

Retaillogistiek

in

Supply Chain perspectief

28 April 2010
VLM voorjaarscongres

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Houten

Agenda

- Positionering retaillogistiek in de SC
- Supply Chain Logistics
- E-tailing en E-logistics
- Retail- inventory management: schapsystemen
- Retail warehousing: cross-docking
- Retail transport: stadsdistributie
- Conclusie

Hoofdvraag

Consument naar retailer
of
retailer naar consument?

Positionering Retaillogistiek in de SC

Retail

Consumentengedrag : Koopkracht



Retailing : Winkelformules



Retaillogistiek : Facilitair

Trends in consumentengedrag

- Steeds kortere product lifecycles
- Afnemende klantentrouw
- Groei van internetaankopen

Retaillogistiek

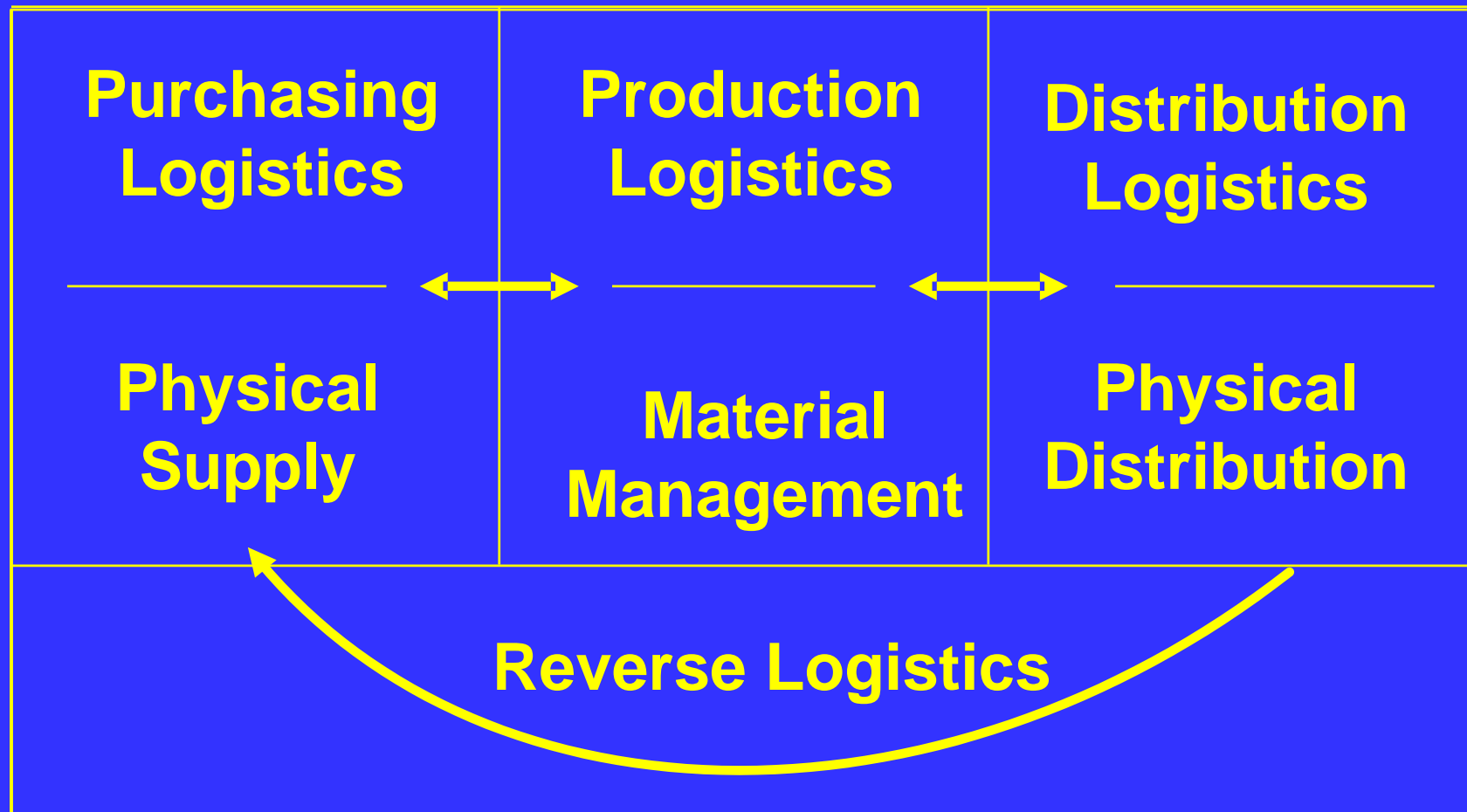
**Voorraad en
Schapbeheer**

**Handling en
Magazijnen**

**Inkomend en
uitgaand Transport**



Business Logistics



DSCM vs. Bedrijfskunde

Supplier

Customer

Supply Chain Management

Bedrijfskunde

Bedrijfskunde

Marketing
Distribution
Production
Purchasing
ICT
HRM
Finance
Logistics

Marketing
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Trends Retaillogistiek

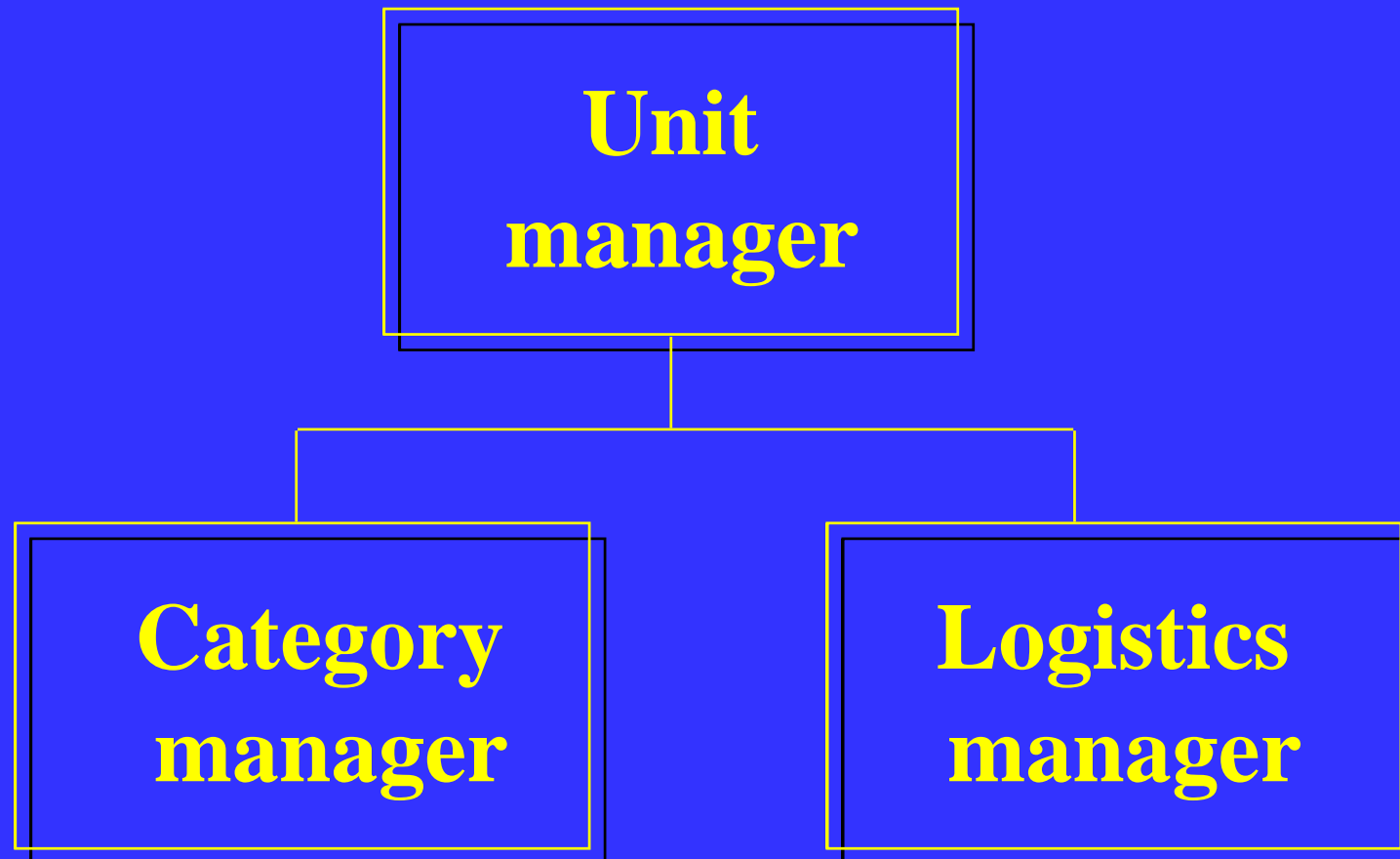
- Transparantie toegevoegde waarde
Werken met logistieke keuzemenu's
- Gelijkwaardigheid commercie en logistiek
- Terugdringen voorraden stroomopwaarts

