



A decade at Duddle, and looking into the big Blue Yonder

Mike Richmond: VP, Duddle – Part of Blue Yonder



“Leaders in Logistics has formidable networking opportunities, thought-provoking presentations and panel discussions. It is a must!”

Lead Visionary – Senior Group Strategist,
PostNord



**A decade at  Dodde
and looking into the big  BlueYonder**





Returns

10th October 2023

2023 Returns - The role of parcel carriers and posts



Out-Of-Home Delivery

Returns

9th August 2023

Parcel Lockers: Key Questions Answered



Deep Dive: Sustainable Delivery, with bpost, Correos, Evri & PedalMe



The Returns Quandary - and How to Solve it



Deep Dive: Changing consumer behaviour in delivery and returns - with Royal Mail, CTT Correios and Delivering London



BOB GRIFFITHS 21st February 2024

5 ways to digitise your returns process and increase profitability

Discover the 5 easy ways to digitise your returns process for better returns efficiency and ROI.



MIKE RICHMOND 20th February 2024

Convenient and sustainable: developing an out-of-home delivery strategy

Sustainability has become a key decision factor for retailers - here's how carriers can stay ahead with an out-of-home delivery strategy that's both sustainable and convenient for consumers.



DODDLE TEAM 12th February 2024

Parcel lockers vs parcel kiosks: which is best for parcel drop-off?

We explore the benefits and drawbacks of parcel lockers and kiosks to help decide the best self-service solutions.



BRUNO COCCALDI 8th February 2024

What do out-of-home networks look like in the UK?

We dive into the biggest logistics operators and their current OOH networks in the UK.



DODDLE TEAM 20th January 2024

5 Changes We Predict in eCommerce Delivery & Returns in 2024

Our predictions for 2024 in eCommerce delivery and returns, plus a roundup of our 2023 predictions.



DODDLE TEAM 4th January 2024

Retailers risk missing an online returns opportunity

CCO Mike Richmond weighed in on the online returns opportunity in the Future of E-commerce Report published by The Times.



DOMINIC KAYE 21st November 2023

Case Study: What carriers can learn from Evri's returns kiosk network

Evri's use of kiosks provides a great lesson for carriers on expanding PUDD networks and capturing volume in the valuable returns and C2C segments.



BRUNO COCCALDI 6th November 2023

2023 report reveals 11% YoY increase in merchants struggling with returns

We explore how the returns market, and merchant perceptions, have changed in the last year.



DODDLE TEAM 24th October 2023

Watch: Shifting the balance with online returns

Find out how retailers, 3PLs and carriers shift the returns balance.



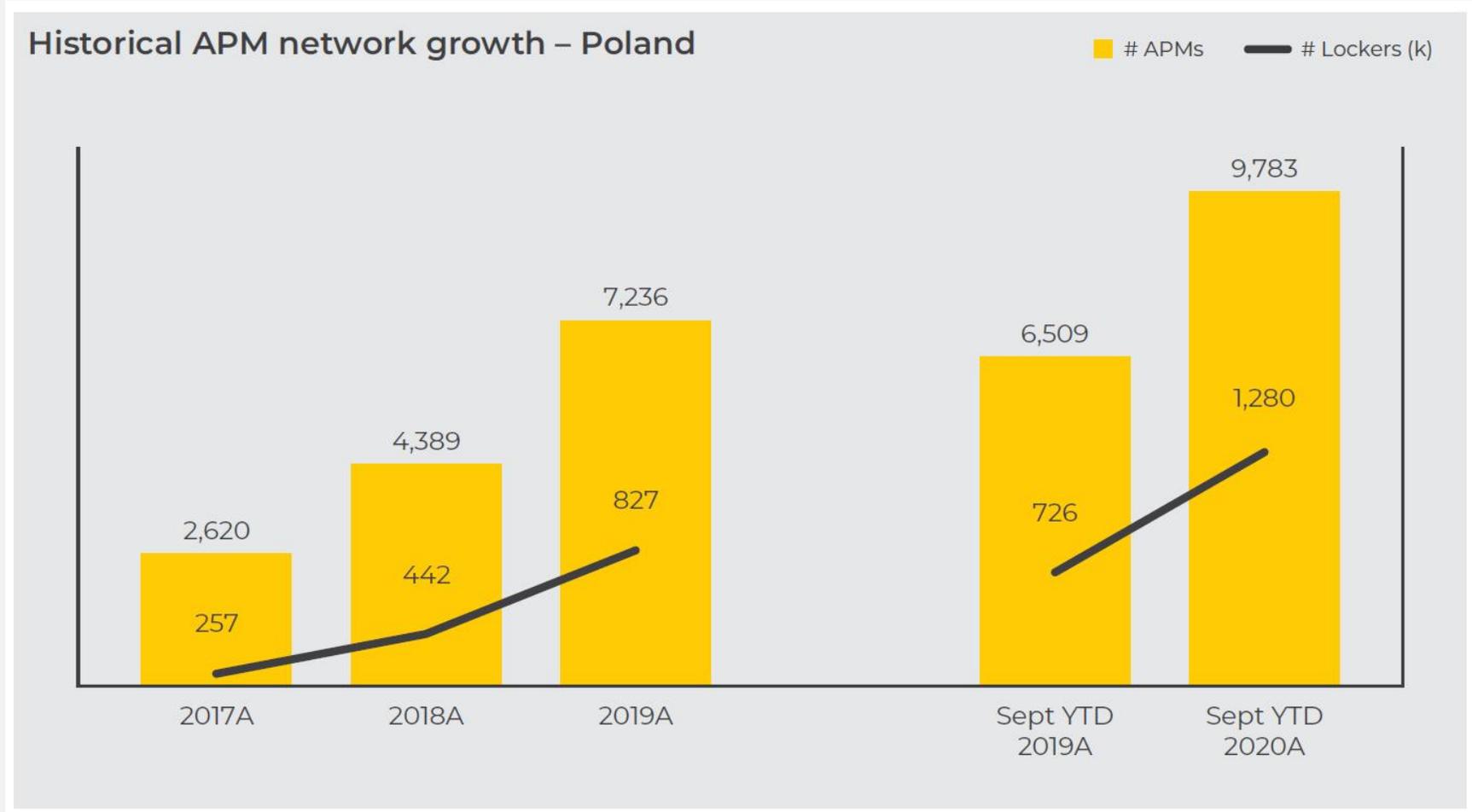
OOH

OOH Growth

	IMRG Click and Collect Report in 2015	Last Mile Experts Report 2023	Growth
Post Office	10,500	11,500	+10%
Collect+	5,800	10,350	+78%
Hermes / Evri	4,200	8,500	+102%
UPS	3,000	5,000	+67%
InPost	1,000	6,000	+500%
Amazon	1,500	17,500	+289%
			+174%



