



Challenges and innovation for transportation and logistics

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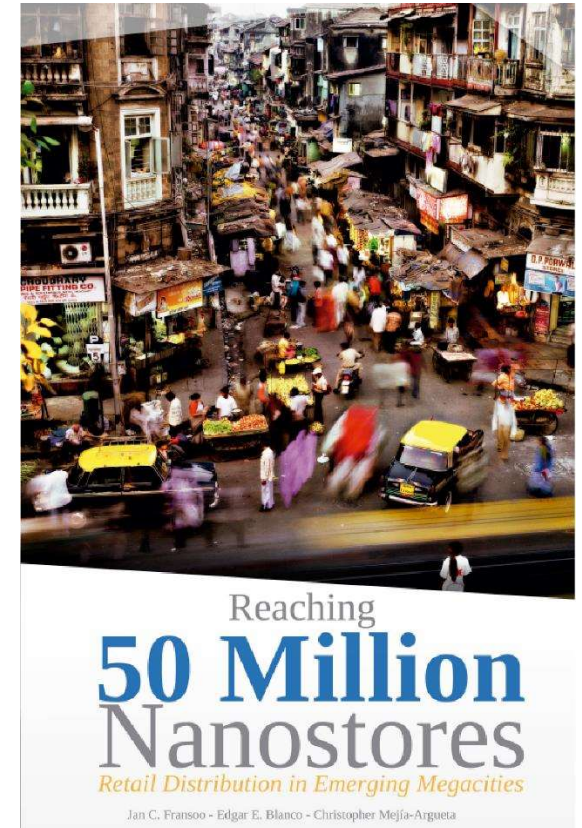
Agenda



- 1 Relevant facts
- 2 Consumer patterns and trends
- 3 Innovative operations
- 4 Future opportunities

Relevant facts

- **85%** of the **world's population** live in **emerging market economies** (Desjardins 2018)
- **Growing urbanization rates** in ME
- **4b people (64%)** of the world's population live with **<US\$5 per day**
- **Decreasing vehicle utilization** – LAC @ 50%



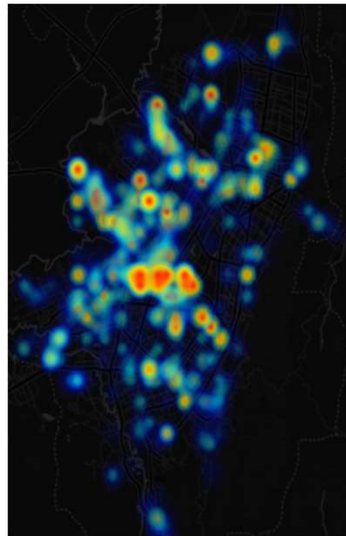
Consumer patterns and trends



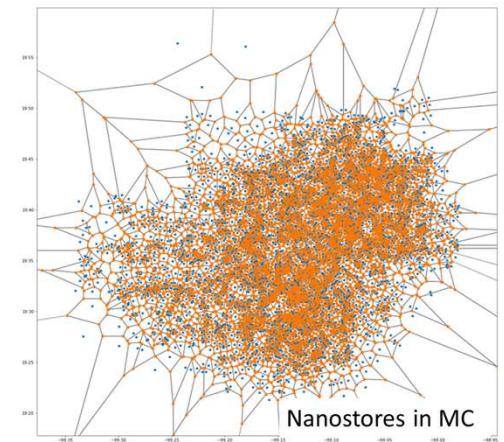
- Diverse needs (e.g., portfolio mix, market penetration)