Supply Chain Manager



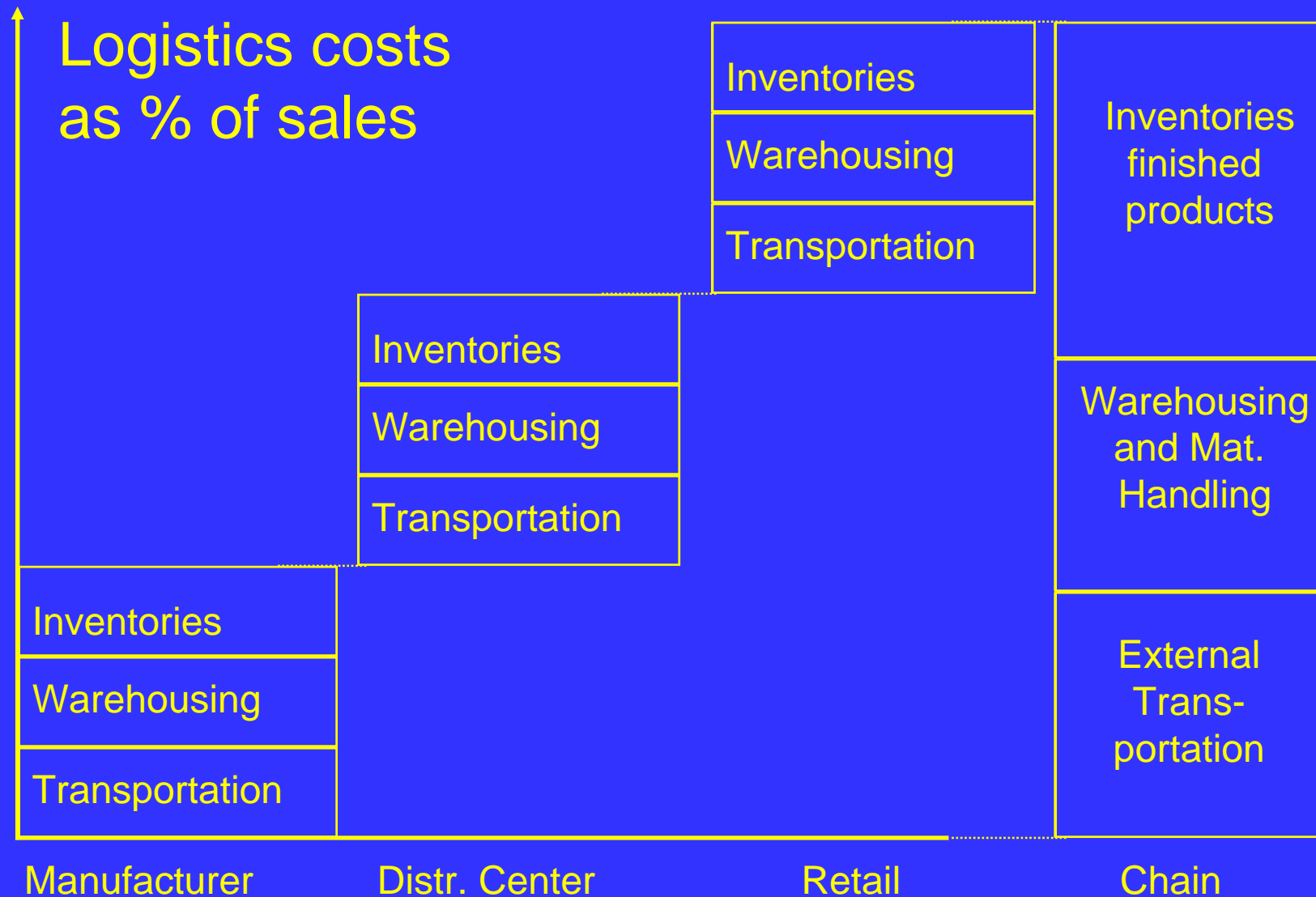
Responsibilities

DSCM Organisation



SC Logistics

Cost Calculation in a Chain



Logistics Chain Costs

| <u>As a % of sales</u> | <u>Food</u> | <u>Non-food</u> |
|------------------------|-------------|-----------------|
| Manufacturer | 7.35 | 5.77 |
| DC/ Wholesale | 5.01 | 7.35 |
| Retail | <u>3.59</u> | 5.03 |
| Totaal | 15.95 | 18.15 |

Supply Chain Logistics

- Core in Distribution Logistics
- Managing the chain as a “single entity”
- No mergers/ acquisitions
- Four types:
 - Physical
 - Information
 - Control
 - Infrastructure

