



IMPORTANCE OF E-COMMERCE

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Iceland Post conference - 24th of February 2016



Who we are

My current activities



logistics

parcel lockers



consulting

web platform



Who we are and what we do?

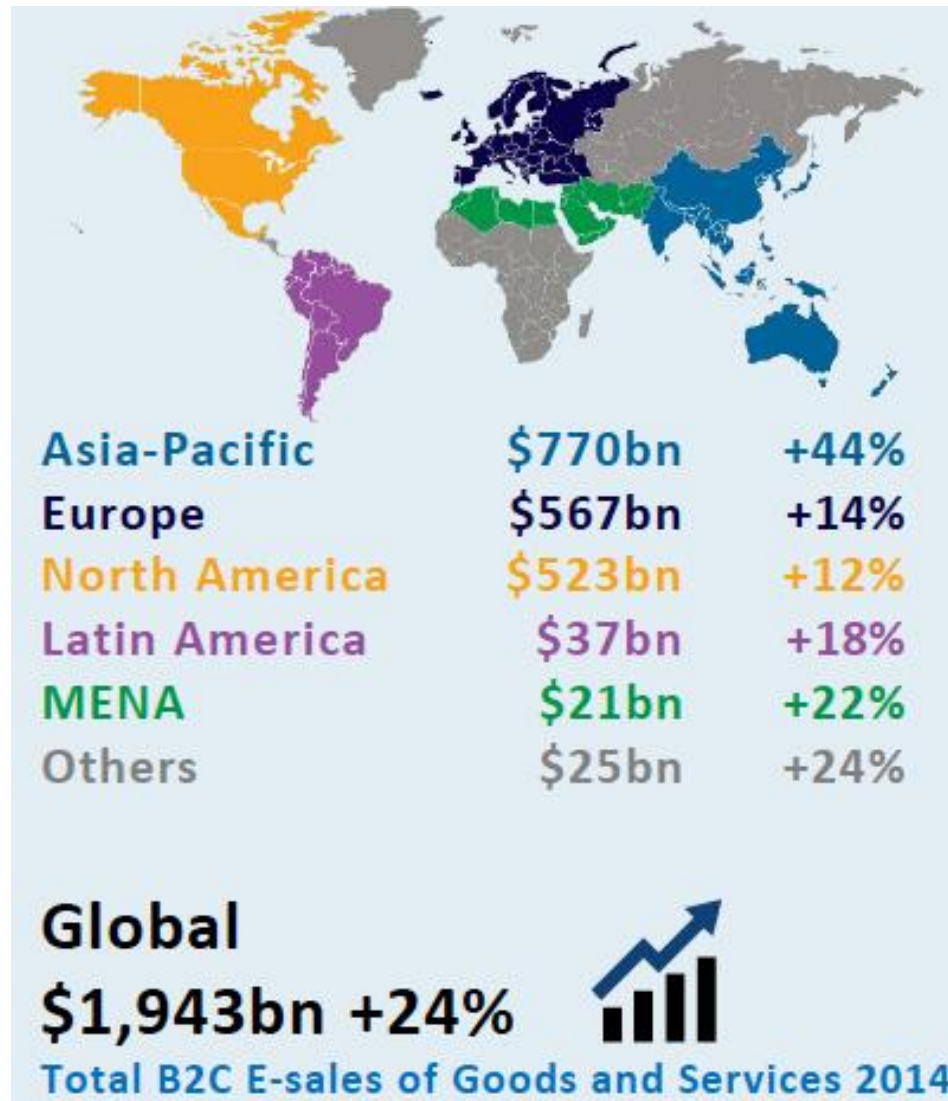
- ❑ A network of **independent consultants** and **interim managers**
- ❑ Focus on **e-solutions** for **pure players**, **retailers**, **logistic companies** and **posts**
- ❑ Strong experience in **Omni-channel** and **X-border solutions**
- ❑ A **pragmatic team of professionals** with multidisciplinary know how and track record in various industries





