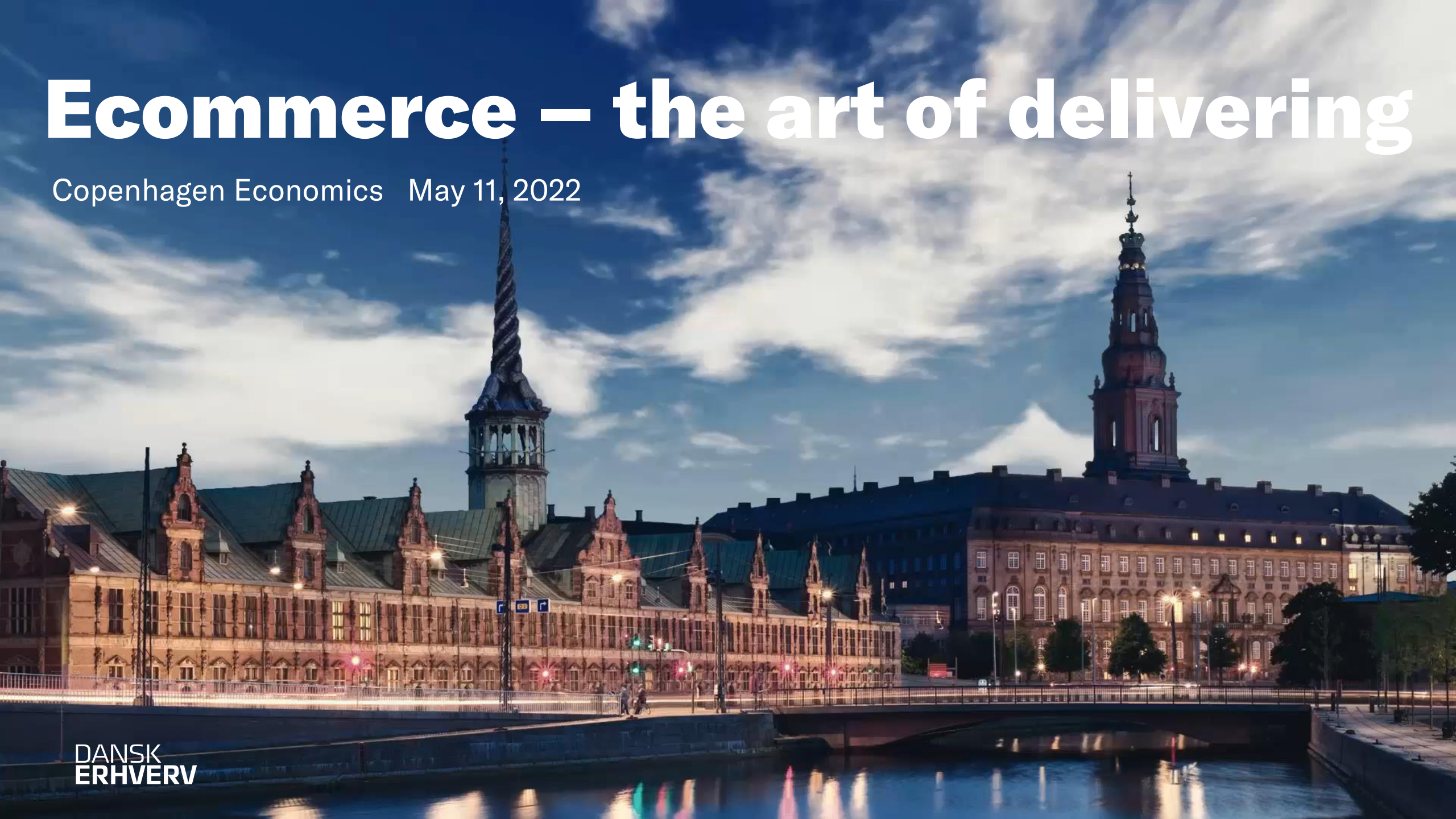


Ecommerce – the art of delivering

Copenhagen Economics May 11, 2022



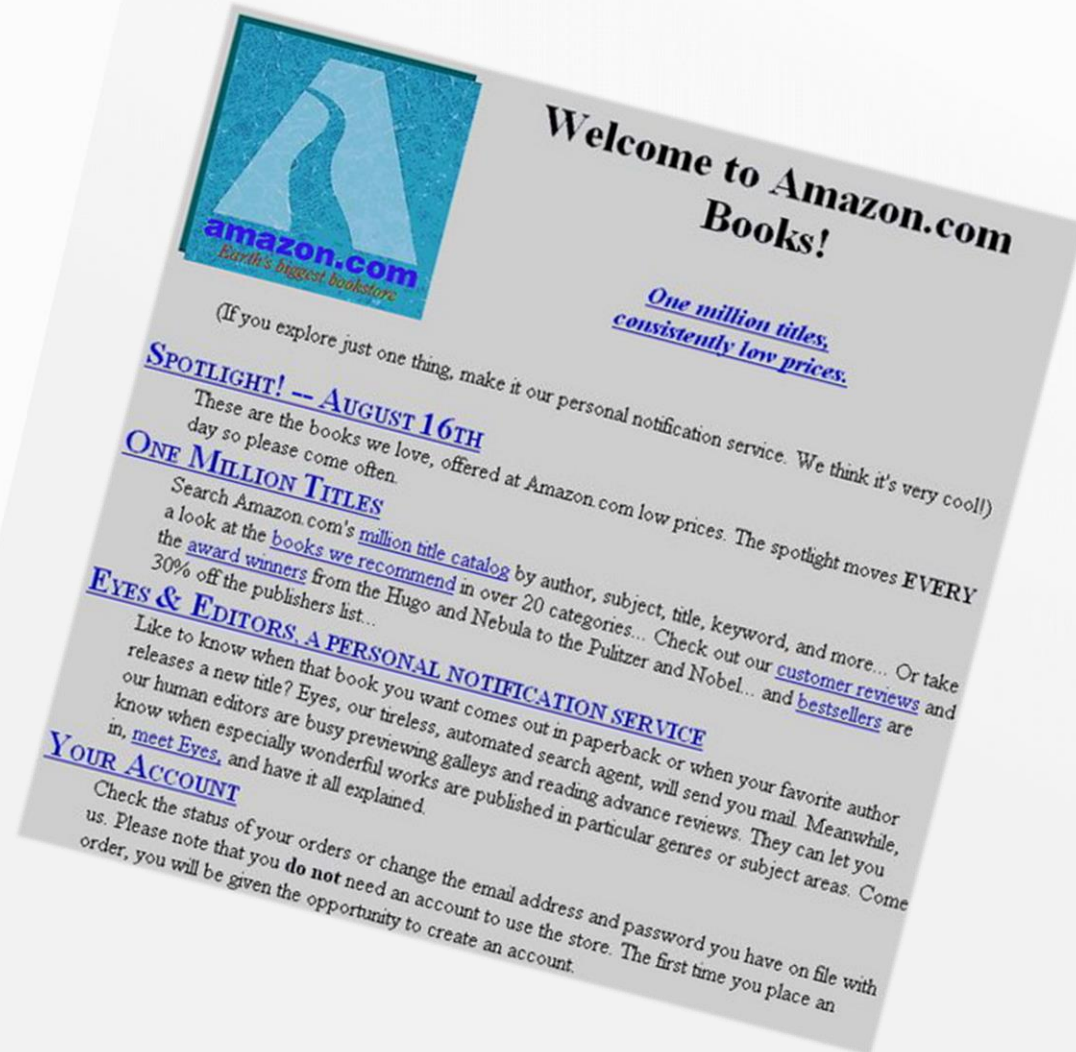
"Good Old Days" – POV Ecommerce

Customers had to accept delivery terms

- Days or weeks
- Delivery at home
- National postal operator

Webshops competition was about

- Price
- Selection of products
- Trust



Today – the consumer is at the helm

Consumers expect convenience

- Anytime – Anywhere
- Day-to-day moving into Same Day-delivery
- Time Slots – in Copenhagen within 10 minutes



Webshops must offer

- Different delivery options (3-4 operators)
- Shipping from warehouse within hours
- Comply with extensive EU-regulations
- Services e.g. Track n Trace



Logistics – what does webshops expect

Challenges depend on shop size

	Small <7000 parcels	Medium sized	Big >50.000 parcels
Top 3 Challenges in logistics	Delivery costs (40%) Customers expectations (33%) Storage capacity (27%)	Handling returns (38%) Internal communication (32%) Delivery costs (29%)	Storage Capacity: 49% Suppliers of goods: 28% Delivery costs: 26%
Top 3 Future competition	Free delivery: 62% Sustainable packaging: 59% Different delivery options 38%	Different delivery options: 79% Sustainable packaging: 46% Free delivery: 42%	Different delivery options: 75% Timeslot delivery 53% Free delivery: 47%

Sustainability

Development right now

- From trucks to bicycles – Carbon footprint
- Minimize or Reuse of packaging material
- Do the consumers care –and will they pay ?
- Competition or regulation



Co-opetition – or bigger companies

- UPU opening for other postal operators
- EU pushing for more competition and more standards
- More mergers (DAO/FK) or strategic alliances
- New Players (Coolrunner)



Thanks for listening

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