



# MARKET UPDATE

## UK & International

MARCH 2024



# UNISERVE MARKET UPDATE

MARCH 2024

## SNAPSHOT

### OCEAN:

- Hapag Lloyd and Maersk Line have announced a new operational agreement set to come into effect from February 2025, named the Gemini Cooperation.
- Ex ISC Ocean Freight market remains challenging with changing schedules & pricing. [[read more](#)]

### AIR:

- An expected softening in the Air Freight market Ex the Far East in early March is looking unlikely.
- Ex ISC Air Freight market is seeing an exceptional demand & pricing situation and will continue for March & April 2024. [[read more](#)]

### WAREHOUSING & TRANSPORT:

- Uniserve Northampton Elevates Supply Chain Excellence with BRC Accreditation.
- Trialling Walking Floor Trailers for Enhanced Logistics Solutions. [[read more](#)]

### EUROPEAN TRANSPORT:

- IRU addresses that EU governments must compensate damages in farmer protests.
- European Road Freight Rate: Benchmark Q4 2023. [[read more](#)]

### ENVIRONMENTAL COMPLIANCE:

- An Ocean Partnership with the National Oceanography Centre; Blue Carbon Project. [[read more](#)]

### ONE WORLD:

- Unlocking Success in 2024: Top Trends in Supply Chain Management. [[read more](#)]

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# OCEAN FREIGHT GLOBAL MARKET OVERVIEW

## GLOBAL MARKET OVERVIEW

The post Chinese New Year forecast appears stable as carriers aim to maintain freight rate levels out of the Far East despite Ocean Freight entering its typical slow season.

With the situation in the Red Sea ongoing, despite some signs of rest bite, carriers are continuing to divert vessels around the Cape of Good Hope. On top of that, blank sailings have been implemented by carriers following the Chinese New Year which has in turn also created a considerable roll pool with a few key carriers which has led to rate levels not dropping as quickly as expected. Following meetings in Singapore recently between Uniserve management and several main line carriers it's clear that the roll pool created by design in Singapore is being managed effectively to ensure rate levels remain stable and help negate any exposure the carriers might have to a lack of volume.

CMA CGM, COSCO Shipping, Evergreen and OOCL extend Ocean alliance until 2032.

The Ocean Alliance group, consisting of COSCO, CMA CGM, Evergreen and OOCL has signed an extension of its current agreement to March 2032, allaying rumours that one of the operators could move to replace Hapag-Lloyd at the THE Alliance. The alliance had previously been extended until 2027 but the latest agreement comes as its members sought to show strength in the face of the partial breakdown of other alliances. Launched in 2017, the Ocean Alliance is the world's biggest shipping network with three of the ten biggest operators globally part of its group and a capacity of around 4.3m TEUs, accounting for 16% of global fleet capacity.

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## OCEAN FREIGHT GLOBAL MARKET OVERVIEW

### GLOBAL MARKET OVERVIEW

**Some acquisition news within the industry has seen the European Commission approve CMA CGM takeover of Bollore Logistics, whilst the battle to acquire UK based logistics Wincanton goes on.**

CMA CGM Group entered into exclusive negotiations with the Bollore Group to acquire Bollore Logistics' transportation and logistics activities in April last year. The deal is thought to be worth about 4.6 billion euros. Meanwhile it appears there could be a bidding war underway for the acquisition of Wincanton with the after UK based logistic provider's board unveiled its intention to unanimously recommend the 762-million-pound takeover offer from US based GXO Logistics, leaving Ceva Logistics out the running as it's "final offer" falls short of the offer from GXO Logistics.

### CMA CGM makes a 'Case-by-Case' Red Sea Return.

The carrier has recently announced that it had reevaluated the situation in the southern area of the Red Sea, concluding that the "evolving conditions allow us to resume transit on case-by-case basis." The container shipping company said the situation is being closely assessed for each vessel before each transit. Therefore, routing choices cannot be anticipated or communicated. All other vessels will still be rerouted via Africa's Cape of Good Hope. Of the liners that skipped the Red Sea, CMA CGM was the latest to commit fully to diverting its vessels on Feb. 1. Unlike the other major container shipping companies, the France-based firm had benefited from having the French Navy escort select vessels through the Red Sea since December amid concerns of lingering Houthi attacks.

