

Keynote Address:

Winds of Change:

**What's shaping Last
Mile in South Africa**



Why South Africa & Why Now?

Favorable Government Policies

South Africa is now opening its market to global players through **favorable economic policies** that is conducive for businesses.

Rising Middle Class

The **middle class** is rising and that is significantly changing the dynamics of society with more disposable incomes & purchasing power.

Aspirational High Income Segment

A rising aspirational **high-income segment** is driving new expectations on businesses and behaviors in customers .

Reduced Inflation Pressures

The effects of **inflation** on both operational and capital costs is affecting critical decisions for businesses.

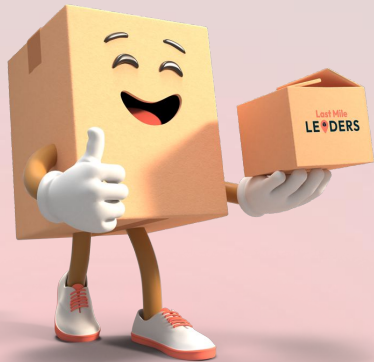
Global Giants

News / Retail



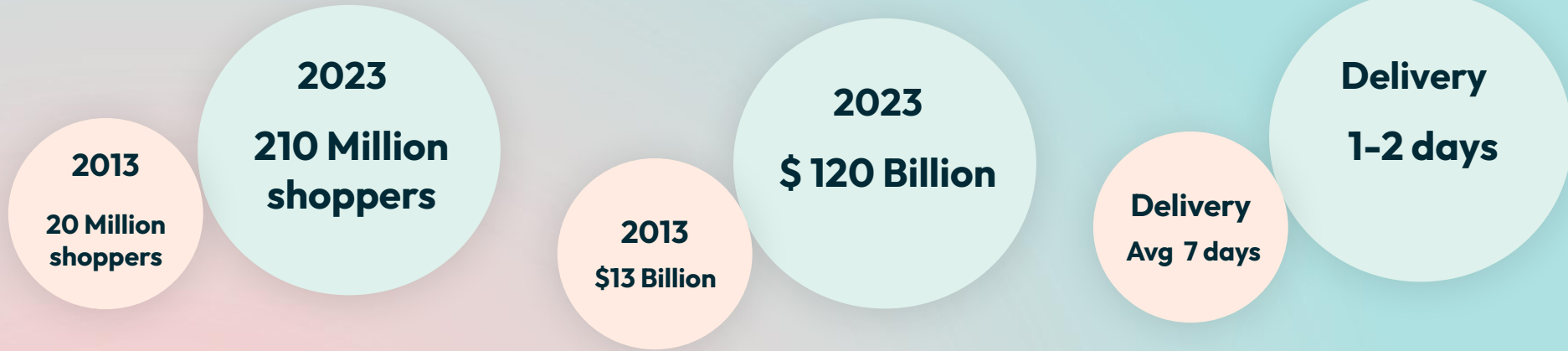
May 6, 2024

Amazon launches Amazon.co.za in South Africa



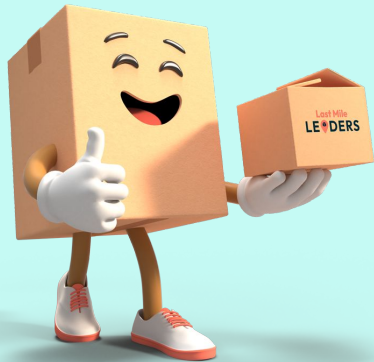
SHEIN

Last 10 years in India

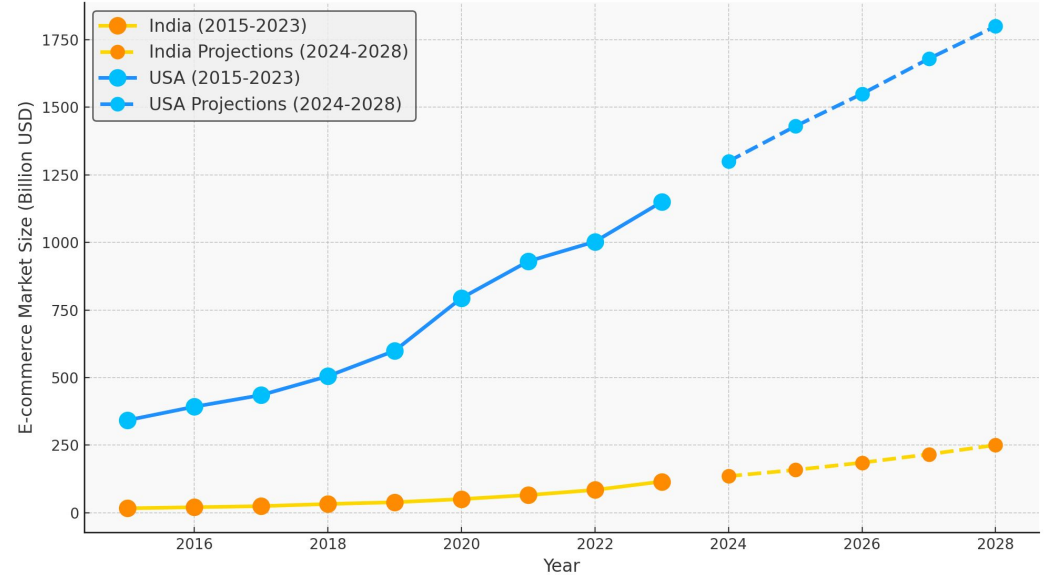


Drawing Parallels

Growth Story of e-Commerce in India & the USA



E-commerce Growth Comparison: India vs USA (2015-2028)

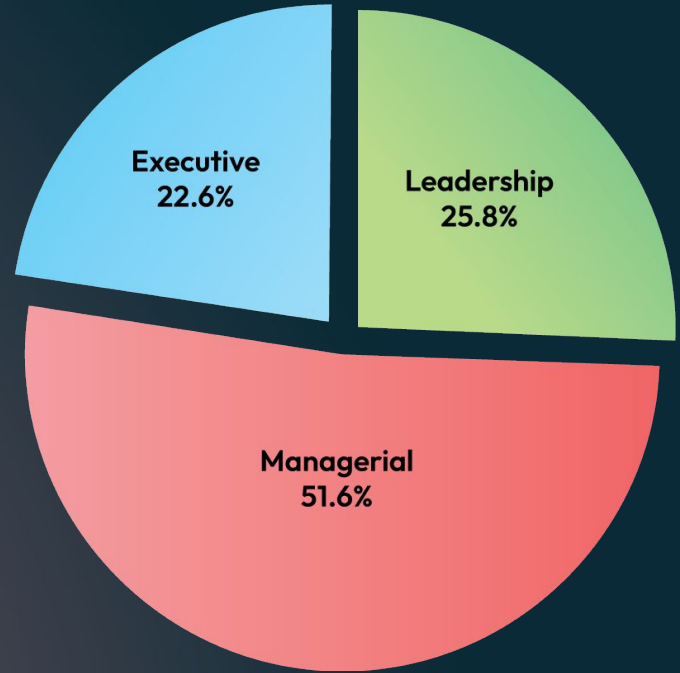


Eye on Last Mile :

