Nordic Logistics Barometer 2008

- A report on challenges and trends in the Nordic logistics market

Foreword

The logistics market in the Nordic region is experiencing intense pressure to change. An increasing number of global logistics companies are strengthening their Nordic presence and stiffening the competition. Rapid technological advancements create opportunities for new, advanced logistics services. Nordic economic trends are also influenced by problematic events in the rest of the world, including high fuel prices and global financial turbulence.

In an attempt to highlight the challenges and trends affecting the Nordic logistics market, Posten Logistik is publishing its first Nordic Logistics Barometer. In this report, we present market trends and key ratios for the Nordic logistics market, along with results of studies of Nordic logistics purchasers in particular areas.

The report shows that over half of companies in the Nordic region see no scope for eco-efficient transport that leads to price increases and longer delivery times. Rather, tough competition in the retail, wholesale, and manufacturing industries calls for transport solutions which combine delivery precision with cost-effectiveness and eco-efficiency. The increased emphasis put on environmental considerations throughout the entire business will therefore be more important for both purchasers and suppliers of logistics.

The report also shows that Nordic companies are focused on their own and other Nordic countries in terms of plans for expansion. This is most applicable to companies in Sweden and Norway, while Danish and Finnish companies also have plans for the Baltic, Eastern European and Russian markets. In a few years' time, corporate growth plans will influence the way both logistics networks and market demand develops on the Nordic logistics market.

We hope that the Nordic Logistics Barometer will increase interest in our home market and boost awareness of the challenges facing industry operators.

Pleasant reading!

Henrik Höjsgaard, CEO Posten Logistik

September 2008

Contents

About the study

The first part of the study in based on telephone interviews with nearly 1,800 randomly selected Nordic region logistics purchasers. All interviewed companies have an annual turnover of at least 10 million SEK. Both large and small logistics purchasers are represented, primarily from the retail, wholesale and manufacturing industries.

The study was conducted by Cliente between 15 May and 18 June 2008. Data was collected by GFK Sverige.

The second part of the study is based on in-depth interviews with three logistics managers at companies active in the retail, wholesale and manufacturing industries. Interviewees: Rolf Andersson, manager of Clas Ohlson Distribution Center (22/8);
Leif Christensson, logistics manager at Ahlsell (27/8); and Johan Jemdahl, Head of Distribution Logistics at LM Ericsson (18/9).

Summary

In this report, Posten Logistik presents trends and key ratios concerning the Nordic logistics market. The report is based on interviews of nearly 1,800 Nordic companies, in-depth conversations with three leading representatives from the industry's wholesale, retail and manufacturing sectors, and Posten's own calculations and business environment analyses. The objective of the report is to further acquaint people with the development and the challenges facing the Nordic logistics market.

- **Price and delivery precision challenge environmentalism** – Over half of Nordic logistics purchasers see no scope for eco-efficient transportation which entails price increases or longer delivery times. Danish logistics purchasers see the least scope; Swedes see the most.

- **ISO certification most important for logistics purchasers** – One in four Nordic logistics purchasers, 27 per cent, require their logistics suppliers to be ISO certified. Approximately one in five respondents request that their logistics supplier practices sustainability accounting and uses eco-efficient fuel.

- **Big plans for expansion in the Nordics** – Close to two-fifths of Nordic logistics purchasers plan to open new business ventures that will affect their logistic operations in the coming five years. 58 per cent of these ventures are planned in the company's native country and 19 per cent in other Nordic countries. Danish and Finnish plans also include expansion in the Baltics, Russia and Eastern Europe.

- **"Environmentalism is more about the fact that we have to start talking to each other, and less about taking radical steps and making major investments"**, says Rolf Andersson, manager of Clas Ohlson Distribution Center, in a conversation about eco-efficient transportation.

- **"Tight margins will call for improvements to planning and utilisation of lead-time – with better planning, transportation can become both smarter and less expensive."** Ahlsell's logistics manager Leif Christensson describes the most important logistics trend in the wholesale sector.