### INDIAN SUBCONTINENT

- Ex ISC major carriers like CMA / Hapag / ONE / COSCO are facing space crunch & rates are likely to increase from 15th March 2024.
- Indian Exporters have called for logistical interventions by the Government, collaboration with insurance providers to develop specialised policies for trade disruptions and delays, 30 per cent reduction in CONCOR rail freight for a period of 12 months, establishing a strong Indian shipping line with sufficient capacity to cater to major export destinations, reducing reliance on foreign lines and regulating air freight prices to facilitate emergency imports and exports.
- Ex Chennai & Tuticorin no availability of 20ft and 20ft reefer equipment.
- IEX service is facing delay in sailings & NEMO service is sailing as per schedule.
- Ex BD & PK pricing-space situation for March 2024 is expected to be same as Feb 2024 but due to upcoming month of Ramadan from 11th March to 10th April there will be reduced working hours for a month to perform religious activities and before EID Holiday around 9th April 2024 shipment volume is expected increase.
- Ex SR port congestion has increased during Feb 2024 due to high volume. Rates & space remain stable.

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# AIR FREIGHT MARKET OVERVIEW & REGIONAL REVIEW

## AIR FREIGHT SUMMARY

**The on-going situation in the Red Sea is continuing to drive volume to air freight, with the Indian Subcontinent being heavily impacted since early February.**

Initially the throughput at hubs, driven by Chinese New Year volumes, was forcing rates up ex the ISC. However, as these volumes worked through during the holiday, direct volumes from Indian and Bangladesh manufacturing started to increase and have grown since.

As China's output has started post the holiday period, we are seeing rates rise to pre-CNY levels more quickly than we might have expected. Ironically, this may be in part due to the pressure on hubs from current ISC volumes.

The market outlook is that these pressures will continue through March. Despite the challenges we have kept cargo flowing using carrier agreements and relationships and will continue to work on solutions to support your supply chain.

**An expected softening in the Air Freight market Ex the Far East in early March is looking unlikely. Booking levels have rebounded faster than anticipated, with rates similarly recovering.**

With factory openings post Chinese New Year, bookings volumes have started to

build and some new season retail orders look to be converting to air to ensure stock availability in UK, EU, and USA. Rates have returned to pre-CNY levels much faster than anticipated.

The markets across the Far East and Southeast Asia are seeing similar rate restoration much faster than anticipated, indicating that carriers are feeling buoyant about the short to medium term outlook for the air freight market.

## INDIAN SUBCONTINENT

Ex India space situation is critical with pricing fluctuating at a shipment level.

- Ex DEL Rates are going up, minimum selling price is increasing and there is very short validity provided by the airlines. QR, AF, TK are not accepting any cargo until mid-next week. EK and LX are accepting only express shipments and that too not immediate clearance. The rates are ad-hoc and likely to go upwards until April 2024.
- Ex MUM space availability after 7-8 days and most airlines are not even accepting shipments for 3-4 days. TK has started a new option of URGENT rates which are higher than express but even at that rates the clearance is after 3-4 days minimum. QR and EK are fully booked till 10th March 2024. Vistara, CX, TK are not accepting any fresh booking until the backlog in hand is cleared.

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## AIR FREIGHT MARKET OVERVIEW & REGIONAL REVIEW

### AIR FREIGHT SUMMARY

- Ex MAA there is a huge demand for space therefore we are planning shipments via BLR. The airport infrastructure is also not able to keep up with the demand which results in cargo getting stuck outside the cargo terminal, huge ques of trucks outside can be seen.
- Ex BLR Ad-hoc freighters operated by EK, QR & ET.
- Bangladesh cargo via DEL has impacted the Infrastructure at DEL because of the screening and checking of cargo at piece level. There has been a representation from exporters in India to stop Bangladesh cargo, so we might see slight reduction in volumes.

Ex Bangladesh the airport is experiencing significant congestion, with over 1000 tons of shipments in back log and limited space available on all airlines. Long transit times and continuous partial arrivals are being observed for all destinations. The airfreight rates are regularly increasing, and there is no possibility of providing rate validity currently.

#### Upcoming Freighter Schedules:

- QR: No freighter available in March 2024
- 7L: 2nd & 5th March 2024
- EY: 4th March
- TK: 12th, 19th & 26th March 2024

Ex Sri-Lanka Airfreight rates are at peak due to massive Sea/Air transshipment volumes via Colombo in addition to the local cargo. Traditional peak starts in March 2024 due to Sri Lankan New Year in Mid-April 2024.

Ex Pakistan ocean-to-air volumes following the Red Sea crisis have increased which is creating a spike in rates. Since last two week most of carriers have increased their air freight rates and the space situation is now getting critical. No new capacities added in the market.

There is huge demand for Ramadan from the middle east in terms of food products, perishables, live goats, so this is impacting the flow of cargo in addition to cargo which was originally planned for sea moving by air.

All airlines are facing space issues from their hubs.

