



IPIC 2017

Physical internet: challenges
and opportunities for a 3PL.

Pablo GOMEZ

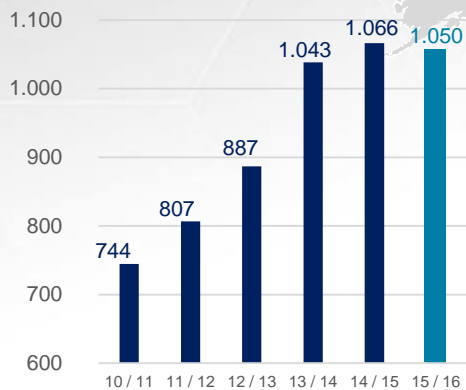
**Head of Innovation FM Logistic Group
& General Director FM Ibérica
Vice Chair ALICE**

**Environmental Engineer
Master & Business Administration IESE**

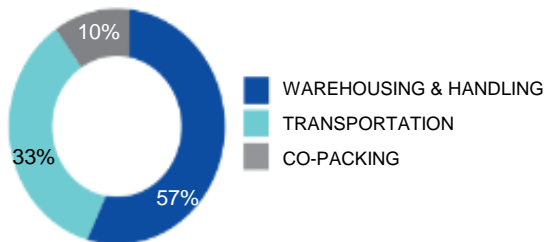


FM LOGISTIC

TURNOVER in M€



Revenue per business activity



CENTRAL EUROPE

| Employees | €m | Sites |
|-----------|-----|-------|
| 5,300 | 274 | 21 |

EASTERN EUROPE & CHINA

| Employees | €m | Sites |
|-----------|-----|-------|
| 6,800 | 227 | 27 |

