



# DIGITAL INNOVATION IN SUPPLY CHAIN MANAGEMENT

THE DAY WHEN 3RD PARTY LOGISTICS PROVIDERS MOVE DATA INSTEAD OF FREIGHT

# AGENDA

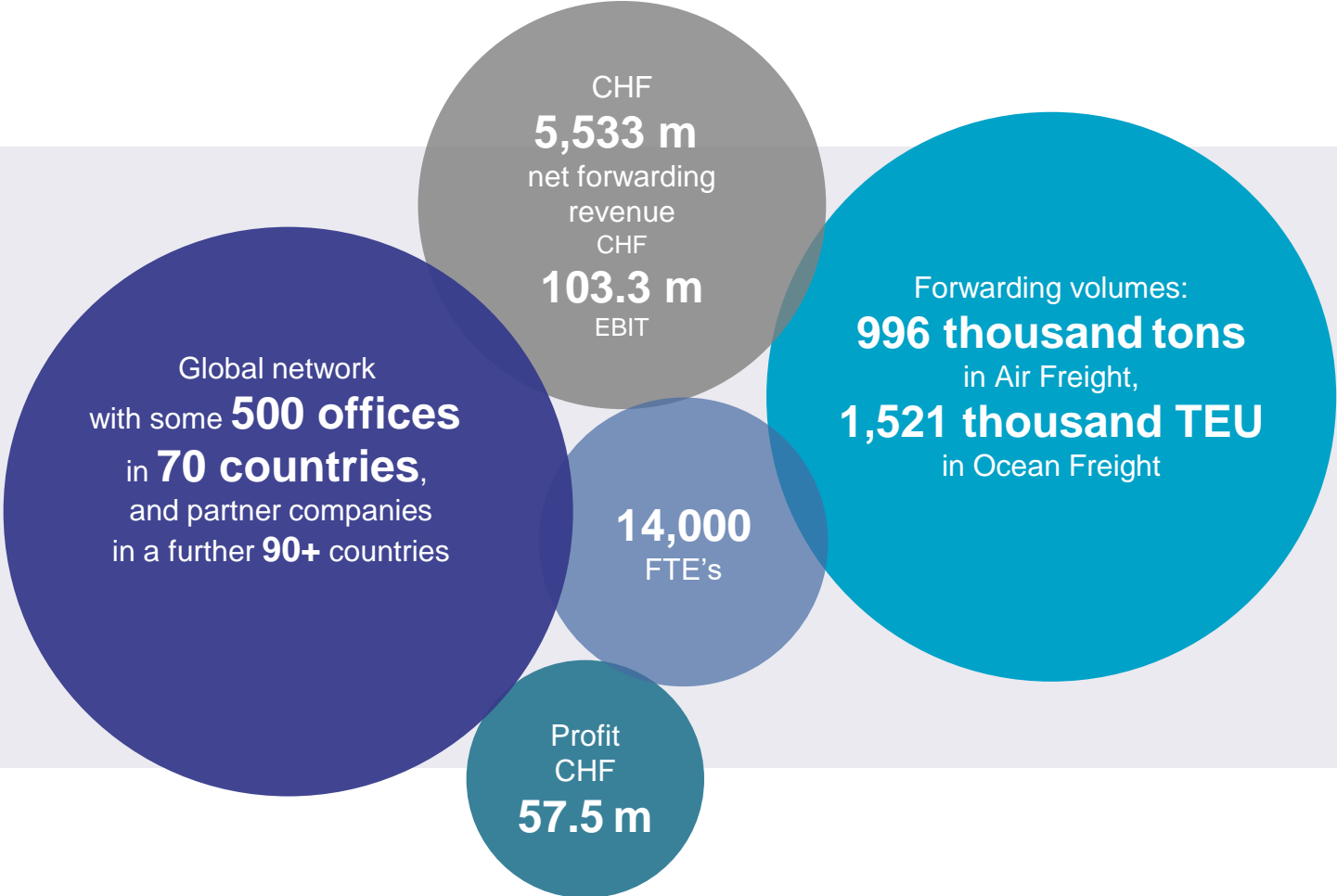
---

A brief history and today's expectations.

Internet-of-Things (IoT) – what it can do... and what not.