The eCommerce opportunity

The e-Commerce opportunity



China # 1

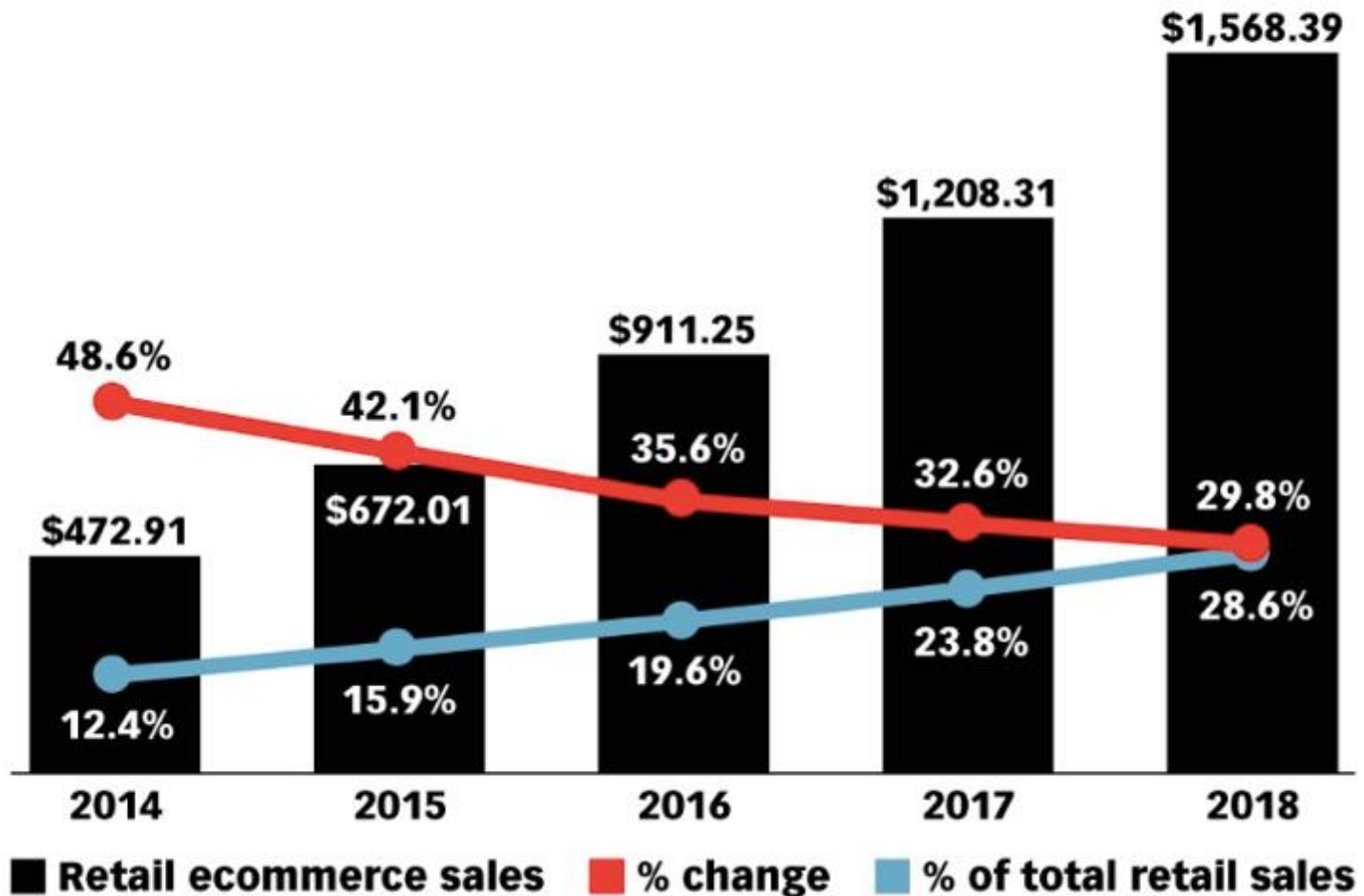
TOP 10 ECOMMERCE MARKETS GLOBAL SALES, TRENDS AND STATISTICS



China: e-Commerce already 20% of retail

Retail Ecommerce Sales in China, 2014-2018

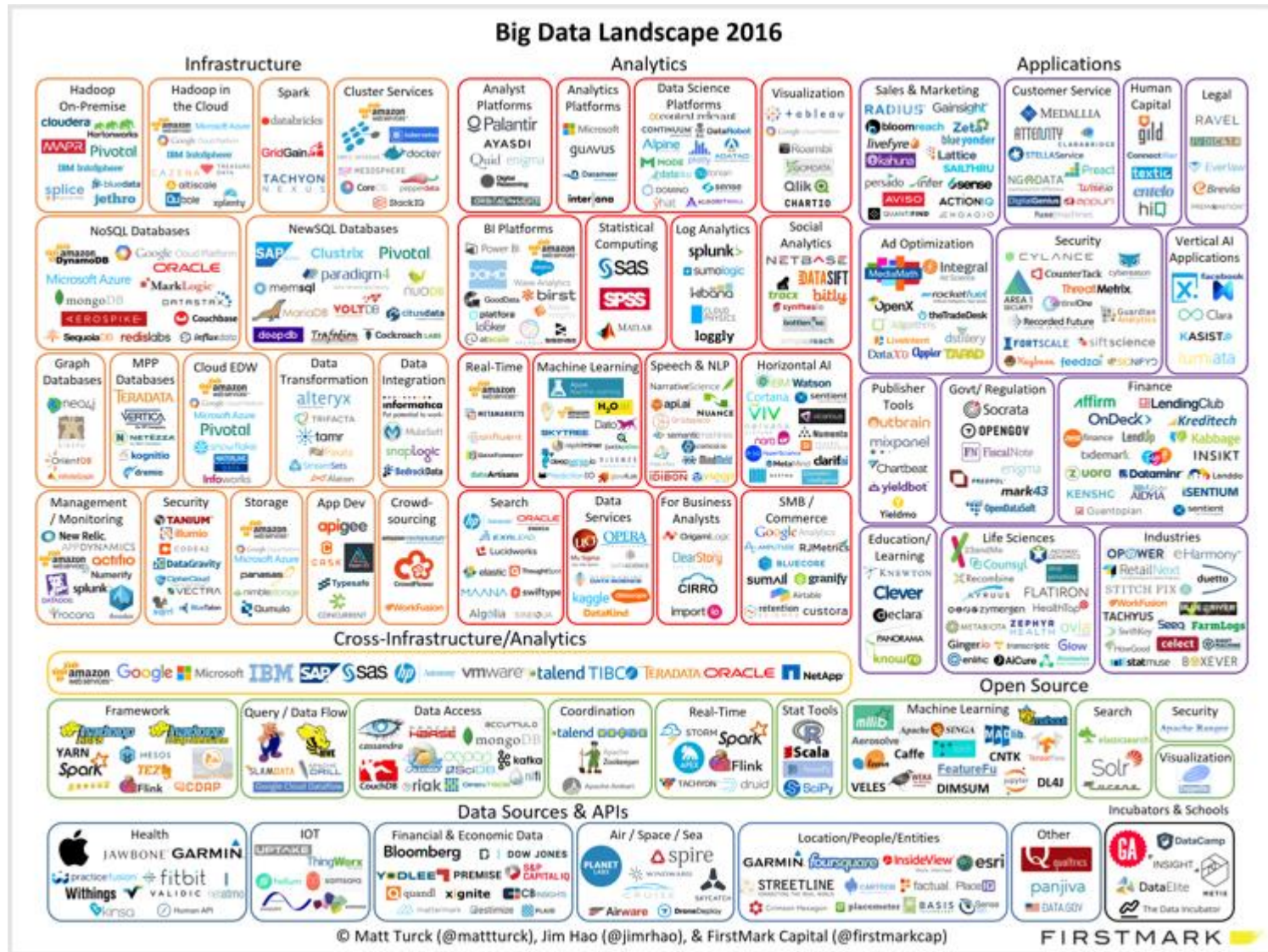
billions, % change and % of total retail sales