WESTERN EUROPE

| Employees | €m | Sites |
|-----------|-----|-------|
| 5,300 | 460 | 33 |

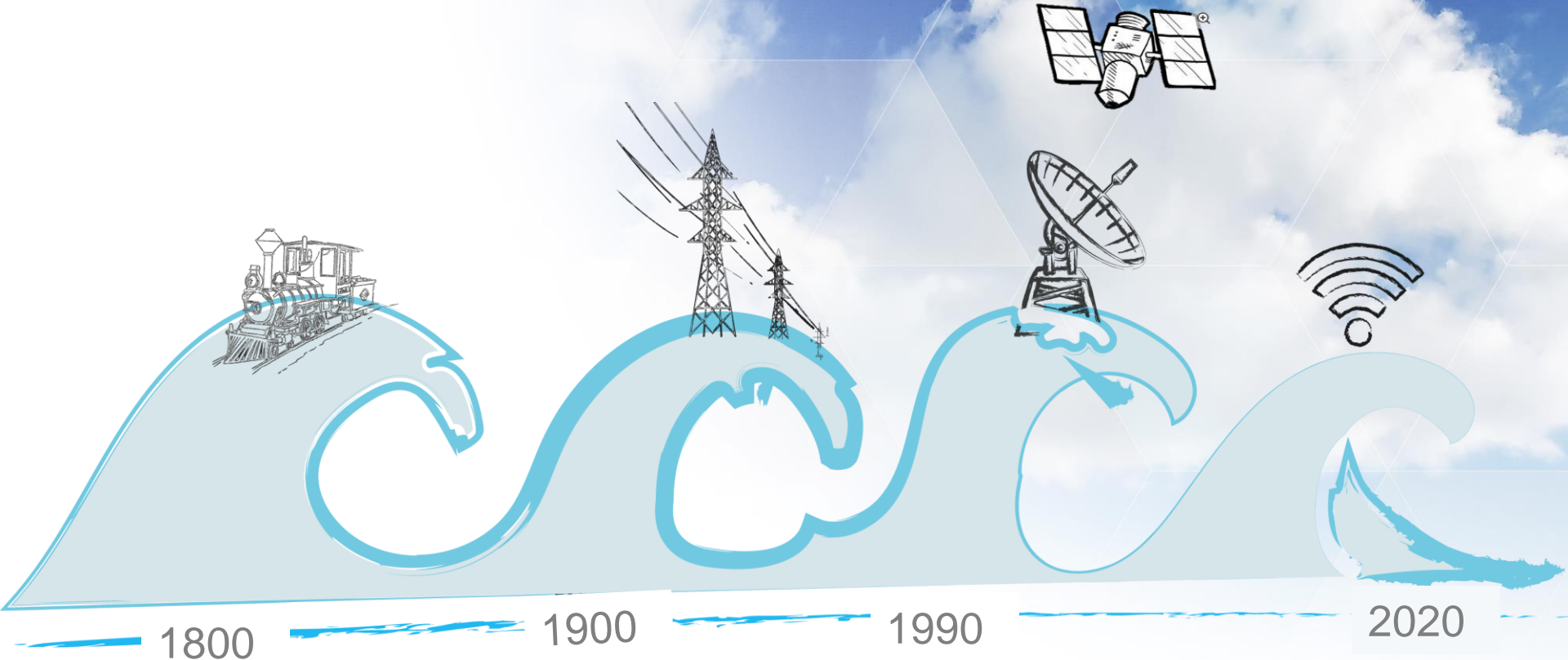
ASIA

| Employees | €m | Sites |
|-----------|----|-------|
| 3 500 | 47 | 5 |

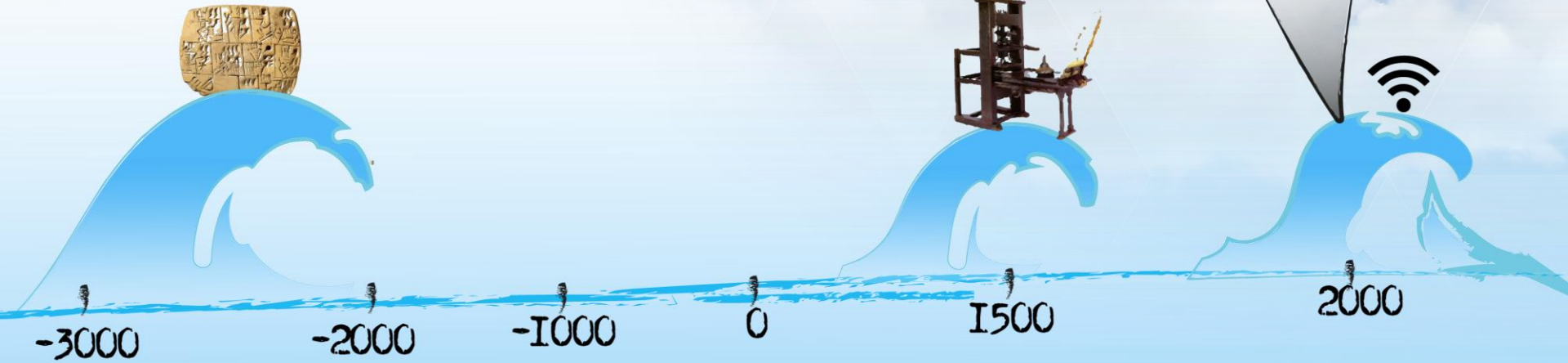
BRAZIL

| Employees | €m | Sites |
|-----------|----|-------|
| 900 | 27 | 4 |

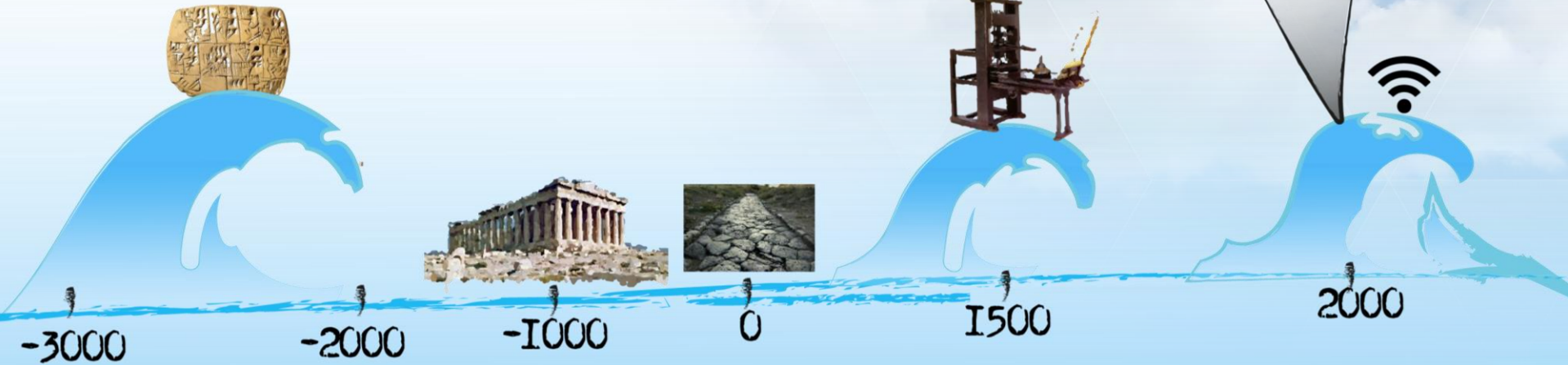
THE FOUR INDUSTRIAL REVOLUTIONS



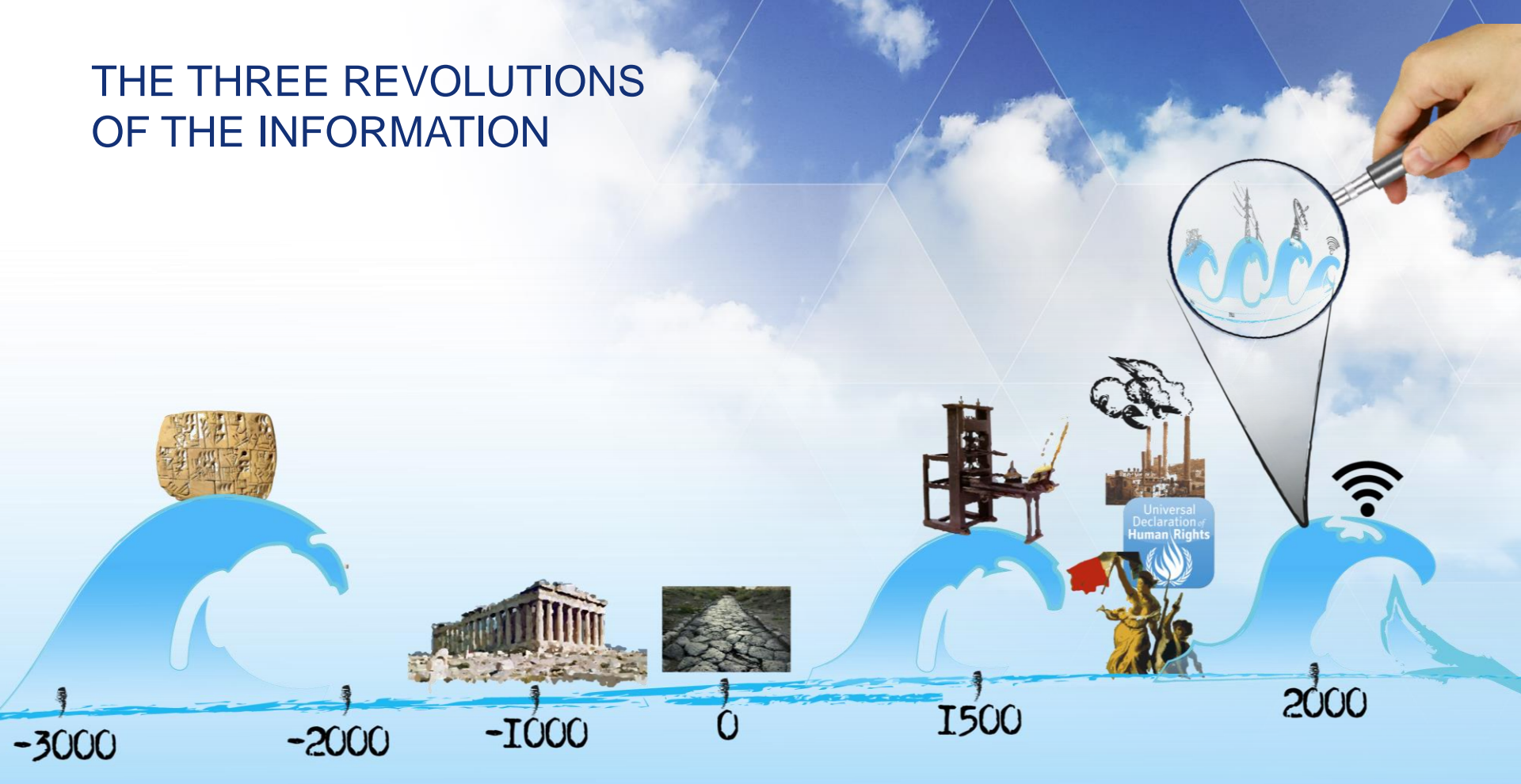
THE THREE REVOLUTIONS OF THE INFORMATION



THE THREE REVOLUTIONS OF THE INFORMATION



THE THREE REVOLUTIONS OF THE INFORMATION



THE 6 MASS EXTINCTIONS

ORDOVICH

Sea level change



400M

DEVONIAN

End of oxygen in deep ocean



395M

PERMIAN

Supernova ??



250M

TRIASSIC

Volcano



200M

CRETACEOUS

Asteroid



65M



0 2000



FRAMEWORK

- Unpredictable and rapid consequences at the social level.
- Creation of world dominating companies
- The contact technology in the hands of A.A.F.A
- Europe lack of business references
- Free investment strategy versus investment strategy
- Scarce resource economy
- Mobility change

STRATEGY ASSET LIGHT/ ASSET ENGAGED

Value **365.200M\$**
(Ago 2016)

