



DGSAPro

Dangerous Goods Management System

CEVA LOGISTICS DIGITAL LIVE

Rebounding out of COVID-19. A supply chain perspective from Key Industry Leaders.

“Notes from the first live webcast prepared by CEVA Logistics, which was an honor to participate as TMGD Hizmetleri Company.”



Notes are compiled by;

Keyvan Shahidi – Project Manager

Yiğit Deniz – DGSA & Company Owner

DGSAPro Dangerous Goods Management System

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www.tmgdhizmetleri.com

CEVA LOGISTICS DIGITAL LIVE
Rebounding out of COVID-19. A supply chain perspective from Key Industry Leaders.
- TAKEN NOTES FROM THE WEBCAST -

Camille Egloff

Global Leader Transportation and Logistics

BCG

3 main issues affecting the sector and creating anxiety:

1. Epidemic
2. Economy
3. Growth

2008 financial crisis,

- Strategies and paths followed by countries such as Canada and Athens can be taken as examples.
 - In the 2008 financial crisis, Canada managed finance as a single body by gathering its banks under one roof using the centralization system. In other words, the path followed by Canada can be explained as "we will either rise together or fall together". - Centralization
 - Besides the financial crisis, Greece was experiencing political problems. If it was an individual country, it could track internal investments and shrinkage, and strengthen the internal economy. However, as a member of the European Union, it had to make major losses by following the decisions made by the main members. Greece had continued its path with the help of other members in the UN yet the economy has never reached its old line. – Unite, Follow a Single Policy, Collaborate

L, V, and U shapes for recovery

What kind of recovery scenario do you expect for your industry and context? U, V or L shape?

- V shape recovery: Optimistic – contained loss (27.3%)
- U shape recovery: Base – with significant lost value (64.9%)
- L shape recovery: Pessimistic – significant perpetually growing lost value (7.8%)

According to Ms. Camille Egloff, we are at the deep U type of shape of the recovery.

Crisis brings opportunity; in this perspective 2 main questions that need to be asked:

1. What we do and should do?

2. How we do and should do?

Visualizing every scenario can be significant.

2 main elements:

1. Visibility - creating central control towers - Companies are currently making investments on this project.

- A control tower for supply chains is a central hub with the required technology, organization and processes to capture and use transportation data to provide enhanced visibility for short- and long-term decision-making aligned with strategic objectives. Control towers in general support the following essential needs for managing supply chains:

- Provide end-to-end supply chain visibility
- Respond and adapt to supply chain disruptions
- Deliver multi-tier process orchestration and supply chain collaboration
- Maximize predictive decision-making and dynamic supply chain execution

Motives for using a control tower vary among companies and industries, e.g.:

- Centralized decision-making in CPG
- Supply chain collaboration in manufacturing
- Transparency in retail distribution

At a basic level, you'll find that a robust Control Tower will serve the following functions:

- **Real-Time Order Planning:** To improve customer service levels, your Control Tower should be able to capture and leverage key data in real-time, such as the delivery time, inventory availability, and transportation costs. Doing so allows you to always select the best, most cost-effective order flow.
- **Exceptions Management:** Your Control tower should also focus on consistently delivering OTIF orders by tracking supply chain milestones and sending alerts when issues arise. More importantly, your solution should allow you to take action directly within the app.
- **Granular Visibility:** In addition to track and trace, your Control Tower would ideally provide granular visibility into the details of each order to effectively fulfill on every required element

2 Main Types of Operational Control Towers:

- Transportation focused
- Supply chain focused

Operational Control Towers

Transportation vs. Supply Chain Control Towers

Control Tower Type	Analytics Capabilities	Operational Capabilities
Transportation	<ul style="list-style-type: none"> On-time orders Transportation costs Carrier performance Transportation milestones 	<ul style="list-style-type: none"> Track & trace Exceptions management on time related transportation steps Static inventory sourcing Optimization for transportation only Shipment Order focused
Supply Chain	<ul style="list-style-type: none"> On-time, in-full orders Total cost to serve (activity costs, transport costs, broker costs, supplier costs, etc.) Supplier, 3PL, carrier and internal resource performance End-to-end supply chain milestones 	<ul style="list-style-type: none"> End-to-end supply chain visibility (manufacturing, distribution, transport, etc.) Exceptions management across any granular supply chain step Dynamic multi-tier inventory sourcing Optimization across transportation, dynamic multi-tier inventory, internal capacity and order SLAs Customer order focused (sales order, shipment order, service order)

2. Creating an open-book, sharing information with and receiving from others – Collaboration

Criteria #1; companies should consider:

1. Cost,
2. Quality,
3. And Sustainability.

CEVA Logistics Studio

Air capacity will not return back to its old place for the next 2-3 years.

Resilience, adaptability, collaboration, and transparency can assist companies to survive these hard times.

When do you expect to ramp back up to pre-covid levels with your air shipments?

- By Q3 2020 – 10.9%
- By Q4 2020 – 13.0%
- By H1 2021 – 37.3%
- H2 2021 or later – 31.6%

- We will not return to the pre-covid levels – 7.3%

Darren Chaisty

Supply Chain Control & Logistics Executive

Rolls-Royce plc

- Risk management processes should be taken into account and drawn up for the business.
- Companies should create molds and move from air freight to sea freight lane.
- Cost parameters should be created.

In the upcoming 6-12 months; volume will go down, smoothness in trade will be disappeared, lower sources and materials will be faced.

The sector will be flattened and return to its normal stage in 2-3 years.

Acceleration in every perspective can be a significant game-changer.

Edgard Pezzo

Executive Director Global Logistics and Containerization

General Motors

- Mapping
 - Target your "hot spots" in your business areas.