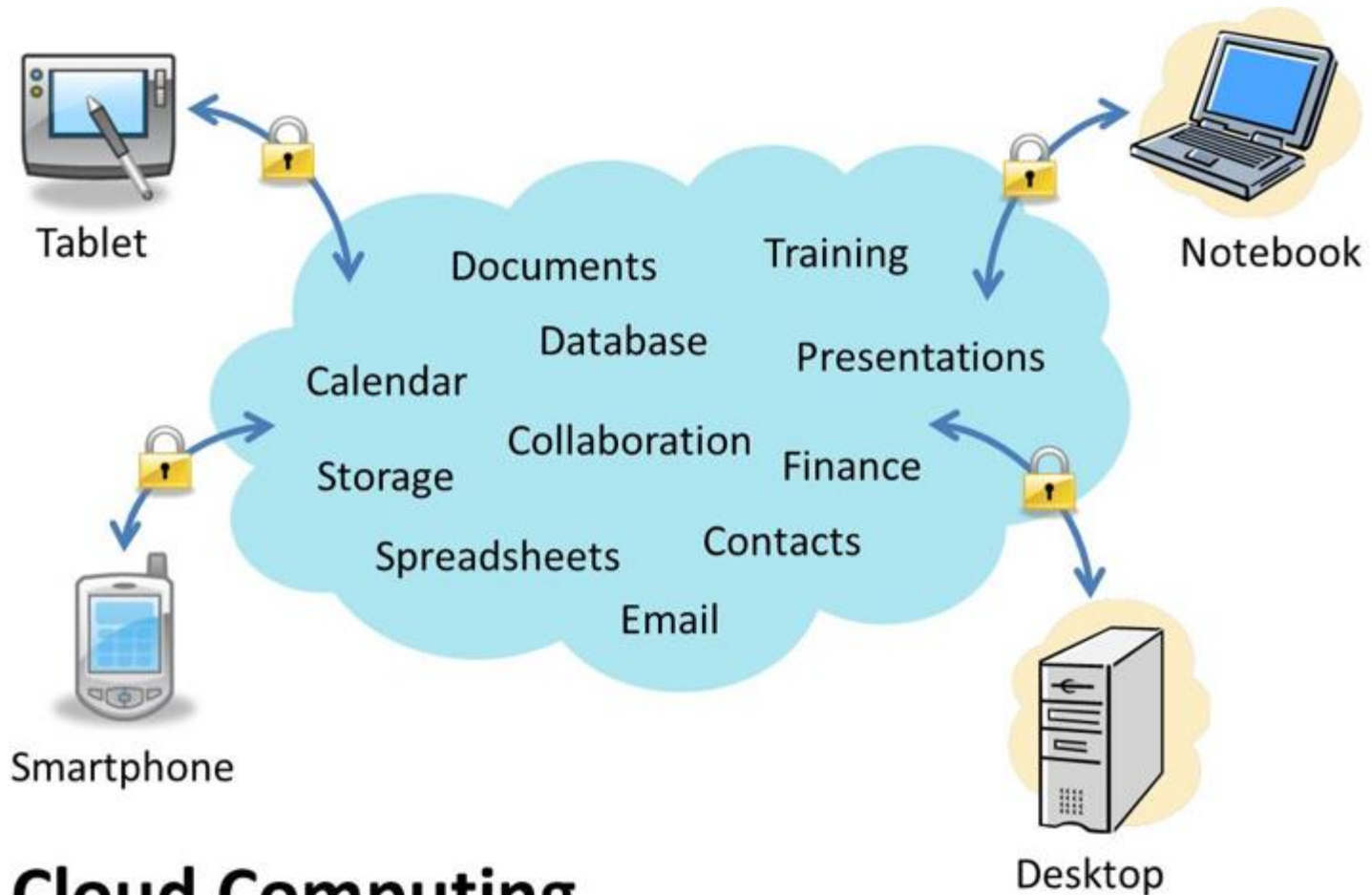


Technology and E-Commerce trends

Big data



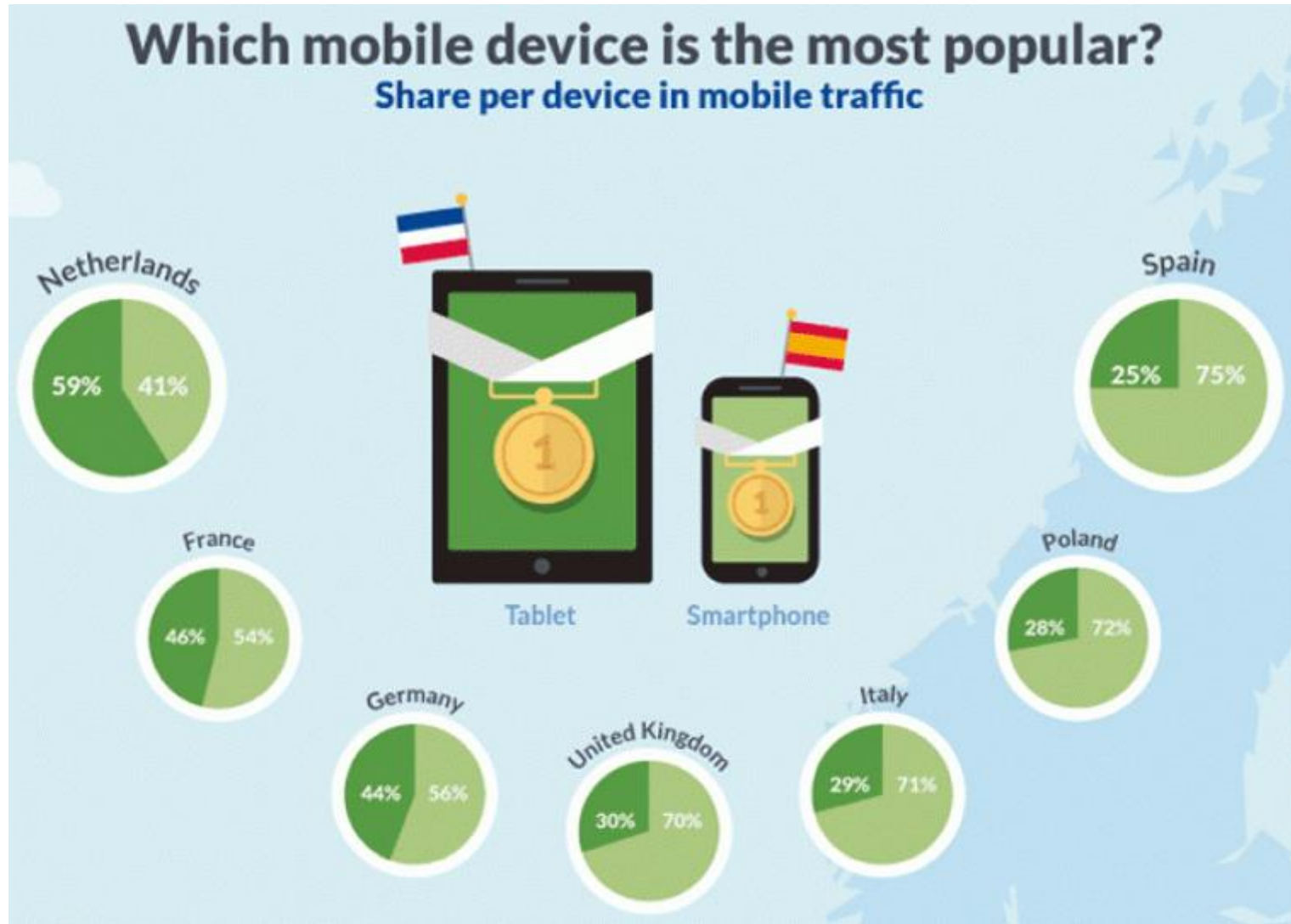
Cloud computing



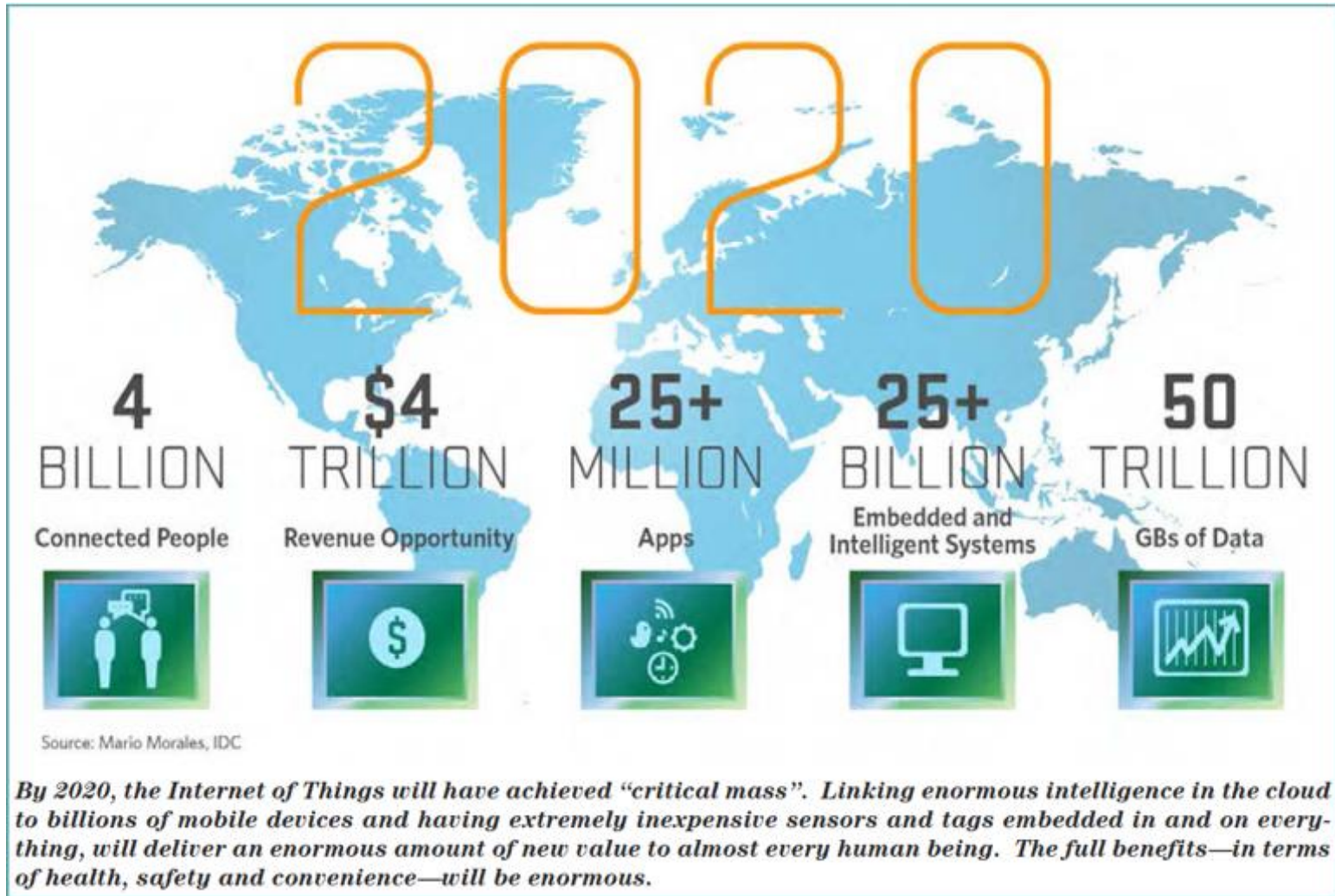
Cloud Computing

Having secure access to all your applications and data from any network device

Mobile Commerce in Europe reaches 25%



