

# Shipper Pain Points – Separating Perception From Reality

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## LogTech19 Themes

- Future of freight procurement
- System interoperability
- Tech as an enabler of trade finance
- What does visibility mean?
- Will VC money continue to flood into this industry?
- What to build, buy, or outsource



# How logistics is often viewed



# What it's actually more like



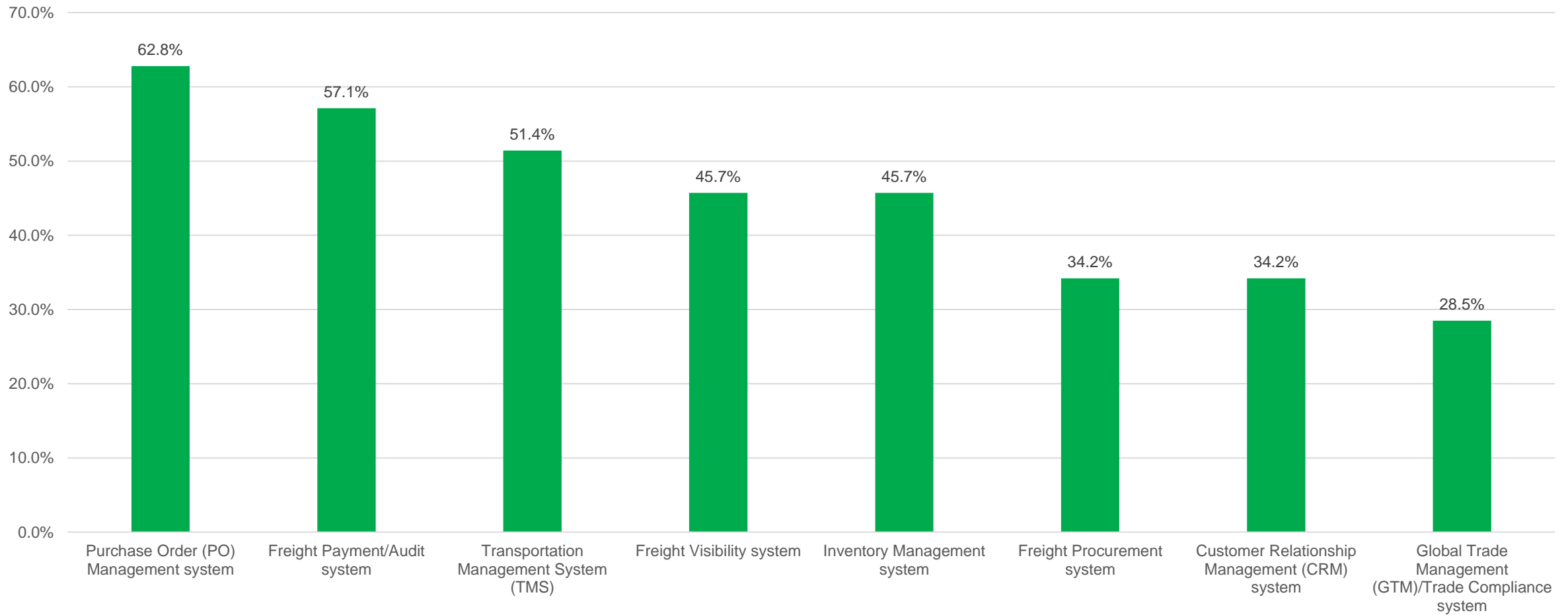
# How technologists view the future of logistics