Move from air to more ocean transportation.

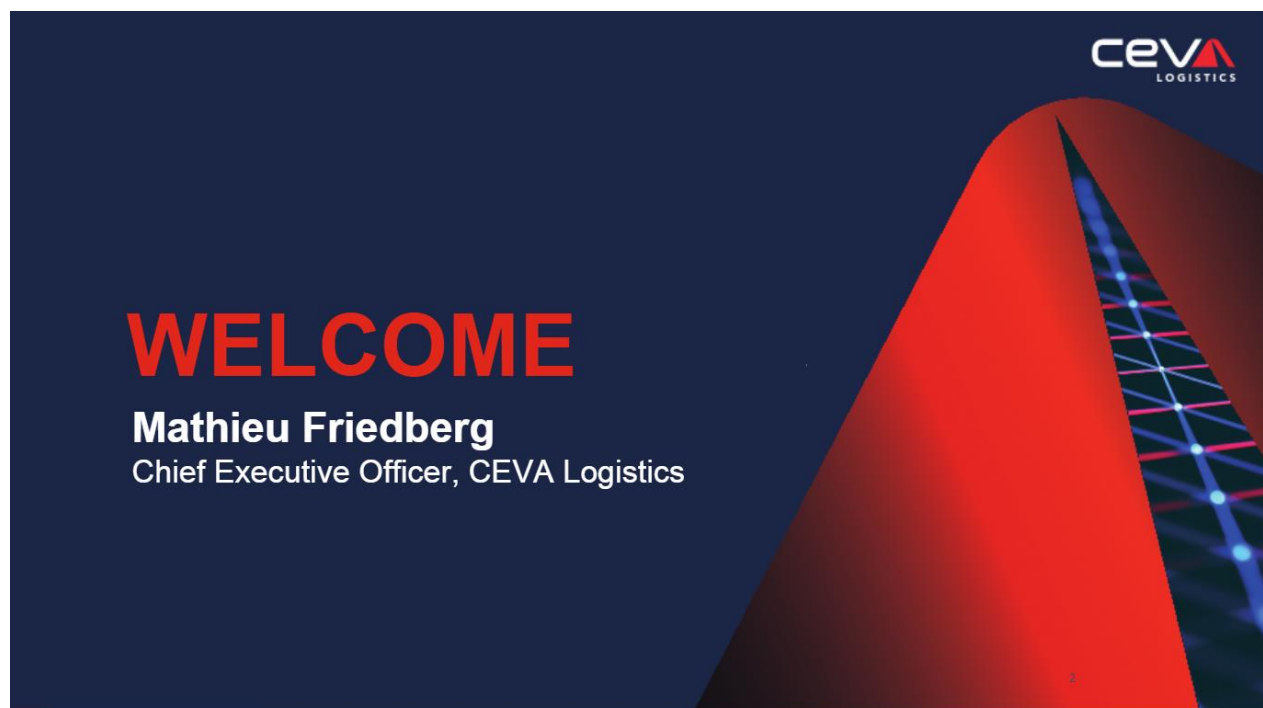
Stay alert for any situation.

General Motors is working and having a close partnership with CEVA. General Motors' logistics field is provided by CEVA.

CEVA LOGISTICS DIGITAL LIVE

Rebounding out of COVID-19. A supply chain perspective from Key Industry Leaders.

- SLIDES -



TODAY SPEAKERS



Camille Egloff
Global Leader
Transportation & Logistics
BCG



Edgard Pezzo
Executive Director Global
Logistics & Containerization
General Motors



Maria Rigotti
Head of Customer
Supply Chain
GlaxoSmithKline



Darren Chaisty
Head of Logistics
Rolls Royce



Guillaume Col
Chief Operating Officer
CEVA Logistics



Laurent Binetti
Chief Commercial Officer
CEVA Logistics



PERSPECTIVE ON T&L

Camille Egloff

Global Leader Transportation & Logistics, BCG

COVID 19 recovery & the world after: perspective on T&L

JUNE 2020

Objectives

- 1 Latest Macroeconomic scenarios for COVID recovery
- 2 COVID-19 impact on trade & the different sectors
- 3 BCG perspective on how to accelerate out of COVID

Macroeconomic scenarios

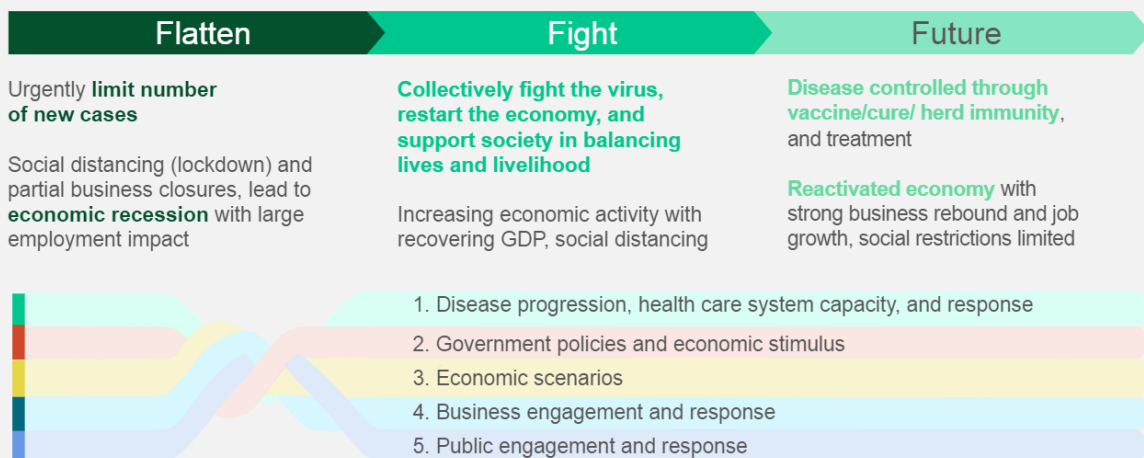
Impact on Trade & Sectors

How to Rebound

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COVID-19 is a journey, requiring an integrated perspective