OOH Growth



OOH Growth



We are the leading out-of-home e-commerce delivery company in Europe



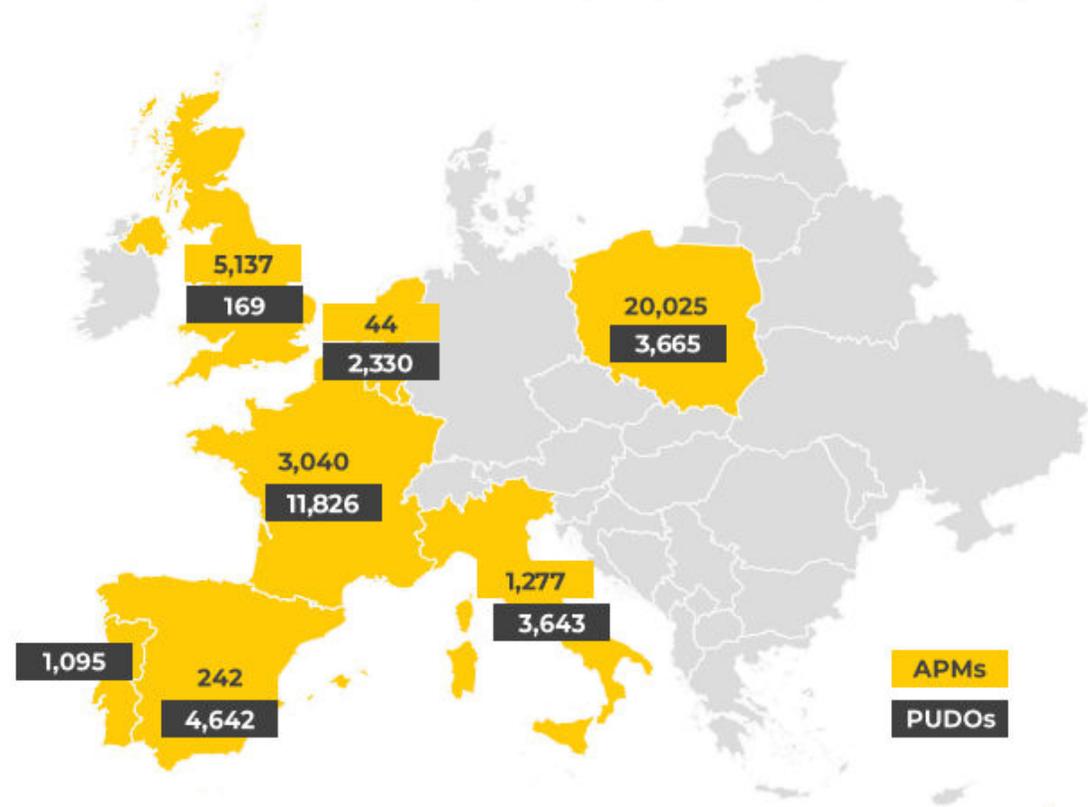
Markets
9



Total APM
29,765



Total PUDO
27,370



Source: Company data as at the end of Q1 2023



OOH Growth

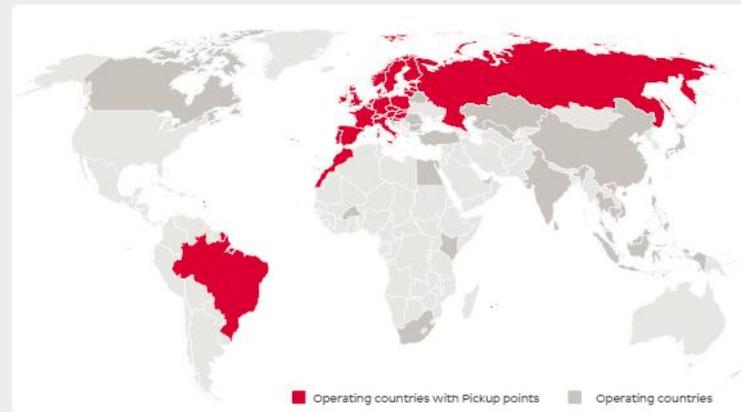


2020
Pickup network



28
countries worldwide

More than
58,000
Pickup points (parcel shops and lockers)
worldwide



Austria 1,544	French overseas (Guadeloupe + Guyana + Martinique + Réunion) 87	Norway 1,584
Belgium & Luxembourg 802	Germany 6,922	Poland 2,679
Brazil 2,189	Hungary 82	Portugal 660 including 47 lockers
Croatia 501	Ireland 353	Russia 6,698 including 3,394 lockers
Czech Republic 1,053	Italy 2,188	Slovakia 327
Denmark 2,878 including 4 lockers	Latvia 254 including 150 lockers	Slovenia 621
Estonia 174 including 174 lockers	Lithuania 200 including 145 lockers	Spain 2,038 including 196 lockers
Finland 1,742 including 475 lockers	Marocco 200	Sweden 2,087
France 14,039 including 403 lockers	Netherlands 1,223	Switzerland 365
		United Kingdom 4,883



OOH Growth



7. December 2023 | News

DPD opens 100.000e service point in Europe and pursues its strong growth in Out-of-Home delivery

- DPD's out-of-home network included 20,000 service points in Europe in 2015.
- By 2021 there were 50,000.
- By 2023 there were 100,000.



