LUXURY & FASHION
FORUM 2023

DUBAI | COLOGNE | SINGAPORE | **NEW YORK CITY**

RETAIL. YOUR WAY.

OFFICIAL WELCOME

RAHN LEE

VICE PRESIDENT ERETAIL & FASHION,
DHL CUSTOMER SOLUTIONS & INNOVATION

RETAIL. YOUR WAY.


Superstar


DHL


DHL

DHL

WELCOME TO THE DHL LUXURY & FASHION FORUM

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DIOR
LVMH Fragrance Brands
STELLA McCARTNEY
LOCUS
TORY BURCH
COLGATE-PALMOLIVE
SEPHORA
GIVENCHY
YNAP
CAPRI HOLDINGS LIMITED
ebay
ESTĒE LAUDER COMPANIES
crocs
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PRADA
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CHANEL
LVMH
americanas
D&G DOLCE & GABBANA
HERMÈS PARIS
PVH
GOAT
FENDI
COACH NEW YORK
AIRIN TRIBAL
HERNO
Salvatore Ferragamo
MICHAEL KORS
CHARLES & KEITH
Loro Piana

AGENDA, 14 SEPTEMBER 2023

12:00 – 13:00	Arrival, Registration & Light Lunch
13:00 – 13:05	Official welcome **Rahn Lee, Vice President eRetail & Fashion, DHL Group**
13:05 – 13:20	Chances and Limitations of Circularity in the Fashion & Luxury Industry **Katja Busch, Chief Commercial Officer DHL and Head of Customer Solutions & Innovation, DHL Group**
13:20 – 13:45	The State of Fashion 2023: Resilience in the Face of Uncertainty **Joëlle Grunberg, Full time Senior Advisor, McKinsey & Company**
13:45 – 14:15	Evolution of eBay into a Trusted Ecosystem in Luxury & Fashion **Tirath Kamdar, General Manager of Global Luxury, eBay** **Mirella Muller, Sector President eRetail & Fashion, DHL Group**
14:15 – 15:00	Break
15:00 – 15:45	Breakout Sessions **Reverse Logistics | Direct-to-Store | Delivery Experience | Decarbonization**
15:45 – 16:15	Exploring the Future of Flexible Automation in Luxury and Fashion Warehouses **Gina Chung, VP Corporate Development, Locus Robotics**
16:15 – 16:45	The Role of Logistics in the Luxury & Fashion Value Chain **Patricia Gabriel, Chief Supply Chain Officer, Capri Holdings Limited** **Christopher Onisk, Executive Director Global Omnichannel Distribution COE, Estée Lauder** Host: **Alexander Schuett, Head of DHL Consulting Americas, DHL Group**
16:55 – 17:00	Official Closing **Mirella Muller, Sector President eRetail & Fashion, DHL Group**
17:00 – 18:00	Networking Reception & Canapés

CHANCES AND LIMITATIONS OF CIRCULARITY IN THE FASHION & LUXURY INDUSTRY

KATJA BUSCH

CHIEF COMMERCIAL OFFICER DHL AND HEAD OF CUSTOMER SOLUTIONS & INNOVATION, DHL GROUP

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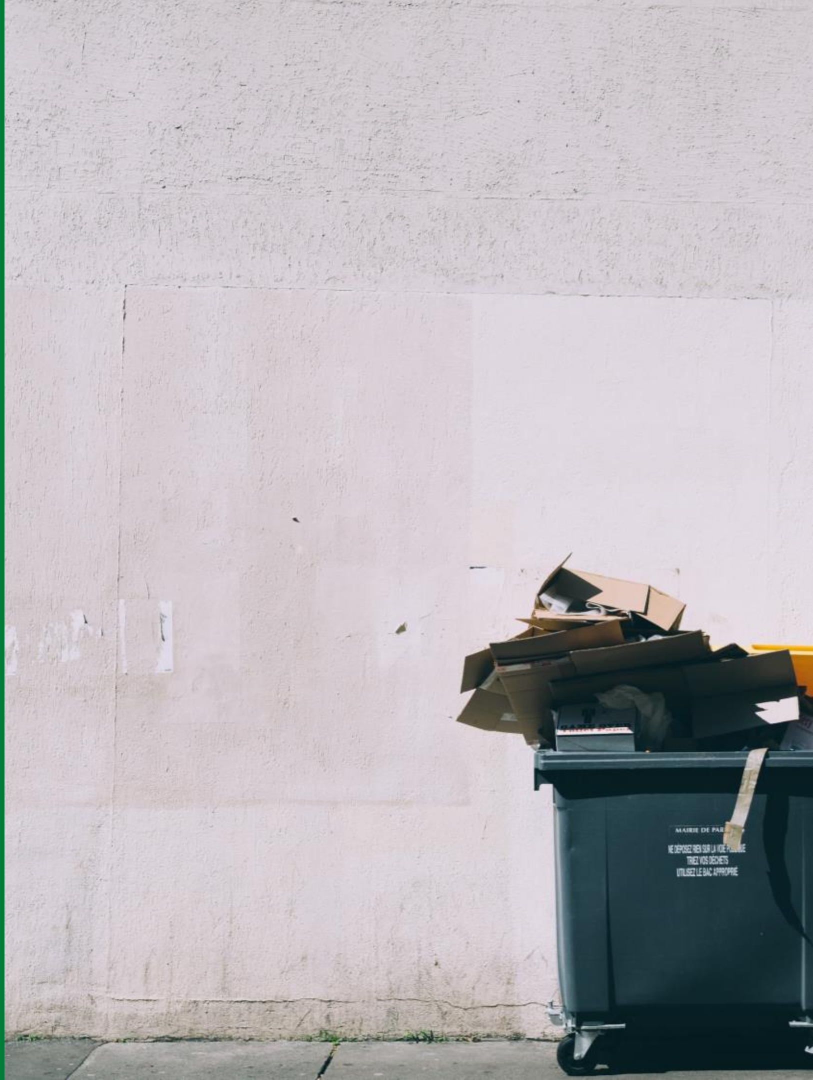
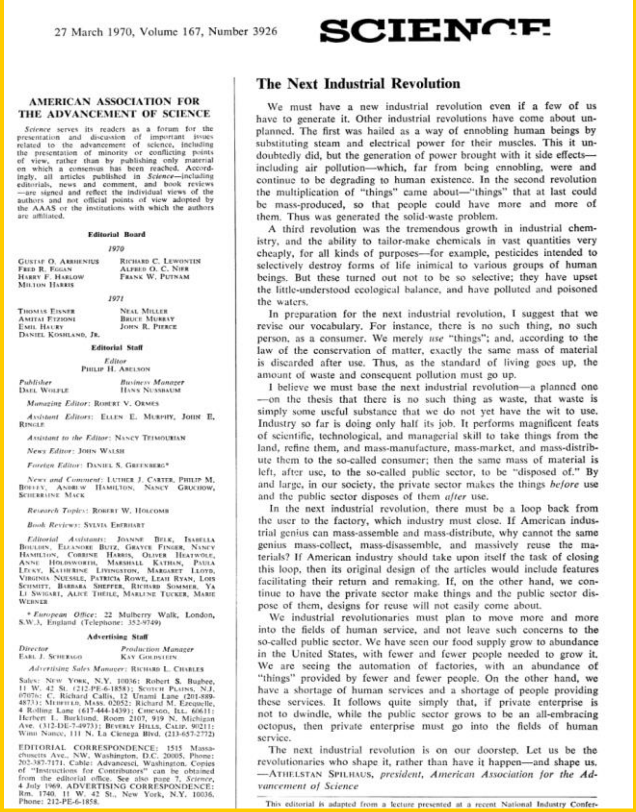
“There is no such thing as “away”.
When we throw anything away it must go somewhere.”

Annie Leonard
Executive Director of Greenpeace USA



“[...] We must base the next industrial revolution – a planned one – on the thesis that there is **no such thing as waste**, that waste is simply some substance that we do not yet have the wit to use.”


27 March 1970, Volume 167, Number 3926

SCIENCE

The Next Industrial Revolution

We must have a new industrial revolution even if a few of us have to generate it. Other industrial revolutions have come about unplanned. The first was hailed as a way of ennobling human beings by substituting steam and electrical power for their muscles. This it undoubtedly did, but the generation of power brought with it side effects—including air pollution—which, far from being ennobling, were and continue to be degrading to human existence. In the second revolution the multiplication of "things" came about—"things" that at last could be mass-produced, so that people could have more and more of them. Thus was generated the solid-waste problem.

A third revolution was the tremendous growth in industrial chemistry, and the ability to tailor-make chemicals in vast quantities very cheaply, for all kinds of purposes—for example, pesticides intended to selectively destroy forms of life inimical to various groups of human beings. But these turned out not to be so selective; they have upset the little-understood ecological balance, and have polluted and poisoned the waters.

In preparation for the next industrial revolution, I suggest that we revise our vocabulary. For instance, there is no such thing, no such person, as a consumer. We merely *use* "things"; and, according to the law of the conservation of matter, exactly the same mass of material is discarded after use. Thus, as the standard of living goes up, the amount of waste and consequent pollution must go up.

I believe we must base the next industrial revolution—a planned one—on the thesis that there is no such thing as waste, that waste is simply some useful substance that we do not yet have the wit to use. Industry so far is doing only half its job. It performs magnificent feats of scientific, technological, and managerial skill to take things from the land, refine them, and mass-manufacture, mass-market, and mass-distribute them to the so-called consumer; then the same mass of material is left, after use, to the so-called public sector, to be "disposed of." By and large, in our society, the private sector makes the things *before* use and the public sector disposes of them *after* use.

