

LogiSYM

The Magazine for Supply Chain Executives

DECEMBER-JANUARY 2025

LOGISTICS OUTLOOK 2025

BY DR. MARCO TIEMAN

2025 HOLDS GREEN OPPORTUNITIES

BY TIM FOOTE

SUPPLY CHAINS IN 2025: OPPORTUNITIES IN TRANSFORMATION

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ROUNDTABLE SYNOPSIS: CONTAINERISED FREIGHT TRENDS, CHALLENGES AND OPPORTUNITIES IN 2025: HOW CAN PARTNERSHIPS RESOLVE THE CHALLENGES AND MITIGATE COSTS

BY BRETT MARSHALL

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EDITORIAL MESSAGE

Welcome to our combined December 24/January 25 edition of LogiSYM Magazine, and we hope our readers have emerged from the festive season refreshed for another exciting year in 2025. The theme for this edition is "Outlook 2025: The Year in Summary and What Our Experts Say We Can Look Forward to in the Coming Year."

As we write, the signals suggest that anticipated further port industrial disruption in the US will not emerge in what would be a very positive start to the year for the shipping industry and related supply chains. We discuss this and some further scenarios that emerged from a LogiSYM Roundtable event with Peter Sand from Xeneta in our article "Roundtable Synopsis: Containerised Freight Trends, Challenges and Opportunities in 2025: How Can Partnerships Resolve the Challenges and Mitigate Costs."

Further expected excitement with the inauguration of Donald Trump to the US Presidency will be followed with visibility of how the tariff landscape for 2025 and the future will truly look as part of a highly anticipated "First 100 Days" for the new President. We look further into how 2025 is shaping up with a thought-provoking exploration by Dr. Marco Tieman in his article "Logistics Outlook 2025" and a great in-depth piece examining the opportunities technology is creating in APAC, "Supply Chains in 2025: Opportunities in Transformation" by Stephanie Krishnan.

With our continued focus on sustainability, we are pleased to have Tim Foote's Green Corridor, now in its fourth year. In his article "2025 Holds Green Opportunities," Tim takes a look at those areas of supply chain making progress and those where there is a lag compared to potential. 2025 really needs to be a year of action, particularly from the small- and medium-sized enterprises playing such a valuable role in Tier 2 and below of our supply chains.

While thinking about the "age of disruption" continuing on many fronts for supply chains, I first heard the term "anti-fragile" listening to a High Performance Podcast (episode 28 November, 2024) with Aldo Kane, a former sniper in the British Royal Marines. Aldo referenced the work of Nassim Nicholas Taleb (in his book, *Anti-Fragile: Things That Gain From Disorder*) about going beyond resilience (emerging the same from events experienced) to anti-fragile (growing beyond events experienced).¹ Further investigating the concept of anti-fragile in a supply chain context revealed work covering the topic by Sean Culey, author of "Transition Point: From Steam to Singularity". "As we go through this massively disruptive period, fragile organisations are going to experience 'post-traumatic stress,' but anti-fragile ones will have 'post-traumatic growth': fragile companies will struggle, resilient companies will survive, but anti-fragile companies will thrive," Culey said, adding that the latter will be competing on business models and delivering external value".² A good topic for the times, and I look forward to further discussion of anti-fragile supply chains.

Brett Marshall
Editor-In-Chief of LogiSYM Magazine

¹Ex-Royal Marine: My Life as a Sniper, Managing Fear & Finding Adventure | Aldo Kane, @HighPerformancePodcast, www.youtube.com/@HighPerformancePodcast, 28 November, 2024

² "Become 'Anti-Fragile' To Go Beyond Resilience or Robustness and Truly Transform Your Business," Nicholas Watson, Group-IPS, www.group-ips.com, 5 May, 2023



LSCMS PRESIDENT'S MESSAGE

Navigating Challenges and Embracing Opportunities: Supply Chains in 2024 and Beyond

As we move through 2024, supply chains globally continue to grapple with significant challenges. Geopolitical tensions, rising costs, and ongoing disruptions in global transportation networks have forced businesses to rethink their strategies. The volatile economic landscape, coupled with growing concerns around sustainability and labour shortages, has underscored the need for resilience and agility in supply chain operations.

However, within these challenges lie substantial opportunities for innovation and growth as we look toward 2025. Digital transformation is accelerating, with advanced technologies such as AI providing tools to enhance visibility, predictability, and efficiency, and with the global trade landscape being what it is, companies are investing in more localised supply chain models to mitigate risks, reduce lead times, and support sustainability goals.

One piece of good news is that the demand for skilled professionals who can navigate this complex environment is at an all-time high, presenting a chance for the industry to attract fresh talent and foster new ideas. Collaboration across ecosystems—spanning suppliers, logistics providers, and technology partners—will also be critical to addressing shared challenges and unlocking potential.

2025 will be a year of recalibration, where businesses that embrace change, innovate, and focus on building stronger, more adaptive supply chains will thrive. As an industry, we must seize these opportunities to not only overcome current hurdles but also set the foundation for long-term success in an evolving global market.

The road ahead is demanding, but it is equally full of promise. Let's work together to shape the future of supply chains.

Raymon Krishnan, FALA, FCILT, CLP
President
The Logistics & Supply Chain Management Society



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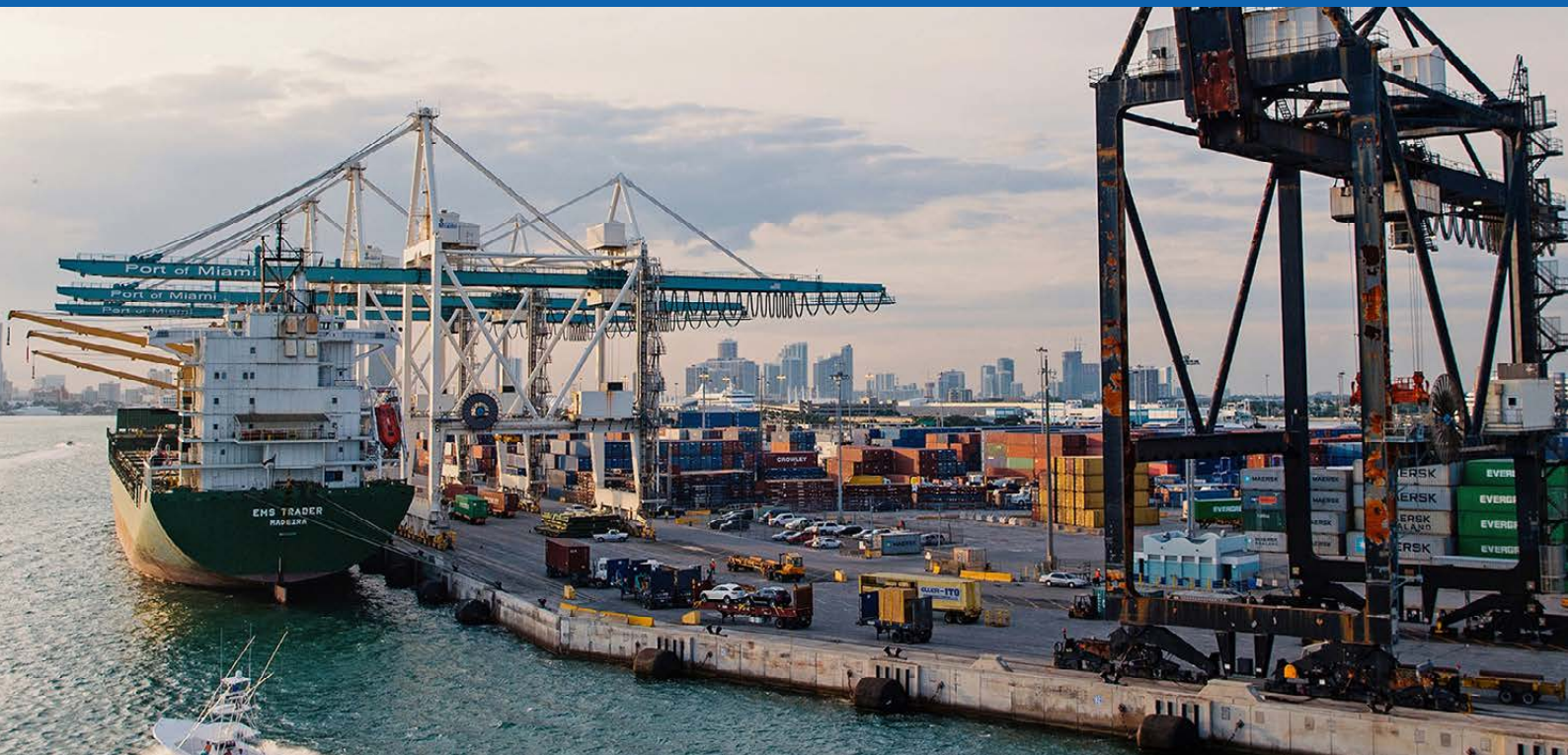
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Swisslog's 'People First' philosophy wins them one of Asia's Best Companies to Work For 2024.