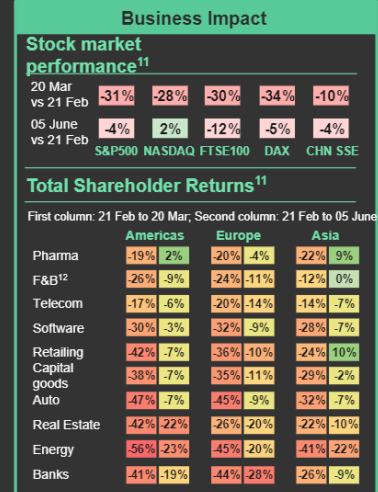
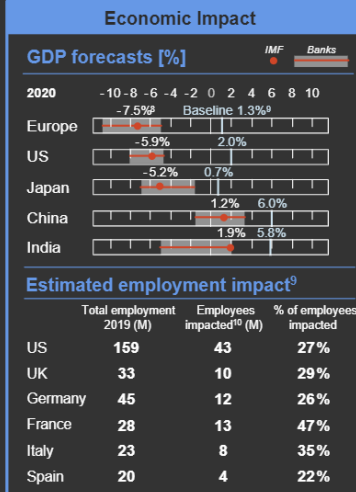
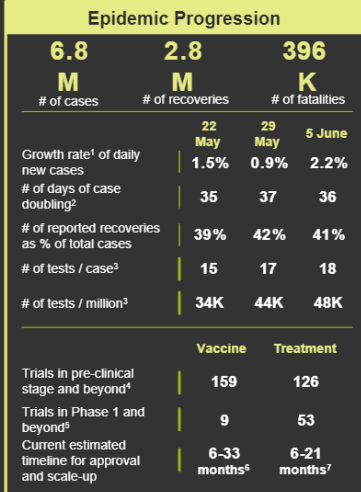


All of the above five factors result in specific economic and social outcomes in each phase

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COVID-19 Impact dashboard

As of 05 June 2020



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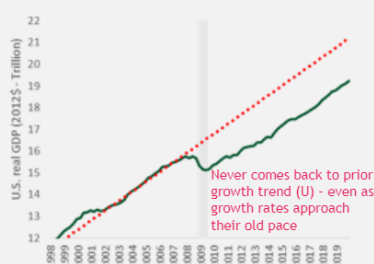
V-U-L empirics — same shock, three shapes

V-shape
2008 Canada



- Canada closest to V-shape (returns to prior trend)
- No systematic banking crisis - no damage to economy's supply side

U-shape
2008 United States



- U.S. clear U-shape (returning to growth rate, but at a lower trend)
- Driven by severe banking crisis - a one time hit to capital formation (supply side)

L-shape
2008 Greece



- Greece experienced a sustained depression and L-shape
- Growth has struggled at a much slower pace, with recurring damage to supply side

Note: Canada trend (1985-2008); US trend (2003-2007); Greece trend (1995-2006)
Source: NBER, BEA, Statistics Canada, Hellenic Statistical Authority (ELSTAT), BCG Center for Macroeconomics analysis

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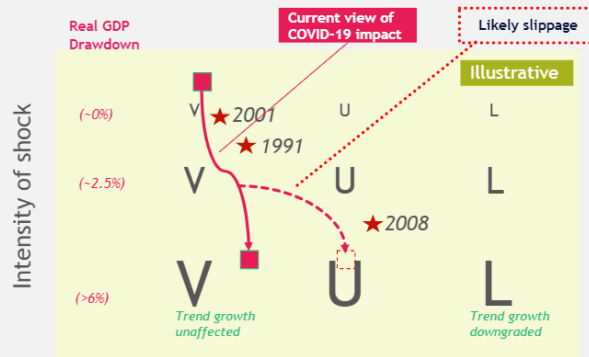
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INSTITUTE

Covid-19 a deep V-shape, clear risk of U

View as of 15 April

Expected impact of COVID-19



- Global recession likely
- US H1 '20 drawdown **larger than in '08**
- Shape not yet fixed - towards **U**
- **U-shape triggered** by shock to labor, capital, and productivity growth is large enough

Note: These analyses represent only potential scenarios based on discrete data from one point in time. They are not intended as a prediction or forecast, and the situation is changing daily Source: NBER, BEA, BCG Center for Macroeconomics analysis

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Macroeconomic scenarios

Impact on Trade & Sectors

How to Rebound

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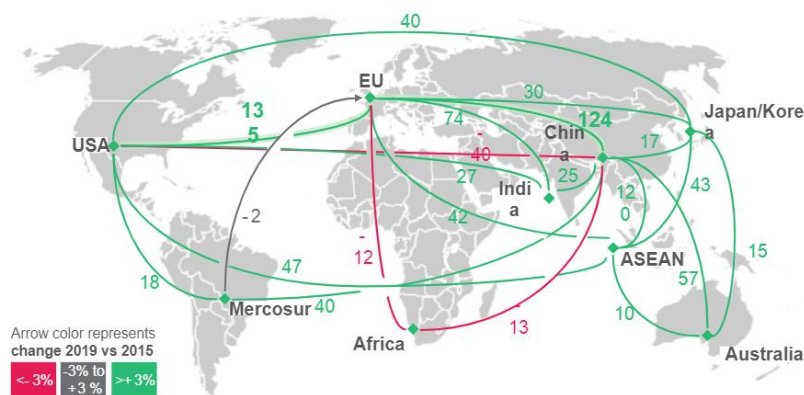
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Pre-COVID-19, global trade grew, sustaining a record \$18 trillion in value