In the next industrial revolution, there must be a loop back from the user to the factory, which industry must close. If American industrial genius can mass-assemble and mass-distribute, why cannot the same genius mass-collect, mass-disassemble, and massively reuse the materials? If American industry should take upon itself the task of closing this loop, then its original design of the articles would include features facilitating their return and remaking. If, on the other hand, we continue to have the private sector make things and the public sector dispose of them, designs for reuse will not easily come about.

We industrial revolutionaries must plan to move more and more into the fields of human service, and not leave such concerns to the so-called public sector. We have seen our food supply grow to abundance in the United States, with fewer and fewer people needed to grow it. We are seeing the automation of factories, with an abundance of "things" provided by fewer and fewer people. On the other hand, we have a shortage of human services and a shortage of people providing these services. It follows quite simply that, if private enterprise is not to dwindle, while the public sector grows to be an all-embracing octopus, then private enterprise must go into the fields of human service.

The next industrial revolution is on our doorstep. Let us be the revolutionaries who shape it, rather than have it happen—and shape us.
—ATHELSTAN SPILHAUS, *president, American Association for the Advancement of Science*

This editorial is adapted from a lecture presented at a recent National Industry Confer-

June 1970


THE ERA OF SUSTAINABLE
LOGISTICS
ENABLING
A WORLD POWERED BY CLEAN ENERGY AND MOBILITY
BUILDING
STRATEGIES FOR SUSTAINABILITY
LEADING
PEOPLE TOWARDS A SUSTAINABLE FUTURE
NAVIGATING
SUSTAINABILITY GOVERNANCE
Vision 2050
CREATING
INSPIRE. CONNECT, IMAGINE
VISION 2050
DEVELOPING
NEW FORMS OF CIRCULARITY
LEVERAGING
DIGITALIZATION & SMART SOLUTIONS
REDUCING
CARBON EMISSION IN THE SUPPLY CHAIN

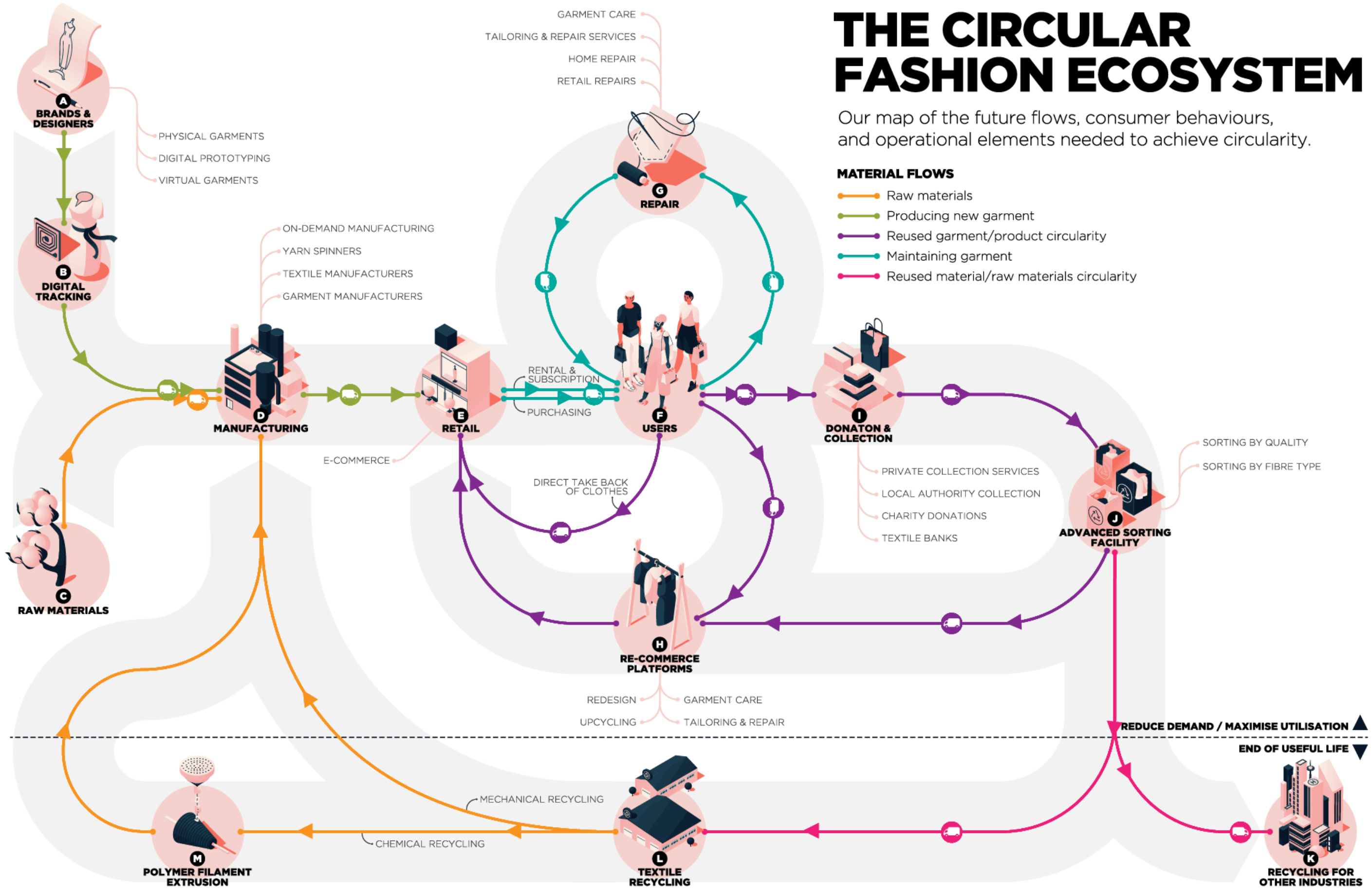

From Production...
...to End of Life
<1% closed-loop recycling
2% recycled feedstock from other industries
>97%
virgin feedstock
14% loss in production & collection
12% cascaded recycling
<1% closed-loop recycling
73%
Untapped resources for a circular economy


DHL
EXPLAINED
CO2
NEUTRAL


RECEIVE
RETURN
CIRCULARITY
RECOVER
REUSE
DHL
INNOVATION
CENTER

THE CIRCULAR FASHION ECOSYSTEM

Our map of the future flows, consumer behaviours, and operational elements needed to achieve circularity.



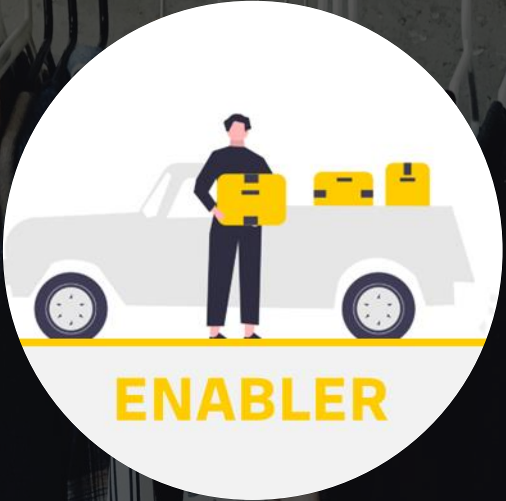
Traditional logistics services...

Transportation & Routing

Efficient **Warehousing**

Sustainable **Packaging Solutions**

Reverse Logistics



...expanded in a circular economy

Product **screening &** small **repairs**

Dispositioning solutions

Demand forecasting & monitoring of flows

Asset recovery tools for better control of returns process

Until early 2010s
Awareness

2015 – 2020
Formalization

2023 – 2030
Acceleration

Costs **Complexity** **Demand**

Consumer Behavior has changed

Societal and regulatory power is on the rise

Technology & Digitalization accelerate circularity more than ever before

THE STATE OF FASHION 2023: RESILIENCE IN THE FACE OF UNCERTAINTY

JOËLLE GRUNBERG,
FULL TIME SENIOR ADVISOR, MCKINSEY & COMPANY

RETAIL. YOUR WAY.

BOF McKinsey & Company

The State of Fashion 2023

DHL Luxury and Fashion Forum NYC

September 14, 2023

Presenting today...

Joelle Grunberg

McKinsey & Company

Senior Advisor in McKinsey’s Apparel, Fashion and Luxury group.