By Swisslog

Swisslog's 'People First' philosophy wins them one of Asia's Best Companies to Work For 2024. Kuala Lumpur, December 12, 2024—Swisslog, a leading provider of best-in-class warehouse automation and software, is proud to announce that it has been recognised as one of HR Asia's Best Companies to Work for in Asia™ 2024 (Malaysia Chapter). This prestigious award underscores Swisslog's unwavering commitment to cultivating a people-centric culture that drives growth,

innovation, and success in the organisation. "This award is more than just a title," says Steven Xie, Head of Southeast Asia at Swisslog. "It's a testament to the dedication and passion of our incredible team here in Southeast Asia. Our company culture, built on a strategic approach to being a 'People First' organisation, is the driver of this achievement." Debbie Tan, Regional Southeast Asia Head of People & Organisation at Swisslog, said, "In today's competitive talent market,

this recognition fuels our ambition to remain an 'Employer of Choice' and aligns with our strategy to attract and retain top talent." A place where purpose meets passion. Swisslog's people-first approach creates an inclusive and empowering environment where employees are valued and purpose meets passion. Regular one-on-one meetings focused on individual growth and the Be Heard global employee engagement survey are examples of how Swisslog has created a safe

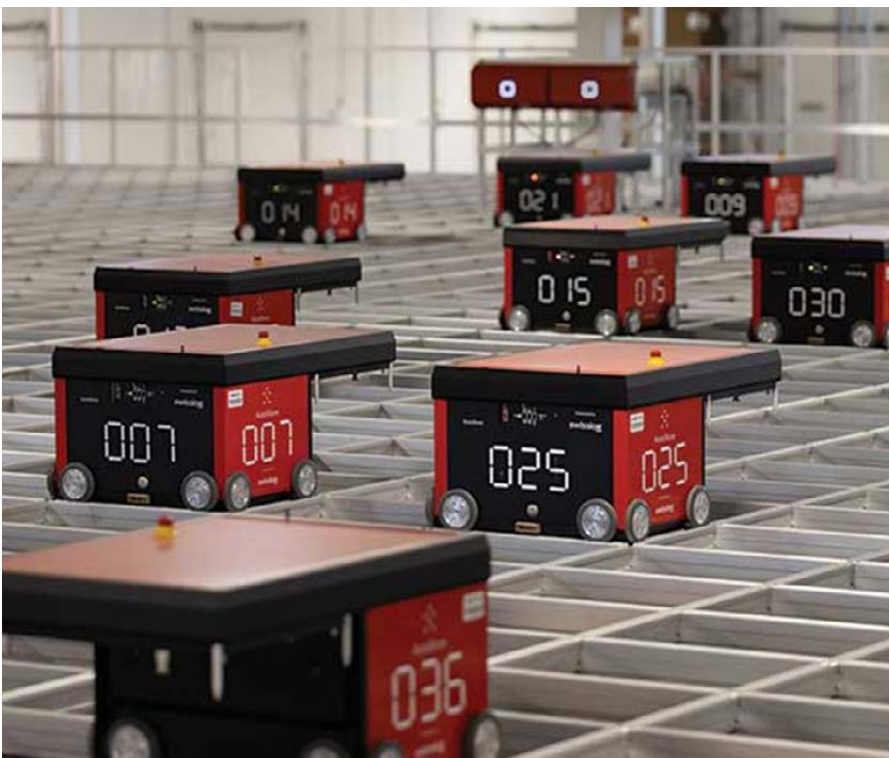


space for bottom-up feedback, ensuring that every voice is heard no matter the role or seniority. Other initiatives like the Swisslog Hackathon encourage global mobility and cross-cultural collaboration. Employees across regions and departments work together as "One Swisslog," exchanging ideas and expertise to deliver innovative solutions. These

efforts align with Swisslog's commitment to living their company values: empowering employees to "Do What You Love and Be Great at What You Do." Swisslog's purpose is to keep the supply chain humming. Through its innovative solutions and dedication to building lasting relationships, Swisslog continues its legacy as a trusted partner for businesses.

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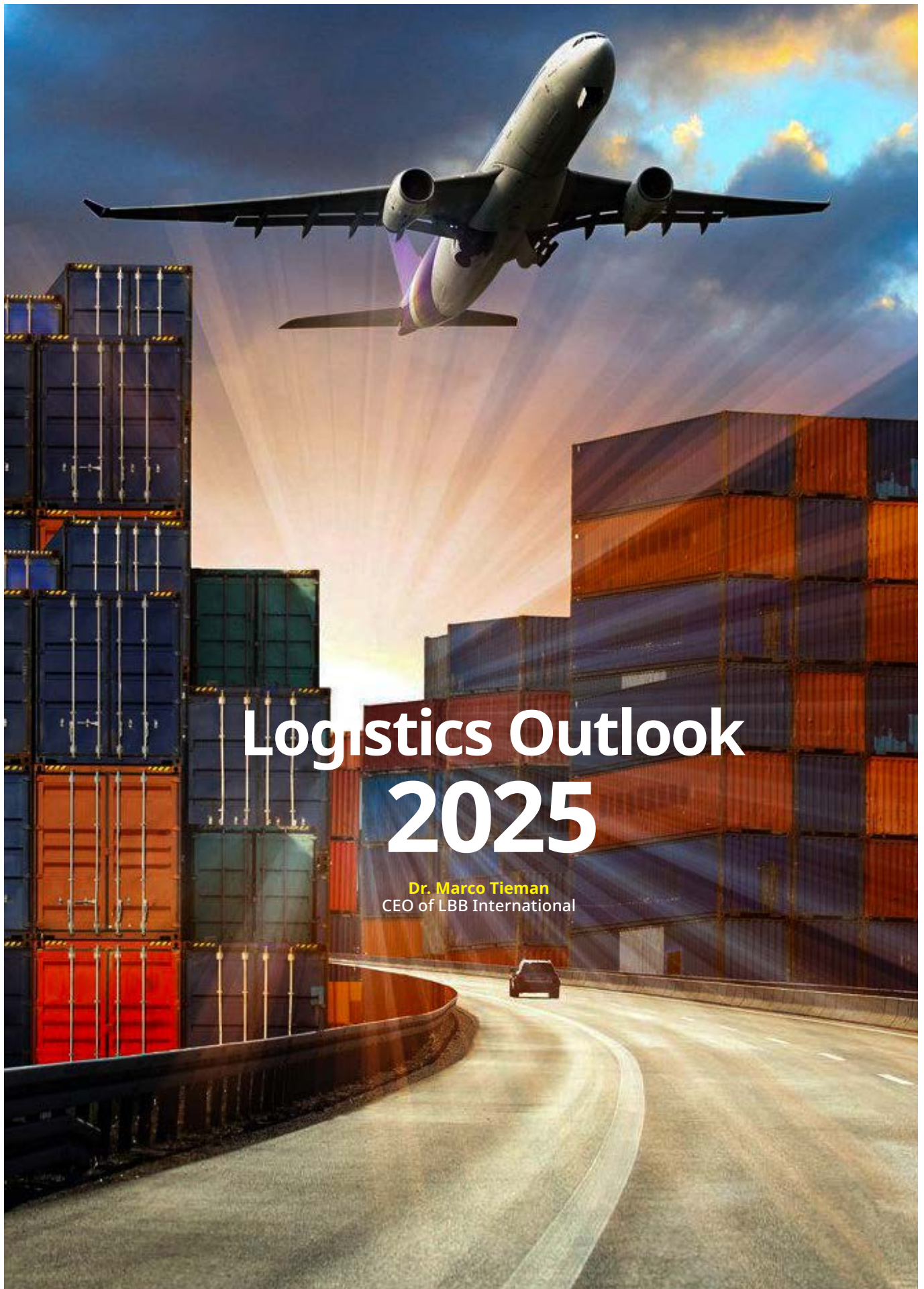
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Logistics Outlook 2025

Dr. Marco Tieman
CEO of LBB International



Introduction

2024 was a year marked by economic uncertainties, including significant elections in the USA and Indonesia and escalating conflicts in Europe and the Middle East. Despite ongoing economic uncertainty in Europe and the USA, which impacts the global economy, it is essential to look forward to 2025 from a logistics and supply chain perspective. Four logistics and supply chain trends will be particularly important for 2025:

De-industrialisation of Europe benefiting Asia and the Middle East

Investment in digitalisation and automation within the logistics industry

The need for end-to-end

halal supply chains for brand owners

The greening of urban logistics

The sections below will discuss these four trends in more detail.