Internet of Things



Social networks



FredCavazza.net

Uberization



uberRUSH



DRIVERLESS CARS?

Omnichannel supply chain



Videos/smell are key for product sharing



A new alarm app by Oscar Mayer deceives you out of bed every morning to not only the sweet sound of frying bacon, but to the smell as well. A small gadget attached to your iPhone's headphone jack sends a bacon fragrance your way as the alarm sizzles. But, *there is no bacon.*

Virtual Reality



"VR SUPERMARKET"

VIRTUAL SHOPPING



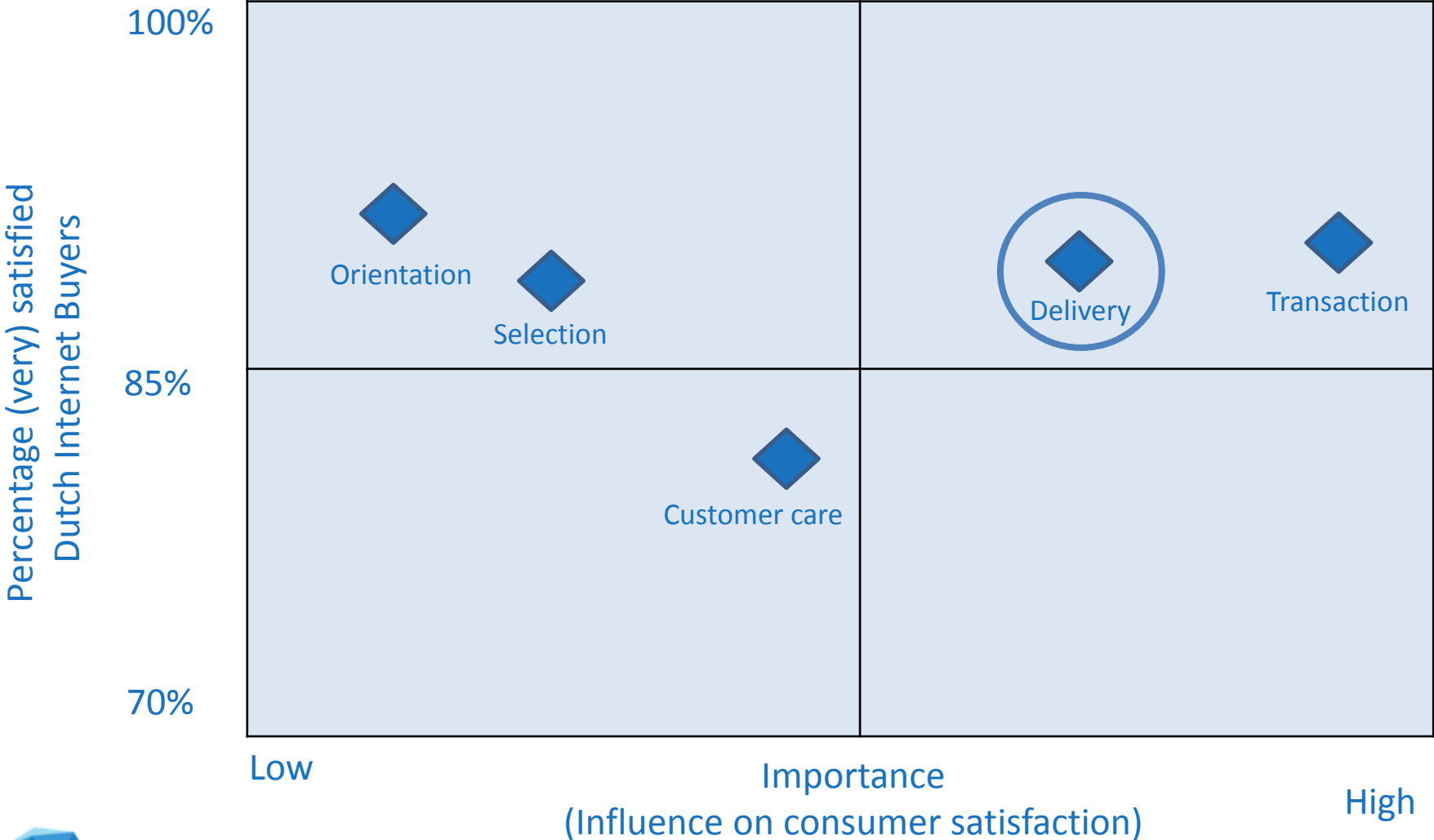
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Importance of customers