Former CEO of Lacoste Americas and former President of Wolverine Boston Brands (Sperry, Saucony, Keds)

"The State of Fashion" – the most comprehensive perspective on the fashion industry

The annual report analyses the global fashion industry

The **McKinsey Global Fashion Index**, composed of over 400 public and private companies spanning across market segments, product categories, and geographies

The **BoF-McKinsey Global Fashion** survey, completed by over 200 senior fashion executives

On the agenda for today

1

The current environment

A look at what is defining winners and losers in the current environment

2

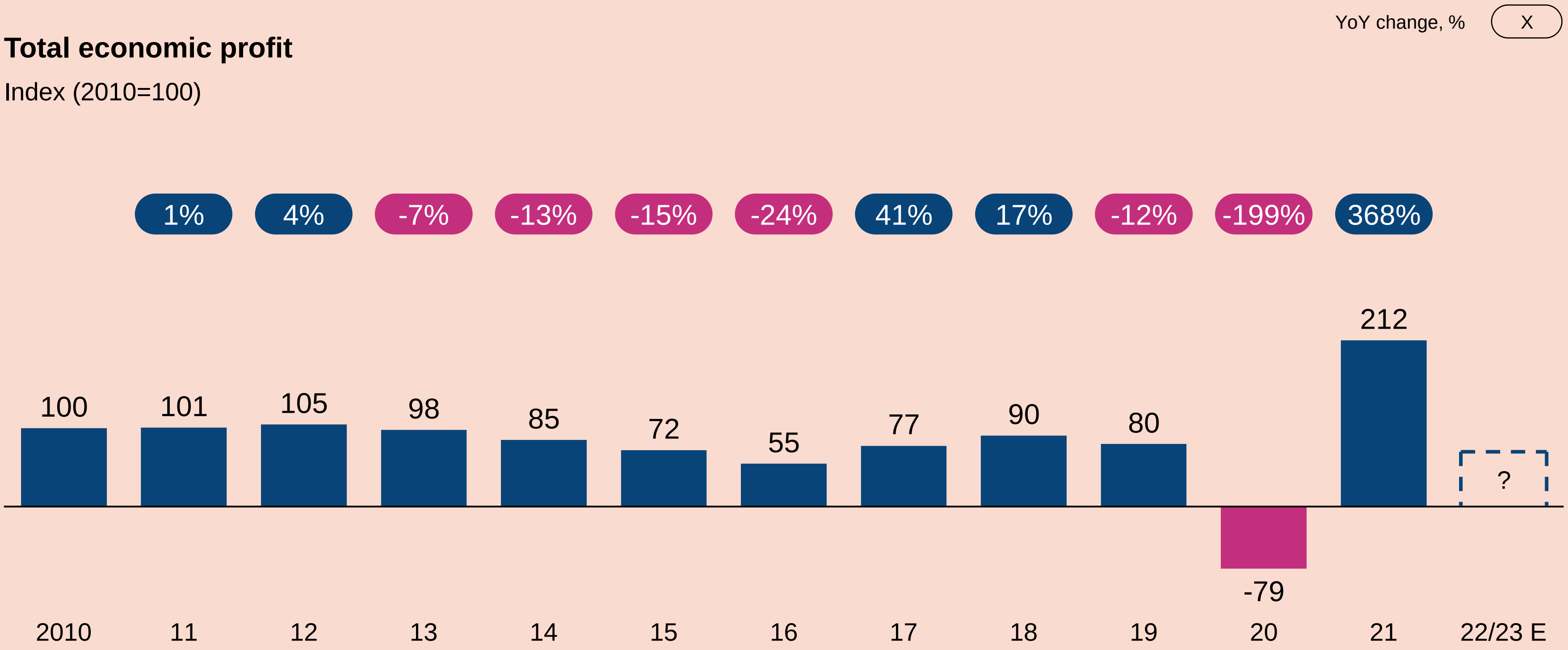
Key themes in this year‘s SoF

An overview of the foundational themes impacting apparel companies this year

The fashion industry strongly rebounded in 2021/22, following years of slowing growth and sharp decline

Total economic profit

Index (2010=100)



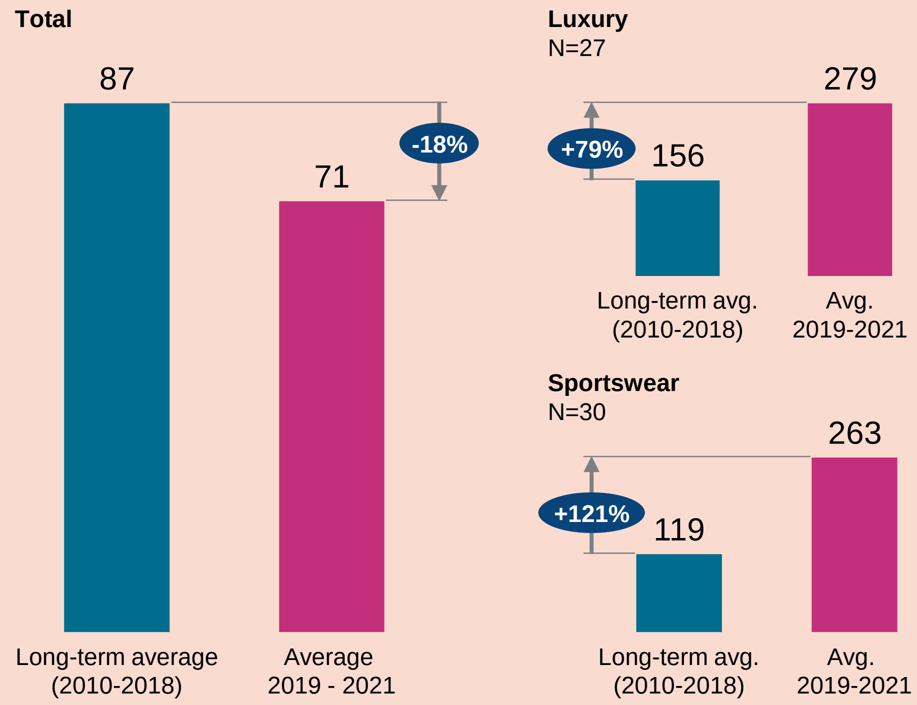
Source: McKinsey Global Fashion Index (MGFI)

Although economic profit increased significantly, the rebound in 2021 merely balanced out the losses from 2019/20

Although 2021’s increase in Economic Profit results look extremely positive, **much of the success in 2021 is conditional on 2020 being so negative**

The two categories that managed to create incremental value on top of capturing pent-up demand were luxury and sportswear

Long-term and 2019-2021 average EP, Indexed to 2010 EP = 100

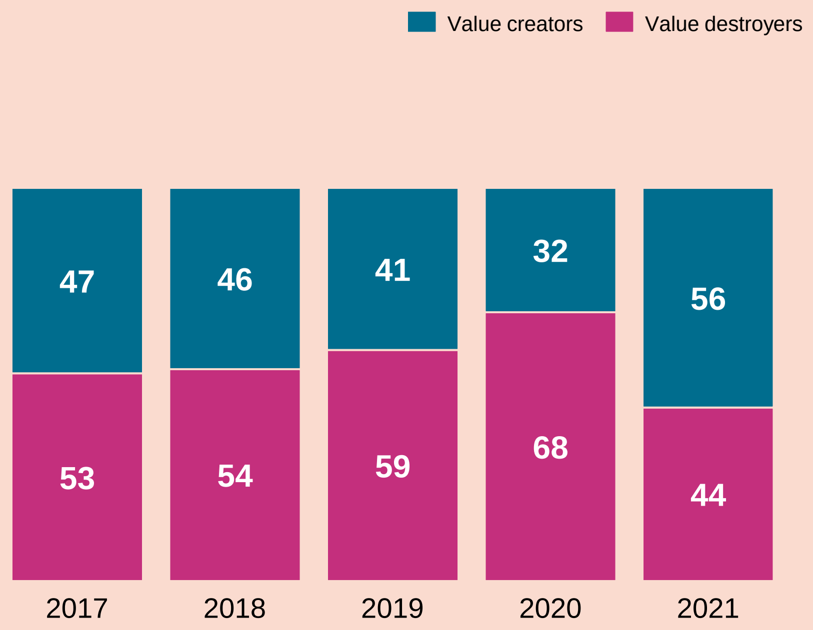


Source: McKinsey Global Fashion Index (MGFI)

2021 saw a rise of new value creators ...

Value creators vs. value destroyers per year

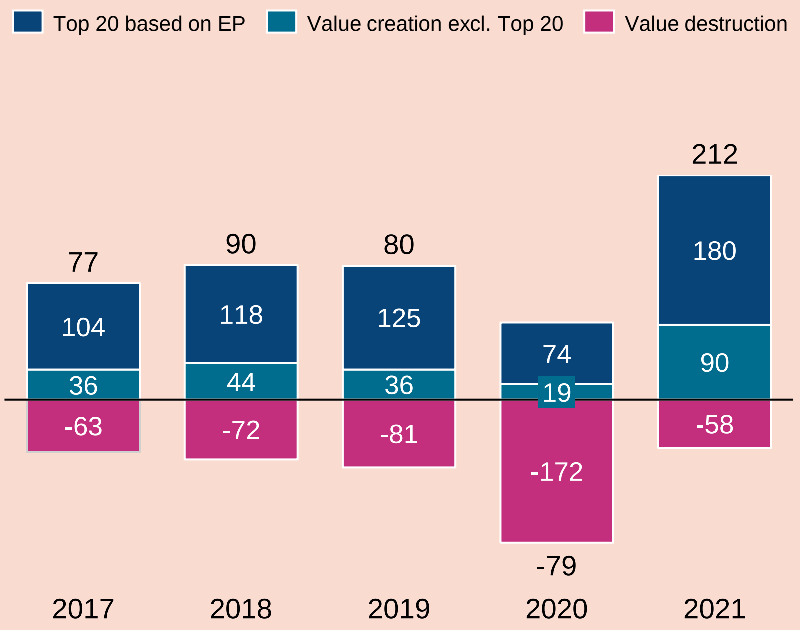
%



... resulting in a less polarised industry

Breakdown of total economic profit per year

Index (2010=100)