# What it's more likely to be...



# What systems do you currently use?



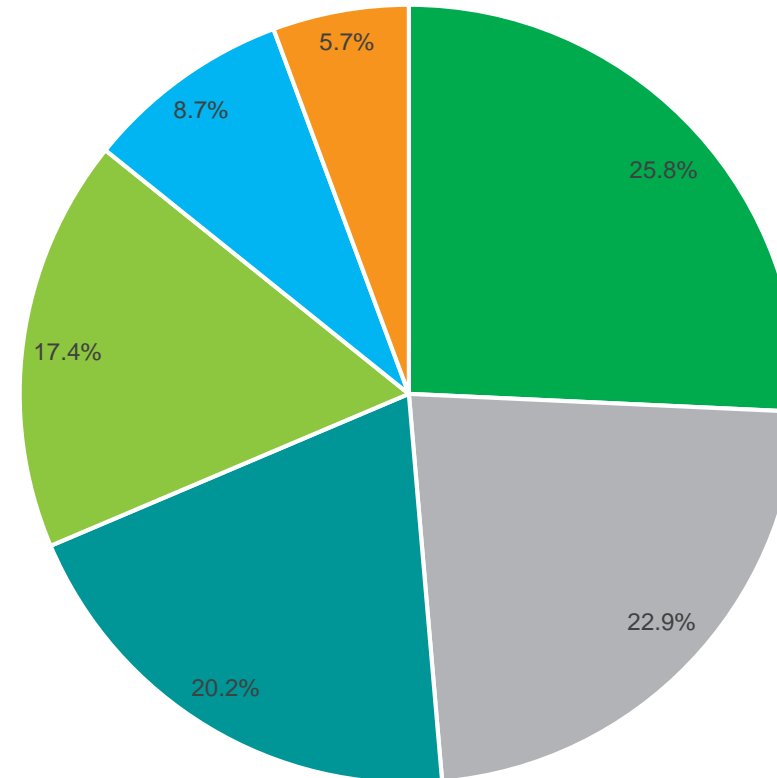
And now, time for some pie...