Change in value of global trade of goods from 2015 to 2019 (Major corridors, \$B)

Data on map represent ~30% of global trade; Not shown: Intra EU=~20%, NAFTA=~8%, China/Hong Kong=4%, ASEAN=3%, RoW=~35%



1. Compound Annual Growth Rate: Note: 2019 figure of \$18.2T followed a 2018 record figure of \$18.3T
Source: UN Comtrade, OECD, WEF, IHS, TradeAlert, BCG

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US-China dynamic had already shifted import sources in 2019

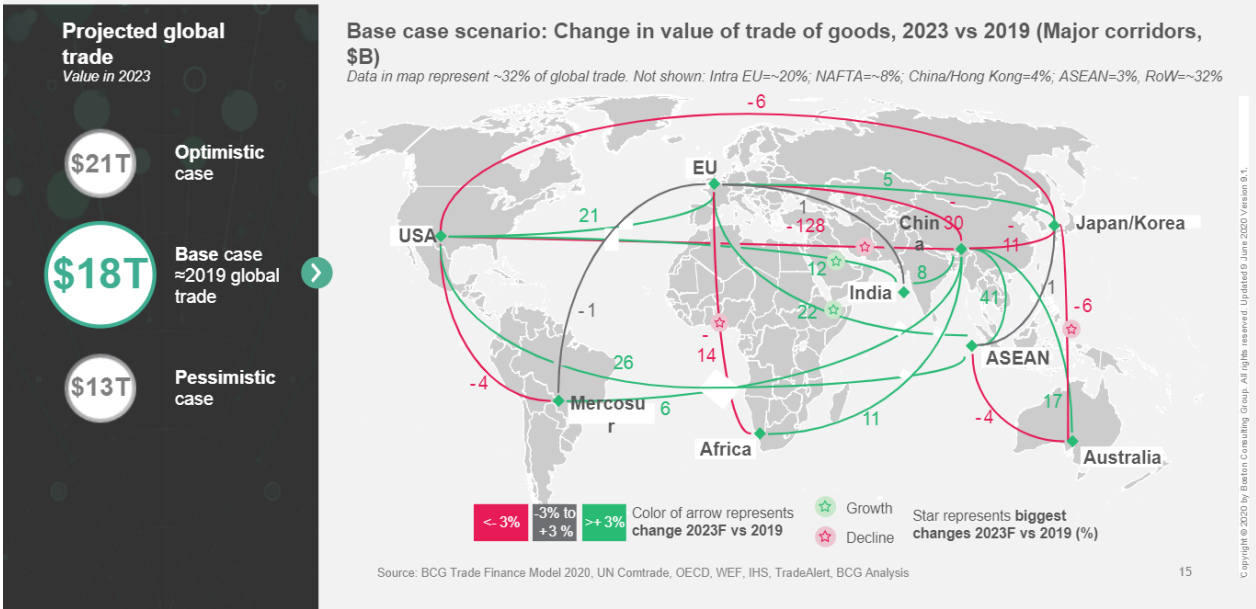
		US Example									
% change in goods imports ('18-'19)		ASEAN	India	China	JP/KR ¹	EU	Mexico	Brazil	Turkey	RoW ³	World
Health Care	Biopharma	-19%	19%	-14%	10%	17%	-6%	-7%	1%	2%	10%
	MedTech	23%	9%	-2%	-2%	5%	11%	31%	-13%	5%	6%
Consumer Goods	Consumer Durables	33%	10%	-19%	6%	3%	1%	26%	1%	5%	-4%
	Fashion & Luxury	12%	5%	-11%	2%	3%	-6%	-3%	8%	5%	0%
	Packaged Food	6%	15%	-36%	11%	6%	10%	-8%	13%	4%	4%
Tech, Media & Telco	Consumer Electronics	24%	100% ²	-13%	-25%	9%	14%	108% ²	138% ²	15%	-8%
	Equip. & Data Center Solutions	-2%	-12%	-31%	-19%	-2%	-4%	23%	-45%	69%	-13%
	Semiconductor & Materials	14%	36%	-53%	-3%	-7%	-14%	-41%	33%	-3%	0%
Energy	Energy	-40%	18%	-68%	34%	3%	-19%	-2%	10%	-14%	-13%
	Aerospace	-14%	39%	-9%	3%	18%	21%	31%	21%	12%	13%
Industrial Goods	Agribusiness	-8%	0%	-23%	9%	3%	10%	6%	-13%	1%	1%
	Automotive - Components	24%	1%	-17%	1%	-1%	2%	-4%	10%	0%	-2%
	Automotive - Vehicles	12%	4%	-19%	1%	-2%	11%	-36%	-12%	1%	3%
	Chemicals	11%	10%	-16%	4%	-1%	5%	0%	7%	-7%	-4%
	Electrical machinery	10%	21%	-18%	1%	3%	7%	14%	11%	7%	-3%
	Mechanical machinery	13%	6%	-37%	3%	2%	5%	9%	22%	10%	-7%
	Metals	2%	-1%	-15%	-1%	-4%	-2%	-12%	-31%	-8%	-7%
	Mining	-38%	5%	-22%	10%	-27%	30%	16%	-2%	2%	2%
Non-metal building materials		45%	38%	-29%	6%	0%	6%	3%	21%	0%	-4%
		% change < -20% -2% to -20% -2% to +2% +2% to +20% > +20%									

1. Japan, South Korea 2. Growing from a very low base in 2018; 3. Rest of World
Source: IHS Markit Global Trade Atlas Global Trade Atlas; BCG & GTI Team analysis