- **"We're heading towards more regionalised supply-chain configuration. It's neither cost-effective nor eco-efficient to transport freight all around the world"**, says Johan Jemdahl, Head of Distribution Logistics at LM Ericsson.

Diversified challenges pose problems for logistics

Over half of Nordic companies see no scope for eco-efficient transportation that entails a price increase or longer delivery times. In order to maintain competitiveness, transportation solutions that combine delivery precision with cost-effectiveness and eco-efficiency are essential. This is the finding from Posten Logistik's interviews of nearly 1,800 Nordic companies in the retail, wholesale and manufacturing industries.

Competitiveness with more components

The retail, wholesale and manufacturing industries are all characterised by complex supply chains that require rapid and accurate distribution. Parallel to this is the increasing demand to limit the climate impact caused by the supply chain.

The competitiveness of a company depends both on well-functioning logistics and cost-effective, eco-efficient transportation – conflicting demands that can give rise to new challenges and balancing problems. One example is the rolling inventory or just-in-time system which reduces both inventory and capital expenditures but often calls for daily deliveries, increasing total mileage and emissions.

In its survey, Posten Logistik asked companies in the retail, wholesale and manufacturing sectors their views on the scope that exists for implementing measures that would make transportation more eco-efficient but that would also involve price increases and longer delivery times. The study shows that many perceive this scope to be very limited.

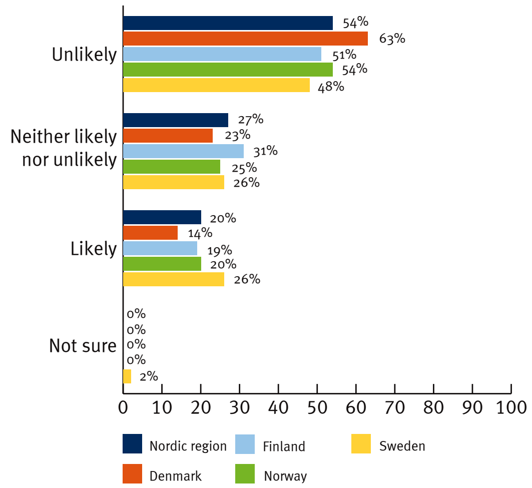
Little scope for increases in price or delivery time

Over half of the interviewed companies, 54 per cent, stated they would be unlikely to replace their existing transport with eco-efficient alternatives that would increase delivery times by 24 hours. Only 20 per cent stated that they would be likely to do so. More than one in four Nordic logistics purchasers, 27 per cent, answered "neither likely nor unlikely."

The scope for implementation of eco-efficient transportation that would involve an increase in prices was seen as equally limited. A similar percentage, 53 per cent, stated that they would be unlikely to replace their existing transport with eco-efficient solutions if doing so would involve a price mark-up of 10 per cent.

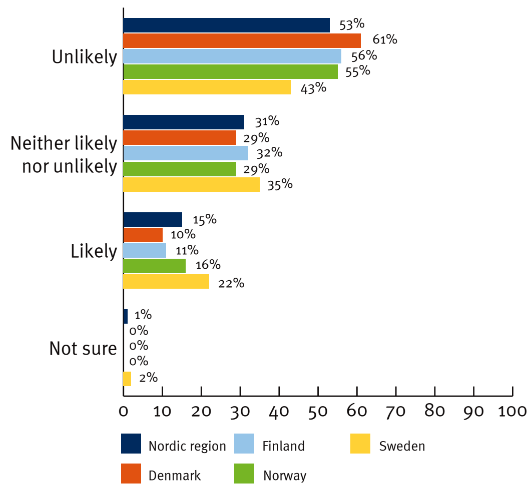
Fifteen per cent of the companies stated that such a price increase would be acceptable, while one in three, 31 per cent, answered "neither likely nor unlikely."

How likely would you be to replace your existing transport with eco-efficient transport, if delivery times would be increased by 24 hours?



Based on all respondents.

How likely would you be to replace your existing transport with eco-efficient transport, if prices would increase by 10 per cent?



Based on all respondents.

Least scope in Denmark, most in Sweden

Differences were found among the Nordic countries in terms of views held by logistics purchasers on the scope for implementing more expensive and slower, though eco-efficient, transportation.