2. De-industrialisation of Europe Benefiting Asia and the Middle East

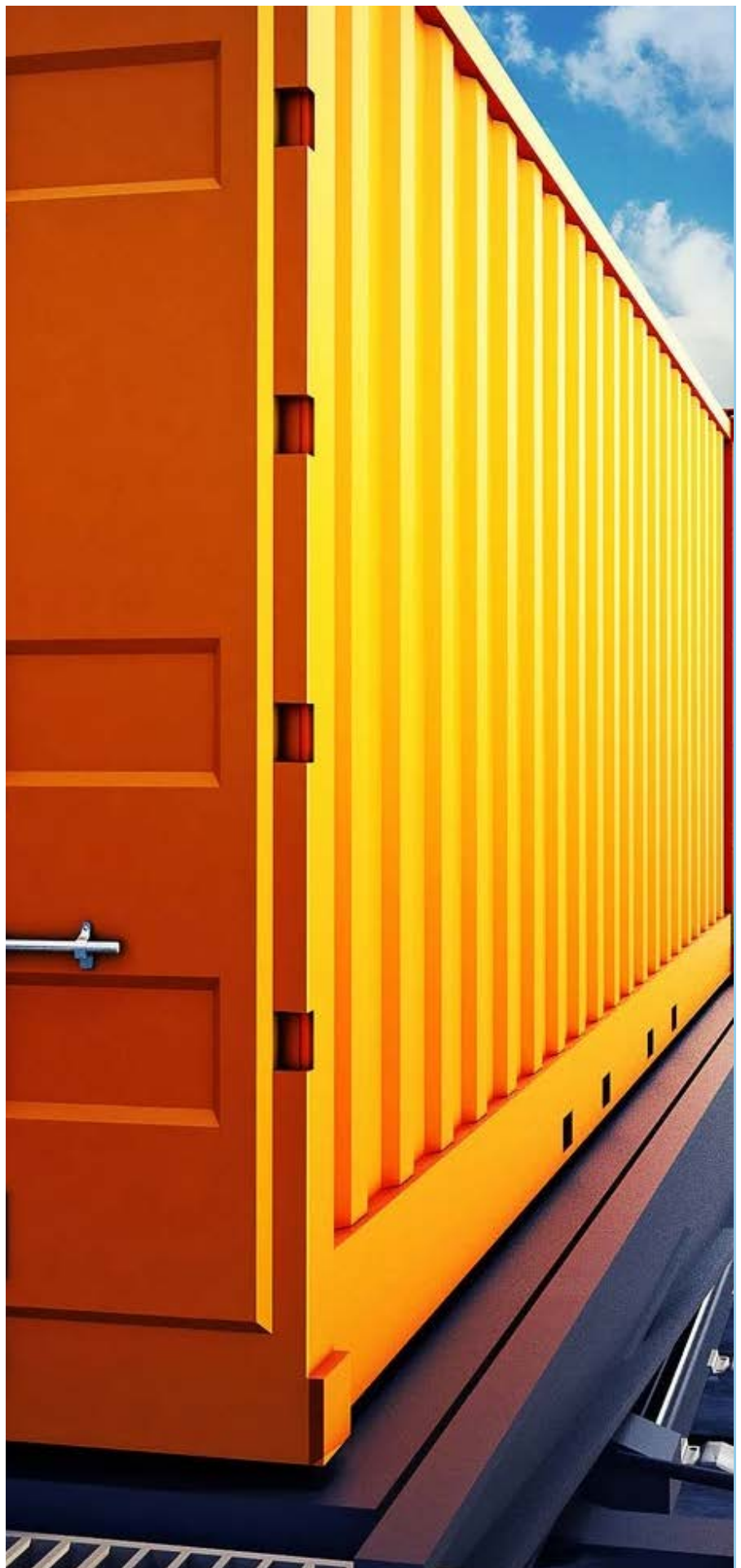
The European Union (EU) has been a significant producer of agri-food and various industrial and consumer products for the world. However, stringent climate change-related laws and regulations implemented by the EU in Brussels are expected to impact agricultural production and the manufacturing industry in Europe. These regulations will force farming and manufacturing

to reduce production, with many [BM1] farmers and manufacturers being incentivised to move operations out of Europe. Asia and the Middle East are poised to benefit from this shift, strengthening their industrial clusters to offset the reduction in agricultural production and manufacturing in Europe. As Asia and the Middle East are also committed to improving cleaner manufacturing practices and increasing the use of green energy sources, there are opportunities for a new generation of industrial and logistics zones developed in Asia and the Middle East where sustainability is addressed by design: linking supply chains to other ecologically fitting supply chains and clusters that increase the business value chain significantly.

These changes will also shift logistics gravity further to Asia and the Middle East, weakening Europe's significance as logistics hubs. Consequently, Asia and the Middle East will become critical production and logistics hubs, dominating international trade flows.

3. Investment in Digitalisation and Automation

The logistics industry has historically lagged in digitalisation and automation compared to other industries. This is especially true in Asia and the Middle East, where logistics operations have heavily relied on cheap labour and paper-based documentation flows. However, the industry will catch up in 2025 and beyond by introducing new-generation distribution centres equipped with automated pallet warehouses and robotics, improving efficiency through process standardisation and automation, thereby significantly reducing manpower in warehouse operations. [BM2] Digitalisation will replace paper-based documentation flows, increasing logistics service efficiency and facilitating better tracking and tracing of goods flows. Important drivers for



digitalisation in logistics and supply chain management include artificial intelligence and machine learning. In 2025, we will see an increased adoption of advanced demand forecasting, inventory management, and route optimisation, significantly improving logistics and supply chain performance as well as risk management. In digitalisation and automation will allow developing countries to reduce logistics costs and lead times.

4. Need for End-to-End Halal Supply Chains for Brand Owners

Halal supply chain management is an emerging requirement for halal food, cosmetics, and pharmaceutical supply chains. Since 17 October 2024, Indonesia has mandated halal certification for food production and their supply chain partners, extending from source to point of consumer purchase: retail, café, catering, restaurant, and e-commerce. By 17 October 2026, this law will extend to the cosmetics and pharmaceutical industry and their supply chain. Other Muslim-majority countries are expected to follow Indonesia's example in the coming years.

Leading food brand owners, including producers and restaurant chains, have already implemented halal supply chain management. Halal assurance is implemented from source to point of consumer purchase, protecting halal integrity for Muslim consumers and corporate reputation in Muslim countries. In addition to halal-certified warehouses and transport, seaports and airports will increasingly implement halal-compliant terminal operations to provide proper identification of halal cargo, segregation of halal cargo from non-halal cargo, and dedicated halal inspection areas.

5. Urban Logistics is Going Green

There is both international and national political pressure to green urban cities toward zero-

emission freight logistics and last-mile delivery. Local governments should promote urban logistics initiatives by bringing the right stakeholders together and creating incentives, acting as a pull factor to collaborate in urban logistics projects. Cleaner vehicles are essential for city deliveries, preferably using bio-gas, bio-diesel, hydrogen, or electricity. In many developing countries, however, a necessary first step is to ban old diesel trucks from entering urban areas.

Logistics service providers will play a crucial role in consolidating and efficiently managing urban freight flows, while governments must foster an environment conducive to collaboration and innovation. By focusing on the largest freight flows, such as construction, HORECA (hotel, restaurant, and café/catering), and waste, and by promoting cleaner vehicle technologies and urban consolidation centres, cities can make significant strides towards greener logistics. The future of urban logistics lies in our ability to collaborate, innovate, and continuously improve, setting the stage for a greener and more sustainable urban environment.



6. Conclusion

2025 will be an exciting year for logistics in Asia and the Middle East, further increasing their dominance as production and logistics hubs. Major investments in the logistics industry and modernising logistics operations through digitalisation and automation are expected. While there will be a significant reduction in unqualified, cheap physical labour, there will be a high demand for well-educated logistics talents to support the industry's migration from traditional storage and transportation activities to more advanced logistics services supported by technology.

As brand owners implement end-to-end halal supply chains to better serve Muslim markets, the logistics industry has opportunities to support

brand owners in organising their halal supply chains. Besides asset-heavy halal logistics solutions like halal transportation, storage, and terminal operations, there is a need for more advanced halal logistics services like halal 3PL and 4PL solutions.

There is both international and national pressure to green urban logistics. Urban logistics requires collaboration with local governments and competing logistics service providers. Logistics service providers that foster a collaborative mindset and invest in green logistics will find numerous opportunities in facilitating urban logistics. I wish you a great logistics year ahead and look forward to meeting you at one of the LogiSYM symposia in 2025.