+107.000 M\$ Sales
2015

230.000 employees

amazon

1.000M\$
profit/quarterly
2016

Vs

AliExpress

11.000M sales

45.000 employees

237.000M\$ value

443M of buyers

Sales **478.000M\$**
2015

50% share of e-commerce
USA, Alemania

ebay

Value **35.000M\$**
Sept 2016

8.600M\$ sales
2015

162M of buyers

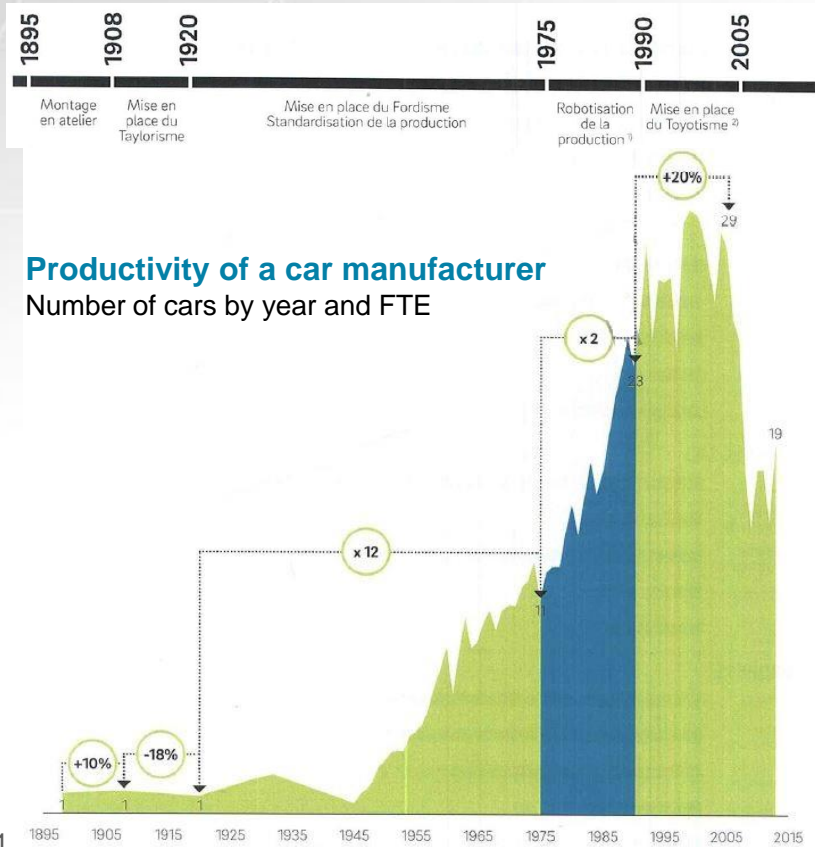
1.725M\$ profit

75% e-commerce in
China



63M PREMIUM
consumers in USA

THE IMPACT OF LOGISTICS IN JOBS



7 lessons from the automation of the automotive industry from 1975 to 1990

- 1 **Productivity**
(between 1975 and 1990) x2
- 2 **Qualification Jobs**
(frames) +45%
- 3 **Wages.**
(Average salary) +35%
- 4 **Safety at work.**
(Work accident) ÷5
- 5 **Relative production cost.**
(% GDP) -2pts
- 6 **Accessibility of the offer.**
(Households with vehicles) +10pts
- 7 **Export.**
(Exported volumes) +50%

THE MOBILITY CHANGE

95%

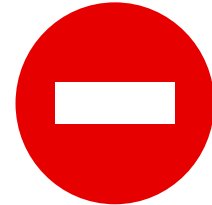
CAPACITY
UNUSED

CABIFY **emov**



UBER

NEW MODELS OF
CAR SHARING

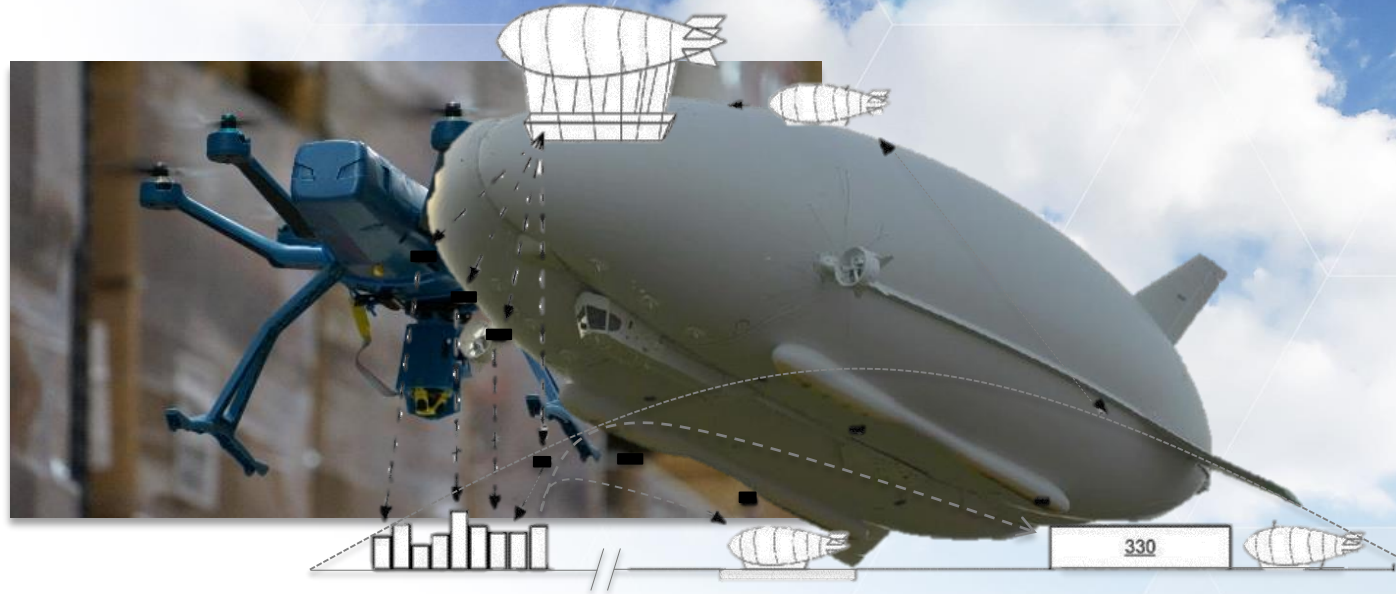


NEW
RESTRICTIONS
IN CITIES

And... Asking our youngsters to make an extra effort to obtain a driving license!!