The scope was perceived as smallest in Denmark, where more than six in ten companies, 63 per cent, stated that they would be unlikely to change to eco-efficient transport if doing so would entail a 24 hour increase in delivery time.

In Sweden, the corresponding number was 48 per cent. Swedes also had the highest level of acceptance of eco-efficient transport solutions that would entail price mark-ups.

Dilemma for logistics suppliers

The results of the study reflect the reality that many companies are struggling with. Eco-efficient production and transportation play important roles in determining how competitive a company is. The development of sustainable transportation at the cost of cost-effectiveness or distribution speed in the transport chain is perceived as very difficult to achieve.

The results of the study also clarify the difference that can be made by a capable, efficient logistics supplier: those able to combine eco-efficiency with low transportation costs and delivery precision will clearly improve their customers' competitiveness.

In today's Nordic logistics market, several measures and logistics solutions meet these multiple challenges. Efforts in fuel-efficient driving, reducing both fuel costs and CO_2 emissions, are well in line with the needs of logistics purchasers. Steps to improve the transport fill ratio, i.e., to increase cargo volume per vehicle, have similar effects. A higher fill ratio decreases both emissions and fuel consumption per transported cargo unit, without affecting delivery time.

Given the role that environmental considerations play in the degree of competitiveness attained by both logistics purchasers and logistics suppliers, the integration of sustainability efforts in all business areas will likely increase in importance and frequency.

ISO certification common environmental requirement

ISO certification is the most common environmental requirement imposed on logistics suppliers by Nordic logistics purchasers. More than one in four companies demand ISO certification, while one in five want to see an eco-alternative in the product portfolio and use of eco-efficient fuel by logistics suppliers.

Increasing eco-efficiency in their business is important for Nordic companies who participated in the study. With respect to transportation, carried out primarily by external logistics suppliers, environmental requirements imposed by companies on their logistics partners are becoming central to attaining targets.

ISO certification in focus

The environmental requirement most often imposed by Nordic logistics purchasers is that of ISO certification. One in four companies surveyed, 27 per cent, demand that their logistics supplier is ISO certified.

In Sweden, the percentage is highest. 35 per cent of Swedish logistics purchasers require ISO certification. Corresponding figures in Norway and Finland are 25 and 26 per cent, respectively. One in five Danish logistics purchasers, 21 per cent, demand ISO certification.

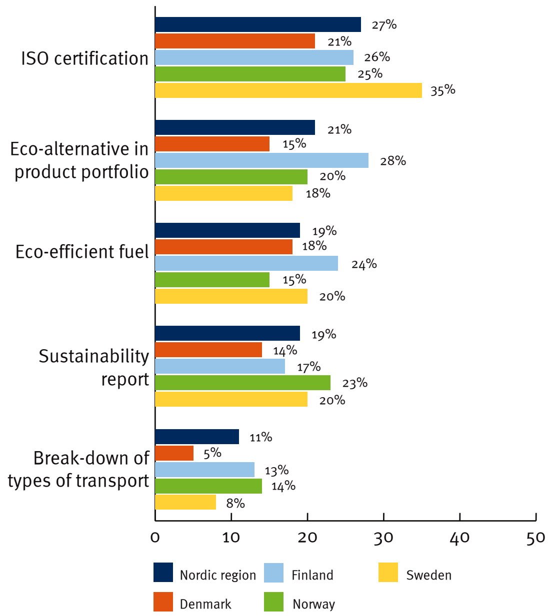
A probable reason for ISO certification being required so often is its stringency – to obtain certification, logistics suppliers are obliged to perform all environmental work in accordance with quality assurance processes. For example, ISO 14001 certification requires that the company identifies its environmental impact and that eco-targets are set and systematically monitored.

Demand for specific eco-alternatives common in Finland

Putting demands on logistics suppliers to have an eco-alternative in their product portfolio is especially common in Finland. Almost one in three Finnish logistics purchasers, 28 per cent, impose this requirement. In the Nordic region as a whole, one in five, 21 per cent, demand an eco-alternative in the product portfolio.