What's next & closing.

# PANALPINA AT A GLANCE



## CORE ACTIVITIES



Air Freight



Ocean Freight



Logistics and Manufacturing



Energy and Project Solutions

## Core Activities

### Airfreight

- Nr. 1 in Switzerland
- Turnover CHF 170 Mio.
- 40'000 tons moved

### Oceanfreight

- Top 4 in Switzerland
- Turnover CHF 95 Mio.
- 25'000 Containers moved

### Logistics

- Turnover CHF 20 Mio.
- Limited W&D Service offerings

## Geographical Coverage

**Basel** (North-Western Switzerland)

**Zurich** (Zurich Area/Central Switzerland)

**Geneva** (Romandie)

**Lyss** (Jura/Swiss-Midland)

**St. Gall** (Eastern Switzerland)

**Lugano** (Southern Switzerland)

Total 350 Employees

## Core Industries served

**Healthcare & Chemical**  
(Basel & Geneva)

**Watch**  
(Lyss und Geneva)

**Machinery & High-tech**  
(Zürich und St. Gall)

**Fashion**  
(Lugano)

# MEGATRENDS

These five mega trends are all interconnected, disruptive and evolving rapidly. We strive to stay ahead of the changes that are impacting your business and ours



## CONSUMERS +EXPECTATIONS

Increased consumer power, with rising expectations of immediacy and personalisation impacting customer behaviour



## TECHNOLOGY +CONNECTIVITY

Increasing need for visibility and connectivity fuelled by convergence of internet, mobile devices, cloud and data analytics



## URBANISATION +MOBILITY

People, products, ideas and information moving around the world at speeds we never imagined



## SUSTAINABILITY +RESOURCES

Scarcity of resources, climate change, and demands from Generation Y will necessitate more sustainable manufacturing and supply chain solutions



## POWER SHIFT +COMMERCE

Tightening trade policies conflicting with customer demand for global access to new products and demand for omni-channel purchasing, delivery and return

# TRENDS AND THEIR IMPLICATIONS FOR SUPPLY CHAINS

Diverse trends are reshaping logistics and impacting both Panalpina and our customers

## Circular Economy

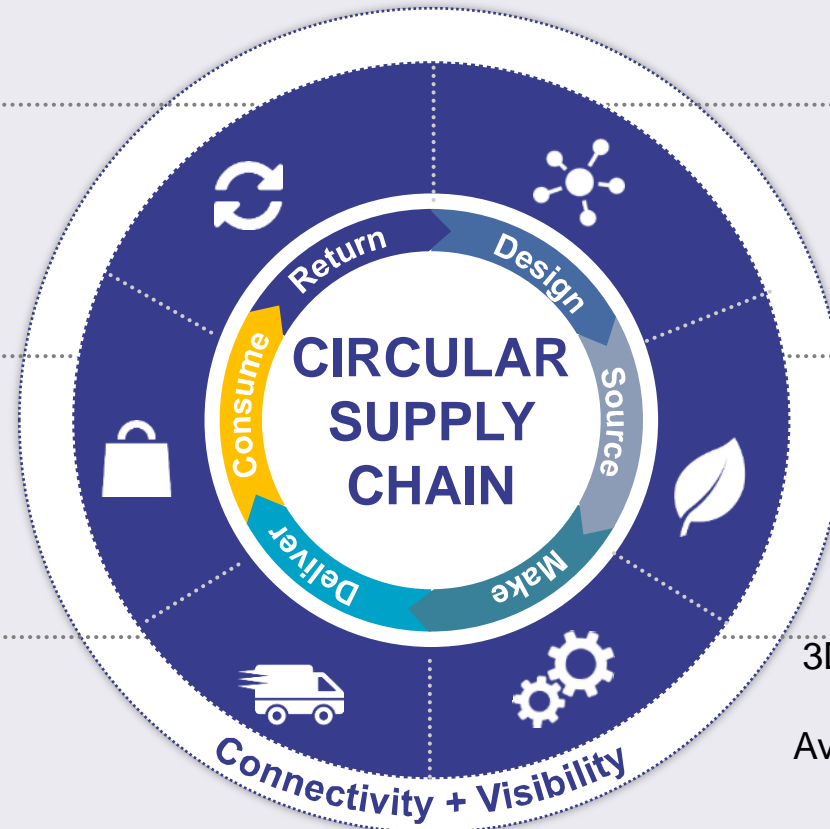
Sharing economy, reconomy, return, repair, recycle, uberisation, modularisation