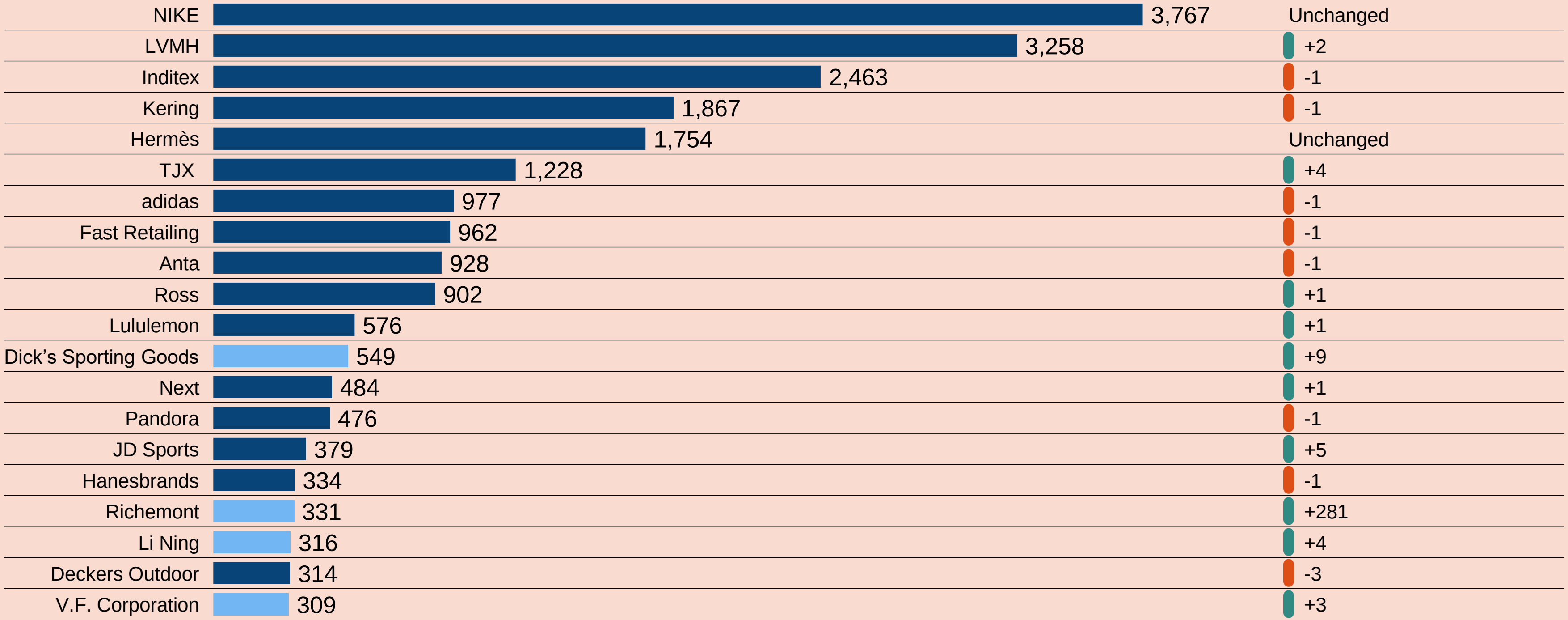
Source: McKinsey Global Fashion Index (MGFI)

But many super winners maintained their status across the years – with sports and luxury leading growth

SoF 2022 super winners   New entrants since SoF 2022 super winners list

Top 20 players based on average Economic Profit 2019-2021
USD millions

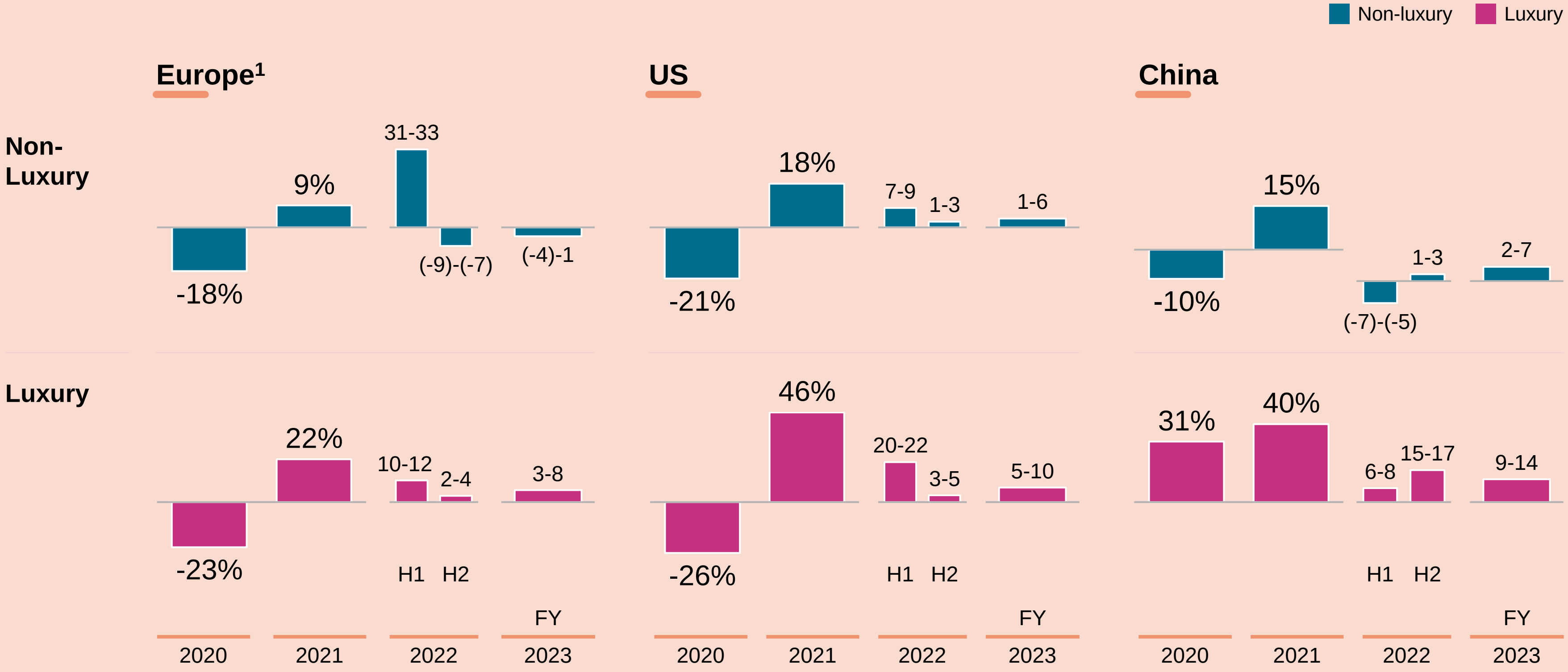
Change in rank vs. SoF 2022 (EP 2019-2020)



Source: McKinsey Global Fashion Index (MGFI)

Looking ahead economic headwinds are expected in Europe, while the US and China are likely to be more insulated

Retail sales growth forecasts by region and segment, YoY growth rates, %

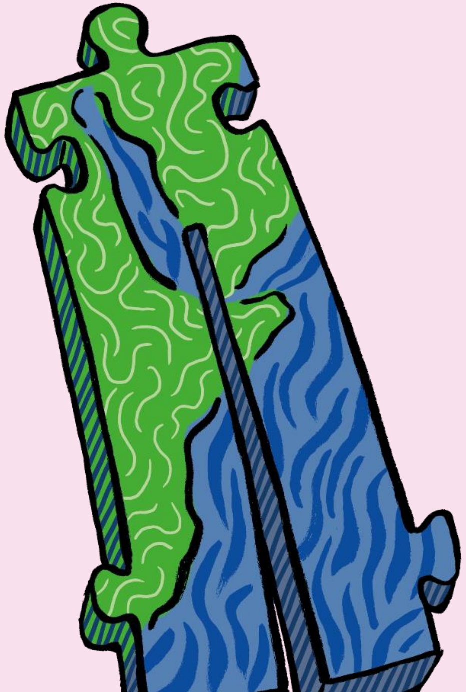


1. Includes Western and Eastern Europe

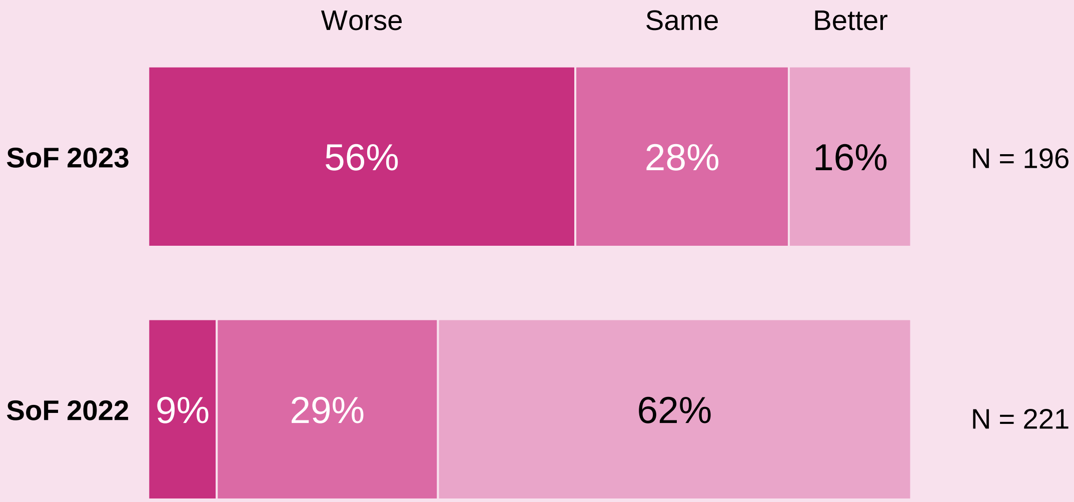
Source: McKinsey State of Fashion Forecasts; McKinsey Global Fashion Index (MGFI)