Consumer in the driving seat, rules are changing in Omni-channel



Importance of 'delivery' in consumer satisfaction (example of The Netherlands)



Appreciation of delivery aspects (UK e-buyers)





X-border eCommerce market

X-border eCommerce market



\$328
billion

value of X-border online shopping in 2014
with 309 million consumers buying from
overseas websites



20%

expected growth pa of X-border eCommerce
for the coming years

X-border eCommerce market

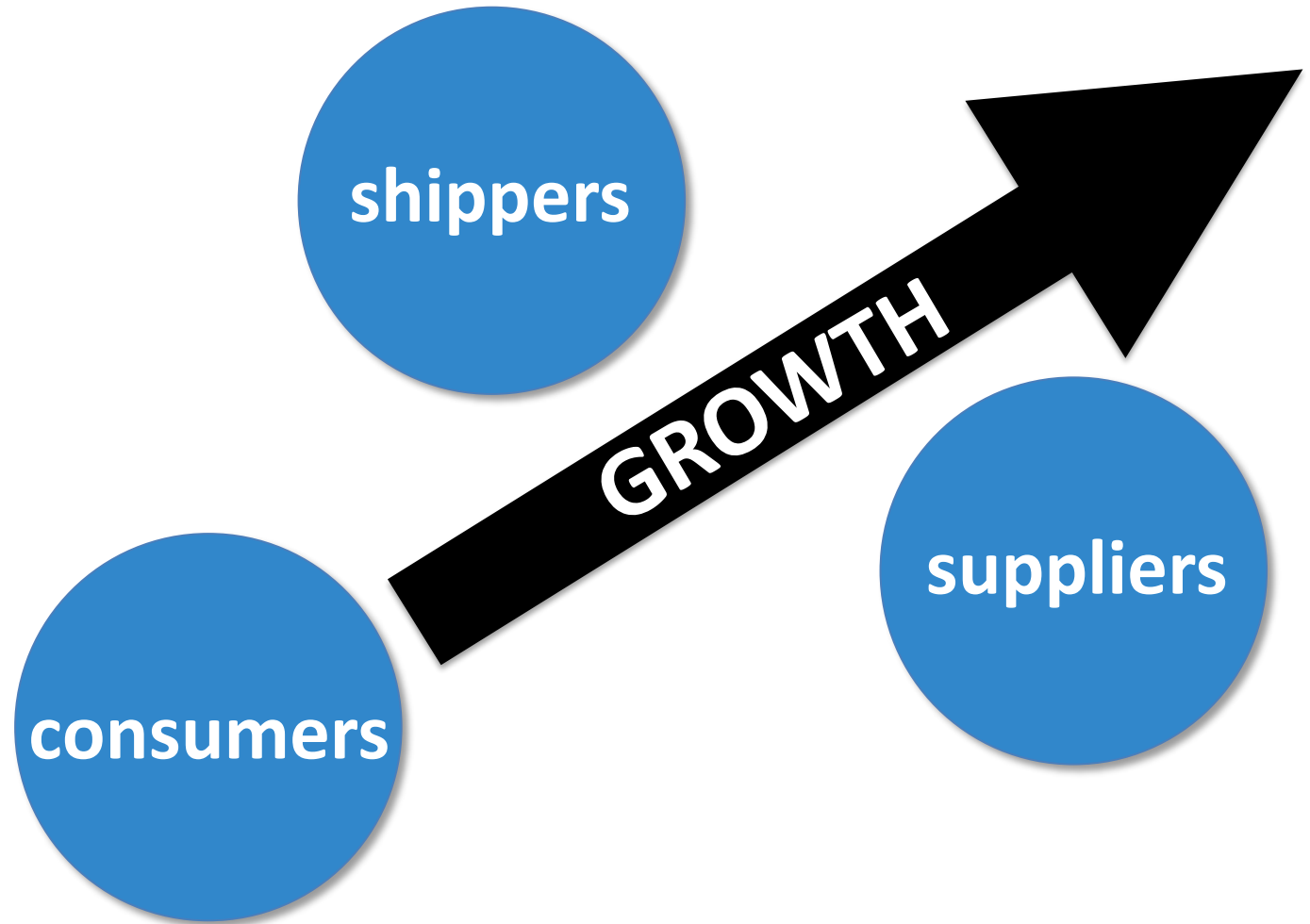
popular
markets

to buy from are USA, UK, Germany, China, Hong Kong

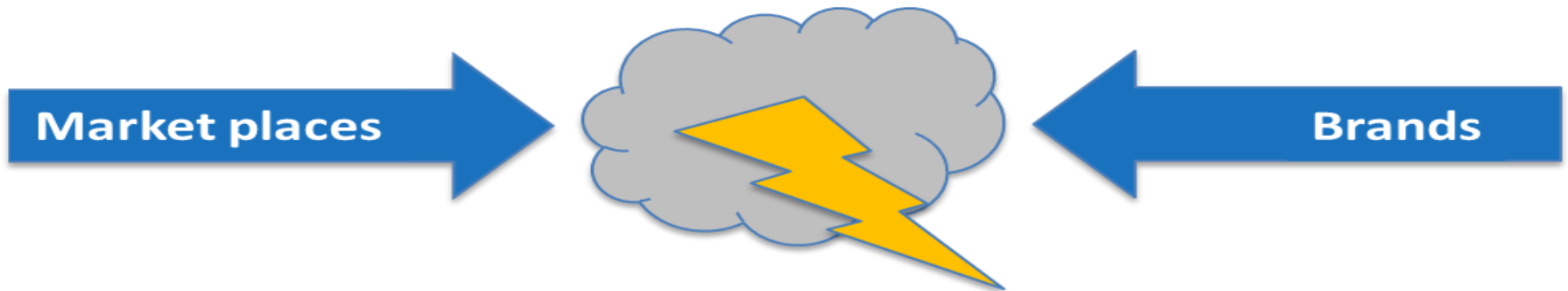
BRIC
EU

- X-border eCommerce into countries like China, India and Russia is seen as a huge opportunity
- Intra (and into) Europe will get a boost as a result of EC measures to stimulate X-border eCommerce

Forces driving the X-border eCommerce



Retailers, brands and manufacturers are discovering X-border eCommerce as a very efficient way to grow their market, go international and compete with marketplaces and large e-tailers



Large **marketplaces** such as Amazon, Alibaba, Rakuten, ...

- See cross-border as a way to grow rapidly their market share
- Open their platforms to smaller e-tailers, brands and manufacturers
- Increasingly engaging in upstream and downstream integration: web services, payment services, **fulfilment** and **delivery**

Consumers buying X-border

motivations

- Price
- Availability of product in local market
- Broader selection
- Authentic products

barriers

- High shipping costs
- Unknown fees: custom clearance, duties
- Long transit times
- No track & trace for low value shipments
- Difficult return process
- Limited choice payment/delivery options
- Fraud risk

Huge choice of suppliers

Webshop, payment and delivery solutions are increasingly offered to retailers and e-tailers as well integrated “**software as a service**” (saas) solutions

Cross border facilitators are offering services by which consumers can easily purchase X-border.

**X-Border
eCommerce**

Integrators/private logistical providers are offering X-border services, develop deferred parcel services with domestic operators and/or via acquisitions.