SPEED OF DELIVERY

Speed

project44

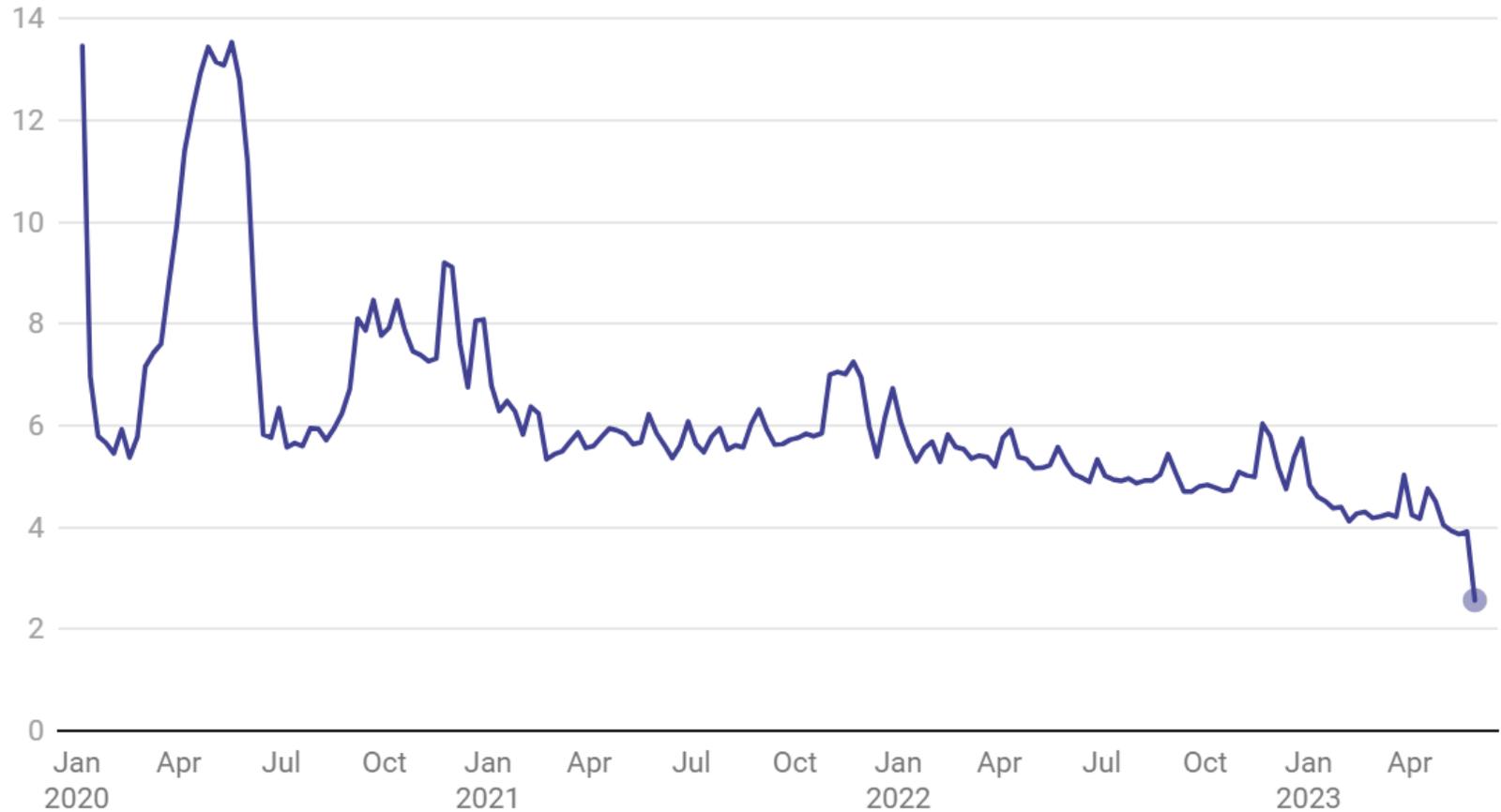
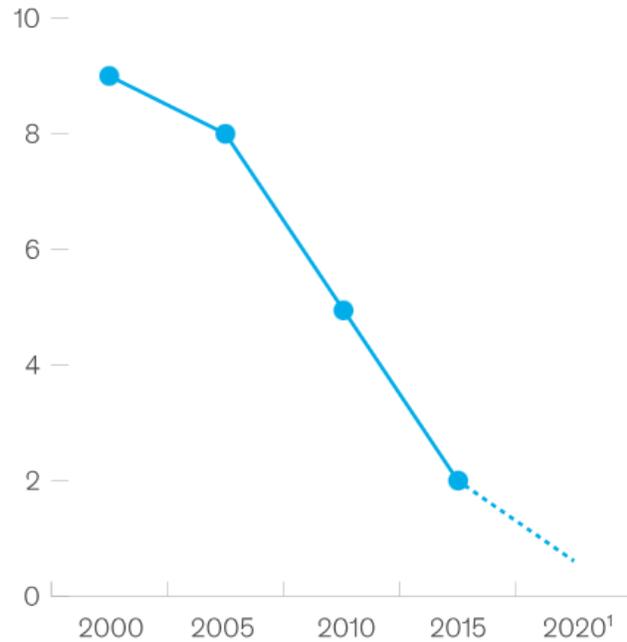


Chart: Max Garland / Supply Chain Dive • Source: project44 • [Get the data](#) • Created with [Datawrapper](#)