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# WAREHOUSING & TRANSPORT UPDATE

## UNISERVE NORTHAMPTON ELEVATES SUPPLY CHAIN EXCELLENCE WITH BRC ACCREDITATION

Uniserve has achieved yet another milestone in our commitment to excellence by obtaining the prestigious British Retail Consortium (BRC) accreditation. This significant accomplishment underscores dedication to ensuring the highest standards of quality and safety in our operations.

The BRC accreditation is a globally recognised certification that demonstrates a company's adherence to rigorous standards for food safety, packaging, and storage. By obtaining this accreditation at our Northampton facility, we have solidified our position as a trusted partner for businesses operating in the food, retail, and consumer goods industries.

One notable aspect of Uniserve's achievement is its existing accreditation at the Felixstowe Mega Distribution Centre (FMDC). This dual accreditation not only highlights the company's unwavering commitment to compliance and best practices but also showcases our capability to consistently meet and exceed industry standards across multiple facilities.

With BRC accreditation in place at both Uniserve Northampton and FMDC, clients can have confidence in the safety and

integrity of their products throughout the supply chain. Whether it's warehousing, transportation, or distribution, Uniserve's adherence to the highest standards ensures that goods are handled with care and in compliance with regulatory requirements.

The accreditation process involved a comprehensive evaluation of our facilities, processes, and procedures to ensure alignment with BRC's stringent criteria. This achievement underscores our dedication to continuous improvement and commitment to providing clients with unparalleled service and reliability.

For Uniserve Northampton, obtaining BRC accreditation is not just a milestone but a testament to ongoing efforts to raise the bar in the logistics and supply chain industry. By prioritising quality, safety, and compliance, Uniserve reaffirms its position as a leader in delivering innovative and reliable solutions that meet the evolving needs of clients in today's dynamic marketplace.

Attainment of BRC accreditation signifies a significant accomplishment in the journey towards operational excellence. With this accreditation in place, Uniserve reaffirms its commitment to delivering superior supply chain solutions while providing clients with the peace of mind that their products are in safe hands from start to finish.

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# WAREHOUSING & TRANSPORT UPDATE

## TRIALLING WALKING FLOOR TRAILERS FOR ENHANCED LOGISTICS SOLUTIONS

In an ongoing pursuit of innovation and improved logistics efficiency, Uniserve is proud to announce the commencement of trials for walking floor trailers, aimed at expanding our transportation capabilities for our valued customers.

The decision to explore walking floor trailers stems from our unwavering commitment to meeting and exceeding the evolving needs of our clients. These specialised trailers offer a dynamic solution for the transportation of various goods, particularly those requiring efficient loading and unloading processes.

The unique feature of walking floor trailers lies in their moving floor system, which facilitates the automatic discharge of cargo upon arrival at the destination. This innovative technology not only streamlines the unloading process but also enhances safety and reduces handling time, ultimately improving overall operational efficiency.

Throughout the trial period, we will closely monitor various factors, including loading and unloading times, cargo security, and overall cost-effectiveness. This data-driven approach will enable us to make informed decisions regarding the integration of walking floor trailers into our fleet, ensuring that we continue to offer best-in-class

logistics solutions to our customers.

The initiation of trials for walking floor trailers represents Uniserve's commitment to innovation and customer-centricity. By exploring new technologies and embracing progressive solutions, we aim to enhance our service offerings, drive operational efficiency, and provide unparalleled value to our clients. We look forward to sharing the outcomes of these trials and the potential benefits they may bring to our customers and the broader logistics industry.

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# UNIEUROPE OVERVIEW

## EUROPEAN TRANSPORT

**IRU addresses that EU governments must compensate damages in farmer protests.**

Many farmer protests across Europe have seriously disrupted logistics chains, blocking key routes, attacking trucks and destroying cargo. The protests block key trade routes, including motorway links, borders, distribution centres and ports, disrupting the transport.

The average cost to the driver or operator of a blocked truck is approximately EUR 100 per hour. Costs can quickly spiral, impacting especially owner-drivers and small and medium transport firms. The wider economic costs have already run into many millions of euros.

Protests have increasingly turned violent, particularly in France, with trucks and drivers being attacked by masked gangs of protesters who damage vehicles and destroy cargo, especially food. Governments across Europe have often failed to ensure continuity of logistics chains and the protection of drivers, as police who are present at the scene but do not attempt to stop criminal damage.

IRU addresses that Governments have a duty to ensure the free movement of goods and to guarantee the security of drivers and their cargo. They defend that transport

operators now need simple and transparent processes to claim compensation.