Posts are repositioning themselves as (domestic) parcels players

Marketplaces are offering webshop, payment, fulfillment and delivery services to smaller e-tailers

Huge choice of suppliers

ProShip
BY NEOPOST

ReadyShipper

PARCEL
INTERNATIONAL

MetaPack

ShipStation

temando

parcelhub

Shipping software

SKYBOX
Buy it, Get it!

INTERNATIONAL
CHECKOUT

GET IT
HERE
SHOP
AND
SHIP
COM

bongo
INTERNATIONAL

shyp

BORDERFREE

Cross border facilitators

X-Border
eCommerce

Logistical players

FedEx

DHL
PARCEL

postnl

ups

GLS

HERMES
LOGISTIK
GRUPPE

parcelmonkey

dpd

InPost

SPRINT
PACK

Marketplaces

Rakuten
SUPER LOGISTICS
formerly Webgistic

amazon

amazonfulfillment

PrimeNOW

天猫 TMALL.COM

Alibaba Group



New challenges and opportunities for the logistics and postal industry

(not all of them are needed in the same market)

Home Delivery of parcels with choice of delivery slot in the AM / afternoon / evening



Home Delivery of parcels with guaranteed next day delivery



Home Delivery of parcels with notification and/or predict of delivery time



PREDICT
2 HOUR WINDOW
IN WHICH WE'LL DELIVER



Delivery of parcels at workplace



© Can Stock Photo - csp14030667



Delivery of parcels at safe place to avoid second or third presentation



Sorry I missed you when I came to deliver parcel(s) **YODEL**

Name: _____

Date: / : :

I have left your parcel in a safe location, as requested by the sender.
Order bucket by car.

I have left your parcel with a neighbour at: _____

Your parcel is new with your local courier because...

Unfortunately there was no safe place to leave your parcel / your advised safe place did not meet our safe place policy

The sender has requested a signature from you or your neighbour for your parcel

The sender has requested your parcel must be delivered to this address only and

Home Delivery of parcels on Saturday



*Saturday
Delivery*



Home Delivery of parcels on Sunday



Same day delivery of parcels

ORDER
by
4 PM
WEEKDAYS
WEEKDAYS

EASTERN TIME



WE SHIP IT
the
SAME DAY
GUARANTEED!
GUARANTEED!