300+ Global Leaders Representing over \$300bn in Revenue

First-ever & Only Primary Report
Focussing On The

Last-Mile in
South Africa



Distribution of Positions by Category

Top Concerns

A Land of Unique Challenges & Opportunities

Global

1. Labor Shortages
2. Geopolitical Tensions

South Africa

1. Inflation
2. Climate Crisis

South Africa - Uniqueness

A Land of Unique Challenges & Opportunities



Cost



Labor



Security



Geopolitical
Conflict



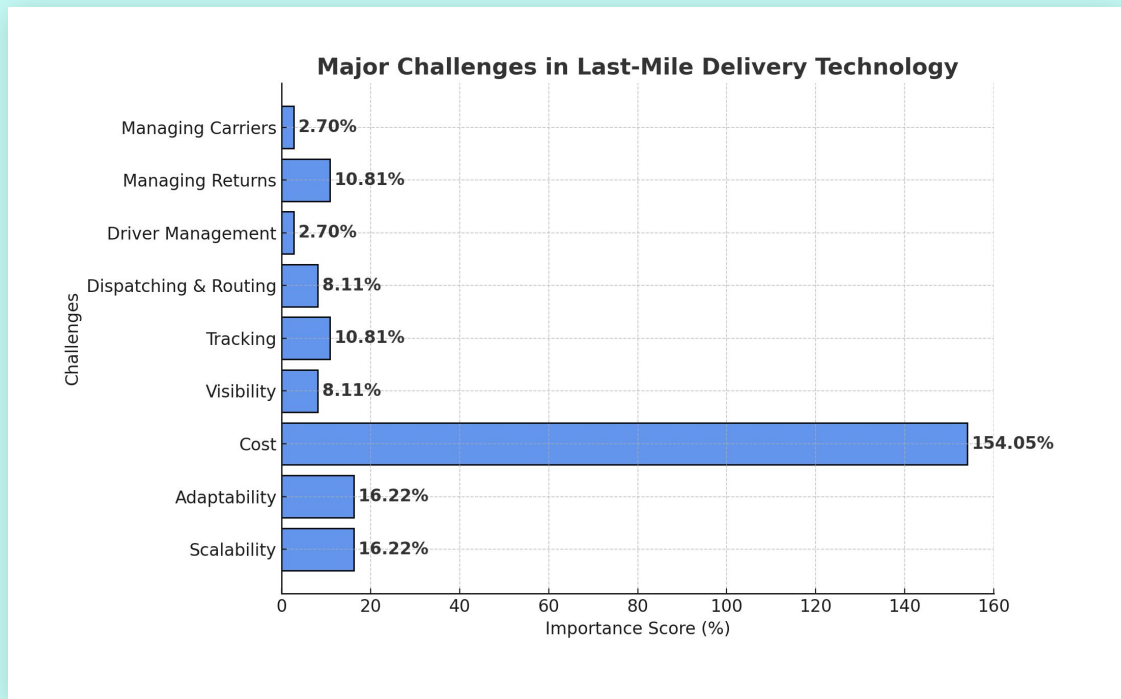
Technology
Pressures

What Are We All SOLVING in 2024

154%

leaders and companies believe
cost is the biggest challenge.

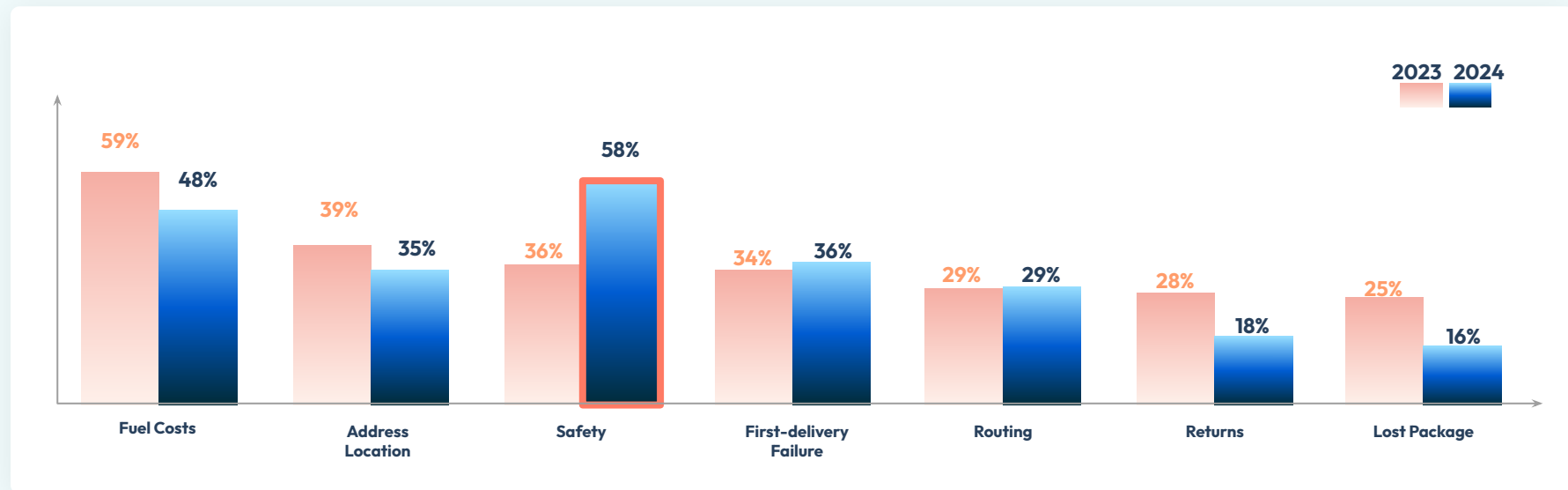
Cost will be the biggest driver of
major decisions