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Total trade could recover to previous level by 2023; substantial shift across corridors



Different impact by sector

As of 05 June 2020

Order based on TSR & net debt/enterprise value¹

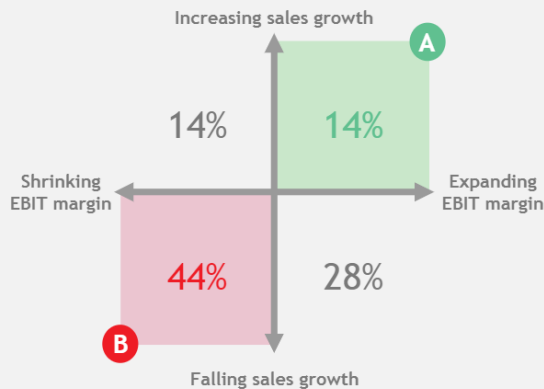
TSR performance ²			Companies with probability of default >15% ³				
		21 Feb 2020 - 20 Mar 2020	21 Feb 2020 - 05 June 2020	22 May 2020 - 05 June 2020	21 Feb 2020	05 June 2020	22 May 2020 - 05 June 2020
Healthier sectors	Semiconductors	-30%	3%	↗	0%	0%	↗
	Pharma	-20%	0%	↗	0%	0%	↗
	Tech Hardware	-28%	-1%	↗	0%	0%	↗
	Household Products	-16%	-3%	↗	0%	0%	↗
	Food/staples Retail	-10%	-3%	↗	0%	0%	↗
Pressured sectors	Health Equipment	-31%	-4%	↗	0%	0%	↗
	Materials	-32%	-5%	↗	4%	9%	↗
	Software	-30%	-5%	↗	9%	8%	↗
	Retailing	-40%	-5%	↗	0%	25%	↗
	Prof. Services	-30%	-6%	↗	0%	0%	↗
	Auto	-41%	-7%	↗	0%	10%	↗
	Financials	-36%	-8%	↗	0%	0%	↗
	Food & Beverage	-23%	-8%	↗	0%	0%	↗
	Capital Goods	-36%	-8%	↗	2%	4%	↗
	Transport	-34%	-9%	↗	0%	36%	↗
Vulnerable sectors	Telecom	-17%	-9%	↗	0%	8%	↗
	Media	-36%	-9%	↗	0%	0%	↗
	Durable Goods	-39%	-12%	↗	0%	5%	↗
	Utilities	-30%	-12%	↗	0%	0%	↗
	Insurance	-39%	-17%	↗	0%	0%	↗
	Real Estate	-39%	-19%	↗	0%	17%	↗
	Banks	-39%	-19%	↗	0%	4%	↗
	Hospitality	-44%	-20%	↗	7%	25%	↗
	Energy	-62%	-21%	↗	0%	21%	↗

Note: As of 05 June 2020; Based on top S&P Global 1200 companies; Sectors are based on GICS definitions; 1. From latest available balance sheet 2. Performance is tracked for two periods, first from 21 February 2020 (before international acceleration of outbreak) to 20 March 2020 (trough of the market) and from 21 February 2020 through 05 June 2020 based on median; 3. Implied by 5-year Credit Default Swap based on median Source: S&P Capital IQ; BCG ValueScience® Center; BCG

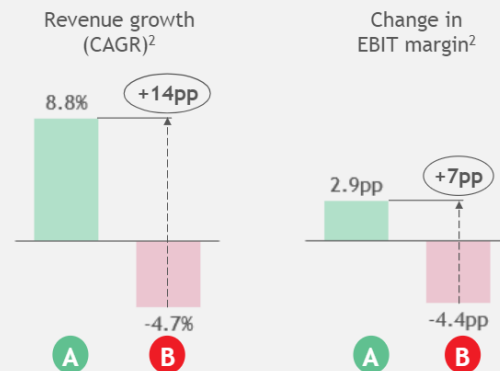
→ Pos. trend >= 2%
→ No sig. change
→ Neg. trend >= 2%

Management will make a difference: Winners and losers in downturns

14% of companies improve growth and margin in downturns, while 44% decline in both...



...and the performance gap between them is substantial



1. Average across last four U.S. downturns since 1986; based on performance compared to three-year pre-downturn baseline for U.S. companies with at least \$50M sales 2. Annualized revenue growth during the downturn period 3. Compared to three-year average pre-downturn EBIT margin | Source: S&P Compustat and Capital IQ, BCG Henderson Institute