Eco-efficient fuel for transportation, e.g., ethanol and biogas, are also important for many logistics purchasers. One in five, 19 per cent, of companies surveyed demand eco-efficient fuel. The same number requires their logistics supplier to show that they practice sustainability report when submitting a tender. This is especially important for logistics purchasers in Norway. Close to one in four, 23 per cent, Norwegian companies demand sustainability accounting.

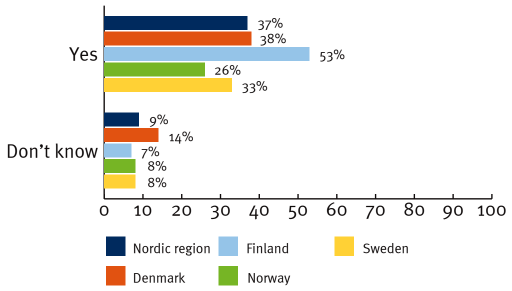
What do you demand of your logistics suppliers with respect to eco-friendly transportation?



Based on all respondents.

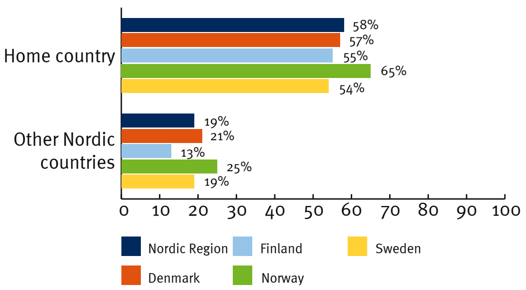
Nordics centre of new business ventures

Does your company plan to start any new ventures that will impact your logistics within the next 5 years?



Based on all respondents.
Responses: "Yes" & "Don't know."

Where do you plan to start your new ventures?



Based on those respondents planning new ventures.
Responses: "Home country" & "Other Nordic countries."

Nearly four out of ten Nordic logistics purchasers plan to start new ventures within the next five years. Of these companies, nearly 80 per cent have expansion plans in the Nordic region.

Today, a large share of the freight volume shipped in the Nordic region travels exclusively within and between the Nordic countries. The future direction and magnitude of the flow of goods in the Nordic region are thus determined to a large extent by Nordic companies' business and growth strategies.

Four out of ten plan new ventures

Of the Nordic companies surveyed, nearly four out of ten, 37 per cent, plan to open new business ventures that will impact their logistics within the next five years.

Expansion plans are most common among Finnish companies. Over half of the Finnish respondents, 53 per cent, plan to open some form of new business venture. Plans for expansion are least common in Norway, where 26 per cent of companies plan to carry out new business ventures during the next five years.

Focus on home country

Among the Nordic companies planning new business ventures, interest is greatest in their home countries (i.e., country where company headquarters is located). Over half of this group's expansion plans target the home country.

Norwegian companies have the strongest focus on their home country. Over six of ten Norwegian respondents planning new ventures, 65 per cent, intend to carry them out in Norway. Of the Danish companies, 57 per cent plan expansion in Denmark. In Sweden and Finland, corresponding figures for domestic ventures are 54 and 55 per cent, respectively.

... and on the rest of the Nordic region

Other than their home country, neighbouring Nordic countries are of interest to companies planning to expand. One in four Norwegian companies, 25 per cent, in this group plans to establish new ventures in Sweden, Denmark or Finland. Corresponding figures in Sweden and Denmark are 19 and 21 per cent, respectively. Finland is least focused on the Nordic region, with only 13 per cent intending to carry out new ventures in a Nordic country other than Finland.

Continued intra-Nordic dominance

The results of the survey indicate that intra-Nordic transportation will continue to dominate the Nordic logistics market. A contributing factor may be that many Nordic companies view the Nordic region as an interrelated market, and that new ventures in neighbouring Nordic countries are thus a natural step in company expansion.

It is therefore likely that Nordic companies will increasingly demand transport services with a Nordic scope and logistics partners capable of handling all transport within the Nordic region.