What Really Drives High Last Mile Costs?

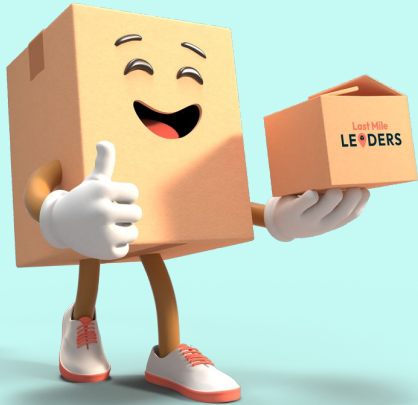


Labor costs leads the race as the highest contributing factor to last mile costs. Up from **36%** last year to over **58%** this year.



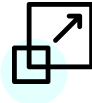
3 Strategies

To Tackle the **Cost Pressures**



Outsourcing

Are you set up for passing on a cost benefit?



Technology

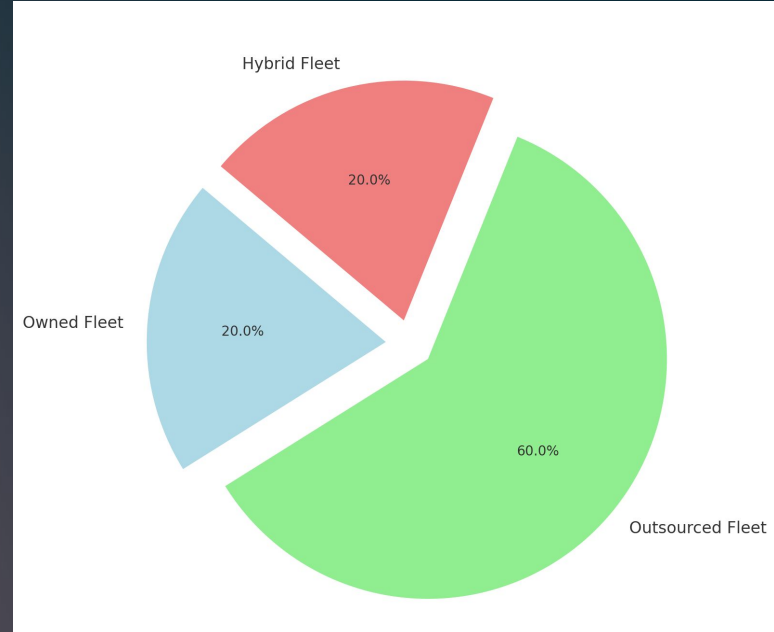
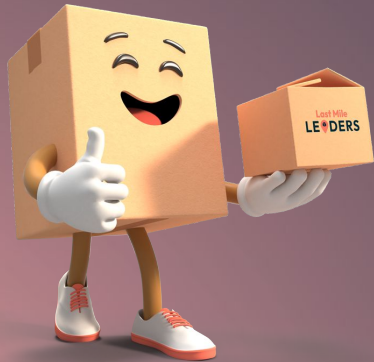
Does your setup allow you to give multiple convenient options?