Marco Tieman
CEO of LBB International

Dr. Marco Tieman is the CEO of LBB International, a supply chain strategy consultancy and research firm, advising companies and governments on supply chain analysis, supply chain design, and market research. He is the organising chairman of LogiSYM Indonesia and Malaysia. He is also an adjunct professor with Saito University College in Malaysia and a senior fellow with IPMI International Business School in Indonesia. He is the author of 'Halal Business Management: A Guide to Achieving Halal Excellence'.

Supply Chains in 2025: Opportunities in Transformation

By Stephanie Krishnan

Associate Vice President, Manufacturing, Retail, and Energy
Insights, IDC Asia/Pacific

Supply chains have long been touted as the backbone of global commerce, quietly enabling the availability of goods and services that consumers and businesses rely upon daily. However, in 2025, the spotlight has shifted, with supply chains being not only enablers of commerce but also critical levers for geopolitical, economic, and technological strategy as companies seek to balance requirements for efficiency and cost management with shifting demand, supply resiliency, and regional adaptability.

In the Asia-Pacific region, this shift presents both opportunities and challenges that businesses must navigate with equal parts optimism

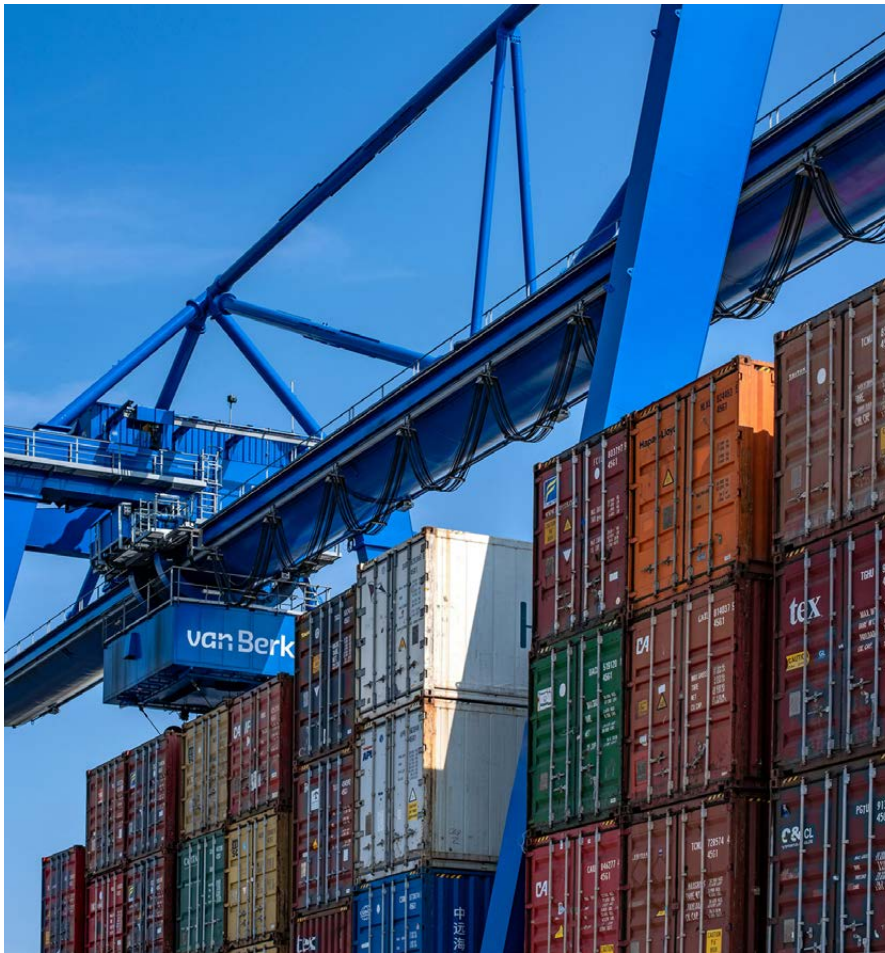
and realism. IDC identifies two key trends—AI and cloud technologies—that are driving transformative change in supply chain operations and addressing these challenges. As companies grapple with increasing geopolitical uncertainty, volatile demand patterns, and the push toward localisation, leveraging these technologies provides a roadmap for achieving agility and resilience. Organisations are seeking to direct their investments toward these trends to create smarter, more adaptable supply chains equipped for the challenges ahead.

Cloud Solutions: Building the Foundation for Agility

We have long heard that cloud

technology is reshaping how businesses in the Asia-Pacific manage their supply chains; however, the focus is now on modernising supply chain operations, areas that have often been secondary to front-office digital investments. As businesses in the Asia-Pacific face growing complexity, cloud adoption provides a pathway to integrate back-office systems with front-office platforms, ensuring end-to-end visibility and better operational coordination. With the need for real-time data, resilience, and compliance at the forefront, this shift is critical to achieving the responsiveness and efficiency required to remain competitive in 2025.

As a result, IDC predicts:



By 2026, 45% of A2000 supply chain organisations will have migrated to cloud solutions, improving inventory velocity by 5% and making small and medium-sized businesses competitive with larger players.

An example is Linfox, a logistics provider in Asia-Pacific, which adopted a cloud-based warehouse management system to reduce deployment times from one week to one day. This rapid implementation allows Linfox to bring new warehouses online quickly, improving lead times, enhancing customer onboarding, and maximising warehouse utilization. These improvements directly support its strategic goals of growth, efficiency, and sustainability under its “Leading the

Way 2025” initiative. For smaller logistics providers and SMEs, adopting similar cloud solutions can level the playing field by enabling faster operational scaling and more efficient resource management, allowing them to compete more effectively with larger players like Linfox.

Practical Considerations:

- **Start with Modular Adoption:** Companies can adopt modular cloud platforms to address specific supply chain challenges, such as order management or inventory tracking, before expanding to broader functionalities. This phased approach enables quicker time-to-value while providing the time and flexibility needed to invest in training and change

management, both of which are critical for successful technology implementation.

- **Leverage Funding Programs:** Many governments in the region offer grants to support cloud adoption. For example, Singapore’s Productivity Solutions Grant (PSG) provides funding for pre-approved IT solutions, and Malaysia’s SME Digitalisation Grant covers up to 50% of eligible costs.

- **Focus on Data Governance:** Centralising data in the cloud improves decision-making but requires strong governance to ensure consistency and security. Companies should inventory critical data sources, set validation rules, and assign ownership for accuracy. Effective governance enables advanced analytics, AI-driven insights, and operational efficiencies, supporting predictive decision-making and risk management. For SMEs, these practices ensure data reliability, build stakeholder trust, and meet compliance requirements, such as PDPA and GDPR, in a regulated landscape. Robust data governance is essential for leveraging cloud technologies effectively in modern supply chains.

Cloud adoption provides the foundational infrastructure for advanced supply chain capabilities, such as AI-driven analytics, real-time visibility, and predictive decision-making. In 2025, supply chain participants must act decisively to build scalable environments that integrate seamlessly with existing systems. Prioritising

the migration of data-heavy functions like inventory management and logistics, where real-time data is critical, ensures compatibility with future technologies like AI and IoT. Establishing clear workflows for collecting and validating high-quality data is essential for leveraging AI effectively. By viewing cloud adoption as a step toward digital maturity, businesses can create flexible, future-ready supply chains that deliver immediate efficiencies and enable long-term innovation.

AI Technologies: Enhancing Decision-Making and Risk Management

Artificial intelligence (AI) is transforming supply chain management by enabling organisations to analyse complex data and make proactive, risk-aware decisions. As risk mitigation becomes a critical driver for supply chain transformation, leaders

seeking to enhance their ability to simulate, assess, and predict risks must first establish a centralised data ecosystem. According to IDC's 2024 Global Supply Chain Survey, the top three actions Asia/Pacific supply chain organisations are taking to mitigate supply chain risks are improving supply chain visibility, enhancing agility, and better aligning supply chain design with operations (refer to Figure 1)—actions that AI directly supports by integrating data and enabling real-time insights. This involves consolidating information from internal systems—such as ERP, warehouse management, and logistics platforms—and external sources like supplier networks, market trends, and environmental data. Achieving this requires seamless integration of diverse data streams through APIs and data lakes, ensuring real-time access to high-quality, actionable data.

Figure 1: Risk Mitigation in Asia Pacific Supply Chains

In parallel, supply chain teams must prioritise robust data governance frameworks to standardise formats, maintain consistency, and ensure compliance with regulations like Singapore and Malaysia's PDPA or Australia's Privacy Act. Effective governance lays the foundation for accurate analytics and reduces risks associated with incomplete or inconsistent data.