Yet overall, the majority of fashion executives expect worse conditions for the industry in 2023 compared to last year

% of respondents that rated industry conditions next year as worse, the same or better[1]



Executives take a much more pessimistic view of the industry for 2023 than they did a year ago, N=148



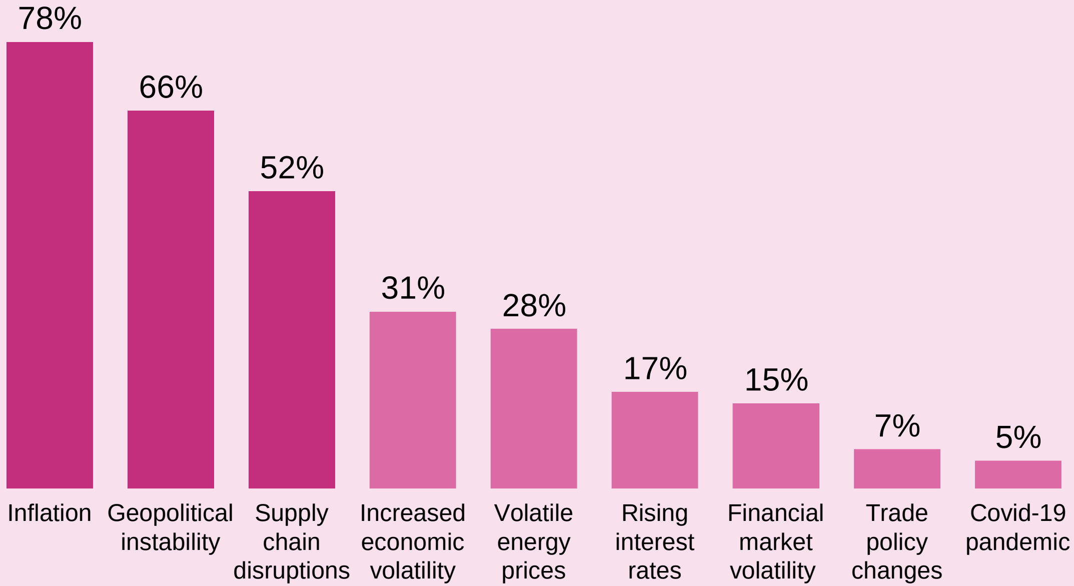
1. Survey question: "Question: How will conditions evolve for the fashion industry in the next year, in your view? "

Source: BOF- McKinsey State of Fashion 2023 Survey, BOF- McKinsey State of Fashion 2022 Survey

Fashion executives are most concerned about inflation, geopolitical uncertainty and supply chain disruptions

% of respondents that rated each topic as one of the top three risks to their businesses in 2023[1]

Inflation, geopolitical instability and continued supply chain disruptions are expected to play a key role shaping the fashion industry going forward, replacing Covid-19 as the top risks to executives' business

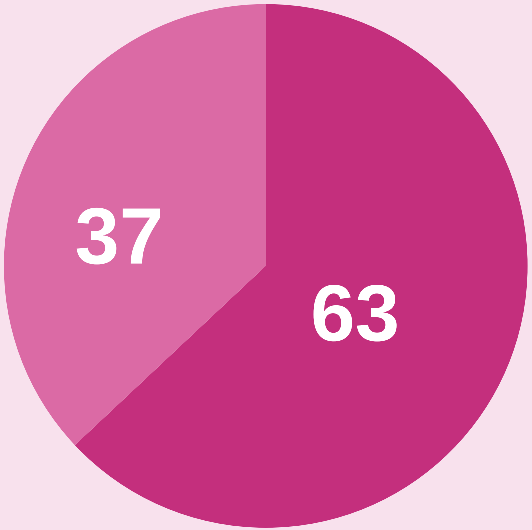


1. Survey question: "What do you expect will be the greatest risks to growth in the global economy in 2023? (Select three)?"

Source: BOF- McKinsey State of Fashion Survey 2023

A record high number of executives are focused on cost improvements – more than during Covid-19

Focus of performance in 2023
% of survey responses



Comparisons with previous editions of SoF

SoF Year	Cost Improvements	Sales Growth
2022	13%	87%
1st year in which Covid-19 was included in State of Fashion		
2021	33%	67%
2020	23%	77%
2019	18%	82%
2018	19%	81%
2017	16%	84%

Source: BOF- McKinsey State of Fashion Survey 2023

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An overview of the foundational themes impacting apparel companies this year

In an increasingly uncertain and ever-changing world, we see four priorities that players in the fashion industry need to push in 2023

Global economy

1 Global fragility

Highest inflation in a generation

Rising geopolitical tensions, climate crises and sinking consumer confidence

Volatility of global economy

2 Regional realities

Uneven post-pandemic economic recoveries

Uncertainty in regional growth priorities and how to hone strategies tailored to a market

A. Build resilience in face of uncertainty

Consumer shifts

3 Two-track spending

Some consumers will postpone or curtail discretionary purchases; others will seek out bargains, increasing demand for resale, rental and off-price

Protect customer loyalty and avoid brand dilution

4 Fluid fashion

Changing consumer attitudes towards gender identity and expression

Blurring of the lines between menswear & womenswear

Requires rethinking their product design, marketing, and experiences

5 Formalwear reinvented

Shoppers rethinking how they dress for work, weddings and other special occasions

Offices and events will likely become more casual

Special occasions may be dominated by statement-making outfits that consumers rent or buy

B. Adapt to evolving demand

Fashion system

6 DTC reckoning

Mounting digital marketing costs puts viability of the DTC model into question

Brands will likely need to diversify their channel mix (incl. wholesale, marketplaces) to sustain growth

7 Digitial marketing reloaded

Recent data rules making customer targeting becomes less effective and more costly

Need to embrace creative campaigns and channels to maximize ROI on marketing spend and gather first-party data

C. Stress-test your channels for future growth

8 Tackling greenwashing

Increasing scrutiny on how brands communicate about their sustainability credentials

To avoid “greenwashing”, brands must demonstrate meaningful and credible change, while abiding by regulatory requirements.

9 Future-proofing manufacturing

Continued supply chain disruptions driving need for reconfiguration of global production

New models based around vertical integration, nearshoring and small-batch production, enabled by enhanced digitisation

10 Organisation overhaul

Execution of strategies will hinge on a company’s alignment around key functions

Need a new vision for what the organisation of the future will require

D. Align operations with key strategic topics

EVOLUTION OF EBAY INTO A TRUSTED ECOSYSTEM IN LUXURY & FASHION

TIRATH KAMDAR
GENERAL MANAGER OF GLOBAL LUXURY, EBAY

MIRELLA MULLER
SECTOR PRESIDENT E-RETAIL & FASHION, DHL GROUP

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BREAKOUT SESSIONS

PLEASE GO TO YOUR RESPECTIVE BREAKOUT SESSION IN THE ORDER YOUR HAVE SIGNED UP

DELIVERY EXPERIENCE

Discover innovative strategies and best practices for enhancing customer experience in the crucial last mile of e-commerce delivery

→ **360° Room** (Main Room - Right)

REVERSE LOGISTICS

Learn about ways to boost sustainability through reverse logistics while helping your brand expand your shopper base

→ **360° Room** (Main Room - Left)

DECARBONIZATION

Do a self-assessment of where you are in your sustainability journey and discover more ways to improve your logistics footprint

→ **Lobby** (Entrance)

DIRECT-TO-STORE

Uncover the power that end-to-end supply chain visibility, right down to the box level, brings to your business

→ **Mezzanine** (Upper Floor)

REFRESHMENT BREAK

14:15 – 15:00

RETAIL. YOUR WAY.

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EXPLORING THE FUTURE OF FLEXIBLE AUTOMATION IN LUXURY AND FASHION WAREHOUSES

GINA CHUNG
VP CORPORATE DEVELOPMENT, LOCUS ROBOTICS

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LOCUS

Leading the Digital Warehouse Transformation

Exploring the Future of Automation in Luxury & Fashion Supply Chains.

DHL Luxury & Fashion Forum | NYC

#1 Choice of Leading Global Brands

Healthcare | Industrial

115+ Customers

280+ Facilities

18 Countries

Retail / E-Comm | 3PL

Pioneers in Flexible Automation

2 BILLION PICKS

Record 230M Picks Peak Season

SERIES F ($117M)

2007-2014
LOCUS ORIGINS

Locus founders deploy Kiva, the first robot powered 3PL.

Amazon acquires Kiva prompting founders to start a new company.

2021 WAY
ACQUISITI

Accelerated exp
the Locus soluti
to support total
optimization.