Speed

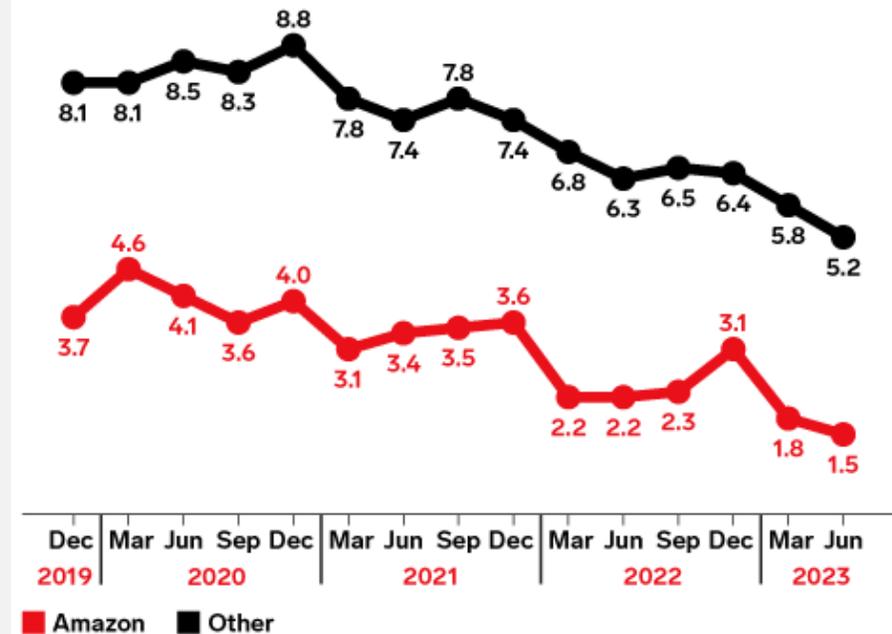
Amazon's free-delivery time, days



¹Forecast.
Source: McKinsey Future of Last Mile study

McKinsey
& Company

Click-to-Door Speed* for US Digital Purchases Made on Amazon vs. Other Retail Sites, Dec 2019-June 2023
days



Note: represents activity on NielsenIQ's platform, broader industry metrics may vary; *the number of days from a digital purchase transaction to package arrival
Source: NielsenIQ, Sep 18, 2023

283398

Insider Intelligence | eMarketer



Speed



Accenture's 2023 postal research: "Amazon has decreased the time it takes to get an item through a Fulfillment Center onto the right truck for shipment from ~18 hours in the early 2000s to ~2 hours on average currently"