### European Road Freight Rate: Benchmark Q4 2023

The Q4 2023 European Road Freight Spot Rate Benchmark Index stood at 123.8, 14.8 points down year on year. The Q4 2023 European Road Freight Contract Rate Benchmark Index stood at 129.4, 0.9 points lower than in Q4 2022. The spot index now sits 5.5 points below the contract index, meaning that spot rates are now closer to their base level than contract rates.

Weak and falling demand for road freight across Europe has pulled down spot rates. But contract rates remain high due to cost pressure driven by new CO2 toll taxes and general cost increases. Transport companies are adapting to operational, financial and environmental challenges to meet future transport demand. Costs have increased across the board over the previous three years. Labour (+28.2%), maintenance and repair (+20.4%), tyres (+21.6%), spare parts (+13.5%), and insurance (+8.7%) have all increased considerably and contributed to a particularly bloated cost base. This is the result of inflation passing through the system.

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## UK TRANSPORT

Import Volumes arriving in the UK have risen as the Deep-Sea vessels arrive having made their way around Africa to avoid the Red Sea.

Forecasts for March are looking promising by showing that this increase in volume is set to continue certainly for the next 4 weeks until the Chinese New Year affect hits UK volumes around the end of March.

Capacity in all sectors of the Transport industry remains high with many companies struggling to find consistent weekly volumes resulting in yet more Transport businesses failing through the month of February.

James Kemball continues to invest in new fuel-efficient trucks and remains active in the marketplace and continues to strive for new business.

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# ENVIRONMENTAL COMPLIANCE AND CONSULTANCY

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In 2023, the partnership between Beyondly and the National Oceanography Centre (NOC) began, two brands dedicated to protecting our ocean and support our natural world.

Twelve months on, we are excited to share the impact of our first project, where together we furthered UK ocean carbon research, by understanding the role of UK seagrasses in storing and sequestering carbon.

*Carbon sequestration - is the capturing, removal and storage of carbon dioxide (CO<sub>2</sub>) from the earth's atmosphere. It's recognised as a key method for removing carbon from the earth's atmosphere.*

NOC's role is to combat challenges facing the ocean through scientific understanding and education. As a charity they pledge to advance, innovate, enable, and share their knowledge with the global community so that together we can take action to protect the ocean we all love.

## The Project

This project specifically looked to grow our understanding of the role of UK seagrasses in storing and sequestering carbon. The first leg of this remarkable project began in Porthdinllaen Bay, a site in North Wales which is a Special Area of Conservation (SAC). NOC's blue carbon experts collected sediment cores from this site, known for the

presence of both seagrass and macroalgae.

The second leg of this project took place at NOC's research facility in Southampton where the metre-long sediment cores, representing thousands of years of history, were scanned and analysed. Through laminographic imaging, NOC were able to identify changes in grain size and date the different layers of sediment from their decay rates to establish the rates of carbon sequestration.

Data from these sediment cores have been added into a larger data base of UK seagrass sedimentary carbon. It is this range of data which creates value and will identify the factors which influence carbon sequestration and help to identify future seagrass restoration sites.

## The Impact

In Summer 2024, these critical field measurements and data will be used to build an open-source computer model and decision support tool which will identify where and how to undertake seagrass restoration with maximum benefit and chance of success.

However, we have also seen immediate impact from this data. This project has been contributing to marine management discussions at national and international levels, with principal investigator Dr Claire Evans presenting evidence to the All-Party Parliamentary Group for the Ocean on the

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# ENVIRONMENTAL COMPLIANCE AND CONSULTANCY

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potential for financing marine restoration, and also leading a session at COP28 on marine sediment management for positive climate outcomes.

The impact of this project will be seen for years to come, as the data will be used to create evidence-based decision and inform UK policy.

Dr Claire Evans, Senior Carbon Researcher at NOC commented:

“The generous donation made by Beyondly to support NOC’s blue carbon research has vastly increased our capacity to determine the role of UK seagrasses in storing and sequestering carbon. This has facilitated a broader analysis to identify the key environmental conditions that determine the rate of seagrass carbon sequestration, and thus underpin effective restoration and enhance nature’s ability to mitigate climate change.”

## What is next?

We are excited to announce that our partnership with NOC will continue throughout 2024, as we work with them to ‘Define the true impact of plastic in our oceans’. More details on this project will be shared in due course.

We encourage everyone to take a look at the work NOC carry out everyday to protect our ocean, be inspired and be part of the community shaping our oceans future - <https://noc.ac.uk/>

Beyondly were able to fund this project incredible through our annual Fund for Change programme, donating 5% of profits to charitable causes, read more about our fund for change [here](#).