Custon

LOCUS LAUNCH

Series B ($2

Series A ($15M)

May 9, 2023

DHL Supply Chain Expands Global Partnership With Locus Robotics To Deploy 5,000 AMRs Across Multiple Sites

Expansion deal represents the industry's largest AMR deal, building on supply chain leader's vision of scalability and digital transformation of its supply chain processes

2014 2015 2016 2017 2018 2019 2020 2021 2022 2023

LocusBots Deployed

Four Global Market Trends Driving Demand

Labor
labor **availability** & **cost** of labor

1

Volume
peak season & demand **fluctuations**

2

Speed
reduce **cycle times** and **deliver faster**

3

Agility
react effectively to disruptions & changes

4

80% OF WAREHOUSES ARE MANUALLY OPERATED

THE LOGISTICS TREND RADAR 6.0

Delivering insight today, creating value tomorrow.

INDOOR MOBILE ROBOTS

PROVEN RESULTS WITH FLEXIBLE AUTOMATION

SCALE FLEET
Up and down

LIVE
In 6-8 weeks

RaaS
All-inclusive monthly fee

ROI
In 6-8 months

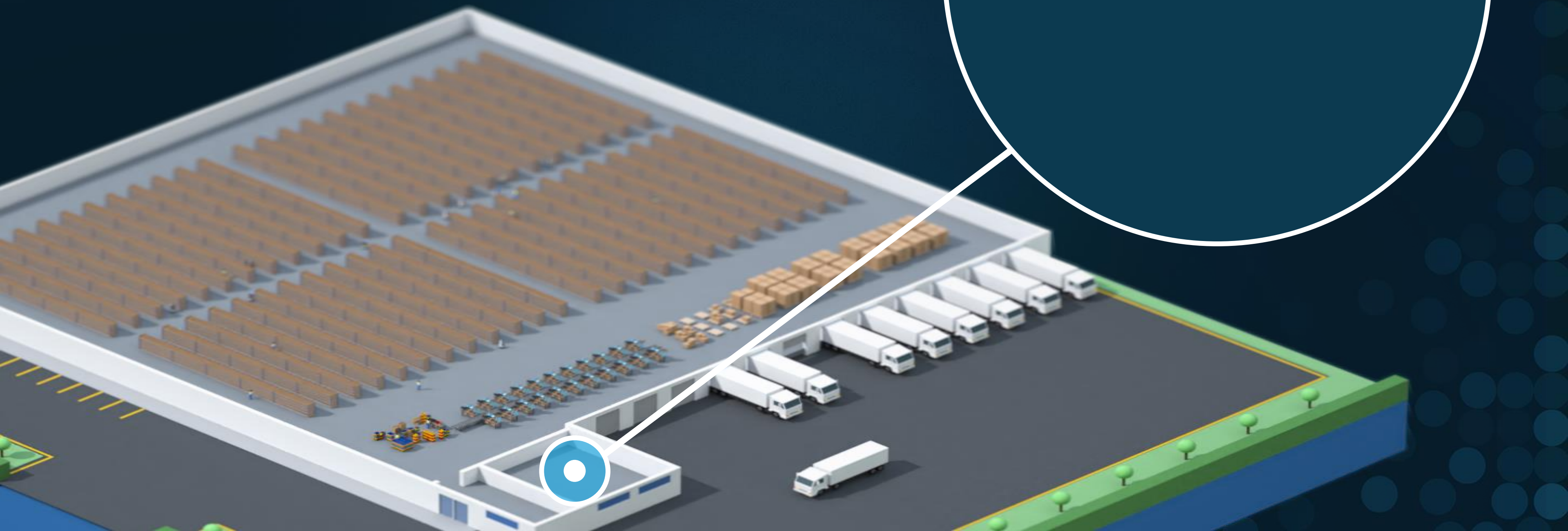
2-3x
Boost in Productivity

MINIMAL
Infrastructure requirements

STEP 1

WORKFLOW OPTIMIZATION

Dynamic, purpose-built algorithms optimize tasks from any WMS, clustering work to increase efficiency, create density, and shorten cycle times.



TASKS FROM ANY WMS:

KÖRBER
Manhattan Associates
BlueYonder
SAP
Softeon
zethcon

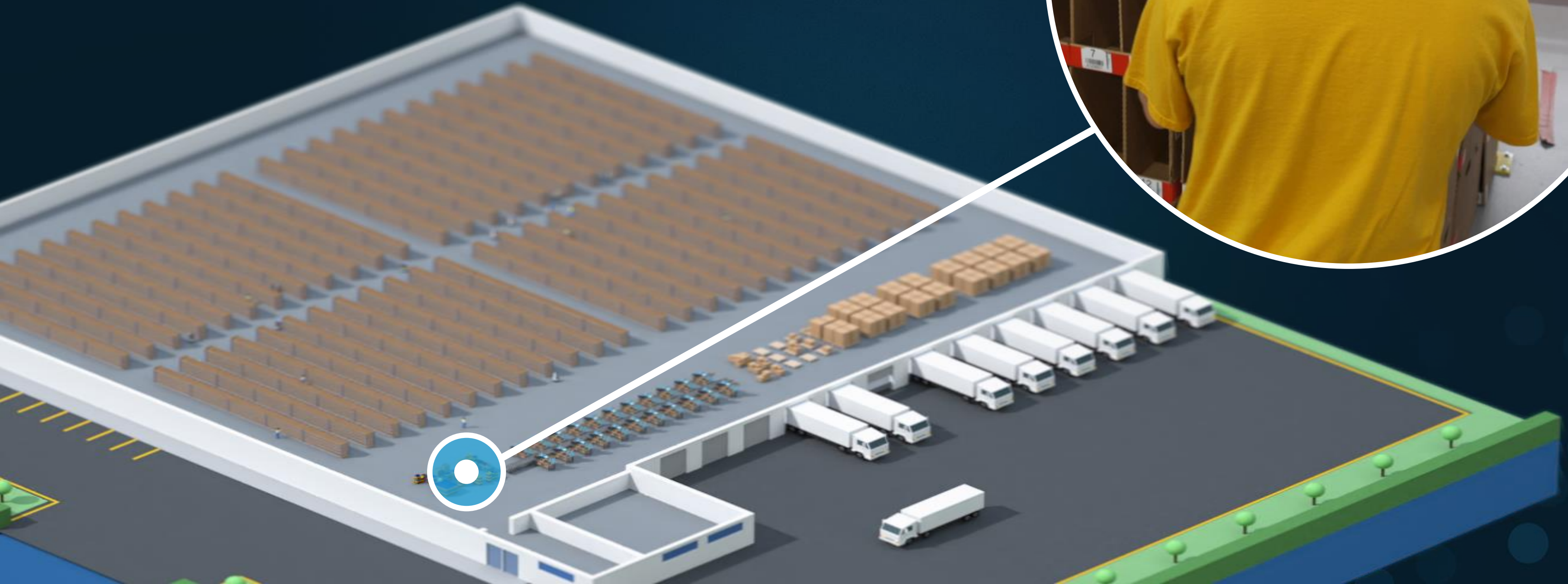
[YOUR CUSTOM WMS]

CONTINUOUS WORKFLOW OPTIMIZATION

STEP 2

INDUCTION

Locus intelligently selects optimal containers for the mission and directs induction on the bot to maximize efficiency.



FLEXIBLE, CONFIGURABLE PAYLOADS

RAPIDLY SCALE UP FOR PEAKS AND SURGES

Step 1

Peak Needs Scoped

Step 2

Bots Shipped

Step 3

Deployed in Minutes

Step 4

Kept or Returned

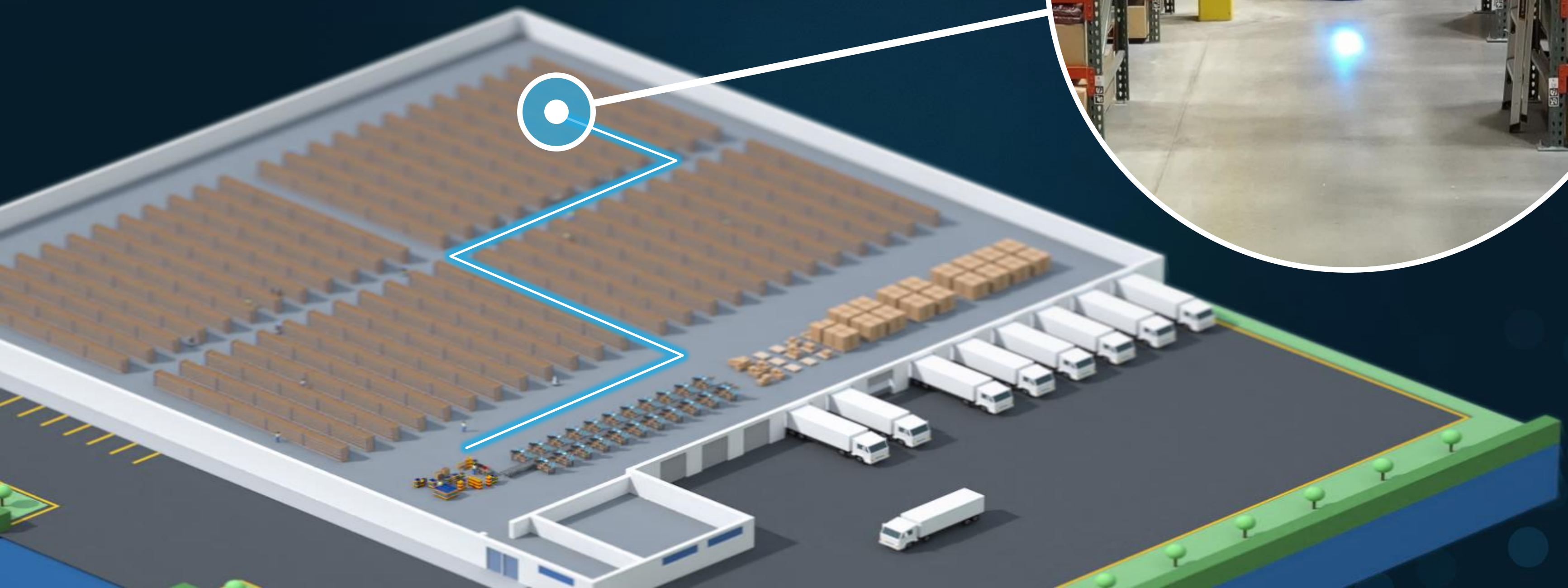
Step 5

Refurbished for New Sites

STEP 3

PATH OPTIMIZATION

LocusBots navigate autonomously throughout the warehouse, optimizing their path to minimize travel and maximize productivity.