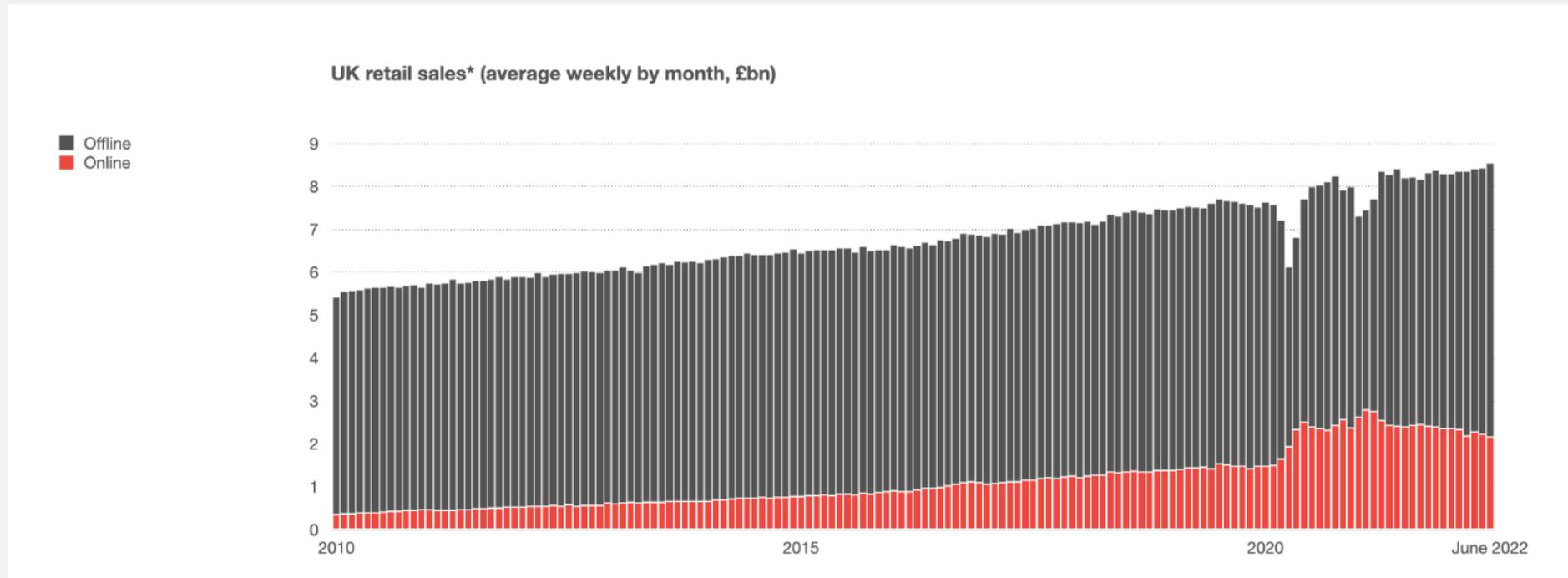


**But what about
ecommerce sales?**

Ecommerce sales

Watch the denominator

UK ecommerce share seems stable even as total sales recover



Source: ONS

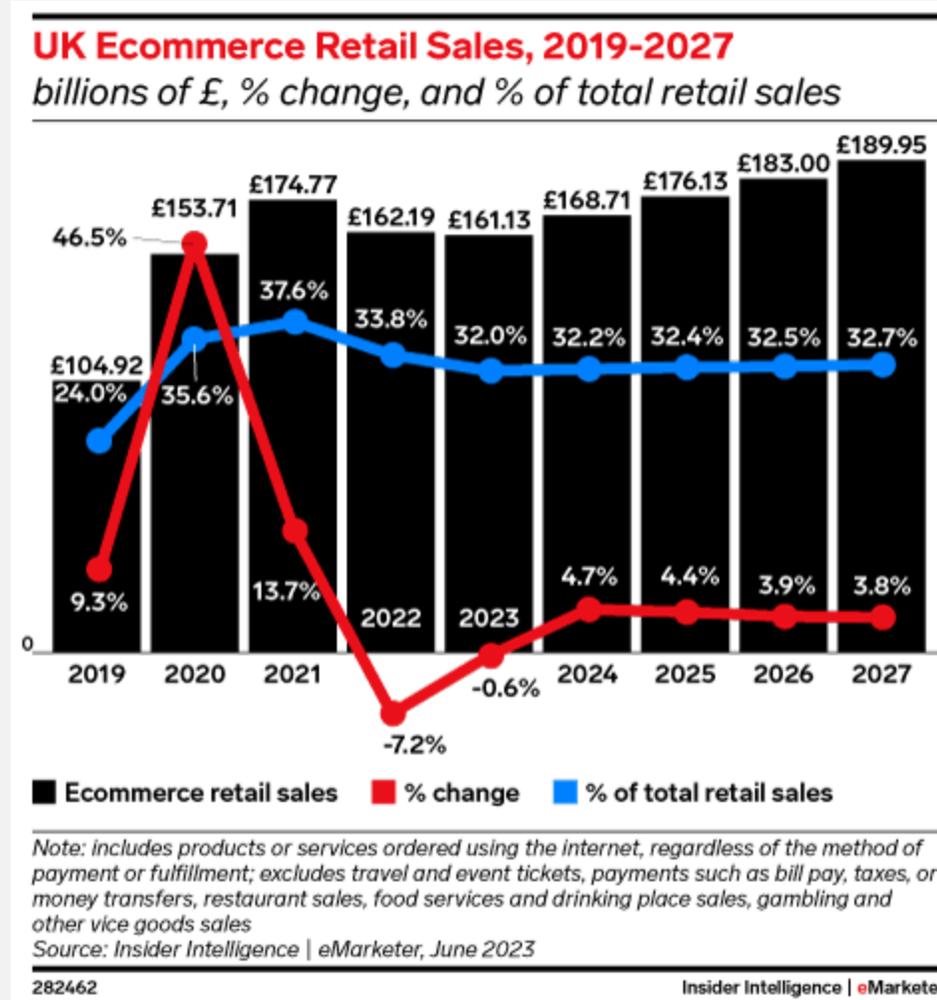
* Excluding cars, car parts, fuel, bars & restaurants. Seasonally adjusted

Benedict Evans — July 2022

115



Ecommerce sales



Ecommerce sales

**Growth of
ecommerce
slows....so
what?**



Ecommerce sales

Growth of
ecommerce
slows....so
what?

**That plateauing of
ecommerce growth has
implications because it
can't keep funding growth
in other areas, which
naturally lag behind
ecommerce growth, but
which are intrinsically
linked to it.**

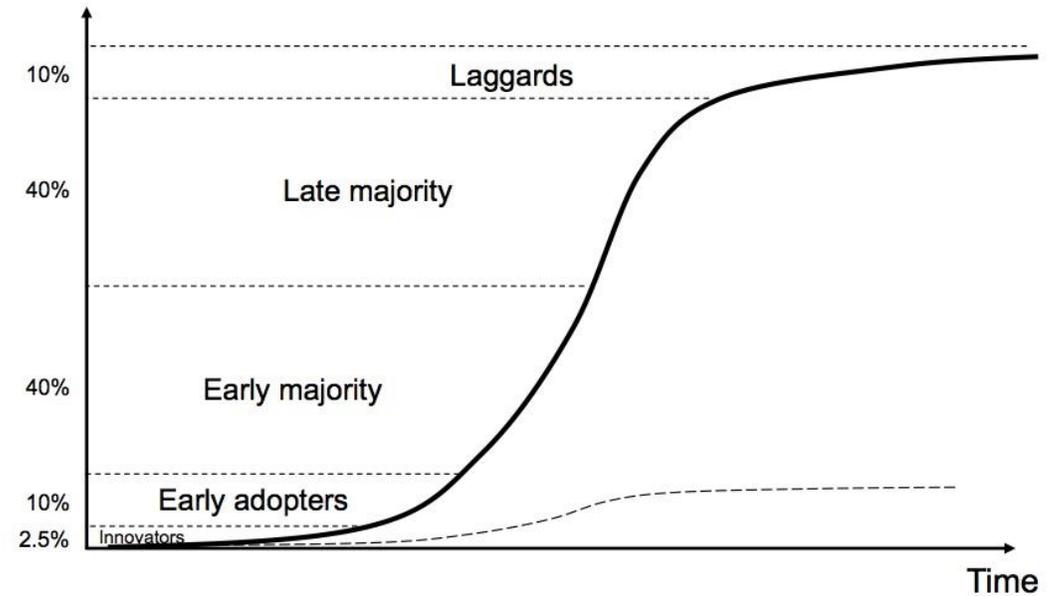


What happens to OOH?



InPost invests £100 million to have 10,000 parcel lockers operational in the UK by 2023