Finally, organisations need to implement predictive modelling capabilities, leveraging machine learning and GenAI to conduct scenario-based risk simulations. These tools enable supply chain professionals to anticipate and mitigate disruptions caused by factors such as geopolitical instability, extreme weather events, or unexpected demand surges. For example, in the Asia-Pacific region, this could mean using AI to model the impact of typhoons on supply routes in the Philippines or forecasting delays caused by regional trade restrictions. By

What steps are you taking to mitigate risk in your supply chain?



Source: IDC 2024 Supply Chain Survey, n Asia/Pacific =843



embedding these capabilities, supply chain leaders can move beyond reactive problem-solving to a proactive, risk-aware approach, driving resilience and adaptability across their operations.

As a result, IDC predicts:

Organizations will deploy a GenAI-powered platform that combines data to simulate, assess, and predict supply chain risks.

Practical considerations:

• D- Define Clear Objectives and Use Cases:

Supply chain leaders must start by identifying specific challenges they aim to address with AI-powered risk management. Examples might include forecasting the impact of supplier disruptions, optimizing inventory during demand surges, or mitigating delays caused by weather or geopolitical events. Prioritising these use cases ensures that investments align with strategic objectives and deliver measurable outcomes.

• **Stakeholder Alignment and Training:** Introducing AI tools often requires a shift in decision-making processes. Supply chain professionals, from procurement managers to logistics planners, need to understand how AI-driven insights can inform their daily operations. Businesses should allocate resources for training programs that focus on interpreting AI outputs, such as scenario-based simulations, and applying them to operational decisions.

• **Co- Establish laborative Processes:** AI risk management systems rely on input from various supply chain stakeholders, including suppliers, third-party logistics providers, and regional managers. Creating a framework for cross-functional collaboration is critical to ensuring data accuracy and timely action based on AI insights. Regular communication and shared dashboards can facilitate alignment.

• **Security and-SecurityCompliance:** Supply chains handle sensitive data, including supplier contracts, customer information, and operational metrics. AI solutions must be aligned with regional and global data protection regulations. Businesses should invest in robust security measures, such as end-to-end encryption and user access controls, to protect data while ensuring compliance.

The opportunities presented by cloud and AI adoption in 2025 are not merely about adopting new technologies but about building integrated, adaptable supply chains that address current challenges while positioning for future growth. Businesses must focus on aligning their technology investments with clear operational objectives, such as improving lead times, enhancing resilience, and meeting sustainability targets. Modular cloud implementations can deliver immediate benefits while providing the flexibility to scale and integrate AI capabilities, such as predictive analytics

and scenario-based risk modelling.

Collaboration among supply chain stakeholders is crucial for maximising benefits. Shared data platforms and real-time visibility tools enhance decision-making, while upskilling teams ensures effective use of advanced technologies. Regional support, including government funding programs, can help offset implementation costs and speed up transformation.

2025 demands decisive action due to rapid changes in supply chain dynamics driven by geopolitical tensions and shifting consumer expectations. Businesses that delay risk falling behind competitors who are already leveraging cloud and AI to boost efficiency and resilience. With regional funding availability and advancements in scalable technologies, now is the right time to invest in transformation. By acting promptly, organisations can not only shore up vulnerabilities but also seize emerging opportunities, fostering a resilient culture that prioritises innovation and informed decision-making for sustainable growth.



Stephanie Krishnan

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Stephanie Krishnan is an associate VP responsible for producing, developing, and growing the IDC Manufacturing and Energy Insights programs in Asia/Pacific. Within Manufacturing Insights, Stephanie conducts supply chain and Industry 4.0 research that supports clients with global sourcing (profitable proximity and sustainable outcomes), transportation, logistics, warehousing, and more. In addition, her contributions to subscription products and custom research span ecosystems, value chains, and the supply chains of industrial industries. In this role, she delivers a research agenda that supports technology buyers in their strategies and buying decisions as well as vendors in terms of market trends and intelligence.

Stephanie has more than 20 years of experience in manufacturing and supply chains. She has a diverse background that complements her years in academia and professional development, consulting in multiple countries such as Australia, Singapore, Malaysia, the United Arab Emirates, and Hong Kong. In addition, she has advised start-ups in process automation and technology adoption, particularly in supply chain management. Prior to IDC, Stephanie was a consultant on economic and supply chain market research in Asia/Pacific and the Middle East.

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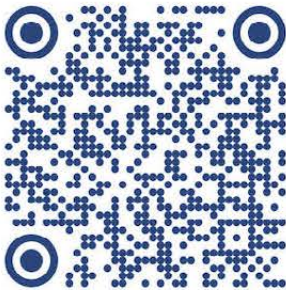
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Roundtable Synopsis: Containerised Freight Trends, Challenges and Opportunities in 2025: How Can Partnerships Resolve the Challenges and Mitigate Costs

By Brett Marshall
Editor-in-Chief of LogiSYM Magazine





The LSCMS Shippers Council met on 27 November. The focus for the meeting centred around containerised freight trends, challenges, and opportunities in 2025.

The group of senior logisticians was provided with excellent insights from Peter Sand, Chief Analyst with Xeneta.

Referring to Xeneta's Market Rate Outlook 2025, Peter analysed the Far East-Mediterranean route, projecting long-term rates coming off an August peak to trend lower at 6% from where it is today, albeit with continued influence of

Red Sea-related issues. On Trans-Pacific with a 2-year perspective, while short-term rates particularly spiked through Q3 2024, the 3-month average for long-term rates has remained lower.

2025 will see 3% more boxes moved, but TEU miles could drop 11% without Red Sea disruption.

Peter discussed potential Trump impact in 2025 with comparisons to the first Trump presidential term, with similar patterns in 2016 of the front-loading and inventory build currently. TEU demand was at a low point in 2022 and peaking in Expected 2024, with a slight drop in Forecast 2025.

Far-East-Mediterranean 2025 TEU miles will continue to reflect the influence of the Red Sea with limited upside for containerhips in scenarios considered between "No Return" and "Full Return."

The geopolitical and regional disputes that influenced 2024 will continue in 2025. Peter noted that in the US, the ILA has yet to sign the agreed pay deal, and 15 January, 2025, could see a repeat of the "right to strike" exercised.

Global container volumes peaked in August 2024, and despite a slowing of demand, remained the highest September on record. TEU capacity is showing 10%



growth in 2024 and expected at 6% in 2025. While there are major changes to the alliances taking place in 2025, MSC alone is projected to add nearly 600,000 TEUs.

Peter wrapped up his presentation looking through the ESG lens; there has been a significant increase in carbon emissions on the back of Red Sea disruption. There are no further regulatory changes anticipated in 2025.

The presentation was then followed by an interactive panel session, moderated by the President of the Logistics and Supply Chain Management

Society, Dr. Raymon Krishnan, and with Peter Sand joined by fellow panellists Jaya Moorthi, VP Global Procurement - Logistics & Industrial, Schneider Electric, and Stefan Pun, General Manager - Regional Logistics and Trade Facilitation, Denso. It was an interactive and thought-provoking session, with some of the key takeaways being:

- Adapting to the mindset of “polycrisis” and preparing to future-proof supply chains through agility to adapt and mitigate, with a clear understanding of both risk and probability, and quickly pivot to mitigating options available;

- The need to look at supply chain costs from an end-to-end perspective rather than shipment-ensure costs alone;

- Ensure there is a clear understanding of trigger points to take action.

- Volume alone can no longer be the sole determinant of partner relationships, as strength and trust with partners are key to addressing the polycrisis.”.





Brett Marshall
Editor-In-Chief
LogiSYM Magazine

Brett is an accomplished transformation leader with 35 years in logistics, supply chain, and quality, including 30 years in the pharmaceutical industry. He is passionate about quality, safety, and sustainability, dedicated to making healthcare accessible while ensuring product integrity and patient safety. Brett cultivates a strong organisational culture by defining clear purpose, setting strategic objectives, and implementing performance management techniques. He is experienced in cross-cultural leadership, process management, and regulatory standards. He has worked in Australia, Indonesia, Thailand, the Philippines, Bangladesh, and Singapore.

Brett is a Certified Sustainable Supply Chain Professional, a member of the GDP-UCI Advisory Board, on the Advisory Board for the Logistics and Supply Chain Management Society of Singapore, a member of the Parenteral Drug Association, a member of the International Society of Pharmaceutical Engineers (ISPE), and a member of ISPE's Women in Pharma and APAC GAMP 5 Communities of Practice.

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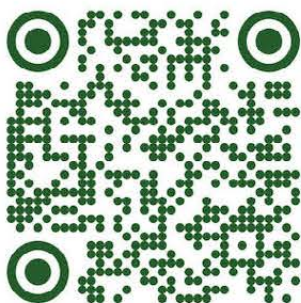
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2025 Holds Green Opportunities

By Timothy Foote

Director Transportation and Network APAC at Asendia
and Founder of Susymbio



Ports additionally are speeding ahead with greening their processes.