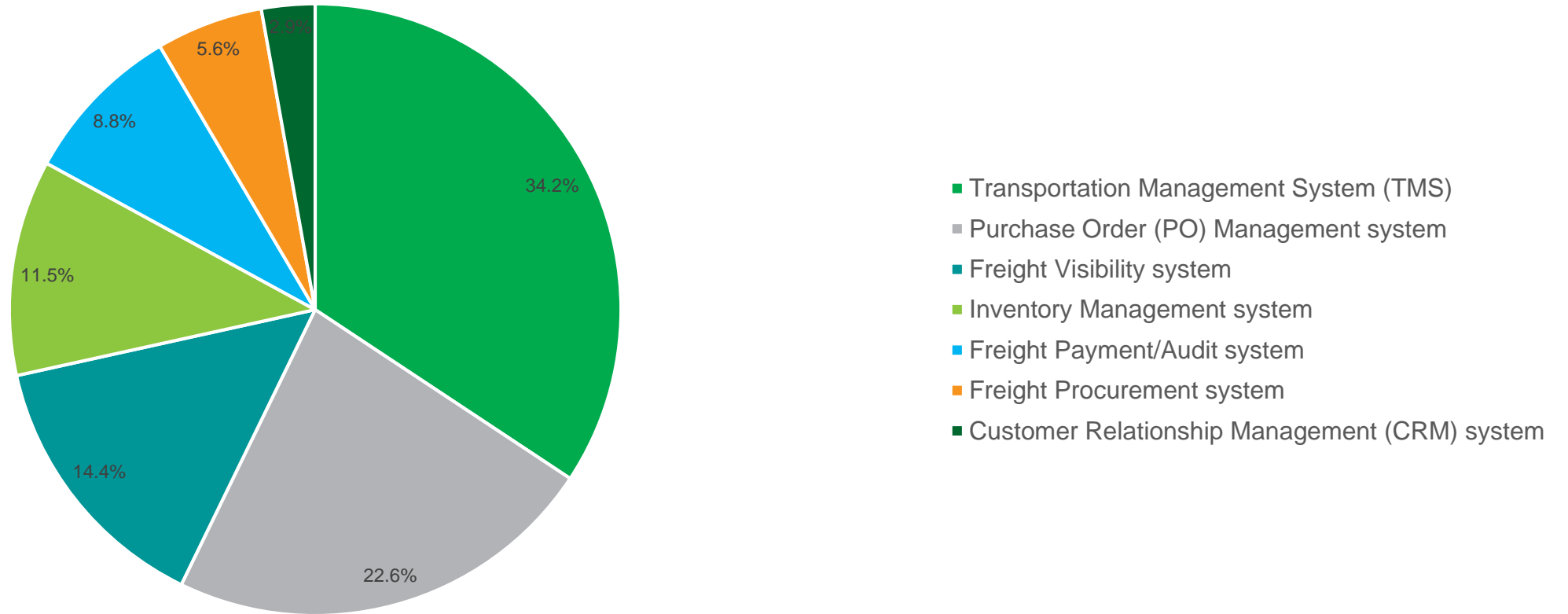


# System shippers are most unsatisfied with

- Freight Visibility system
- Transportation Management System (TMS)
- Freight Payment/Audit system
- Inventory Management system
- Global Trade Management (GTM)/Trade Compliance system
- Freight Procurement system