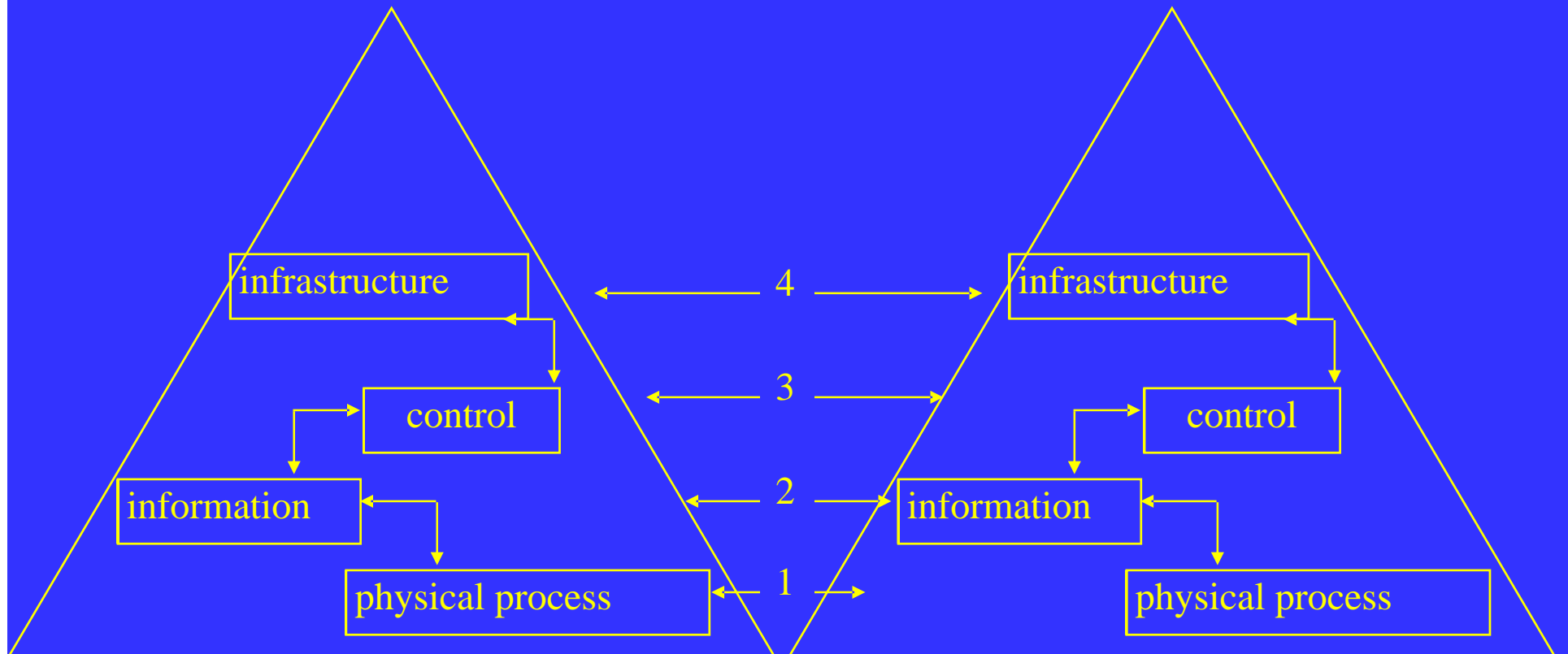
Trends Retail SC Logistics

- Veel aandacht fysieke integratie
- Stijgende aandacht informatie integratie
- Beginnende aandacht besturings integratie
- Grondvorm integratie nog brug te ver