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# ONE WORLD UPDATES



## Unlocking Success in 2024: Top Trends in Supply Chain Management.

In the ever-evolving landscape of supply chain management, the Association for Supply Chain Management's (ASCM) annual report provides valuable insights. The 2024 edition, derived from surveying seasoned supply chain professionals, sheds light on the trends shaping the industry. This report stands as a compass, guiding businesses through the intricate challenges and opportunities presented in the field. These are the top five trends the ASCM has highlighted for the year ahead.

### 1. Digital Supply Chain

The first trend dominating the supply chain landscape in 2024 is the importance of the 'Digital Supply Chain.' This shift towards digitalisation promises a positive impact on supply chains by enhancing efficiency, reducing costs, and fostering agility. Supply chains have long been the victim of tedious processes, often managed by siloed spreadsheets, and are vulnerable to human error. The adoption of the One World technology allows businesses to take advantage of cutting-edge innovations such as IoT (Internet of Things) devices, cloud-based platforms and other tools that support the journey to a fully digital supply chain, enabling businesses to respond

swiftly to market demands and optimise their operations.

### 2. Big Data and Analytics

Accompanying digital transformation is the second trend, 'Big Data and Analytics.' In 2024, harnessing the power of data analytics will become paramount for supply chain success. By leveraging advanced analytics tools, businesses can gain unprecedented insights into their operations, from demand forecasting to inventory management. The positive impact on supply chains is evident: fostering informed decision-making, reducing uncertainties, and enhancing overall performance. This analysis is not possible without the correct measurement structures in place to support it. One World's supply chain technology allows for accurate measurement at every stage of the supply chain. This measurement of high-quality data is vital to powering the reality of Big Data.

### 3. Artificial Intelligence

You would struggle to find a trend report that does not mention this third trend, 'Artificial Intelligence' (AI). As with many industries, AI has emerged as a game-changer in supply chain management, but only if it is applied in the right way, with vast amounts of high-quality data to support it. Recently, there has been a notable emphasis on Large Language Models (LLMs) such as ChatGPT.

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# ONE WORLD UPDATES

However, the effectiveness of these tools is dependent on the quality and accessibility of data they receive. Supply chains frequently struggle with data fragmentation, where information is confined within specific departments, organisations, or functions. To tackle this challenge, One World serves as a centralised hub, aggregating and assessing an extensive range of data. This vast amount of high-quality data enables AI to be the groundbreaking innovation it has long promised to be. Resulting in a powerful tool capable of streamlining processes, optimising routes, and predicting potential disruptions. The positive impact extends to improved decision-making, smarter resource allocation, and overall operational efficiency.

#### 4. Supply Chain Investment (Systems and People)

'Supply chain investment', both in systems and personnel, constitutes the fourth trend. In 2024, it is essential businesses recognise the importance of investing in both state-of-the-art technology and skilled professionals to drive successful supply chain management. Often technology and personnel are seen in

opposition to the other, with the assumption made that adopting technology results in a loss of personnel. Whilst it is true that strategic technology investments contribute to increased automation, improved communication, and a workforce equipped to navigate the complexities of the modern supply chain landscape; any successful business needs to view technology as a tool to allow the workforce to move away from repetitive and often menial tasks towards more strategic roles which have a greater impact propelling the business forward. For example, through the One World platform businesses can connect all their systems, people and process in one place. This connection empowers the automation of tasks based on business rules, instantly saving time and resources. Our platform has been created to be easily configurable, to accommodate rapid changes and support change management across systems, people and regulations.

#### 5. Visibility, Traceability, and Location Intelligence

The fifth trend, 'Visibility, Traceability, and Location Intelligence,' underscores the significance of tools providing a unified view of the supply chain. In an era where real-time information is crucial, technology is a vital tool to understand the health of the entire supply chain. One World's Global Trade Management platform facilitates this by not

only providing one source of truth across disparate and previously siloed elements of the supply chain but actively tracks assets through IOT. Businesses embracing visibility and traceability solutions are better equipped to mitigate risks, enhance customer satisfaction, and adapt to dynamic market conditions.

While the ASCM report highlights the aforementioned trends, notable omissions from the top 5 include sustainability, resilience, and risk management. These factors, although not in the top 5, remain critical considerations for supply chain management in 2024 and beyond. As businesses strive for long-term success, it is imperative to integrate sustainable practices, build resilience, and create robust risk management strategies for a comprehensive and future-proof supply chain. Another key consideration missing from this list is the anticipated increase in regulation and tax implications led by governments and increasingly conscious consumers. As the industry continues to evolve, how businesses react to these trends will define the success of supply chain management strategies in the years to come.

Learn more about how One World can help your business thrive in 2024 and beyond at [owgtm.com](https://owgtm.com)

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