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Macroeconomic scenarios

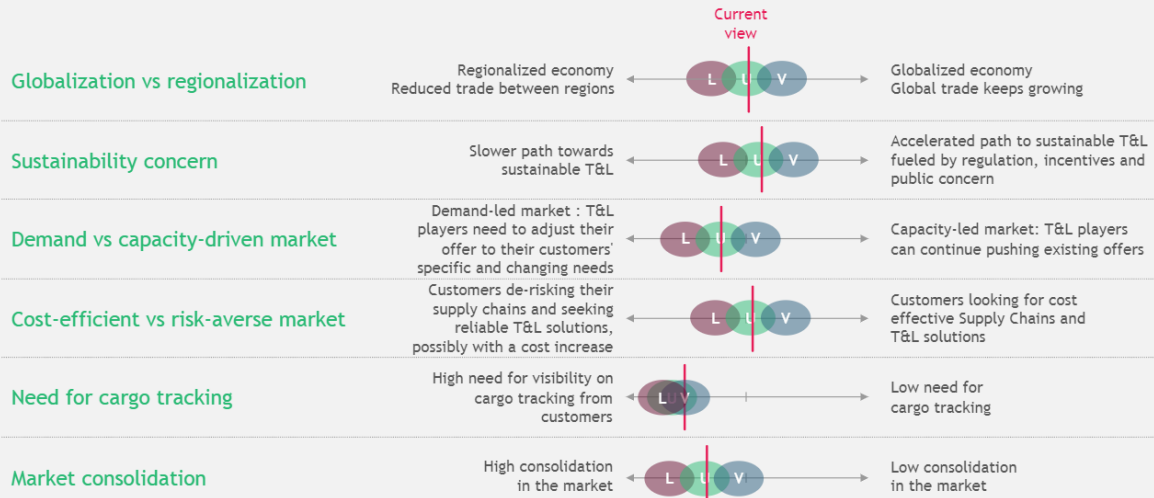
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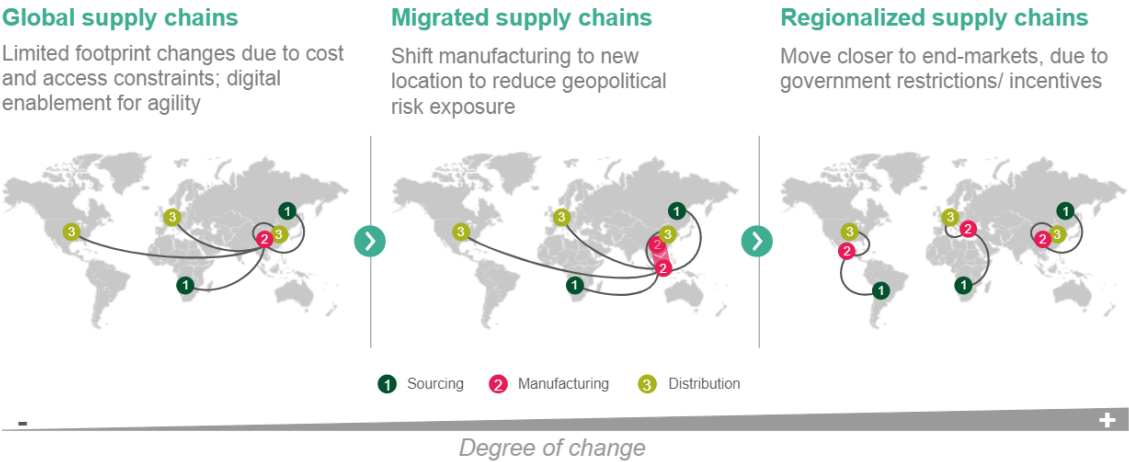
Coming out of COVID, T&L could be profoundly changed



Note: These analyses represent only potential scenarios based on discrete data from one point in time. They are not intended as a prediction or forecast, and the situation is changing daily Source: BCG

Companies already starting to adapt supply chains; three models emerge

Illustrative example for a firm traditionally manufacturing in Asia and selling globally¹



¹ Starting point and speed of change will vary significantly between industries, i.e. some industries will start and/or finish within few months, others within the next years Source: BCG

Immediate actions to increase supply chain resilience, and rebalance priorities

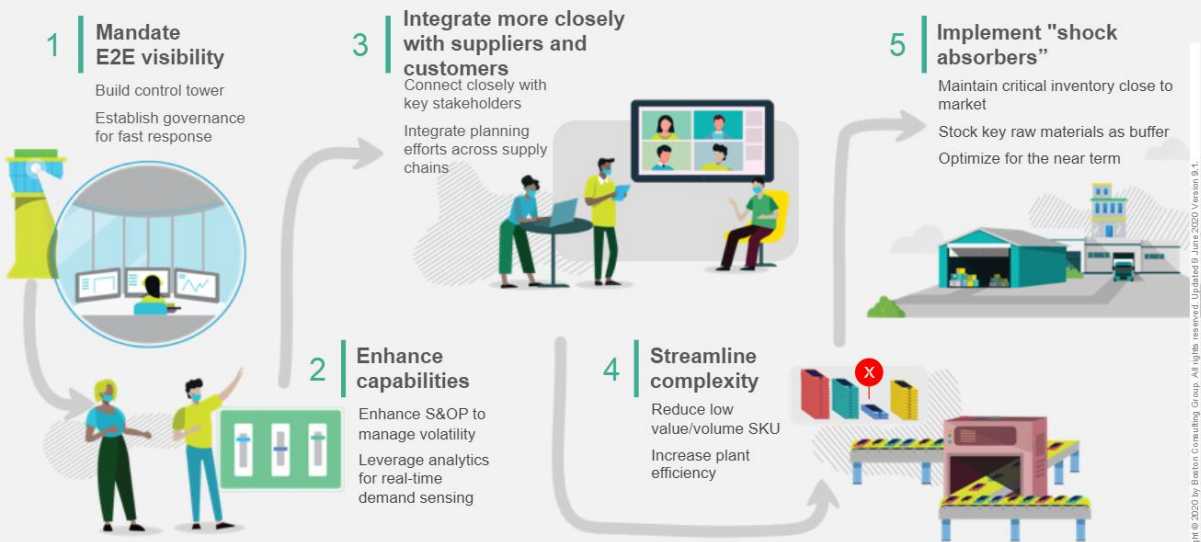


Source: BCG

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Immediate action | Five focus areas support more efficient supply chain ops



Source: BCG

For further reading, please refer to
[*The New Reality for Chief Supply Chain Officers*](#)

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Rebalance supply chain priorities for the new reality

Ensure resilience to disruptions

Reduce exposure to concentration risk

Restructure supply chain for new reality

Secure access to resources & markets

Develop access to new markets, secure current access

Diversify geographic and supplier access of key resources, drive future optionality