Four Types of Supply Chain Logistics

Manufacturer

Distributor



Onderzochte Ketens



**E-tailing
en
E-logistics**

Performance E-business

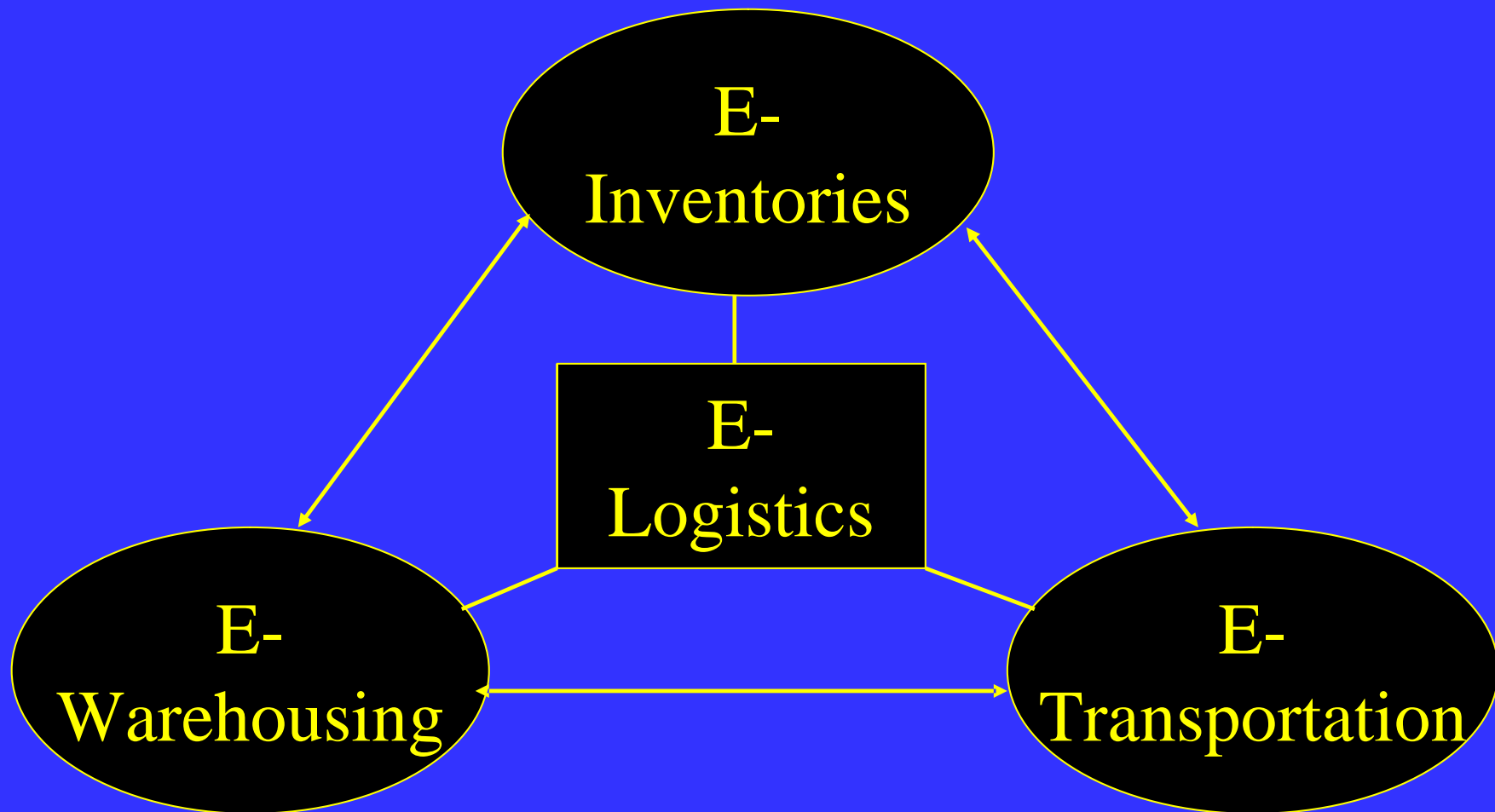
| | | | |
|---------------------|-----|-------------------------|-----|
| Item not in stock | 64% | Limited Selection | 27% |
| Late Delivery | 40% | Site hard to use | 26% |
| Delivery price high | 38% | No complete purchase | 25% |
| Communic Prob | 36% | Price non competitive | 22% |
| No confirmation | 28% | Not enough gift options | 16% |

Source: Anderson Consulting 1999

Trends E-tailing & E-logistics

- Front office concurreren
Back office samenwerken
- E-fulfillment grootste bottle-neck
- Bestelmomenten en aflevermomenten

Logistics Sub-systems



Bruto marge Thuiservice

- Transportkosten 11%
 - Orderverzamelen 10%
 - Orderentry/fact 8%
 - Overhead 4%
- 33%

Streamline

- ◆ Procter/Gamble expects within 5 years 10% sales Consumer Direct (CD)
- ◆ Streamline installs a servicebox
- ◆ Household = installed base
- ◆ 40% - 70% re-ordering consumer
- ◆ Continuous replenishment of basic products
- ◆ Electronic Commerce; supply within 24 hours

Streamline



Trends Retail Inventory Management

- Revival schapsystemen
- Meer aandacht forecasting
- Actielogistiek
- Dominantie private label