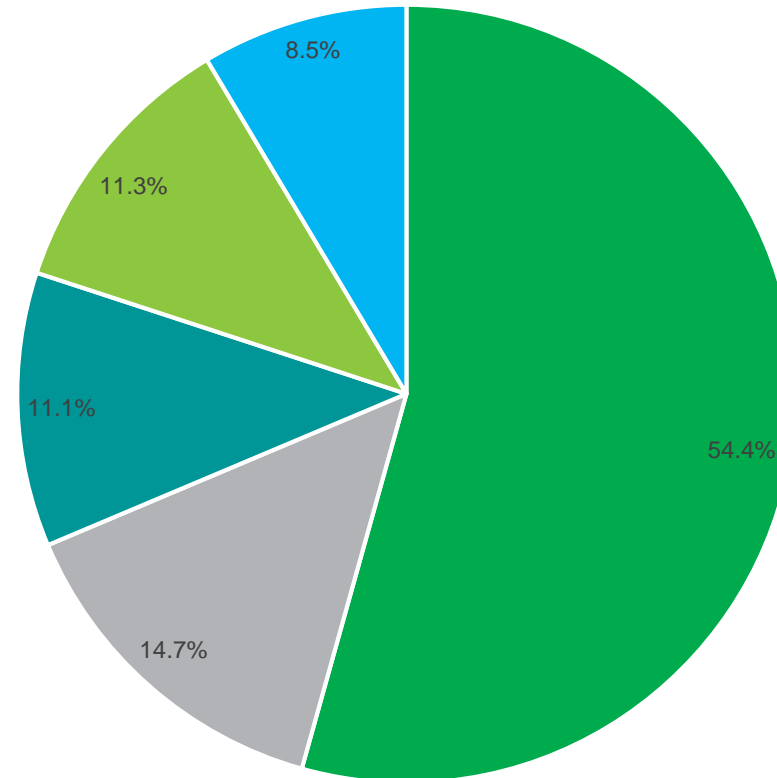


# Most important logistics system

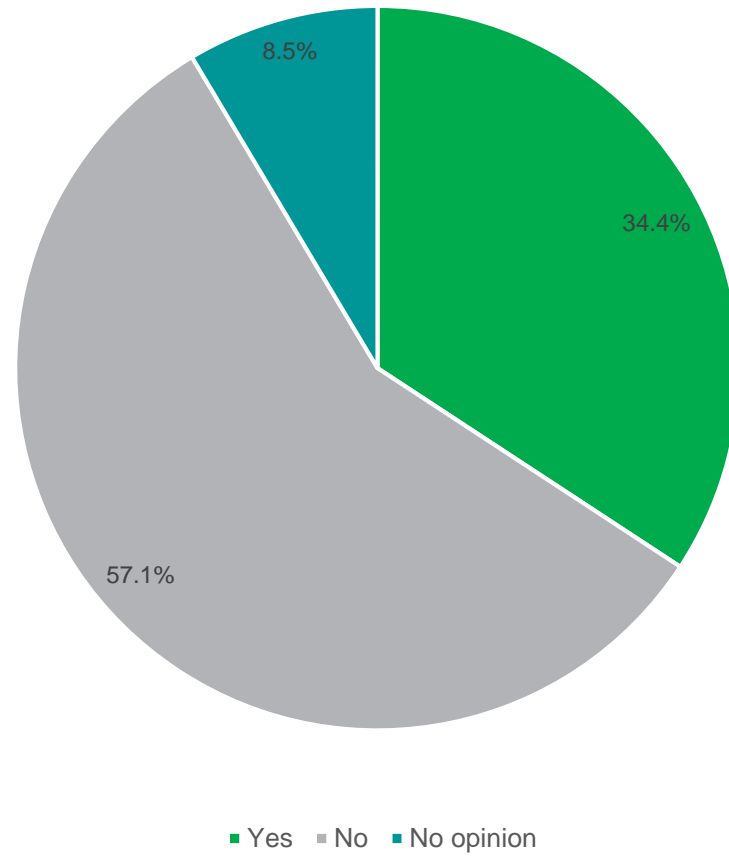


# Biggest logistics pain point technology can solve

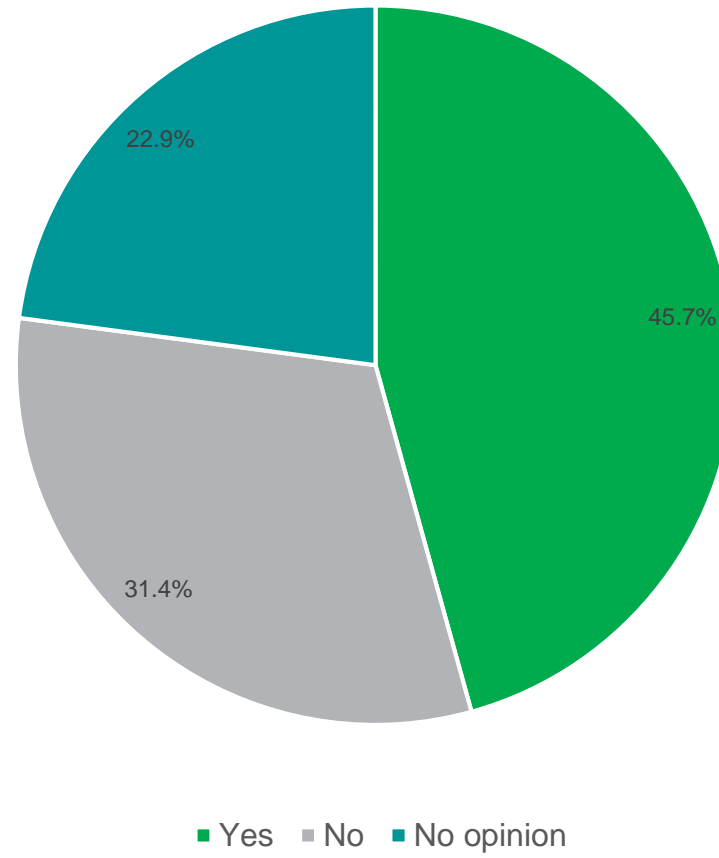
- Poor freight visibility
- Paying too much for freight
- Carrying too much inventory
- Other
- Cargo gets rolled/not loaded too often