Since beginning the Green Corridor in 2021, I've enjoyed putting together an annual sustainability roundup. This year I'll be highlighting again where our green transition is gaining ground and where it seems to be dragging.

Ocean Fleets Are Transforming

Engineering and regulatory progress continues to make progress in the IMO and in key ports around the world. The construction and market entry of dual-fuel-propelled container ships has started phasing out the reliance on fossil fuel-burning engines for shipping. As of late October, DNV reported that there were orders of up to 335 ships with dual fuel power in 2024. These dual-fuel engines are designed to burn sometimes methanol or LNG in addition to fossil fuels.

Additionally, ammonia-powered ships have begun to make an appearance. In 2023 there were only 2 ammonia-capable ships; in 2024 that increased to 15 new ship orders. Ammonia fuelling and storing protocols also made real progress in getting established this year. The Global Centre for Maritime Decarbonisation was on site in late September and early October to witness the first ship-to-ship transfer of ammonia off the coast of Australia. With these critical safety procedures established, the industry will quickly accelerate into the use of this fuel.

Ports additionally are speeding ahead with greening their processes. Several of the world's busiest ports now utilise EV tugboats in place of fossil-fuelled models. Electric drones additionally are being used to do deliveries to ships

in place of gas-guzzling boats. More dock operations are also moving into electric and autonomous operations here in Asia.

My 2025 predictions for the ocean are that transformation will continue. Furthermore, the other decarbonising ship refitting projects will also increase and make good reductions in global emissions in the sector. LNG dual-fuel ships seem to be getting popular in Asia as the first step away from the dirty bunker fuels that dominate the ocean fleets of today. LNG protocols and handling have also helped in establishing safe procedures for the emerging ammonia-powered ships.

Air Industry Plods Along

Not surprisingly, there is still no glimmer of a replacement for the fossil fuel-burning jet engine. There are no dual-fuel



GLOBAL MARKETS BOOST INNOVATION

options nor even new forms of air transport (like blimps) to make any significant reduction to the emissions caused by our fleets of jet aircraft. When electric drones are taking to the skies, their flights reduce the carbon that would have been emitted by courier companies on the ground in nearly all cases.

For this reason the emission reduction emphasis continues to be entirely pinned on increasing the use of SAF. Airlines have begun to fuel with SAF-blended fuels—but only when select airports blend it into their regular fuel. 2024 saw no real scalable solution to significantly increase the supply of SAF.

In 2025, air transport emission reductions per kilo will only be slight. This industry continues to be hampered by insufficient supplies of SAF and the lack of ideas on how to make SAF cheaper and in greater quantities fast. I had some more information on what that SAF development looks like in “The SAF Challenge” (<https://events.logisym.org/the-green-corridor-the-saf-challenge/>).

Land Transportation Evolution

2024 established EV transportation in more and more markets. India and Africa have seen fast-increasing percentages of e-bikes and scooters moving to electric power. This replacement of fossil fuels in fast-developing economies is vital. 2025 will see even more of this.

Batteries are still making significant improvements to

power, durability, weight, and cost. Though many European and North American countries this year blocked competition from Chinese manufacturers of EV automobiles and trucks, this may provide a windfall of affordable vehicles to the emerging markets of the world. It should also help Southeast Asian countries green up their transportation faster.

Green Power

IEA (International Energy Agency) shows continued rapid growth of renewable energy and an increased percentage of renewables being used in the energy mix. At the same time, however, the world economy continues to demand more and more power. Fossil fuels, as a result of this growth, will continue to increase their production.

2025 may see the high point

for coal, though, after which coal will be rapidly taken out of the power mix. Renewables will continue to grow. Grid enhancement to make full use of the energy generated by the sun and wind is moving ahead. I predict that in 2025 grid enhancement will indeed have major development in Southeast Asia.

Courier Fleets

What a change from last year! At the end of last year industry friends only mentioned the hurdles of transitioning to EV technology. There were blockages of vehicles even entering the market because the regulatory authorities needed time to implement new regulations for the new vehicles.

Thankfully over the course of the year many of those regulations were put in place. Monthly I've been seeing

courier and truck fleets here in Asia add EVs to their operations. It is not going to stop either. One continuing challenge though is that charging point access is still needed.

My prediction in 2025 is that lower EV prices and increased attention to creating the new charging infrastructure will advance sustainability and help logistics managers meet their targets.

Packaging

2024 continued to show no real revolution for sustainable packaging in our industry. I'll be hoping to see some innovation, but my hopes are not high for 2025.

One positive from 2024 is the success of programs that moved consumers to bring their own bags for shopping. The policies that allowed consumers to "pay to pollute" clearly show that consumers will avoid paying whenever they can.

Summing It Up

Overall, the progress towards the carbon-free future is continuing to move forward. It will be clunky in places, but it is happening. 2025 shows great promise for increased transformation in emerging markets and in Asia—particularly in the final mile land transport sector, green power sector, and the ocean shipping sector.

Investment is flowing more towards renewable energy than at any time in history—solar



and wind power continue to become more and more valuable versus the chaotic fossil fuels. The cost to store the power they generate also becomes lower and lower. In Southeast Asia we can see real projects underway to create a regional energy grid that will support green energy.

Critically for our region, the closer access to the most advanced and cost-effective solar power and EV technology of China. With trade disputes and protectionism likely in 2025 between China and their usual large markets of Europe and America, Southeast Asia is in a good position to get good deals for solar panels, their grid systems, and electronic vehicles.

2025 can be a great year to leap ahead for our region. Let's all look forward to making the greenest of this coming new year!!



Timothy Foote

Director Transportation and Network APAC at Asendia and Founder of Susymbio

Tim Foote has worked in management positions at multiple MNCs for more than 25 years, gaining expansive expertise in logistical operations. He continues to craft delivery solutions for many e-commerce clients at Asendia. When it comes to sustainability, Tim first gained experience as the Head of Go Green at DHL eCommerce APAC. He later grew his knowledge as a trusted sustainability expert working for his own consulting business, Susymbio. Please reach out to him for any sustainability stories you feel are noteworthy. Let's green our industry together!



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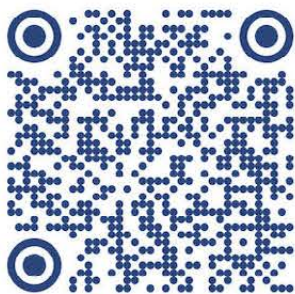
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Cainiao Sees Holiday Package Volumes Surge To At Least Double The Normal Average In U.S. and Mexico

By Cainiao Group



Cainiao, a global leader in e-commerce logistics, has reported a significant surge in holiday package deliveries across the U.S. and Mexico as the peak shopping season begins, with daily package volumes reaching three times the normal average.

With over ten years of experience managing order spikes from major e-commerce events and Cainiao's expanding network in both countries, packages are often delivered as quickly as the next day. The company's advanced automation, including AGVs and sorting tools, boosts efficiency, while its digital systems monitor

real-time performance across distribution centres and final-mile delivery. To meet the rising demand for express services, Cainiao has also made substantial investments in additional handling and sorting capacity across its ground network.

Since launching U.S. operations in early 2024, Cainiao has seen steady growth, with its local express network now covering 90% of the population in California and Florida. With hubs in Los Angeles, Miami, Chicago, and JFK—strategically located near major ports—Cainiao ensures seamless customs clearance and delivery for both cross-

border and local parcels. The company now provides next-day delivery and two-day deliveries in Florida and California.

In Mexico, Cainiao's network has rapidly expanded to cover 18 states, with growing daily package volumes reflecting its increasing market presence. The newly opened national distribution centre near Mexico City, launched in September, enhances Cainiao's ability to provide a 2.5-day priority service, surpassing local market standards during peak demand periods.

"Cainiao is building a global end-to-end logistics network,

and North America is a key region with great growth potential. The e-commerce sector worldwide continues to grow, and we want to be the partner of choice for

e-commerce businesses by offering high-quality services at competitive prices.” The company said.





CAI N!AO

Founded in 2013, Cainiao Group is a global leader in e-commerce logistics. Drawing on our deep e-commerce insights, purposely built technology, and a proven commitment to sustainability, we offer three core services, including global express, global supply chain, and logistics technology solutions.

With a network that spans over 200 countries and territories worldwide, our global express division excels in various segments, including cross-border express delivery and nationwide express services in markets such as China, Europe, and the Americas.

With a long-term mission to achieve nationwide delivery within 24 hours and worldwide delivery within 72 hours, Cainiao Group bridges global markets, empowering businesses and individuals to seize global trade opportunities. For more information about Cainiao, please visit cainiao.com.