Trends Retail Warehousing

- Meer cross-dock
- Automatisering / mechanisering
- Voice-picking
- WMS

Trends Retail Transport

- Stadsdistributie
- Last mile probleem
- TMS
- Home-delivery

Retail

in de

Keten

Verdichten logistieke stromen

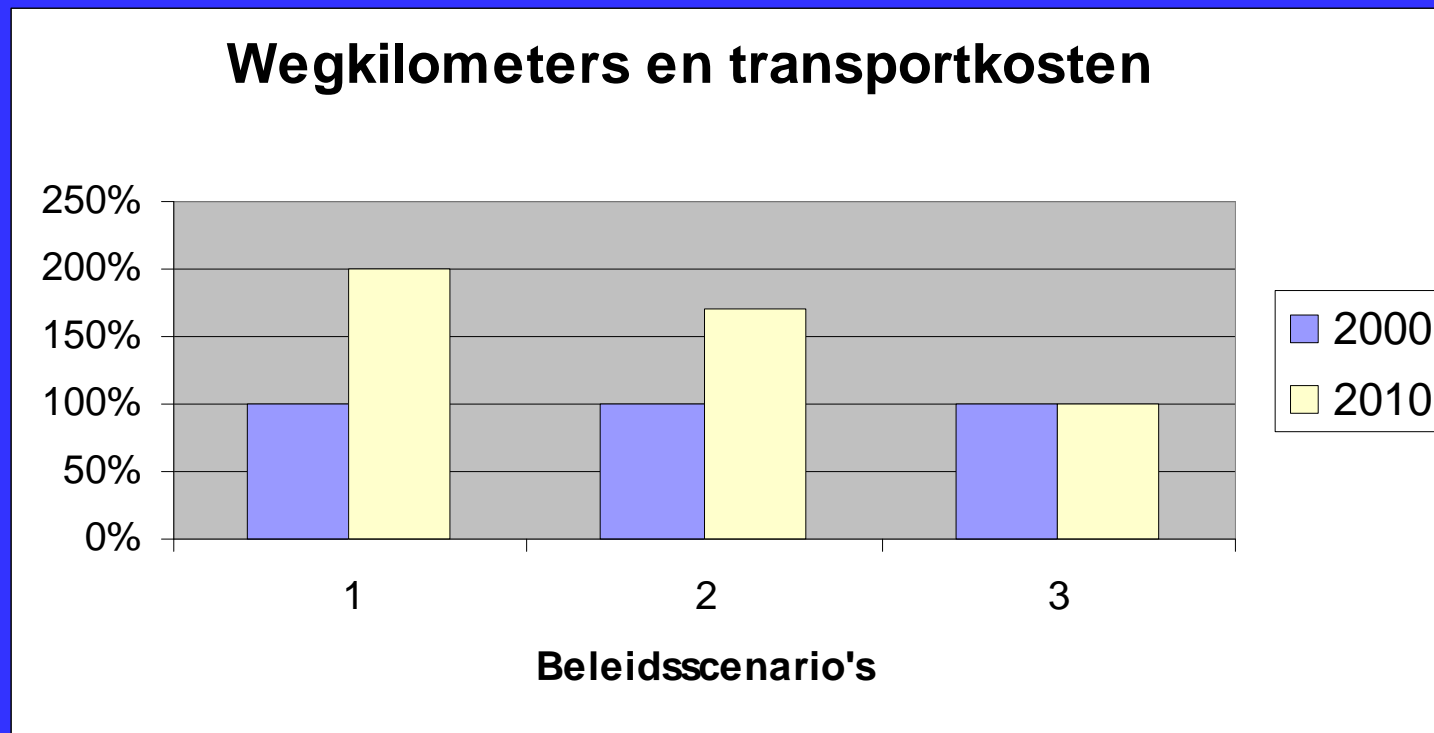
- Logistieke dienstverleners
- Wedergeboorte groothandelsfunctie
- Aanlevering per categorie
- Samenwerking concurrenten
- Gezamenlijke infrastructuur

Drie scenario's

1 = Ongewijzigd beleid

2 = Bundeling binnen keten

3 = Ketenoverschrijdende bundeling



Bron: Connekt Logistieke ontwikkelingen in de retailsector (1999)

Integration by APS!?

Advanced Planning Systems (APS)

ERP

Manufacturer

ERP

Warehouse
Wholesale

ERP

Retail

Chain conversion

From



to



Shifting in Power Balance



Conclusions

- Retail aanjager van de keten
- Demand driven Supply
- No future without Supply Chain Cooperation!
- Competition between chains