THE AIR OCCUPANCY

- Security
- Drones
- Dirigibles



- Amazon patent stores air

SO, THE NEW WORLD OF LOGISTICS

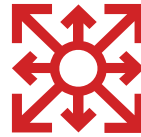
IT IS A WORLD FULL OF OPPORTUNITIES



With physical internet, logistics and transport become a network.
Therefore a challenge for 3PL is:



Specialized
in network
businesses



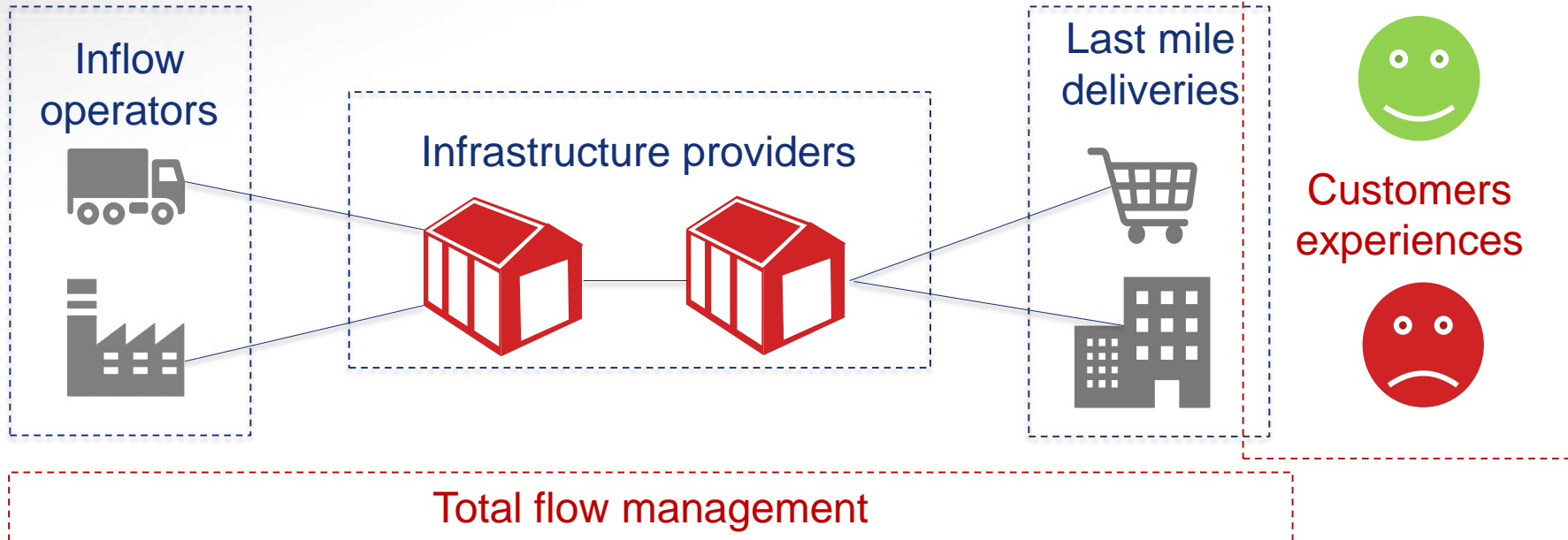
Need of
interoperability



Be reorganized as
part of the solution

SPECIALIZE IN NETWORK BUSINESSES

Language specialists

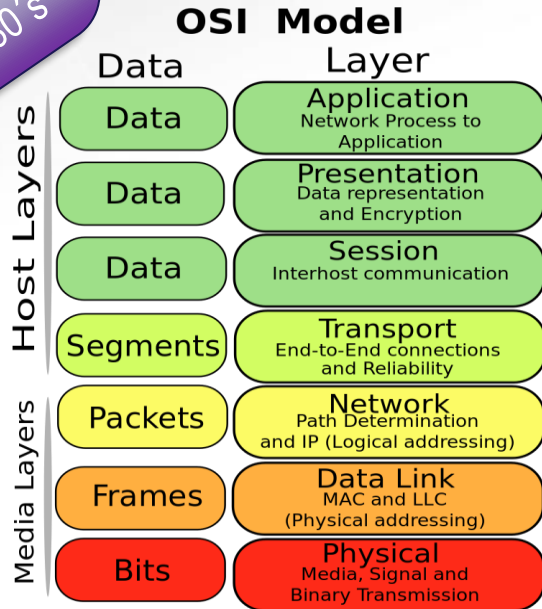


Total flow management

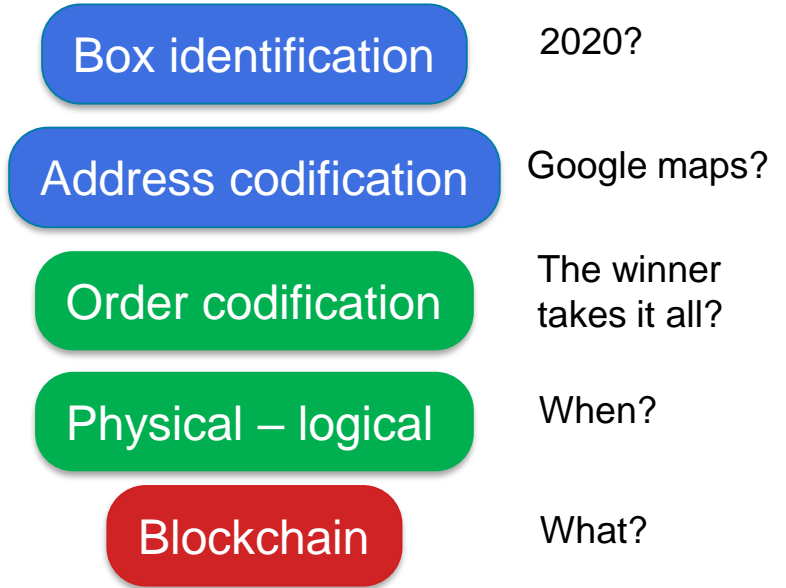
NEED TO INTEROPERATE

INTERNET LANGUAGE

In the 80's



PHYSICAL INTERNET LANGUAGE



MOBILITY LOGISTICS IS NOT THE PROBLEM

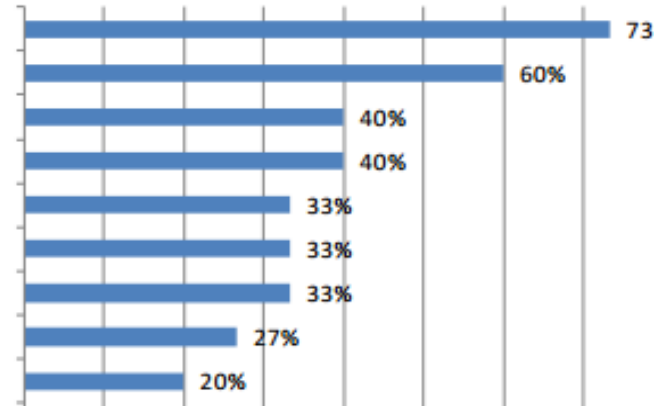


MADRID MOBILITY

| Type of vehicle | Routes |
|--------------------|--------|
| Cars | 81,2% |
| Light distribution | 7,7% |
| Heavy distribution | 1,7% |
| Bus | 1,7% |
| Moto | 2,7% |
| Taxi | 4,9% |