Drive cost efficiency

Accelerate automation to achieve cost efficiency¹

Leverage changes in logistics costs and duties

Respond to demand shifts & revised service requirements

Track demand shifts; build platform for real-time customer communications

Differentiate through delivery performance

Improve sustainability

Reduce CO₂ emissions: less waste, more green tech, EH&S² integrity

Redefine offerings to optimize upstream, downstream footprint



Increased focus expected in light of COVID-19



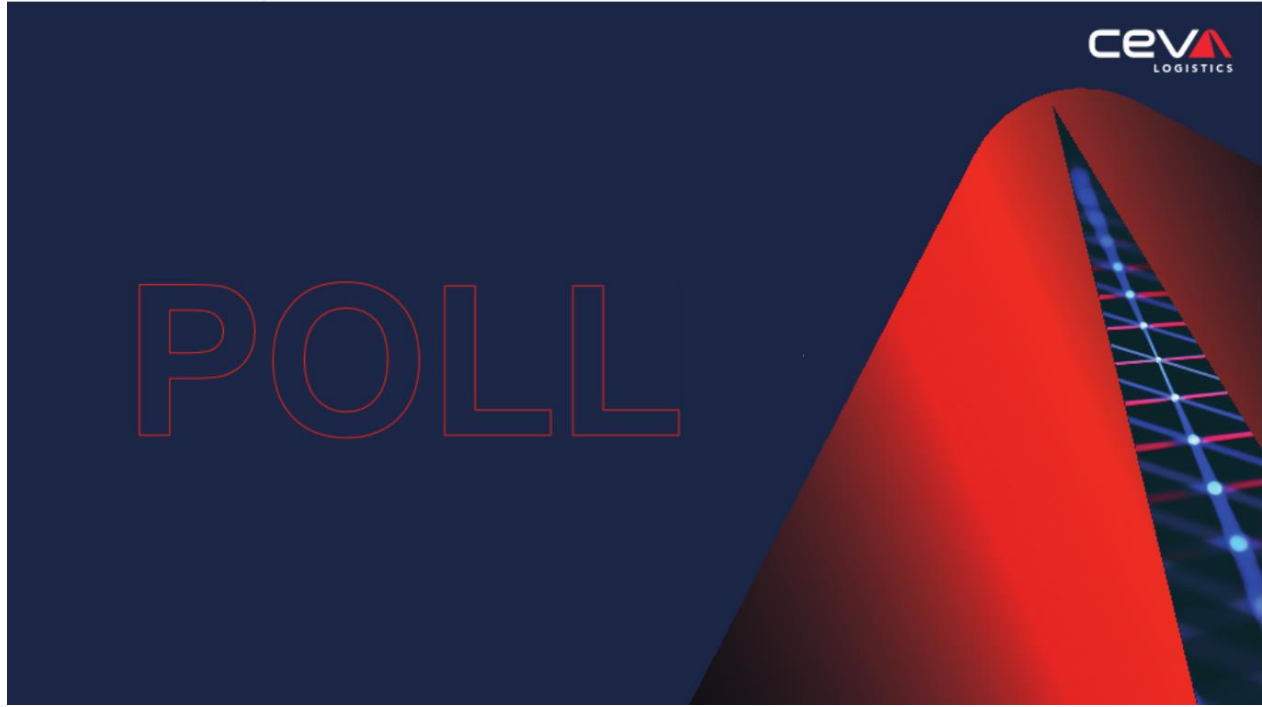
Opportunity to redesign in sustainable manner

1. Capture factor cost differentials from scale effects, inventory levels; 2. Environment, Health & Safety
Source: BCG

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Conclusions

- 1 Impact taking a longer-term profile
- 2 Trade impacted significantly; shifts across corridors
- 3 Those best prepared will win



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Q&A

Poll Question

What kind of recovery scenario do you expect for your specific industry and context? U, V or L shape?

- ☐ V shape recovery: Optimistic - contained loss
- ☐ U shape recovery: Base - with significant lost value
- ☐ L shape recovery: Pessimistic - significant perpetually growing lost value

00:05 Submit

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Aramak için buraya yazın

19:01 19.6.2020

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21:13/60:21

Q&A

Poll Response

What kind of recovery scenario do you expect for your specific industry and context? U, V or L shape?

V shape recovery: Optimistic - contained loss	27.3%
U shape recovery: Base - with significant lost value	64.9%
L shape recovery: Pessimistic - significant perpetually growing lost value	7.8%

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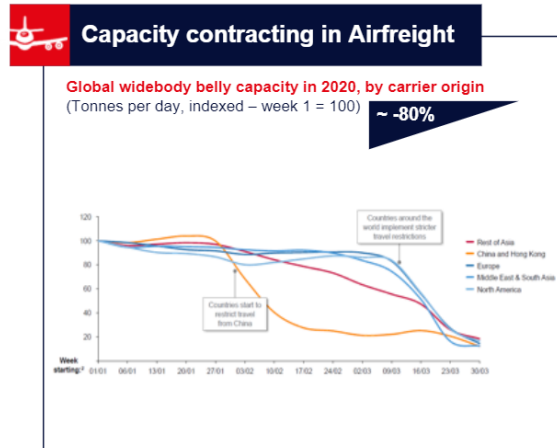
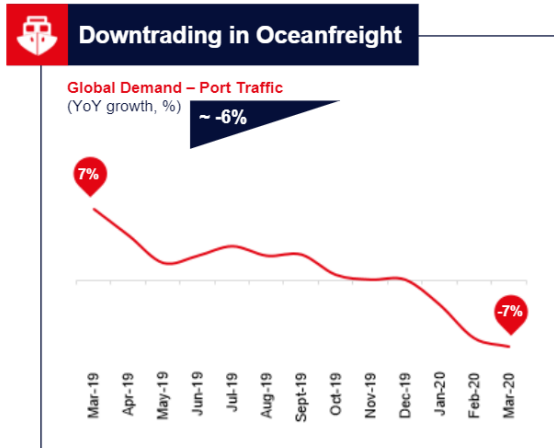
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STATE OF MARKET