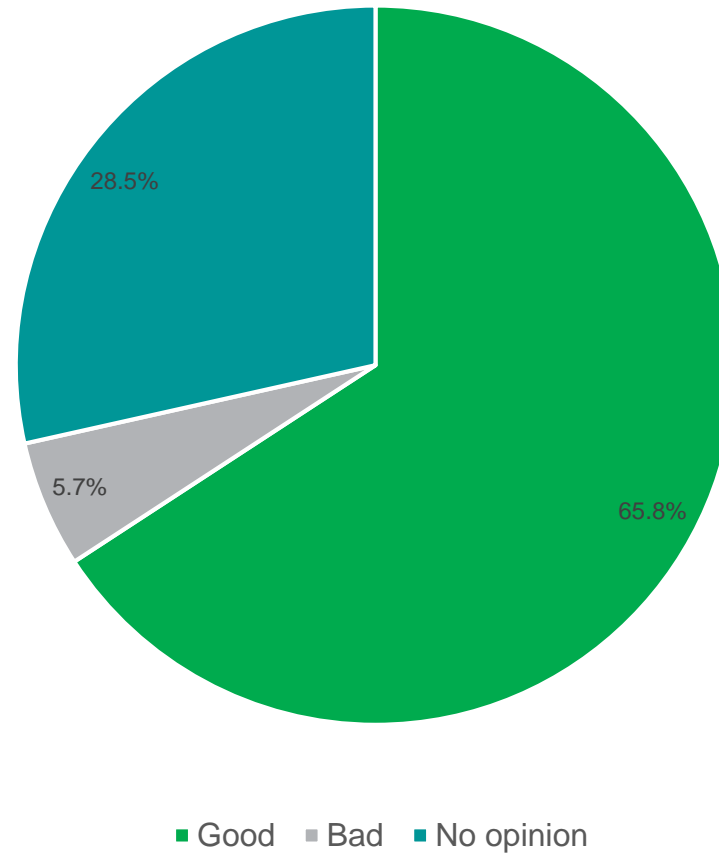
# Do you manage too many systems?