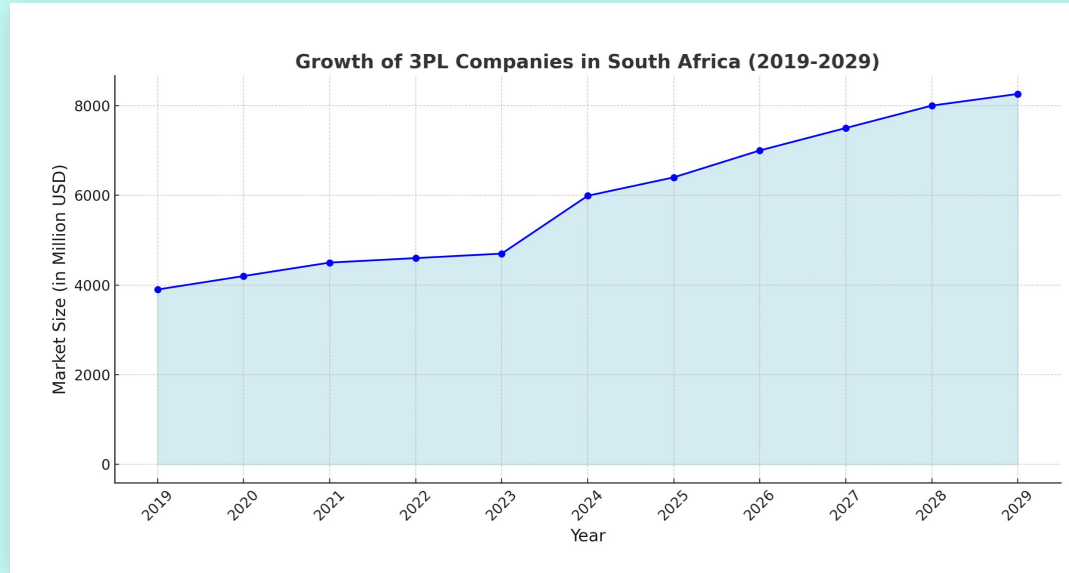
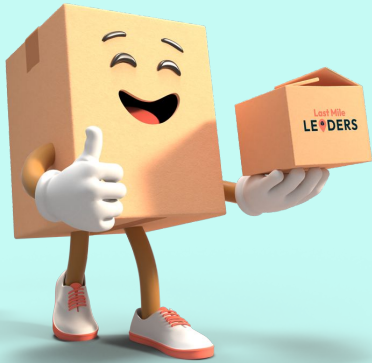
Optimization

Are you setting up your brand for loyalty that sticks?

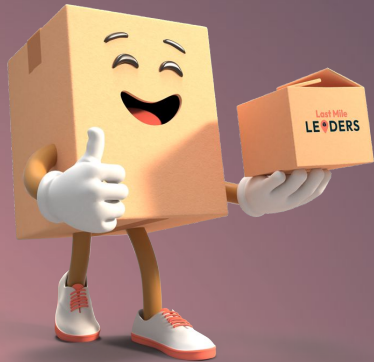
Outsourcing: A Key Strategy to Mitigate Costs



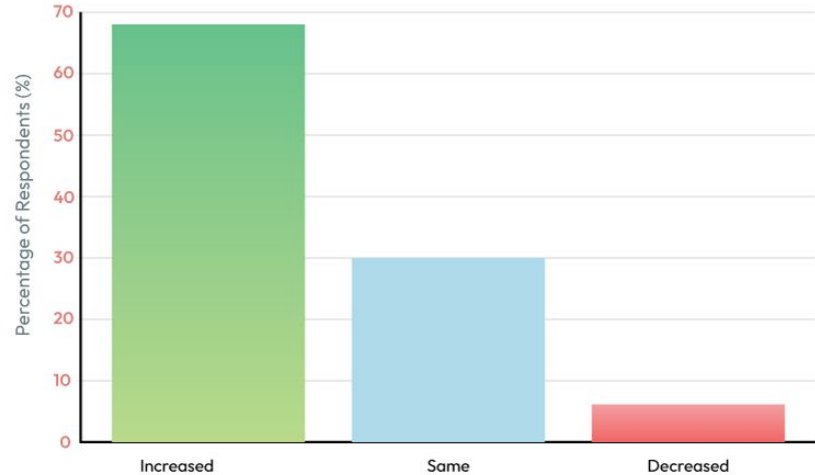
**The dependence
On carriers is set to
grow. 3PL market to
double in the next 5
years.**