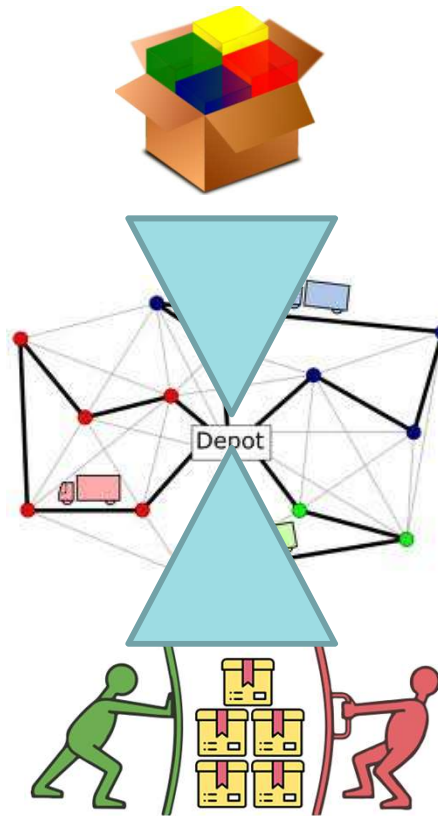
- Evolution



- Fragmentation & Directness



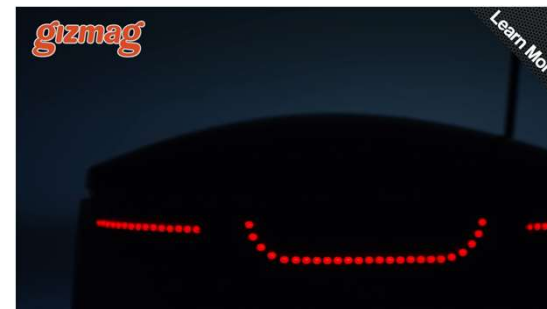
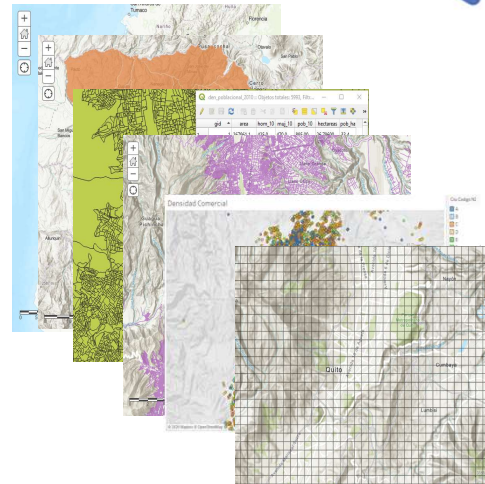
Innovative logistics operations