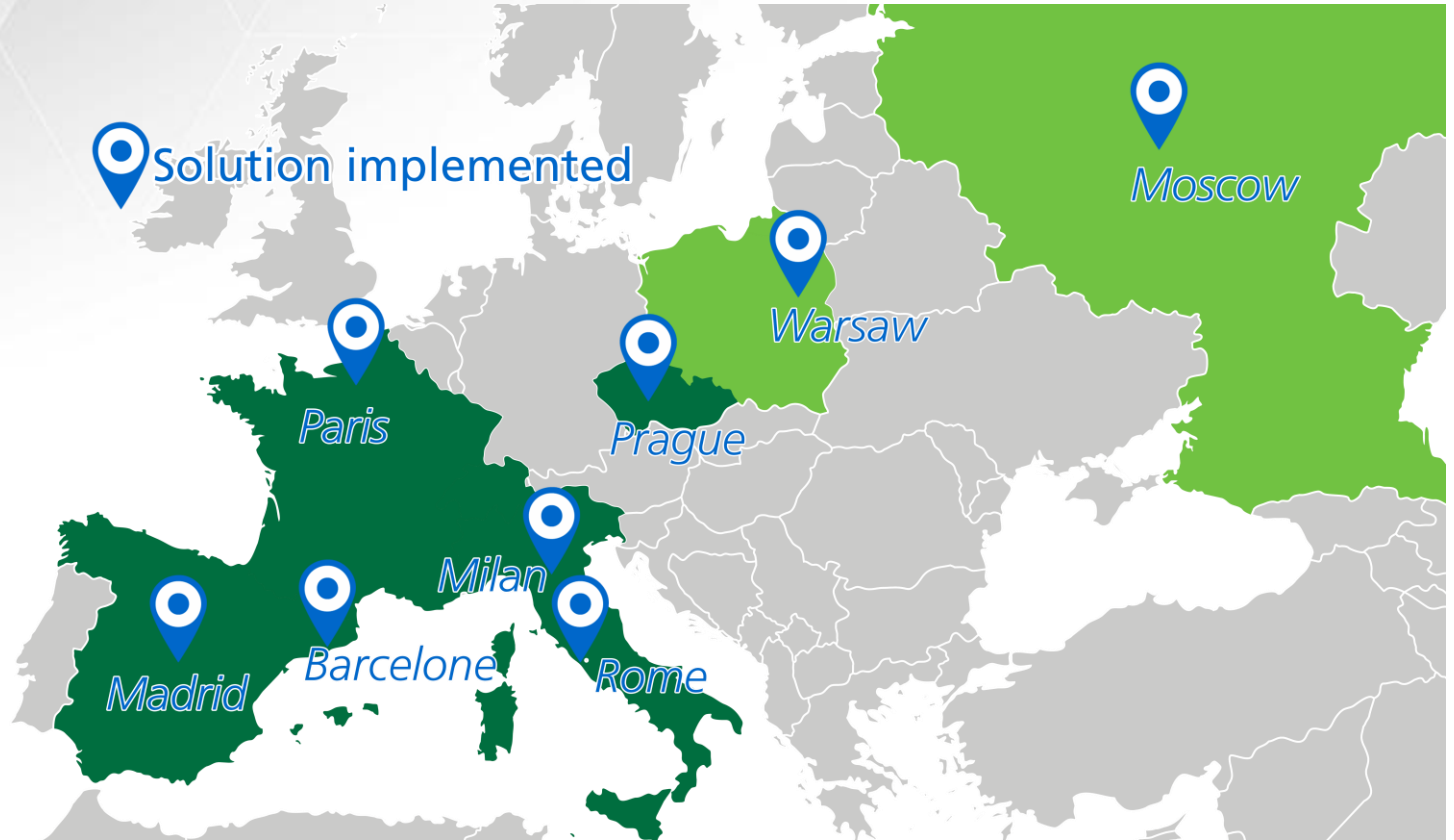
MAIN MOBILITY PROBLEMS IN MADRID. EXPERT COMMISSION

- Driving indiscipline.
- A network of pedestrian routes is missing
- Loading and unloading lack regulation
- High use of the car.
- Lack of scheduling coordination.
- Lack of Campaigns for sustainable mobility
- Loading and unloading indiscipline
- Lack of parking area
- Lack of public transport for metropolitan area



... IS PART OF THE SOLUTION!