## Consumer

Expectation of immediacy, mass customisation, mass personalisation, omni-channel, e-commerce, pay for use models, digital currencies

## Transportation

Autonomous vehicles, e-mobility, drones, last mile delivery, urban decoupling, hi-speed infrastructure, decreasing cost of distance, overcapacity, continental shift



## Design

Makerspace movement, Design for 3DP, sustainable manufacturing design

## Sustainability + Resources

Energy prices, Inventory management  
Carbon footprint, CO<sub>2</sub> reduction, reconomy,

## Manufacturing + Assembly

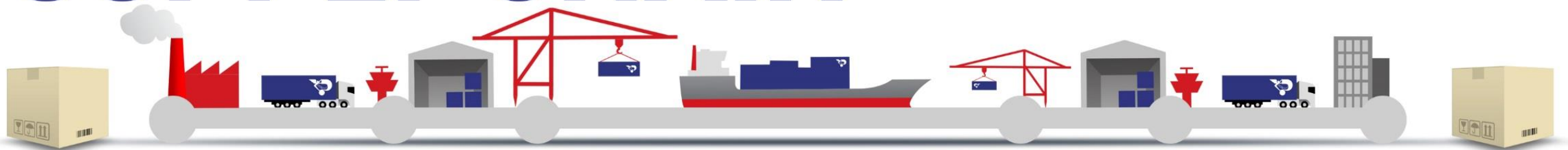
3D printing, distributed manufacturing, clusterisation, near-shoring, offshore/onshore, machine learning, Avatars, trade barriers, industry 4.0, cyber production systems, speed factories

Big data, cloud, business intelligence, Internet of everything, inventory management (D2ID), RFID, augmented reality, cognitive learning, blockchain, machine learning, 5G, digital lean