Danish and Finnish companies grow eastward

After their home countries and other Nordic countries, Eastern Europe and Russia are the most interesting new markets, especially for Danish and Finnish companies. Among Danish companies planning new ventures, one fifth, 20 per cent, plan to start these ventures in Eastern Europe (not including the Baltic States).

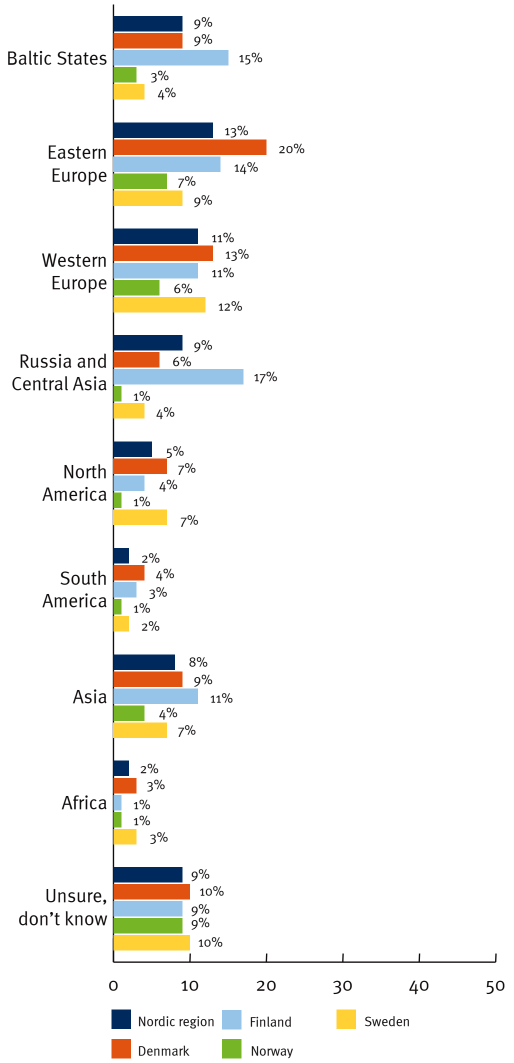
Several of the companies surveyed in Finland have plans to expand in the Baltic States, Russia, Central Asia and Eastern Europe. Nearly one in five Finnish respondents, 17 per cent, intends to start new business ventures in Russia and Central Asia within the next five years. Fifteen per cent of Finnish companies intend to expand in the Baltic States, while 14 per cent plan to expand in Eastern Europe.

New challenges for Nordic logistics suppliers

The expansion plans of Danish and Finnish companies indicate that the flow of goods to and from Russia and Eastern Europe will increase. Keeping pace with the development of the Russian, Baltic and Eastern European markets, companies in other Nordic countries are likely to devote greater attention to these regions.

The development eastward can impose additional demands on Nordic logistics suppliers. In addition to requiring Nordic scope, many customers may come to expect their logistics supplier (on its own or via international partnerships) to offer the same high-quality service in Eastern Europe and Russia as they do in their intra-Nordic operations.

Where do you plan to start your new ventures?



Based on those respondents planning new ventures. Responses: All except "Home country" and "Other Nordic countries."

In-depth: Retail Logistics Manager

CLAS OHLSON

"Environmentalism is more about the fact that we have to start talking with each other, and less about taking radical steps and making major investments."

Interview with Rolf Andersson, manager of Clas Ohlson Distribution Center

What are the most important trends and changes within your industry, from a logistics and transportation perspective?

First of all, it's about our accessibility. With a demand-chain system and a guaranteed line of products that has to be in place when the customer enters the store, it's vital that our inbound logistics work without hitch and that deliveries arrive on time. Secondly, we need well-developed information logistics in order to provide first-rate customer service and allow Clas Ohlson to be available to the customer before, during and after their purchase. Thirdly, it's about the environment. We have a clear-cut mandate to limit our impact on the environment, and this has a huge effect on logistics.

What do you think your logistics requirements will look like in 2015?

The need for coordination will increase. With the growth and expansion into new markets that we anticipate, both volume and stock points will increase. This will impose even greater demands on our information logistics.