CITYLOGIN

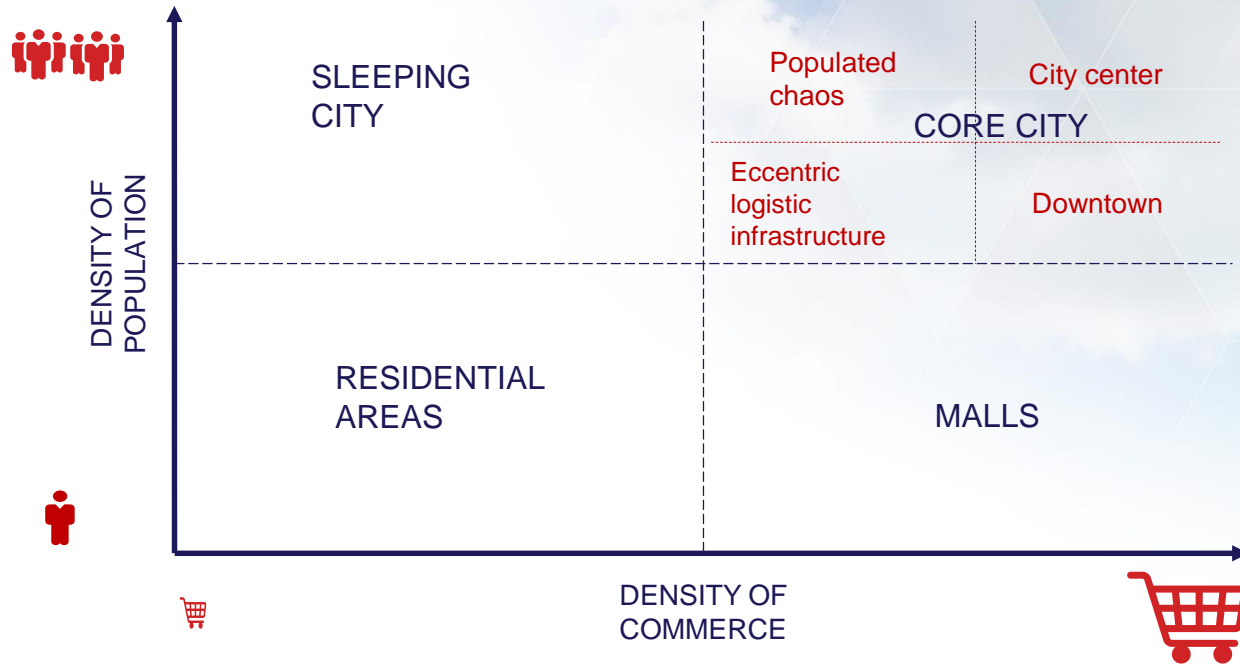


INNOVATION LABORATORY FOR SUSTAINABLE CITYLOGISTICS



LIMITATION ON SPACE / TIME

Cities-> new models, private-public



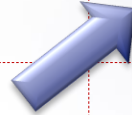
LIMITATION ON SPACE / TIME

Cities-> new models, private-public

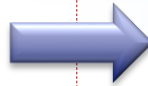
Populated
chaos