# YOUR PRODUCTS

# END-TO-END SUPPLY CHAIN

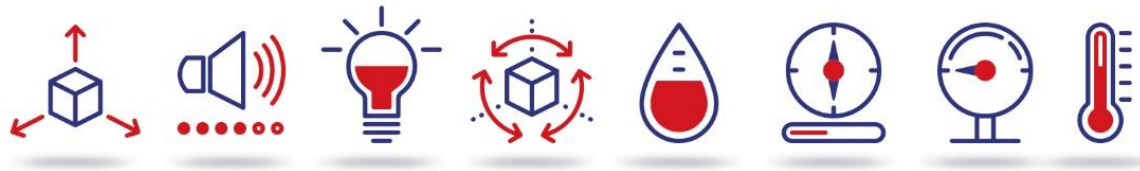


# SUPPLY-CHAIN **CONNECTIVITY** BACK IN 1991



TODAY  
**REAL-TIME**  
IS AN EXPECTATION

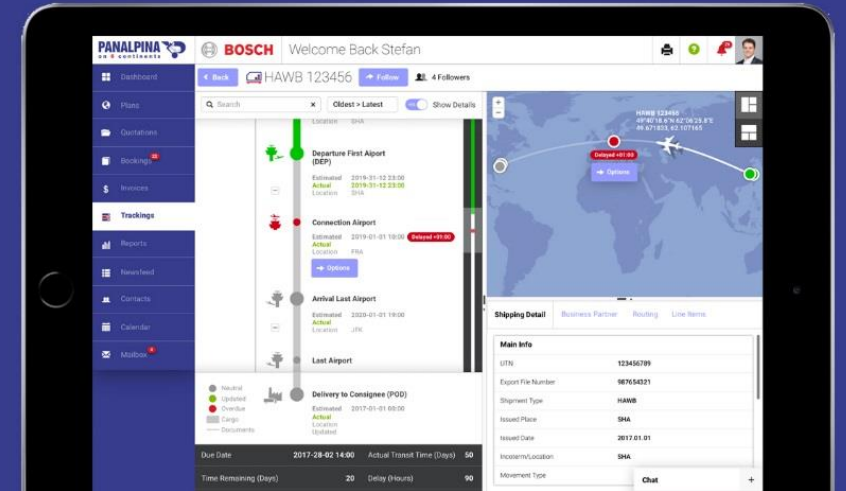




# 2009 ONLY HIGH VALUE CARGO



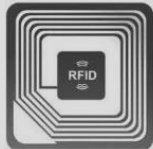
# 2018 ALL CARGO





# EVOLUTION OF **MOBILE**

WIDESPREAD



SMART



WE ARE HERE



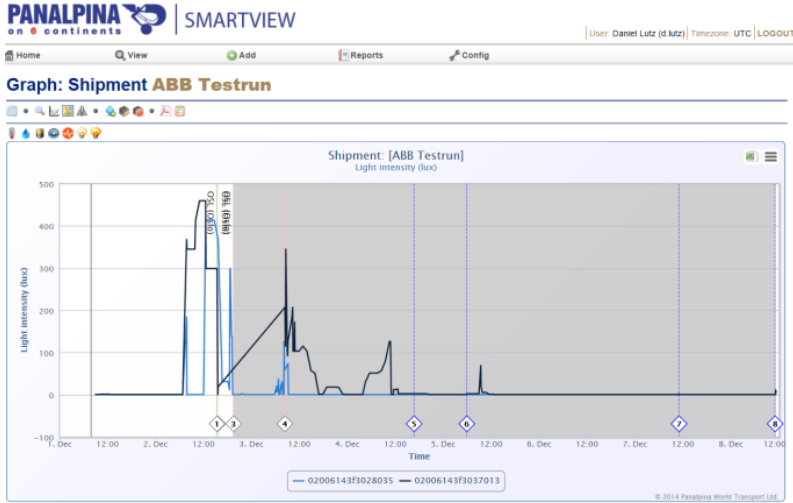
WIDESPREAD + SMART



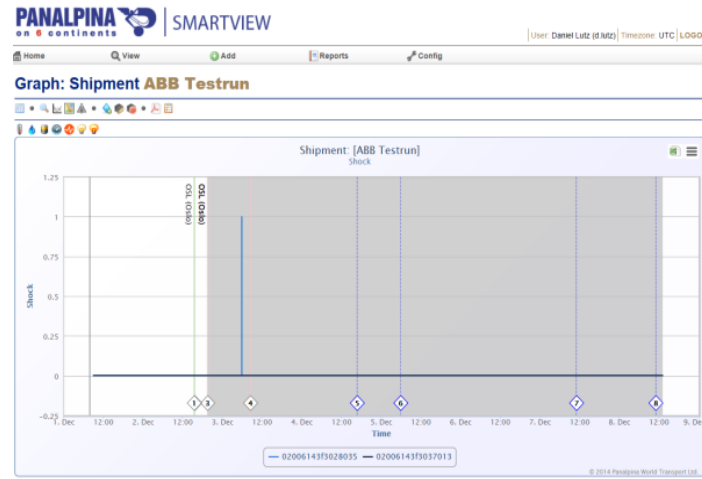
# EVOLUTION OF IoT



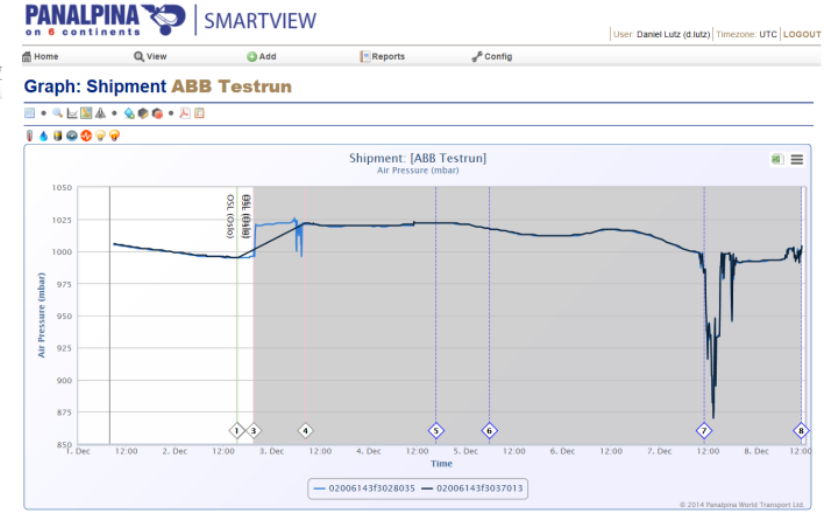
# Light impact



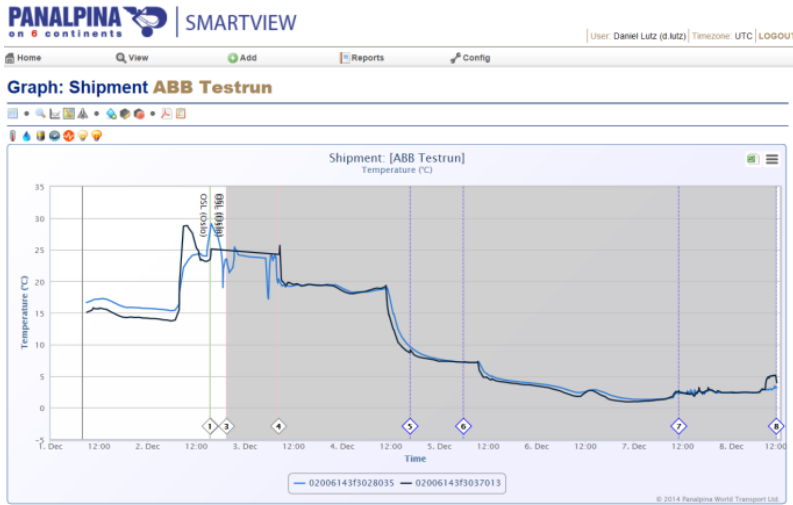
# Shock



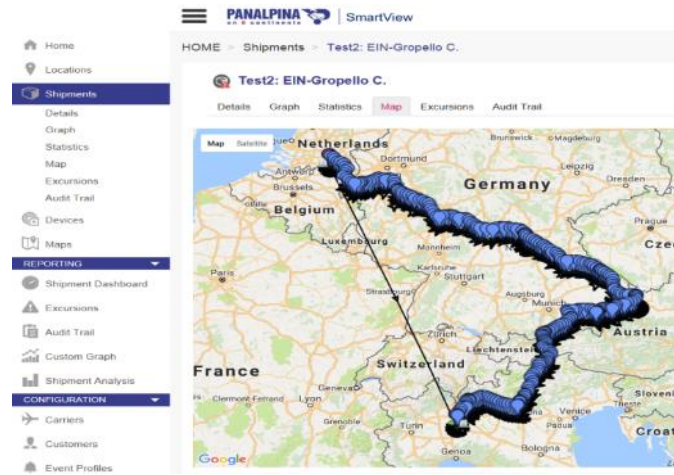
# Air Pressure



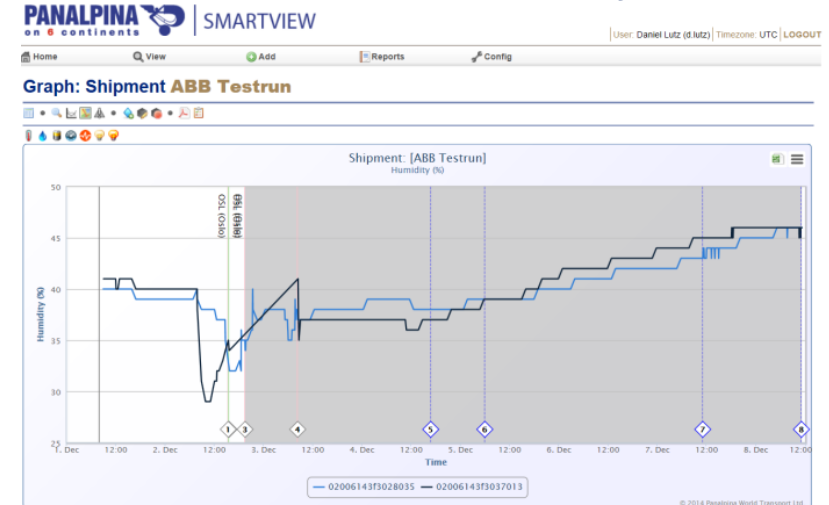
# Temperature readings



# GPS location / Geo-Fence



# Relative humidity



MORE DATA... **AND?**



# YOUR JOURNEY

N/A

N/A

N/A

N/A

N/A



# YOUR **SUITCASE?**

DATA

KNOWLEDGE



+



=

INFORMATION



INFORMED DECISION



MAKES **DECISIONS?**

**CHOOSE  
FLIGHT**

**AUTO BOOK**



ANY **PRODUCT?**

# BRINGING **PRODUCTS TO LIFE** WITH PANALPINA



OK, BUT WHO **CARES?**



**ALL OF US**





# ANY PRODUCT

# GET YOUR PRODUCTS **CONNECTED**



**Walter Isler**

Panalpina Ltd., Zurich, Head Office, Switzerland  
Country Managing Director  
Eichstrasse 50, 8152 Glattbrugg, Switzerland  
Phone: +41 (44) 829 41 11, Fax +41 (44) 829 41 01  
E-Mail: [walter.isler@panalpina.com](mailto:walter.isler@panalpina.com)