Drone Delivery of parcels



Pick-up and drop-off parcel (returns) in Post office (PUDO)



Pick-up in store of retailer (Omni-channel)



Delivery in parcel box at home (+returns)



Pick-up of parcel in automated locker



Pick-up of parcel in drive-through




Delivery in the trunk of your car





Delivery where you are

parcify.com






Parcify - Never miss your parcel - home

 Shop anywhere online, and ship to your personal Parcify shipping address.

 We'll sign for you, send you a notification, and securely hold your package at our depot until you're ready.

 Schedule & follow the delivery of your parcel with the app. No need to stay at home or work. We bring it to you.

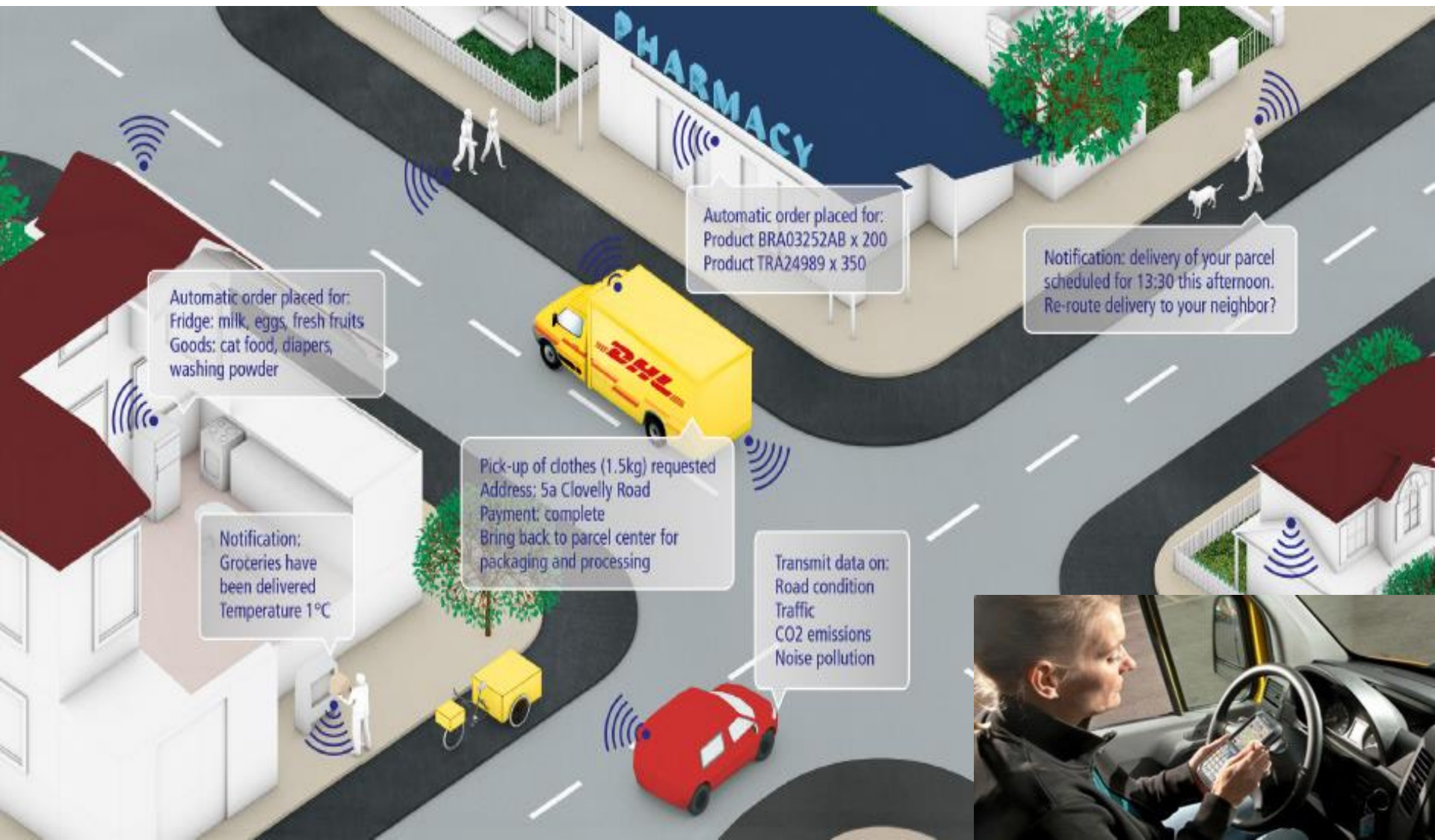
BENEFITS

-  No more missed deliveries.
-  Time saving.
-  Track your parcel in real time with the app.
-  Live chat with the driver.
-  Receive your parcels no matter where you are.

AVAILABLE IN ANTWERP

Real time track & trace

made available to ordering consumers and/or link to a dynamic planning system enabling for accurate notification of delivery time



WHO WILL WIN THE E-COMMERCE PARCEL DELIVERY BATTLE?

POSTS? INTEGRATORS? OR ...?





Delivery of food at home is the next big thing

Online groceries



Specialized delivery capabilities



Groceries



Health Care





Take aways

- **Nobody can ignore the reality of E-Commerce today**
- **Traditional retailers/FMCG will need to figure out their E-Com strategy and keep in mind the changing technology, markets and behaviors of consumers**
- **Logistic companies need to adapt their systems to the new normal: whatever, whenever, wherever**
- **Logistics incl. delivery is important part of consumer satisfaction**
- **Cross-border is important for you**
- **Iceland Post will as the supplier of choice support you in this**

Thank you for your attention

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