Eccentric
logistic
infrastructure



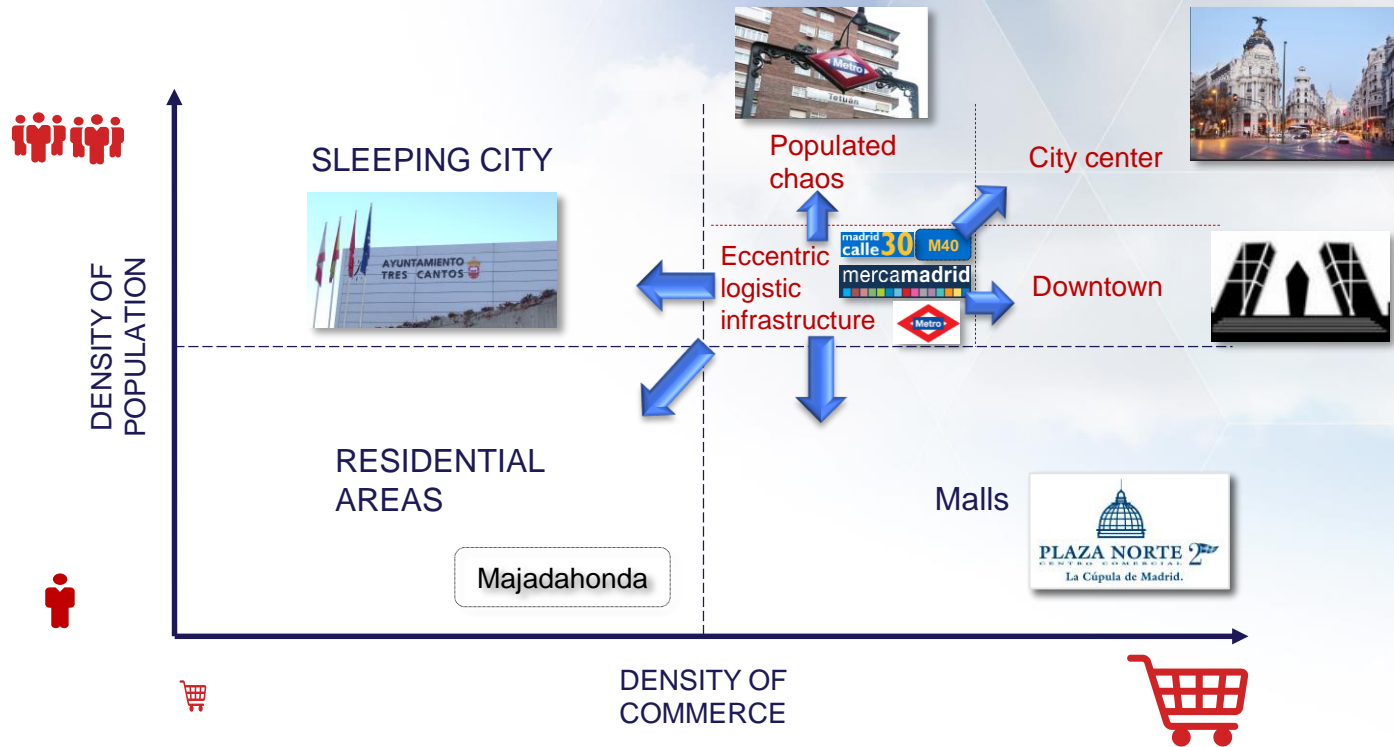
City center



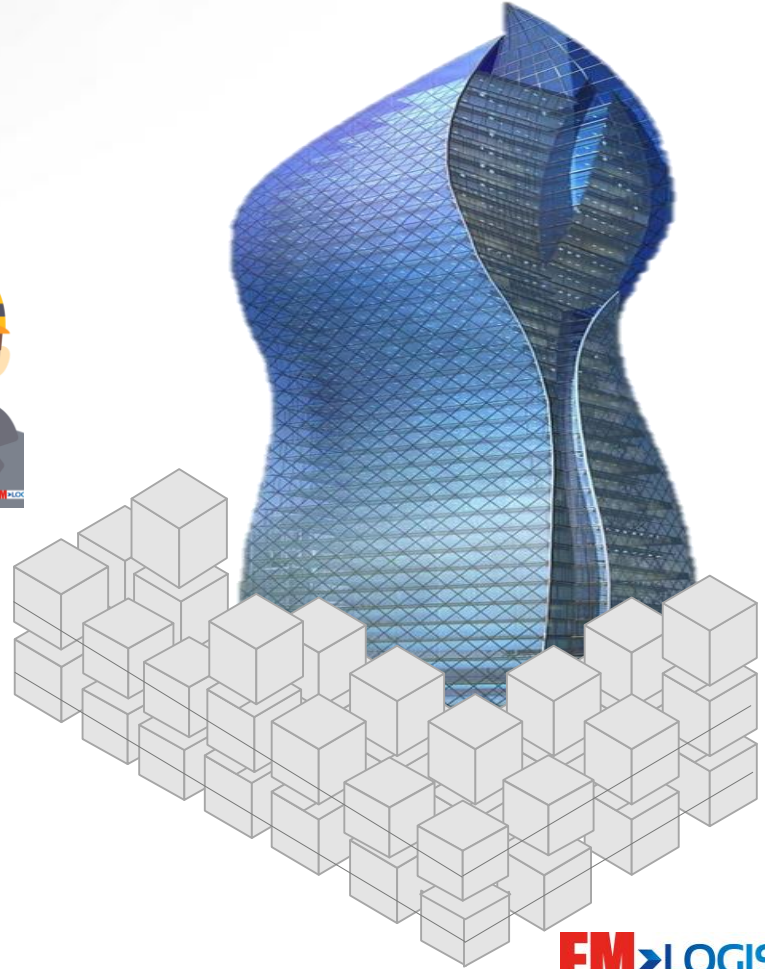
Downtown

LIMITATION ON SPACE / TIME

Cities-> new models, private-public



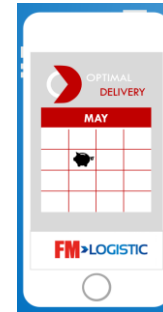
TECHNOLOGY



OPEN INNOVATION



STARTUPS



FASTER MIND
CHALLENGE



INNOVATION CLUB

THANK YOU