**Christoph Lienhard**

Panalpina Management Ltd., Corporate Information Technology, Switzerland  
Head of Customer & Forwarding IT Products  
E-Mail: [christoph.lienhard@panalpina.com](mailto:christoph.lienhard@panalpina.com)

**Dr. Philipp Müller**

Panalpina Management Ltd., Corporate Information Technology, Switzerland  
VP Global Operations Transformation Manager  
E-Mail: [philipp.mueller@panalpina.com](mailto:philipp.mueller@panalpina.com)

Viaduktstrasse 42, Basel, Switzerland  
Phone: +41 (61) 226 11 10, Fax +41 (61) 226 11 01



# PHILIPP MUELLER, VP GLOBAL OPERATIONS TRANSFORMATION MANAGER

---



## Responsible for:

Strategic operations transformation initiatives impacting Business and IT functions

Transformation of Global IT Services

## Curriculum vitae:

Philipp Mueller joined the Group in 2015 as Head Governance and PMO of the Operations Transformation Program. This program introduced a new corporate freight forwarding platform which involves several core business processes across the organization and consolidates corporate data management. More recently, he leads the transformation initiative forming the Global IT Services organization. He has 20 years of experience with ICT Management mainly in the pharmaceutical industry. He was the Corporate Head IT Strategy & Architecture at Novartis and prior to this he was the Chief of Staff Global IT Infrastructure, where he managed large transformation initiatives. He holds a Ph.D. in electrical engineering from ETH Zurich and TELECOM ParisTech, and an executive MBA from IMD Lausanne.