Guillaume Col
Chief Operating Officer, CEVA Logistics

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MASSIVE IMPACT IN FREIGHT FORWARDING



Sources: Seabury Global Trade Dashboard – Air Freight and Drewry Shipper Insight

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CHANGING THE RULES OF THE GAME IN AIRFREIGHT



FROM PAX FLIGHTS

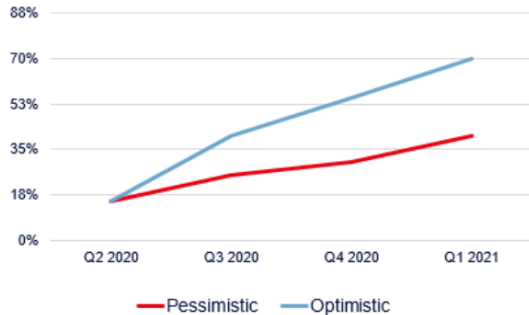


TO CHARTER FLIGHTS

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AIR CAPACITY MAY NOT RECOVER 2019 LEVEL BEFORE 2023

How do you see the passenger aircraft capacity returning to the market in the coming months?

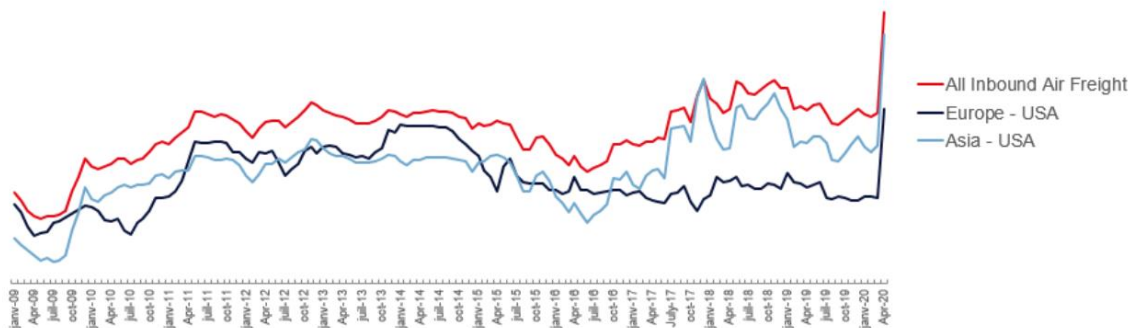


- Government directives and increased passenger fares will impact load factors
- All carriers anticipate smaller fleets for the future with uneconomic and narrow bodied aircraft being scrapped

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RATES HAVE NEVER BEEN AS VOLATILE

US Inbound Air Freight Rates



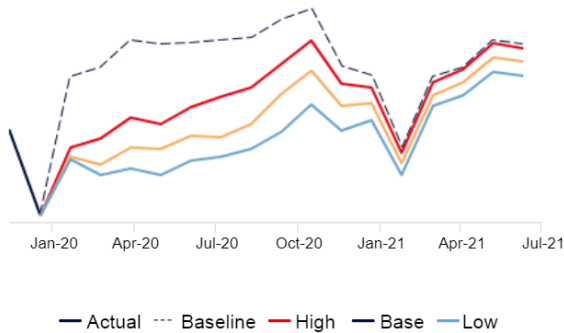
Oil prices add further uncertainty

Sources: Transport Intelligence April 2020

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FREIGHT FORWARDERS TO ENGAGE DIFFERENTLY WITH AIRLINES

Transpacific air freight volume forecasts in 3 scenarios (K tons)



Forecasting will become critical

IN THIS UNCERTAIN TIME, IT'S ALL ABOUT SHARING OUR PROJECTIONS

INCREASED VISIBILITY ALLOWS CEVA TO DELIVER ON YOUR COMMITMENTS



WhatsApp x Google Translate x Mail - Keyvan Shahidi - Outlook x Digital Live by CEVA Logistics x control towers in supply chain x

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Poll Question

When do you expect to ramp back up to pre-covid levels with your air shipments?

☐ By Q3 2020

☐ By Q4 2020

☐ By H1 2021

☐ H2 2021 or later

☐ We will not return to the pre-covid levels

00:06 Submit

Q&A

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Aramak için buraya yazın

19:49 19.6.2020

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Poll Response

When do you expect to ramp back up to pre-covid levels with your air shipments?

By Q3 2020 10.9%

By Q4 2020 13.0%

By H1 2021 37.3%

H2 2021 or later 31.6%

We will not return to the pre-covid levels 7.3%

Q&A

POWERED BY ON24

Aramak için buraya yazın

19:51 19.6.2020

PANEL SESSION

Laurent Binetti

Chief Commercial Officer
CEVA Logistics



Maria Rigotti
Head of Customer
Supply Chain
GlaxoSmithKline



Edgard Pezzo
Executive Director Global
Logistics & Containerization
General Motors



Darren Chaisty
Head of Logistics
Rolls Royce




PANEL SESSION

How was your business in general and your supply chain specifically impacted by COVID 19? And what type of decisions did you have to take to manage the crisis?



PANEL SESSION

Tam ekrandan çıkmak için  tuşuna basın

Are there any lessons you have learned from this COVID crisis that will make your supply chain stronger in the coming years?



PANEL SESSION

**How would you see the next 6 to 12 months?
Continuous disruptions or progressive return to normalcy?**