FOR BOTH BROWNFIELDS & GREENFIELDS

STEP 4

DIRECTED PICKING

Associates are guided to pick the right item and place it in the appropriate container. Interleaved tasks also include putaway, and inventory counting.

MULTI-LANGUAGE

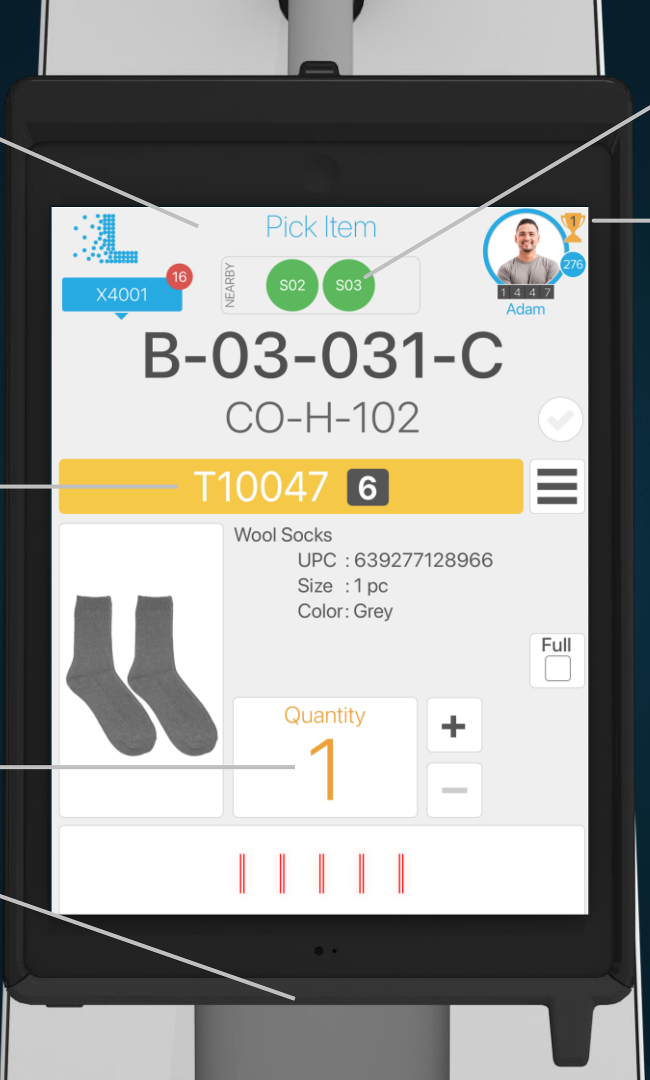
UI automatically adjusts to one of 25+ languages based on preference.

TOTE ID & POSITION

Shows worker which tote on the robot to place item

QUANTITY

INTEGRATED SCANNER



NEAREST ROBOT INDICATOR

Directs associate to the next task

PROPRIETARY GAMIFICATION

Motivating worker performance with clear goals as they work

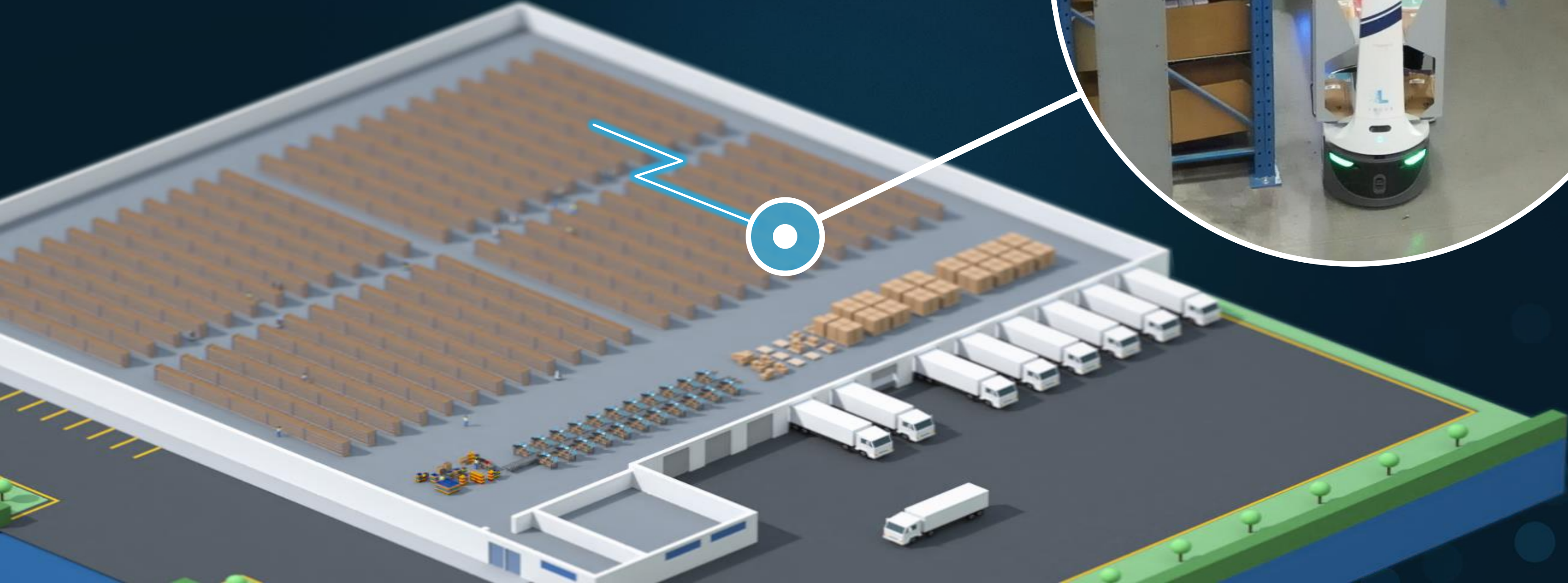
LOCUS TAG

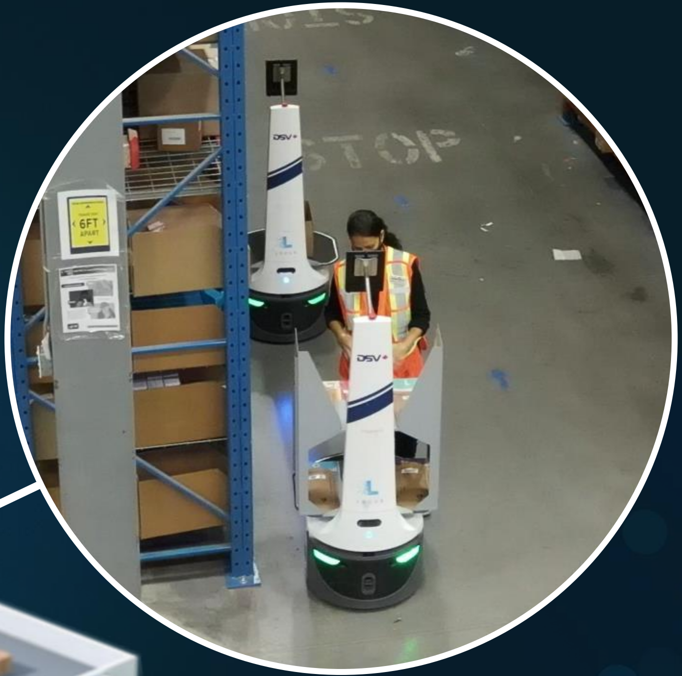
Patented technology identifies worker to robots

STEP 5

MULTIBOT COLLABORATION

Robots travel to the next location to work with a new associate. Locus's patented multi-bot approach delivers increased effective capacity per worker, higher density, and lower cycle time.