Penetration of Target Market



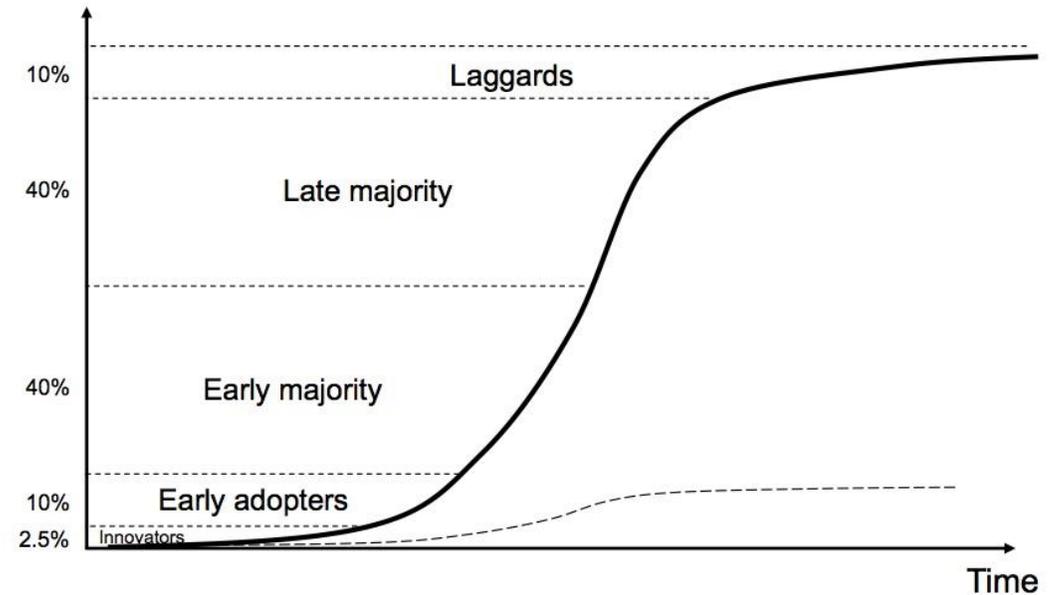
What happens to Speed?

DEEP DIVE

Deliveries keep getting faster. Will it last?

Deliveries continue to get faster, but further improvements will be hard to realize in an era of shifting consumer preferences and cost mitigation among shippers.

Penetration of Target Market



Past decade

Having the
technology & the
infrastructure

Next decade

Optimising use of
that technology &
infrastructure



We'll go **FROM** form and function...i.e., having the stuff in the first place.

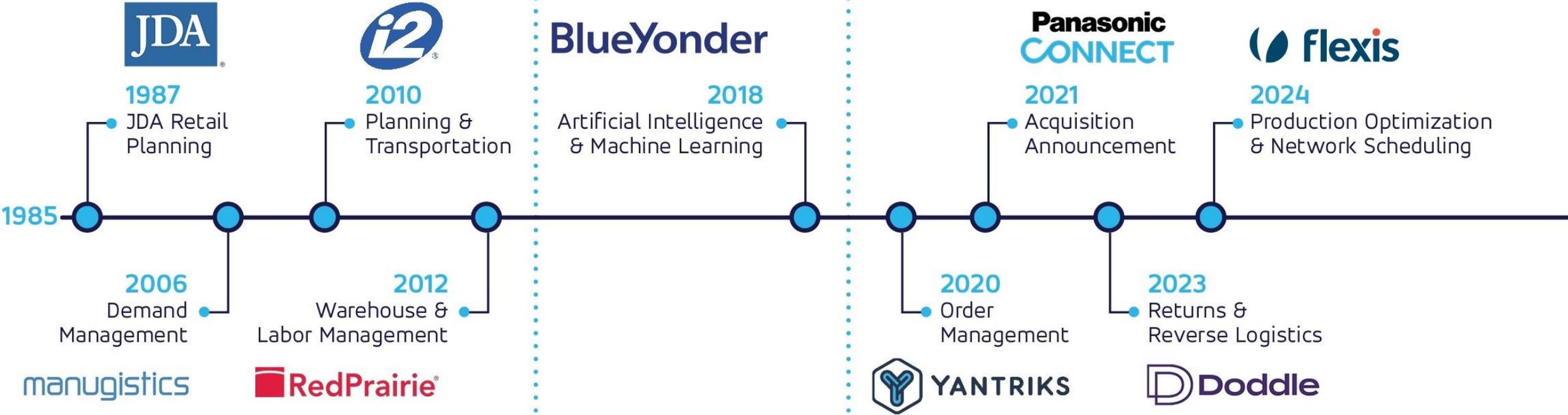
TO Efficiency and Utilisation.....i.e., making the optimal use of that technology and infrastructure you've invested in.

“Now I have this fleet of vehicles, these post offices, these hubs, this locker network, these people, how do I best use them”



 Dodddie  BlueYonder

Our Journey



Helping Our Customers Lead

3,000+

Global Customers in

76

Countries

167

New Customer Logos
(2023)

RETAIL

76
TOP 100

MANUFACTURING

53
TOP 100

CPG

73
TOP 100

GLOBAL 3RD PARTY LOGISTICS

28
TOP 50



The World's Leading End-to-End, Supply Chain Cloud

Solutions

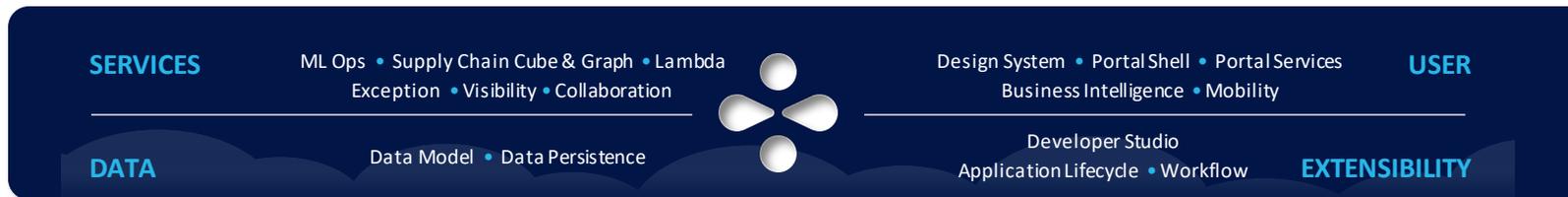


Capabilities



One Data | One Experience | One Ecosystem

Platform



Blue Yonder is the only company positioned to provide **end-to-end supply chain management**, unifying operations with our industry-first supply chain clouds to our expansive capabilities across **planning, logistics** and **commerce**, all powered by the Luminate Platform.



