.

- If you would like to know more about the changes and how these may affect your company or have any further questions around setting Science based targets, more information can be found by contacting Beyondly. Click here.

CUSTOM INSIGHTS

Changes Affecting Northern Ireland Traders: Urgent Action Required for Duty Deferment Accounts Changes Affecting Northern Ireland

- HMRC is making significant changes that will affect Northern Ireland traders, and these changes could disrupt supply chains, especially in the crucial week before Christmas. Here are the key points to take away:

Linking Duty Deferment Accounts (DDA) to EORI Numbers:

- Companies with a Duty Deferment Account will now have it linked to their EORI number. For businesses holding both a GB EORI and an XI EORI (XI being the prefix for Northern Ireland), starting from 19th December, their DDA can only be linked to one EORI.

Action Required by Traders:

- Traders must inform HMRC which EORI they want their DDA linked to, choosing between GB or XI EORI. If no instruction is received, HMRC will default the DDA to the XI EORI number. If traders wish to use a DDA in both GB and NI they will need another DDA as one DDA will no longer cover both territories.

Implications for Traders:

- Failure to inform HMRC means the DDA will default to XI EORI.
- Import entries into GB will fail from 19th December, rendering the DDA invalid.
- Pre-lodged entries on road freight movements arriving via Dover or Eurotunnel will require trailers to report to Sevington until payment issues are resolved.
- Inventory-linked movements (Road, Sea, or Air) will not customs clear, and goods will remain at the port until payment is resolved.
- Failure to address these changes promptly could result in delays, financial repercussions, and increased complexity in resolving the issues.

British International Freight Association (BIFA) Response:

- The BIFA Policy Group is actively lobbying HMRC to delay the implementation of these changes. The potential chaos ensuing from the alterations necessitates a reconsideration of the timeline. If not delayed, the process of resolving issues could take up to six months, as obtaining a new DDA involves a lengthy application and approval period.

ONE WORLD UPDATES

The Spreadsheet Conundrum in Supply Chain Management: Why Digitalisation is the Way Forward

In today's fast-paced global economy, efficient supply chain management is crucial for businesses to remain competitive and meet customer demands. For years, many organisations have relied on spreadsheets as a primary tool for managing various aspects of their supply chains. While spreadsheets can be versatile and accessible, they come with a slew of issues that can hinder supply chain performance.

The Spreadsheet Syndrome

Spreadsheets have long been the go-to solution for tracking inventory, forecasting demand, managing suppliers, and monitoring production schedules. However, their continued use can cause significant challenges in supply chain management.

- Difficulty in Collaboration

Collaboration is essential in supply chain management, involving multiple departments, suppliers, and partners. Spreadsheets stored on individual computers or shared drives can hinder effective collaboration. The Supply Chain Management Review reports that 41% of supply chain professionals cite difficulties in sharing data and collaborating as a major challenge when using spreadsheets.

- Data Errors and Inaccuracies

One of the most common issues with spreadsheets is the high likelihood of data errors. According to a report by MarketWatch, approximately 88% of all spreadsheets contain errors, leading to costly mistakes in supply chain operations. Such errors can result from manual data entry, formula mistakes, or outdated information, leading to misinformed decisions and disruptions in the supply chain.

- Lack of Real-time Visibility

In today's interconnected world, supply chain stakeholders require real-time visibility into inventory levels, order statuses, and production schedules. Spreadsheets are inherently static documents that lack the capability to provide up-to-the-minute information. A survey by the Aberdeen Group found that 52% of organisations struggle with limited real-time visibility in their supply chains, impacting their ability to respond swiftly to disruptions.

ONE WORLD UPDATES

The Spreadsheet Conundrum in Supply Chain Management: Why Digitalisation is the Way Forward...CONTINUED

- Sustainability

Having accurate data and real-time visibility allows supply chain professionals to make more sustainable decisions in a timely manner. As it allows them to assess their environmental impact throughout the supply chain. It also reduces the operational strain on the workforce, improving working conditions for people around the world.

- Scalability Challenges

As businesses grow, their supply chain complexity often increases. Spreadsheets are ill-equipped to handle the growing complexity, making it challenging to scale operations efficiently. A study by Gartner found that 57% of supply chain leaders cited scalability issues as a significant problem with spreadsheet-based supply chain management.

To address the challenges posed by spreadsheets, One World's Supply Chain management platform leverages advanced technologies to optimise supply chain operations.

- Enhanced Accuracy with Real-time Data

One World provides access to real-time data from various sources across the supply chain, reducing the risk of errors. Companies embracing digital supply chain solutions report improved forecast accuracy, leading to better inventory management and cost reduction.

- Improved Visibility and Transparency

Through One World, supply chain stakeholders gain real-time visibility into all aspects of their operations. This transparency allows for quicker decision-making and improved responsiveness to disruptions.

- Streamlined Collaboration

Seamless collaboration is enabled between different departments, suppliers, and partners. The McKinsey Global Institute found that digitalisation can boost collaboration efficiency by up to 25%, leading to better coordination and quicker problem-solving.

ONE WORLD UPDATES

The Spreadsheet Conundrum in Supply Chain Management: Why Digitalisation is the Way Forward...CONTINUED

- Scalability and Agility

The One World platform empowers supply chains to adapt and scale with ease. According to a study by Deloitte, 86% of companies report increased agility through digitalisation, enabling them to respond rapidly to market changes and customer demands. This scalability is crucial for companies seeking to expand their operations.

While spreadsheets have served as a reliable tool for supply chain management for decades, their limitations are becoming increasingly apparent in today's fast-paced business environment. Data errors, limited visibility, collaboration challenges, and scalability issues all pose significant obstacles to effective supply chain operations. Supply chain digitalisation, on the other hand, offers a comprehensive solution by providing real-time data, enhancing visibility, streamlining collaboration, and enabling scalability.

One World still offers all the flexibility that spreadsheets bring, allowing you to configure the requirements to capture data from all types of organisations across the supply chain, with the additional benefits of: data quality assurance, validation, real time collaboration, measure and much more. Just like spreadsheets, it can be a layer above existing execution systems or replace core aspects of data capture requirements.

Companies that embrace this kind of technology are poised to gain a competitive edge, improve efficiency, reduce costs, and deliver exceptional customer experiences. To remain competitive in the modern business landscape, organisations must recognise the issues posed by spreadsheets and seize the opportunities presented by digitalisation in their supply chain operations.

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your **global** business

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