Other innovative solutions

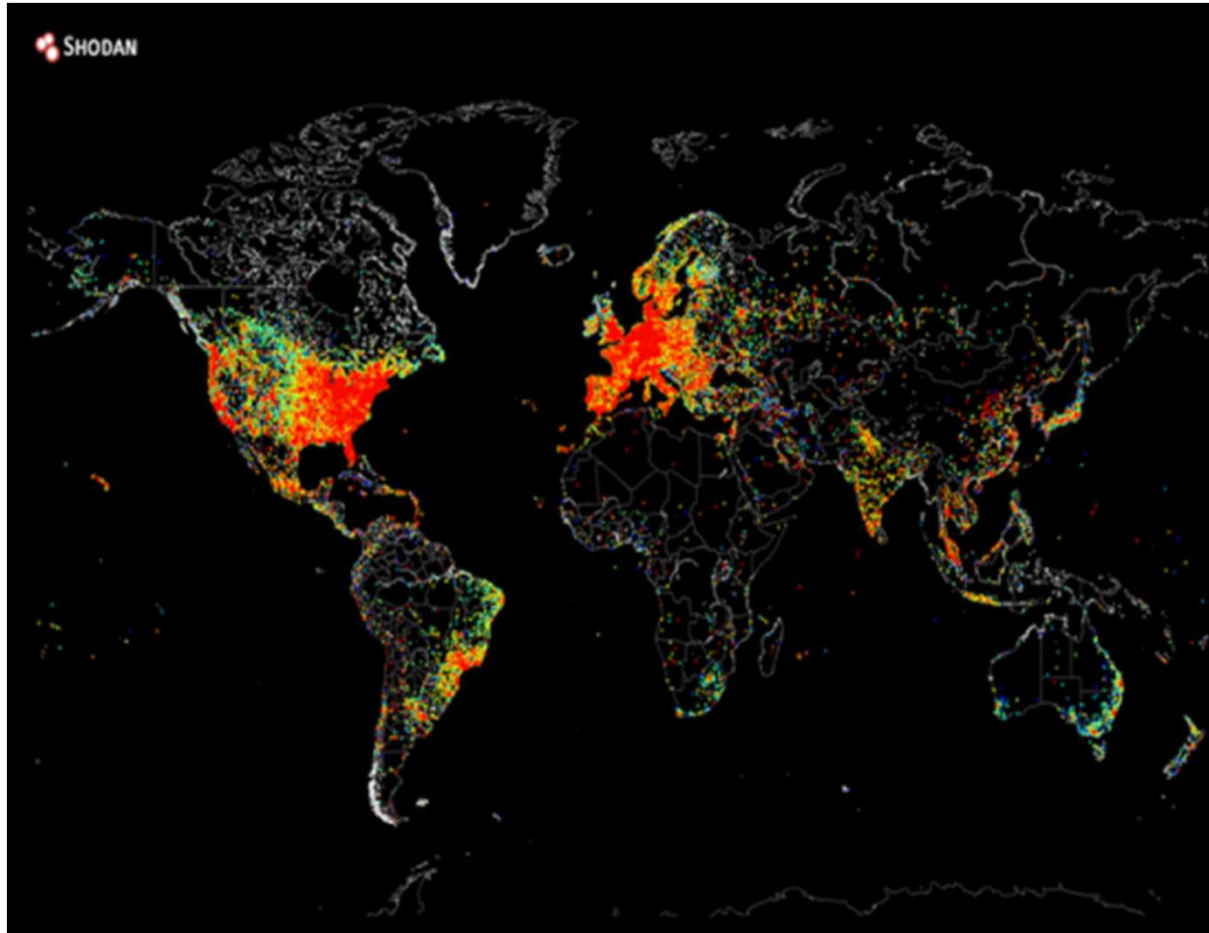


SUSTAINABLE
MOBILITY

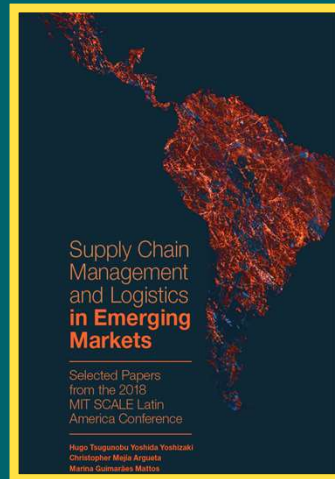
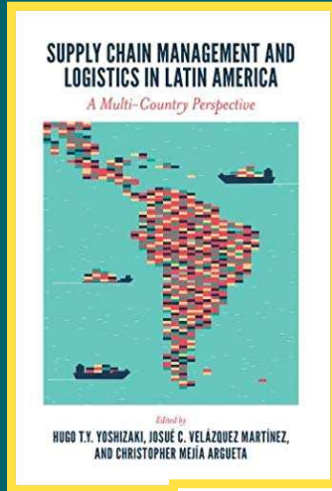
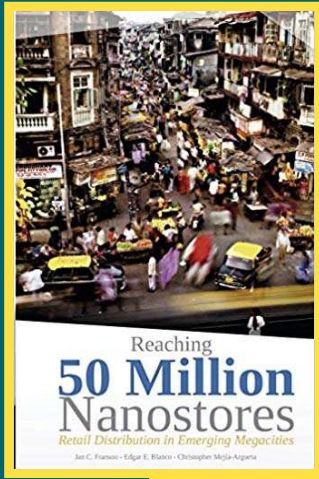


Source: USFQ (2021)

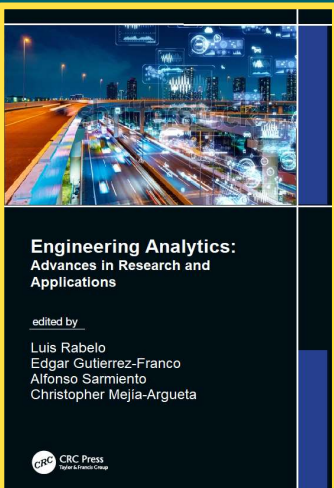
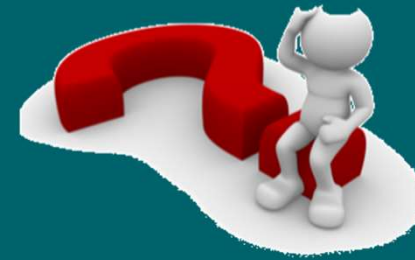
The promising road ahead



- Technology: Sleeping giant
- Operations: Dark stores and pilots O2O
- Horizontal collaboration and serving BoP needs



THANK YOU!



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