Every 2 out of 3 businesses are progressing with tech investments

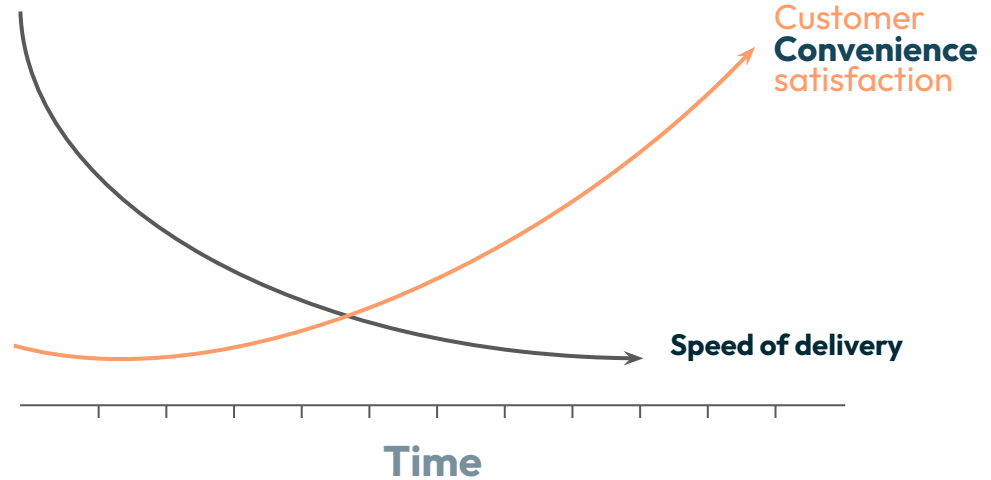


Budget Changes for Last-Mile Delivery, Logistics & Transportation Software



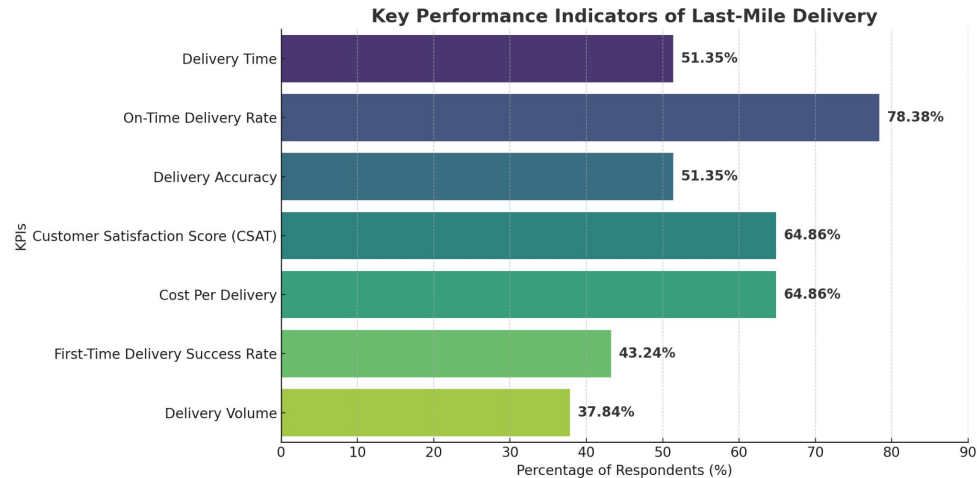
The Perfect Delivery: Convenience Trumps Speed

Priorities are shifting



Speed vs Convenience

The New Way To Measure **C-SAT** is here



Achieving on-time delivery is highly critical

Customer satisfaction is a direct outcome of **on-time delivery**

Lets together shape the future of logistics for South Africa



Convenience



More Orders



More Employment