## WALTER ISLER, COUNTRY MANAGER PANALPINA SWITZERLAND

---



### **Responsible for:**

Panalpina Switzerland

### **Curriculum vitae:**

Walter Isler became the Country Manager for Panalpina Switzerland in 2011. He has over 40 years of experience in Logistics and International Freight Forwarding. Before taking over the current position he served as Country Manager in Italy for 3 years and various Sales and Operation Functions at Panalpina Switzerland. Prior to joining Panalpina in 1994, Walter Isler spent 20 years with other Global Logistics providers in Switzerland, Canada and Saudi Arabia and as Logistics Manager with a Global Automotive Manufacturer.

# CHRIS LIENHARD, CORPORATE HEAD OF CUSTOMER & FORWARDING IT PRODUCTS

---



## Responsible for:

Global application portfolio of Customer & Freight Forwarding IT Systems

## Curriculum vitae:

Christoph Lienhard became a member of the group CIO's management team in 2015. He has over 20 years IT and general management experience at frontline, regional and headquarter based positions. Before moving to Panalpina's head office as Supply Chain Business Consultant Manager and Head of Customer Systems in 2007, he served 4 years with the regional IT management team in Hong Kong. Before joining Panalpina Christoph Lienhard spent 10 years with Maersk Sealand in IT and Operations positions in Thailand, Mali & Denmark. He holds a Master of Business Administration from IMD, Switzerland.