12
weeks

12
months

12
years



“Blue Yonder solutions **orchestrate** sourcing, production, logistics and network strategies with the **continuing goal of improving the efficiency of global supply chains.**”



3 Core trends for the next decade.

1. Best-in-Class from End-to-End

Plan and execute with greater speed and agility leveraging a complete set of supply chain solutions



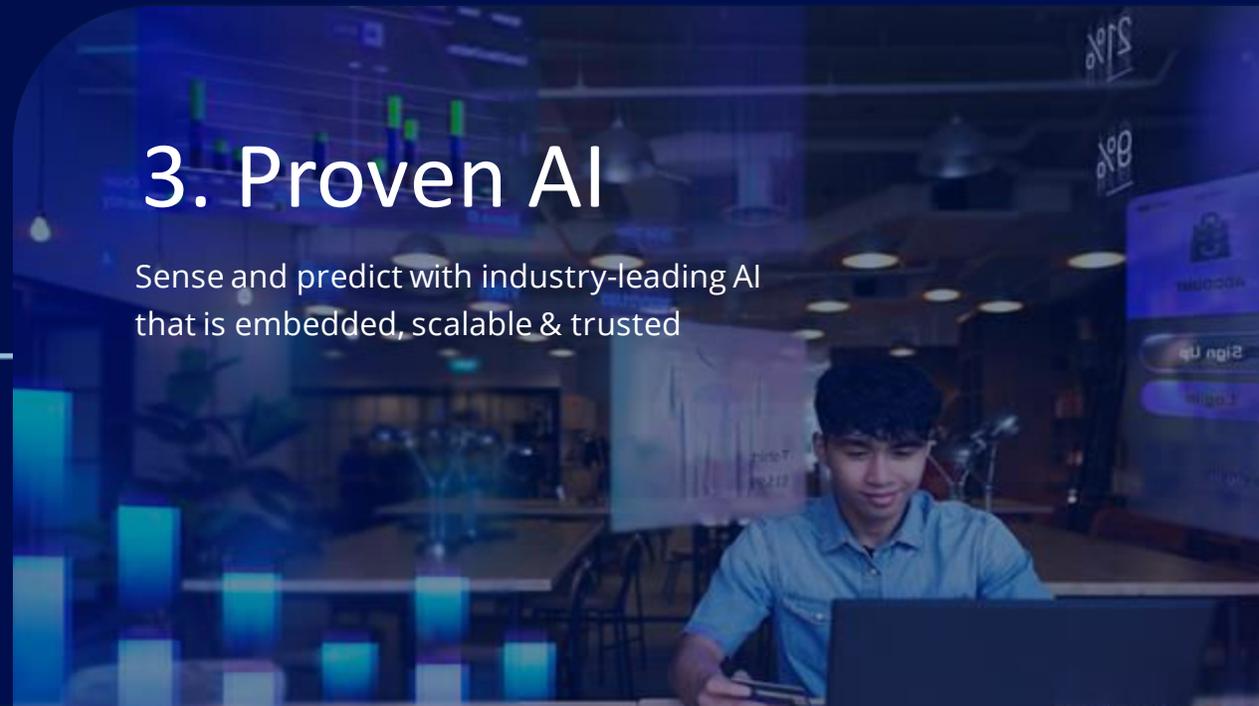
2. Interoperable

Synchronize data, workflows, and systems to enhance decision-making and transparency



3. Proven AI

Sense and predict with industry-leading AI that is embedded, scalable & trusted



1. Best-in-Class from End-to-End



2. Interoperable



Interoperability is the ability to synchronise data, workflows and systems to enhance decision making and transparency

Supply Chains today operate with technological independence. Systems don't communicate



2. Interoperable



2. Interoperable



2. Interoperable

NEWS

[Home](#) | [Israel-Gaza war](#) | [Cost of Living](#) | [War in Ukraine](#) | [Climate](#) | [UK](#) | [World](#) | [Business](#) | [Politics](#) | [Culture](#)

[Business](#) | [Market Data](#) | [Economy](#) | [Your Money](#) | [Companies](#) | [Technology of Business](#) | [CEO Secrets](#) | [Artificial Intelligence](#)

H&M starts charging shoppers for online returns

20 September 2023 · [Comments](#)



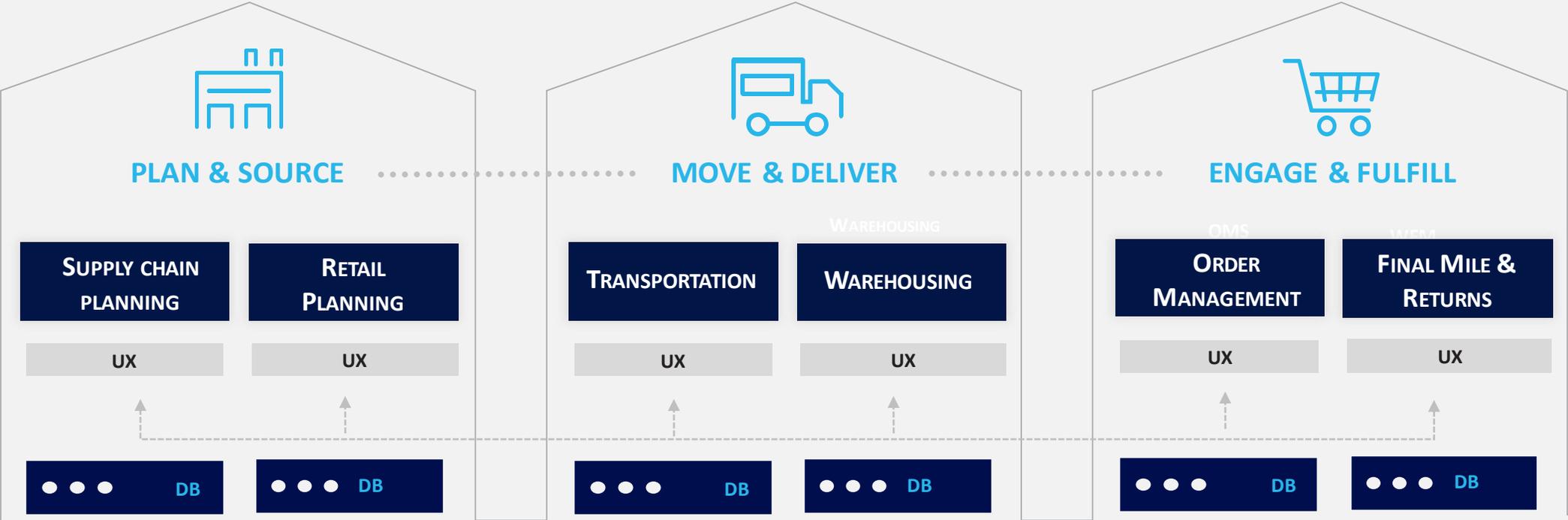
Zara to charge customers a fee for returning goods bought online