Which geographical market will be the focus of your business in the coming 5 years?

The British market. We will open two to four stores in Great Britain during financial year 2008/09.

How can the eco-effectiveness of transportation be developed without increasing price and delivery times?

Environmentalism is more about the fact that logistics purchasers and logistics suppliers must start talking to each other, and less about taking radical steps and making major investments. For example, there's great potential for transportation purchasers to coordinate their shipments with collective third-party logistics, a practice that we're already seeing. We also need to see better coordination between transportation companies.

Also, there are many simple measures that can make a big difference (for example, eco-driving and the right tyre pressure). We're working with Posten Logistik to increase transport fill ratios and to maximize the use of terminals that are located closer to our stores.

"We have a clear-cut mandate to limit our impact on the environment, and this has a huge effect on logistics."

Photo: Clas Ohlson

In-depth: Wholesale Logistics Manager

"Tight margins will call for improvements to planning and utilisation of lead-time – with better planning, transportation can become both smarter and less expensive."

Interview with Leif Christensson, logistics manager at Ahlsell

What are the most important trends and changes within your industry, from a logistics and transportation perspective?

The most important trend is the basic need for better planning. For almost ten years, it's been the practice in, for example, the construction industry to delay ordering a product until the day before it's needed, while still being sure that the product will arrive the next day. This has, of course, cost a lot of money – but so far, just-in-time arrival has been more important than cost.

But now we're heading towards tighter margins, and this gives us an incentive to thoroughly rethink the way we operate. Tight margins will call for improvements to planning and utilisation of lead-time – with better planning, transportation can become both smarter and less expensive, for example, by increasing transport fill ratios. A change of this type has to happen at the industry level. A single company alone can't make a difference in terms of better planning and longer lead-time, but cost and environmental considerations will help to drive through a change.

What do you think your logistics requirements will look like in 2015?

In-depth knowledge and logistics expertise will continue to be highly valuable. As today, many companies won't have logistics as their "core business."

Which geographical market will be the focus of your business in the coming 5 years?

We will continue to develop our existing business in the Nordic region and, from a logistics standpoint, our major focus will be on Norway.

How can the eco-effectiveness of transportation be developed without increasing price and delivery times?

Railway capacity must increase, especially for longdistance shipments. Today, we can't meet customer demand for flexible, fast delivery by shipping via railway.

More advanced planning would also make a huge difference. For example, we can increase fill ratios with better planning – which would improve our eco-efficiency.

Foto: Ahlsell

"Railway capacity must increase, especially for long-distance shipments."


Photo: Ahlsell

In-depth: Manufacturing Logistics Manager

"We're heading towards a more regionalised supply-chain configuration. It's neither cost-effective nor eco-efficient to transport freight all around the world."

Interview with Johan Jemdahl, Head of Distribution Logistics at LM Ericsson

What are the most important trends and changes within your industry, from a logistics and transportation perspective?

First of all, environmental considerations. The seriousness of the environmental issue has increased dramatically over the past few years, but I don't think it has attained its full impact yet – the demand for eco-classified transportation has been too limited. This will most likely change in the future.

Second, the increased cost of transportation, which is linked to high fuel prices and other factors. Overall cost-consciousness also increases, along with focus on margins, during periods with lower GNP growth.

Third, we're heading towards a more regionalised supply-chain configuration. It's neither cost-effective nor eco-efficient to transport freight all around the world.

What do you think your logistics requirements will look like in 2015?

The demand for logistics will continue to be high and is likely to increase. Compared to today's conditions, this demand will be more regional and local. We're already working on decreasing the volume of our air transport, and we will continue with this effort. Our goal is to increase the volume we ship by land. The degree of intermodalism will also increase.

Which geographical market will be the focus of your business in the coming 5 years?

LM Ericsson is a global company with customers in over 200 countries. We are constantly focused on several geographic markets.

How can the eco-effectiveness of transportation be developed without increasing price and delivery times?

I think there's great potential for transporters to start collaborating, which could increase the fill ratios. There are a whole lot of empty trucks out on the roads today. Implementation will require a system capable of coordinating the logistics flow. We can gain inspiration from the telecom industry, where operators are in the habit of using each other's infrastructure.