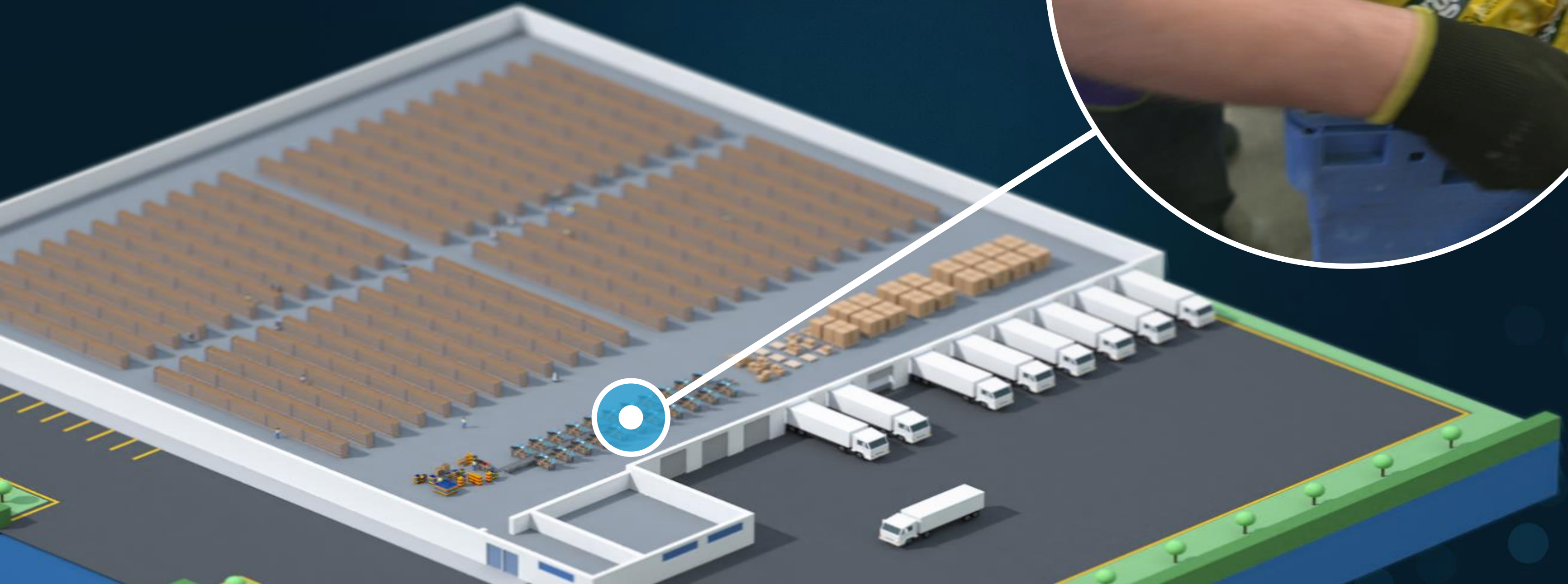


RIGHT JOB FOR THE RIGHT BOT.

STEP 6

SEAMLESS HANDOFF

Locus integrates with connected systems for sorting and packing, dropping off work at packing stations, conveyors, putwalls, and more.



ENABLING E2E AUTOMATION

LOCUS

CARHAR
LEVERA
FOR SUC

THANK YOU. QUESTIONS?

CONTACT US

Gina Chung
VP Corporate Development

gchung@locusrobotics.com
mobile: 312.504.7069

Melissa Valentine
VP Sales North America

mvalentine@locusrobotics.com
mobile: 214.924.3214

THE ROLE OF LOGISTICS IN THE LUXURY & FASHION VALUE CHAIN

PATRICIA GABRIEL
CHIEF SUPPLY CHAIN OFFICER, CAPRI HOLDINGS LIMITED

CHRISTOPHER ONISK
EXECUTIVE DIRECTOR GLOBAL OMNICHANNEL DISTRIBUTION ESTÉE LAUDER

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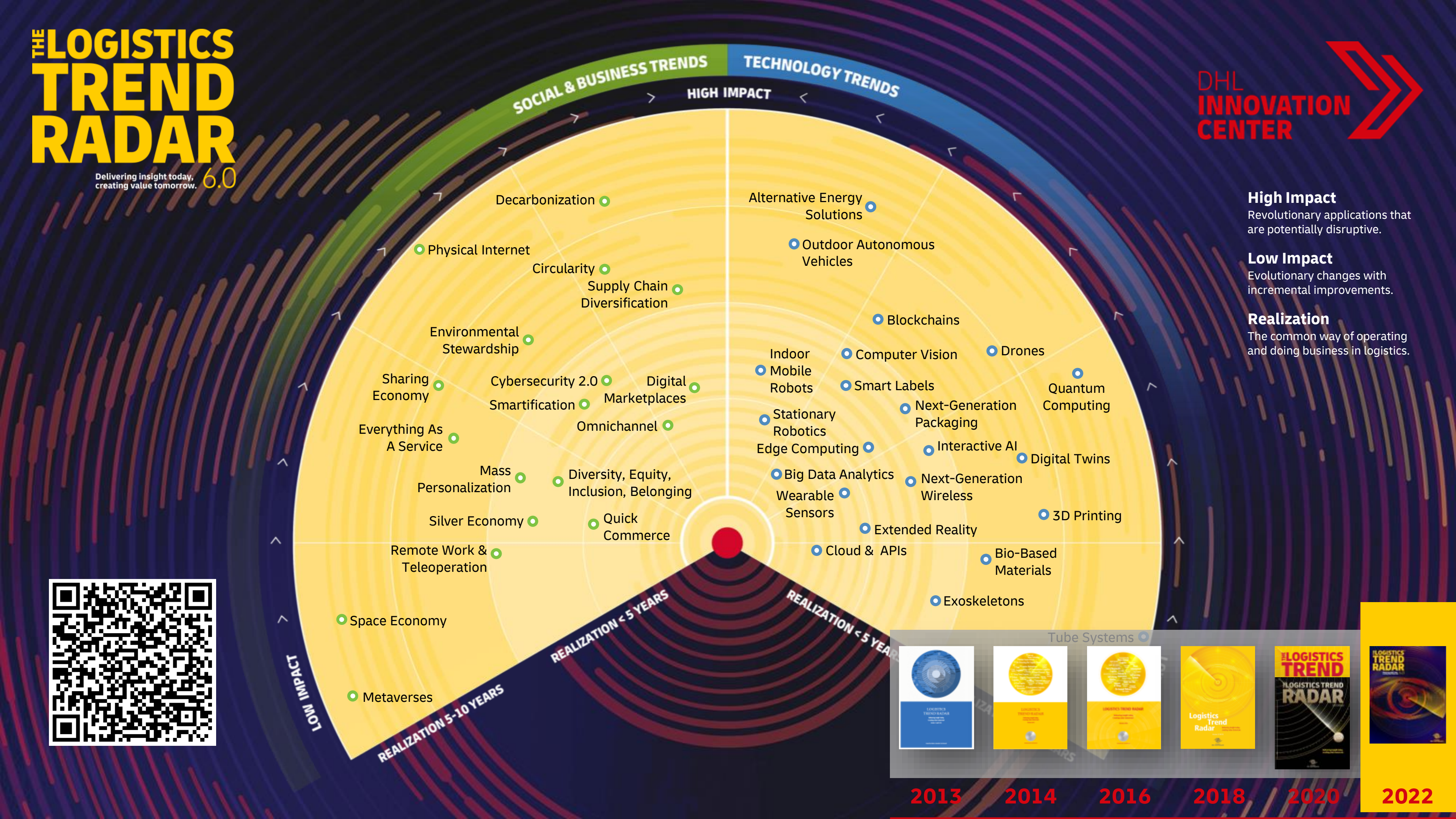
Troisdorf, Germany *Est.* 2007

MEA Mobile Innovation Center
Dubai, UAE Est. Oct 2021

Asia Pacific Innovation Center
Singapore *Est.* 2015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HIGH IMPACT
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REALIZATION < 5 YEARS
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REALIZATION < 5 YEARS
Decarbonization
Physical Internet
Circularity
Supply Chain Diversification
Environmental Stewardship
Sharing Economy
Cybersecurity 2.0
Digital Marketplaces
Smartification
Omnichannel
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Mass Personalization
Diversity, Equity, Inclusion, Belonging
Silver Economy
Quick Commerce
Remote Work & Teleoperation
Space Economy
Metaverses
Alternative Energy Solutions
Outdoor Autonomous Vehicles
Blockchains
Indoor Mobile Robots
Computer Vision
Drones
Smart Labels
Quantum Computing
Next-Generation Packaging
Stationary Robotics
Edge Computing
Interactive AI
Digital Twins
Big Data Analytics
Next-Generation Wireless
Wearable Sensors
3D Printing
Extended Reality
Cloud & APIs
Bio-Based Materials
Exoskeletons
Tube Systems
DHL INNOVATION CENTER
High Impact
Revolutionary applications that are potentially disruptive.
Low Impact
Evolutionary changes with incremental improvements.
Realization
The common way of operating and doing business in logistics.
2013
2014
2016
2018
2020
2022

SOME FINAL THOUGHTS ...

OMNI-CHANNEL DISTRIBUTION

LOGISTICS **IMPACT**

1. Enhance cross-channel fulfilment capabilities and rapid re-stocking capabilities.
2. Integrate systems for seamless inventory visibility.
3. Invest in a sophisticated planning system

GREEN & CIRCULAR LOGISTICS

LOGISTICS **IMPACT**

1. Re-evaluate supply chains towards C02 emissions & material circularity.
2. Partner with sustainable suppliers.
3. Adopt renewable energy transportation options

ENHANCED TRACK & TRACE CAPABILITY

LOGISTICS **IMPACT**

1. Integrate advanced tracking technologies into operations
2. Ensure full transparency & security along supply chain
3. Educate customers on tracking benefits.

LOCALIZED AND AGILE WAREHOUSING

LOGISTICS **IMPACT**

1. Shift from centralized to localized warehousing.
2. Build/close warehouses based on demand trends.
3. Implement adaptive warehousing tech.

WHITE-GLOVE & PREMIUM DELIVERY

LOGISTICS **IMPACT**

1. Ensuring a high level of service quality and personalization across cities.
2. Introduce luxury packaging options.
3. Specialized training for delivery personnel.

THANK YOU!

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