Locad raises \$9m for smart digital logistics engine to expand globally

By LOCAD

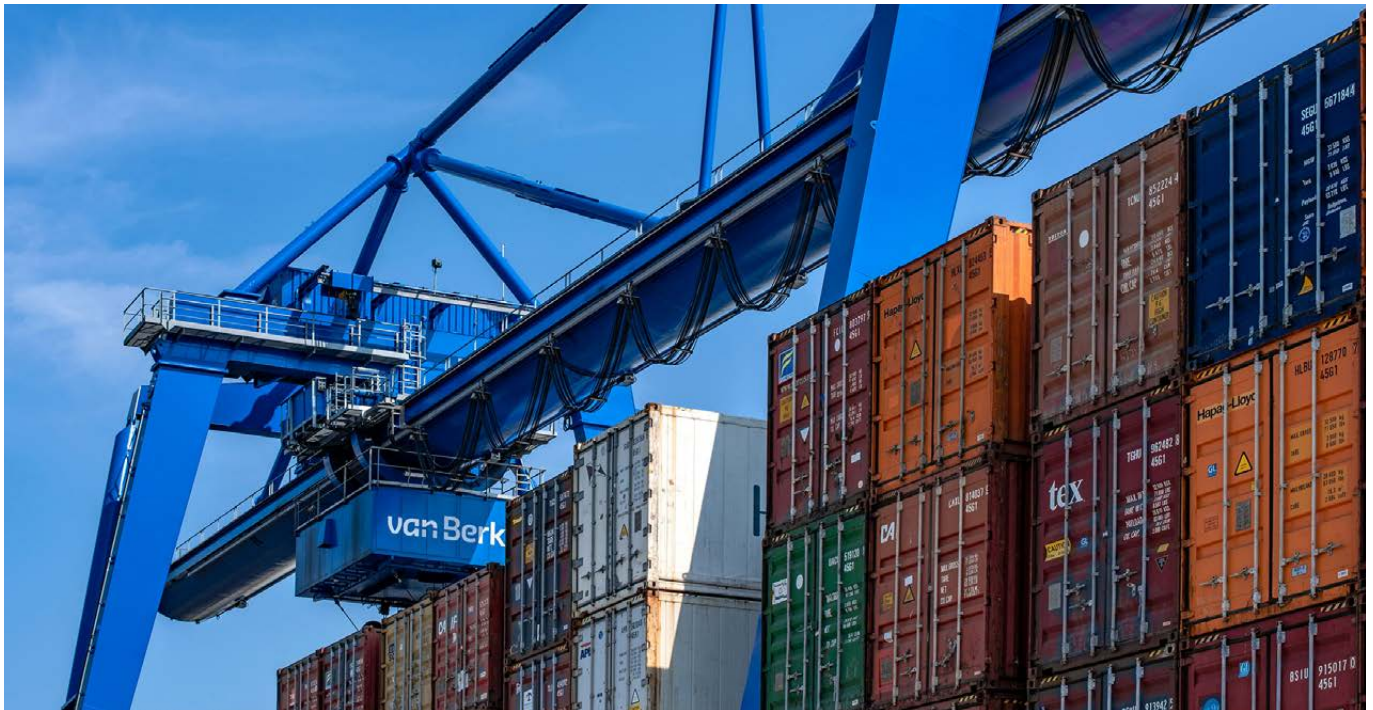
The pre-series B funding is co-led by Global Ventures and existing investor Reefknot Investments; proceeds to accelerate global expansion and AI development.

[Singapore / UAE] - 20th November 2024: Locad—the leading smart digital logistics engine empowering consumer brands with its Cloud Supply Chain-as-a-Service for global

distribution—announces its \$9 million Pre-Series B fundraise.

The round was co-led by Global Ventures and existing investor Reefknot Investments. Other participating investors include Sumitomo Equity Ventures and existing investors Antler Elevate, Febe Ventures, and JG Summit.

The new funding will accelerate Locad's international expansion, starting with the UAE and Saudi Arabia in Q4 2024 as part of its 'Grow Global, Go Local' strategy for brands, and will also be used to enhance Locad's AI-driven smart logistics capabilities. Locad is on a mission to build the supply chain infrastructure of modern commerce, connecting brands to



consumers in growth markets with a global cloud supply chain as a service.

Locad's cloud supply chain enables smart digital logistics and open commerce for consumer brands through an integrated operating system and supply chain infrastructure as a service. Locad allows brands to connect all sales channels in e-commerce and retail to a single pool of inventory and a smart logistics network, managed through its Control Tower orchestration platform that provides real-time visibility, analytics, and AI-enhanced workflow automation.

Constantin Robertz, CEO and Co-Founder of Locad, said: "We are on a mission to enable smart digital logistics for consumer brands. Over the last four years we have built a cloud supply chain platform in APAC that allows brands to unify their omnichannel distribution and access localised fulfilment in growth

markets of SEA and AU. We are now excited to take Locad global, opening our presence in the US and entering the GCC to make it easier for brands to sell anywhere with a fully localised customer experience.

Noor Sweid, Founder and Managing Partner of Global Ventures, commented: "We are delighted to lead Locad's funding round. Locad's innovative engine is transforming how brands manage their supply chains and enabling faster, more efficient customer reach—aligning with our thesis on the need for decentralised and resilient supply chains to meet today's consumer demands.

"Locad is a prime example of this shift—offering a localised, efficient solution that aligns with our vision for the future of supply chains. We are confident Locad is well-positioned to capitalise on opportunities in rapidly evolving markets like MENA, embodying the future of agile and sustainable

logistics."

Marc Dragon, Managing Director of Reefknot Investments, commented: "At Reefknot, we are excited to co-lead this oversubscribed funding round and deepen our commitment to Locad as they expand their global reach and impact. Since our Series A investment, Locad has demonstrated a strong ability to execute, scaling their asset-light fulfilment model across markets in Southeast Asia, Australia, and China, while continuously deepening their product capabilities with AI-driven features such as demand, inventory, and carrier analytics & optimisation.

We are confident that Locad's global expansion, combined with their dedication to product, technology, and service quality and innovation, will create exceptional value for brands aiming to grow overseas and elevate their respective customer experience."

Shrey Jain, Co-Founder and CTO of Locad, commented: "By integrating smart digital logistics with AI-driven insights, we empower brands to optimise their supply chains—placing inventory closer to demand, reducing delivery times, and enhancing customer satisfaction. This fundraise allows us to double down on building a robust, tech-enabled logistics ecosystem that drives efficiency and helps brands thrive in an increasingly dynamic commerce landscape."

Jannis Dargel, Co-Founder and COO of Locad, commented: "For brands, unifying inventory across sales channels in ecommerce and retail leads to higher revenue and faster sell-through, and localised fulfilment and delivery allows brands to increase conversion rates and improve customer experience."

Since its 2023 Series A round, Locad has made significant strides in expanding its market presence and refining its platform. The company now supports over 300 consumer brands across Southeast Asia and Australia, providing smart digital logistics solutions to enhance operational

efficiency and customer experience. Locad's logistics engine integrates seamlessly with leading e-commerce platforms such as Shopify, Shopee, Amazon, and TikTok, enabling brands to optimise their inventory and delivery management across diverse sales channels. The global expansion to the GCC and USA opens additional markets for brands that leverage Locad's platform to expand their distribution. The company's unique approach to logistics—localising warehouses to reduce delivery times and costs, combined with an AI-powered platform that optimises inventory allocation and carrier selection—has positioned it as a preferred logistics partner for consumer brands looking to scale in rapidly growing markets. The benefits for consumer brands are multiple: Enhanced logistics allows brands to manage omnichannel commerce via an integrated software and physical logistics network. Their growth is then supported across multiple channels, with new market entries enabled and higher customer satisfaction via faster, more reliable delivery options.

LOCAD

Locad is the logistics engine enabling e-commerce brands with a cloud supply chain to grow their omnichannel business and automatically store, pack, ship, and track orders across their B2C and B2B distribution channels.

Locad's tech platform syncs inventory across online channels and organizes end-to-end order fulfillment through their reliable network of warehouses and carriers across APAC, the US, and the Middle East. Through this, brands and merchants get a geographically distributed warehousing infrastructure that allows them to stock goods closer to customers, enabling faster delivery at a lower cost.

Hundreds of brands now have access to the Locad logistics engine, allowing faster shipping, reduced costs, and exponential growth. Equipped with the technology, infrastructure, and partners running on one integrated system, Locad is on a mission to propel every business forward.

For more information, visit <https://golocad.com> or follow us on LinkedIn, Facebook, and Instagram.