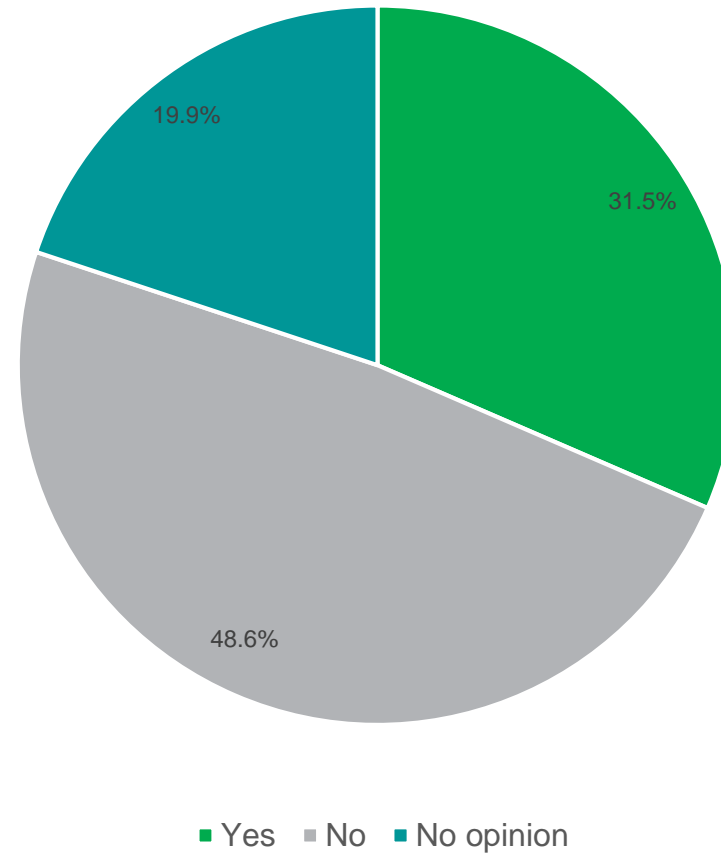
# Openness to non-cloud-based systems



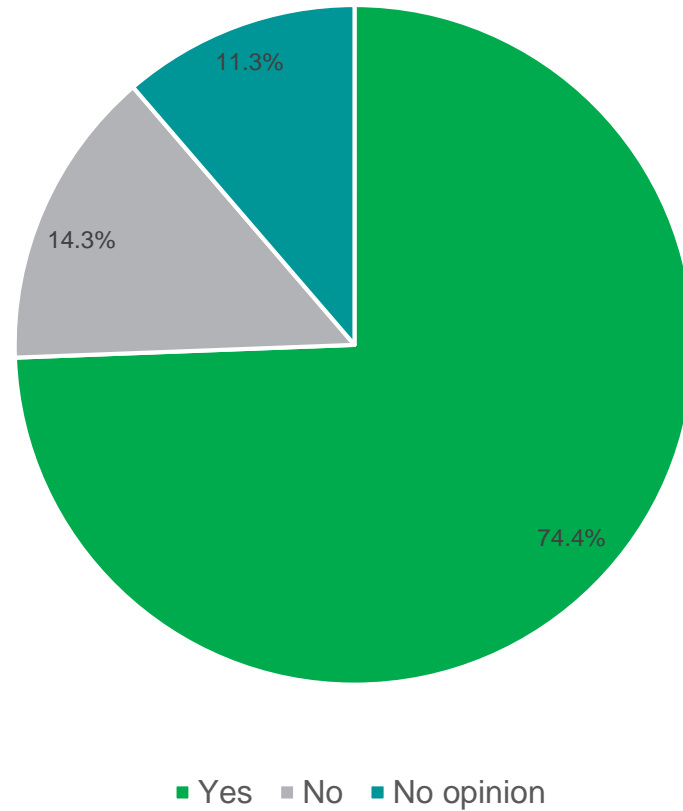
# Is VC interest in logistics a good or bad thing?



# Any problem using a startup LogTech provider?



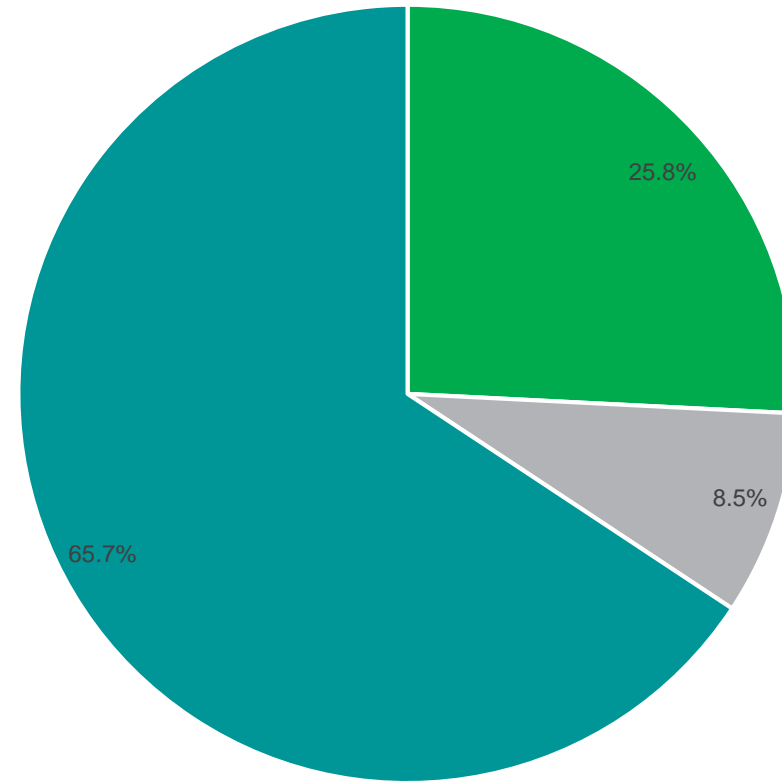
# Do you know the difference between a digital freight forwarder and a traditional freight forwarder?





# Who is responsible for logistics innovation?

- Software providers
- 3PLs (NVOCCs, freight forwarders, freight brokers)
- We are



# Demographics

- 34 shippers
- 31% manufacturers, 23% wholesalers, 23% commodities, 14% retailers, 9% other
- Surveyed in July and August

# Takeaways

- Majority of shippers are open to innovation
- Two-thirds see it as their responsibility to be innovative
- Freight visibility is the key area of struggle
- TMS and PO management the most important systems

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