Image: Zara, archive photo



Siloed supply chains cannot address the complex challenges of today with enough speed or agility to improve efficiency



- High cost & complex
- Lack of coordination across roles
- Historic-driven decisioning
- Stale, static & disjointed



2. Interoperable

TMS



OMS



CRM



LOCKER

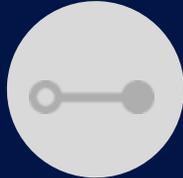


2. Interoperable

SILOED



LINEAR



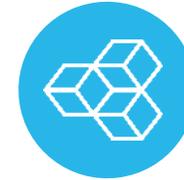
HIGH COST,
HIGH COMPLEXITY



MANUAL



COMPOSABLE
MICROSERVICES



LOWER COST &
COMPLEXITY



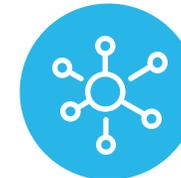
COGNITIVE
ORCHESTRATION



COMMON
DATA CLOUD



UNIFIED
EXPERIENCES



Supply Chains Are Shifting From Linear to
Composable, Connected & Intelligent

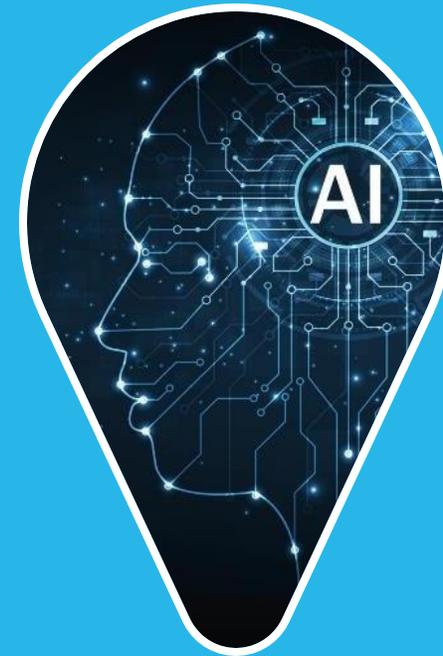
3. AI

Predictive AI



What is going to happen based on historical data

Generative AI



Deep-learning models that take data and “learn” to generate statistically probable outputs



Harnessing the Power of Generative AI & Large Language Models



Blue Yonder Orchestrator

How do I reduce returns costs by 12%?

Submit

Orchestrating returns



Imagine AI could

- Link into the **CRM or ERP** to spot bad behaviour or fraudulent activity by customers
- Link into the **WMS** to work out which products are being returned more frequently, to feed that back into **Planning** and **Forecasting** tools
- Link into **CMS** to drive the right returns options based on the speed at which that item needs to be returned
- Link into **stock management** tools to determine what items customers should be encouraged to return to what store based on stock levels of those products



Once data is truly shared, and systems are interoperable, it's AI that sets up the rules and decision-making that drives performance



Enabling Multiple Levels of Supply Chain Interoperability Maturity



Level 0

*Legacy Point Solutions &
Batch Processing*

Project built integration



Level 1

*Packaged Application
& Data Integration*

Facilitate inter- and
intra-enterprise
coordination



Level 2

*Interoperable
Workflows*

Optimize speed,
performance and
scalability



Level 3

*Cognitive
Orchestration*

Unlock performance
and build sustainable
supply chain resilience



Level 4

*Cognitive
Network*

Achieve autonomous, multi-
enterprise data sharing and end-
to-end visibility

**A decade at  Dodde
and looking into the big  BlueYonder**



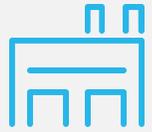
Past decade

Accumulation

Next decade

Utilisation





PLAN & SOURCE

SUPPLY CHAIN
PLANNING

RETAIL
PLANNING

UX

UX

DB

DB



MOVE & DELIVER

WAREHOUSING

TRANSPORTATION

WAREHOUSING

UX

UX

DB

DB



ENGAGE & FULFILL

OMS

WFM

ORDER
MANAGEMENT

FINAL MILE &
RETURNS

UX

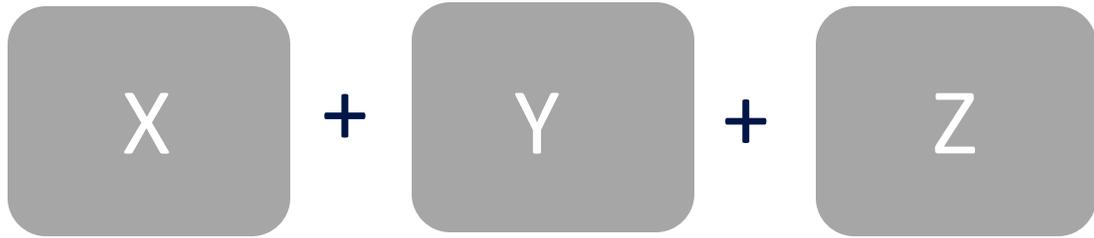
UX

DB

DB



Opportunity



TRADITIONAL
PROCESSES



MODERN
SUPPLY CHAIN

merchandising ×
planning ×
commerce ×
logistics =

**exponential
potential**



- **Investing \$1bn over 3 years**
- **Unparalleled investment in data science, automation, AI and machine learning**
- **Goal to be the world's Leading End-to-End, Supply Chain Cloud**





A decade at Duddle, and the big Blue Yonder

Mike Richmond: VP, Duddle – Part of Blue Yonder