Also, we can gradually phase out the trucks that aren't eco-efficient. I don't see the process of replacing an entire truck fleet with eco-efficient vehicles as an excuse to charge a higher price, but rather as a way to maintain and win market share.

Finally, we must continue to work with carriers to improve our planning – this will create scope for the longer lead-times caused by slower shipments. You can't have your cake and eat it, too.

"Our goal is to increase the volume we ship by land. The degree of intermodalism will also increase."

The Nordic logistics market in figures

Transportation with a national character

The national transportation industries of the Nordic countries have distinctive features, based on factors such as geography and the structure of national service and goods production.

Forty per cent of freight in Norway is shipped via domestic waterways. Road transport predominates in other Nordic areas. Finland is distinguished by its trade with Russia – approximately 15 per cent of Finland's international road transport goes to Russia.

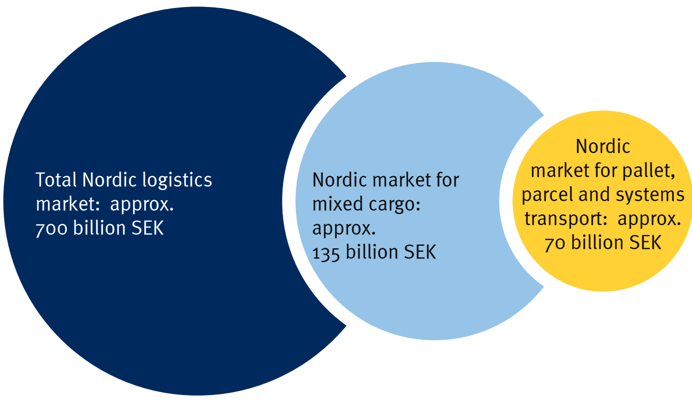
In Denmark, 50 per cent of transport consists of goods in transit; i.e., half of all goods transported neither originate nor have their final destination in Denmark.

Nordic turnover nearly 700 billion SEK

According to Posten's evaluation, the total turnover in the Nordic logistics market is close to 700 billion SEK, calculated based on turnover of all Nordic companies working with transport operations.[1]

The Nordic market for mixed cargo constitutes around 20 per cent of the total logistics market. "Mixed cargo" refers to freight that does not require special transport containers (e.g., tankers, pipelines) and which can be transported piecemeal by trucks, planes or in containers.

The estimated turnover for this market is approximately 135 billion SEK.



The five largest logistics suppliers by country.[2]

The pallet, parcel and systems transportation services account for around half of the Nordic market for mixed cargo. Systems transports are distinguished by the transportation of goods at night and according to a preset time table. The pallet, parcel and systems transports have an aggregate turnover of about 70 billion SEK.

Largest logistics operators in the Nordic region

The German logistics suppliers Schenker and DHL, as well as Danish DSV, are the largest operators on the Nordic logistics market with respect to total Nordic region turnover. Their respective turnovers in the region are 20 and 30 billion SEK, and each are estimated to have a one-fifth share of the Nordic market for mixed cargo.

Posten Logistik is one of the five largest logistics suppliers in the Nordic region.

The German state is a major operator in the Nordic logistics market. Schenker is wholly-owned by the German government, which also owns, through Deutsche Post, a 34 per cent share of DHL.

1 Estimate based on most recent available figures (2006).

2 Bring is Posten Norge's new name (as of September 2008) Posten Logistik became sole owner of Norwegian Tollpost Globe in February 2008.

Driving forces and trends in the Nordic logistics market

Weakening economy has uncertain impact

A fundamental driving force in the Nordic logistics market is economic growth in both the Nordic countries and in other parts of the world.

According to the latest report from the Swedish Institute of Economic Research, global growth in 2008-09 will be just under four per cent, i.e., about one percentage point lower than the previous year. The global economy is expected to rally during the year 2010.[1]

The effect these changes will have on the Nordic logistics market is uncertain. While the anticipated slowdown can have a negative impact, other factors indicate that demand for Nordic transportation will continue to be strong.