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Experts Convene in Rotterdam to Explore Pest-Resistant Container Design

By Containers Owners Association, BIC, World Shipping Council
and Dept of Agriculture, Fisheries and Forestry Australia

Pest-resistant container design took centre stage at a meeting between specialists from the global container shipping industry and biosecurity experts, aiming to address the \$423 billion global challenge posed by invasive pests every year.

Attendees at The International Symposium on Optimising Container Design to Mitigate Risks of Pest Contamination included representatives from major carriers, leasing

companies, container manufacturers, biosecurity experts, and plant health stakeholders.

"Container design has historically focused on production efficiency and durability, but in a global supply chain we must also prioritise pest resistance," said Mike Downes, senior technical expert at BIC and chair of the Container Cleanliness Industry Advisory Group supporting the IPPC's Sea Container Focus

Group (SCFG).

"By rethinking container design, we can mitigate the risks of invasive species and safeguard biodiversity, forests, and global food supplies," Mr. Downes said.

A key focus was a groundbreaking study by the Australian government comparing standard containers with modified designs. The study revealed that while 8%

of standard containers showed signs of pest contamination, the rate dropped to just 1.45% in modified units, demonstrating the potential of targeted design modifications.

"Data from interceptions collected by several countries indicate that approximately 90 percent of pest contamination found on the external surfaces of sea containers is linked to the understructures, while contamination on internal surfaces is primarily associated with the floorboards," said Rama Karri, Director at the Australian Department of Agriculture, Fisheries and Forestry.

The symposium looked at practical modifications such as floor designs that eliminate gaps and cracks and prevent nail holes; understructures with fewer horizontal ledge configurations; and the elimination of bitumastic undercoatings. These

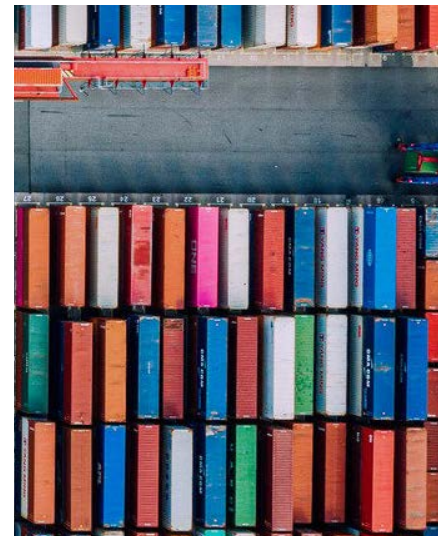
design changes aim to make containers less hospitable to invasive pests without compromising functionality or cost-efficiency.

At the end of the conference, a working group with representatives from the major container owners, operators, and manufacturers was established to move forward the many promising ideas introduced. The group will present proposals for container design modifications to the IPPC's SCFG and ultimately to the Commission on Phytosanitary Measures (CPM) that oversees the IPPC's activities in regard to container cleanliness.

"This is a critical societal issue, and collaborative efforts like this symposium are helping broaden our industry's recognition of the problem and strengthen its commitment to accelerate efforts to create a pest-resistant supply

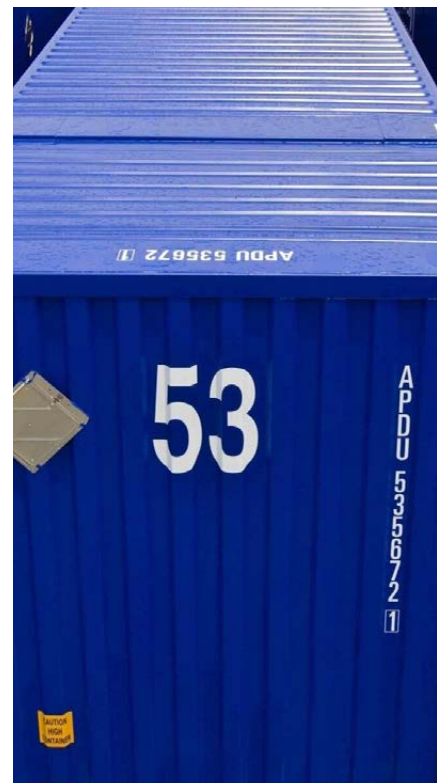
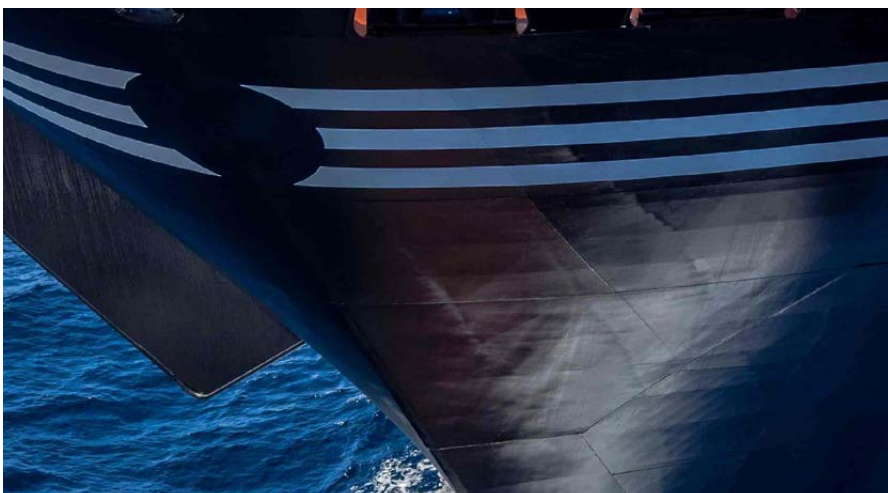
chain," said Lars Kjaer, Senior Vice President of the World Shipping Council.

The symposium was hosted in Rotterdam on 11th November 2024, organised by the International Plant Protection Convention (IPPC) Secretariat in partnership with the Bureau International des Containers (BIC), the Container Owners Association (COA), and the World Shipping Council (WSC).





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the future growth of
a sustainable, safe,
and secure shipping
industry.**





Founded under the auspices of the International Chamber of Commerce in 1933 as a neutral, non-profit international organisation, BIC's mission is to enable efficiency in container transportation while promoting safety, security, standardisation, and sustainability.

BIC continues its active role in the development of sensible standards in the container industry and the promotion of professional dialogue amongst its 2,900+ members, standards bodies, governments, and other industry organisations.

BIC holds full consultative status as an NGO at the International Maritime Organisation (IMO), is an official partner organisation of the World Customs Organisation (WCO), and holds NGO observer status at the United Nations Economic Commission for Europe (UNECE). BIC staff and board members participate as experts in working groups at numerous international organisations, and the BIC is active in conferences, exhibitions, and intergovernmental bodies.



The international organisation representing the common interests of owners of freight containers. The principle aims of the COA are to promote common standards and safe use of containers.

The Container Owners Association was established in November 2004 as an international organisation representing the common interests of owners and operators of intermodal freight containers. The principal aims of the COA are to provide a service to its members, including the following:

- Development of Industry Standards—with the aim of promoting industry efficiency
- Dissemination of information through conferences, training, and education
- Lobbying relevant regulatory authorities and cooperating with industry groups
- Promotion of Safe Operation of Containers
- Promoting Environmental Awareness



The World Shipping Council (WSC) is the primary industry trade association representing the international liner shipping industry, which offers regularly scheduled service on fixed schedules. Most liner carriers are container shipping lines. The WSC is headquartered in Washington, D.C., and is led by Chief Executive John W. Butler, former general counsel for the WSC and former President of the Maritime Administrative Bar Association. The WSC also has branches located internationally in Brussels and Singapore, allowing for a global reach. Our work is coordinated through subject-matter councils and working groups made up of member representatives, with strategic direction set by the board. All member companies may appoint a representative on CEO level to the WSC Board.

We are an experienced and dedicated team with a deep background in container and ro-ro shipping. The World Shipping Council is growing, and we currently have offices in Washington, Brussels, London, and Singapore.



Australian Government
Department of Agriculture,
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We work to enhance our agricultural, fisheries, and forestry industries. We create new and maintain existing agricultural export opportunities to provide gains for Australian agriculture. We manage biosecurity risks to Australia to protect our multi-billion-dollar agricultural industries and our way of life.

Our ministers

The Hon Julie Collins MP is Minister for Agriculture, Fisheries, and Forestry. Senator the Hon. Anthony Chisholm is Assistant Minister for Agriculture, Fisheries, and Forestry.

Our people

Our staff have many different roles. From biosecurity dog handlers to researchers and scientists, as well as regulators, program administrators, policy advisers, IT specialists, and much more. We work all over Australia.

We also have staff based overseas. They maintain relationships with international organisations and our trading partners.

Our skills and expertise are as diverse as our portfolio, and we are ready for any challenge. This ensures our advice and activities meet the needs of the community, industry, and other governments.





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