One example is distance trade, which has a turnover of approximately 47 billion SEK in the Nordic region.[2] The average Nordic growth rate has been 18% annually during recent years,[3] and it is estimated that Nordic distance trade will also grow strongly in the future.[4]

The most recent available figures on Swedish e-commerce (which stands for a major portion of the growth in Swedish distance trade) show that e-commerce increased by 21 per cent during the second quarter of 2008. During 2008, e-commerce in anticipated to have a turnover exceeding 20 billion SEK, constituting 4 per cent of total retail sales.[5]

Nimble handling of international goods

The manner in which changing customer demand interacts with technological development will have a great impact on the development of the Nordic logistics market.

A growing trend in the information technology sector is to gather data regarding specific international transports in an "electronic dossier." The data is accessible to both carriers and receivers.

Types of data gathered include import or export duties, freight charges and security information about the items being transported.

Since data can be retrieved from the electronic dossier while the goods are in transit, administrative details can be handled in advance. This facilitates the import and export of goods and decreases the risk of delays in delivery.

Customer portals add simplicity

The Nordic logistics market is seeing a growth in both the number and the variation of web-based customer portals. The portals improve the integration between logistics suppliers and logistics purchasers, and can be used for functions such as ordering or tracking a shipment and handling customs. The portals both facilitate logistics purchasing and enable improved monitoring of the flow of goods.

The customers of logistics purchasers also utilise customer portals for popular services such as choice of delivery site and shipment tracking.

New proposal on EU policy for greener transportation

National and European regulations are other important factors that influence the Nordic logistics market.

In July 2008, the EU Commission launched a new action package aimed at encouraging sustainable transportation. The package includes a proposal to change the current EU regulations regarding charges on heavy freight vehicles that utilise certain infrastructure.[6]

Under the proposal, Member States would find it easier to modify toll charges depending on local eco-impact (air and noise pollution) and local traffic congestion caused by certain vehicles.[7]

The proposal will be discussed in the European Parliament and the Council of the European Union (Council of Ministers) prior to the decision.

1 Statistical Survey of Current Economic Trends, August 2008, Swedish Institute of Economic Research
2 According to the most recent available figures (2006).
3 Growth figures from 2003-06.
4 EMOTA, Forrester Research, HUI, SDH, Booz Allen
5 E-barometer for Q2-2008, HUI and Posten. Distance trade refers to all ordering of goods irrespective of payment method. E-commerce refers to orders of goods via the Internet only.
6 Directive 1999/62/EC, the "Eurovigette Directive"
7 Communication from the Commission to the Council and European Parliament, COM (2008) 433 final.

Appendix: Survey questions

Broad-spectrum interview

Question 1: How likely would you be to replace your existing transport with eco-efficient transport, if delivery times would be increased by 24 hours? Answer on a scale of 1 to 5, with 1 representing "unlikely" and 5 representing "very likely."

Question 2: How likely would you be to replace your existing transport with eco-efficient transport, if prices would increase by 10 per cent? Answer on a scale of 1 to 5, with 1 representing "unlikely" and 5 representing "very likely."

Question 3: What do you demand of your logistics suppliers with respect to eco-friendly transportation?

a) ISO certification

b) Break-down of types of transport

c) Sustainability accounting

d) Eco-efficient fuel

e) Eco-alternative in product portfolio

Question 4: Does your company plan to start any new ventures that will impact your logistics within the next 5 years?

Question 5: Where do you plan to start your new ventures?

a) Home country

b) Nordic region

c) Baltic States

d) Eastern Europe

e) Western Europe

f) Russia and Central Asia

g) North America

h) South America

i) Asia

j) Africa

In-depth interviews with the logistics managers of Clas Ohlson, Ahlsell and LM Ericsson

Question 1: What are the most important trends and changes within your industry, from a logistics and transportation perspective?

Question 2: What do you think your logistics requirements will look like in 2015?

Question 3: Which geographical market will be the focus of your business in the coming 5 years?

Question 4: How can the eco-efficiency of transportation be developed without increasing price and delivery times?

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