

2016 Global Logistics Report

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Introduction and Conclusion by Todd Johnson, Chief Customer Officer, JDA Software Group, Inc.



Introduction

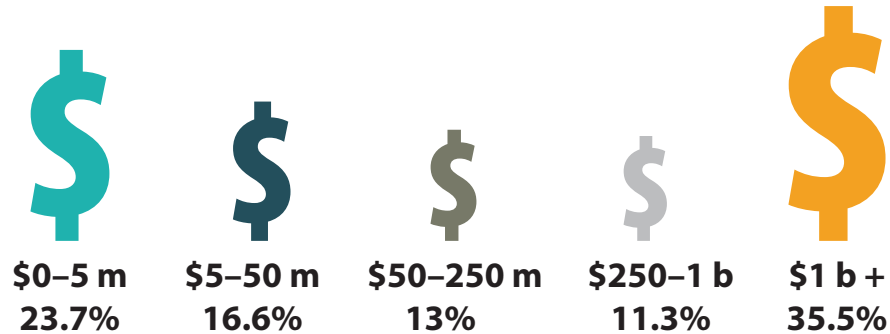
2016 is a year of great opportunity for logistics service providers (LSPs). The many positive trends documented in this new report from EFT show that customers are looking to gain more value from their LSPs and, in fact, want to engage with their LSPs more strategically than before. Key findings in this report include an accelerating interest in innovation, eCommerce and talent management.

There are a tremendous number of opportunities that LSPs can take advantage of to make 2016 a defining year for the industry. This report aims to provide you with the trends, bench-marking and shipper insight required for industry stakeholders to effectively navigate the logistics industry in 2016. JDA is sponsoring this important, independent research because we know the LSP landscape is going through a period of fundamental change and these insights can help guide us all.

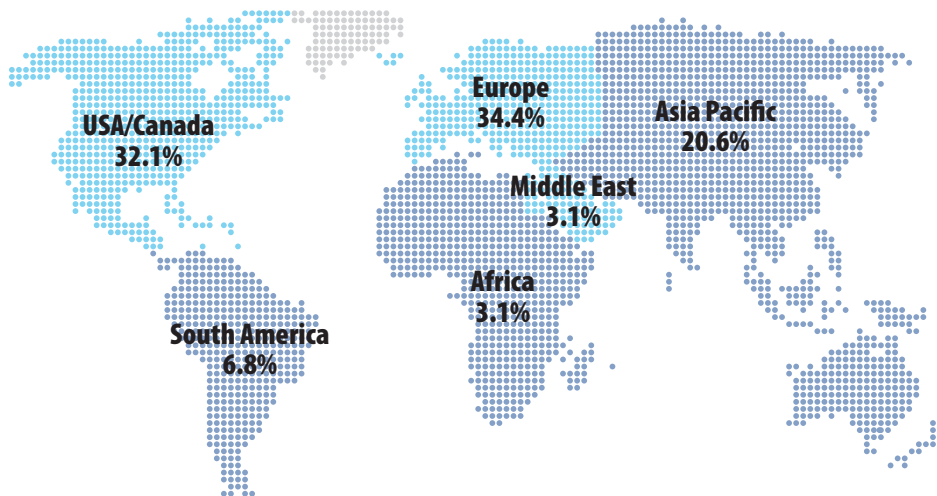
Todd Johnson

Chief Customer Officer
JDA Software Group, Inc.

What is your company's annual revenue?



What region are you based in?



Count: 471

What best describes your business type?



40%
Logistics Providers

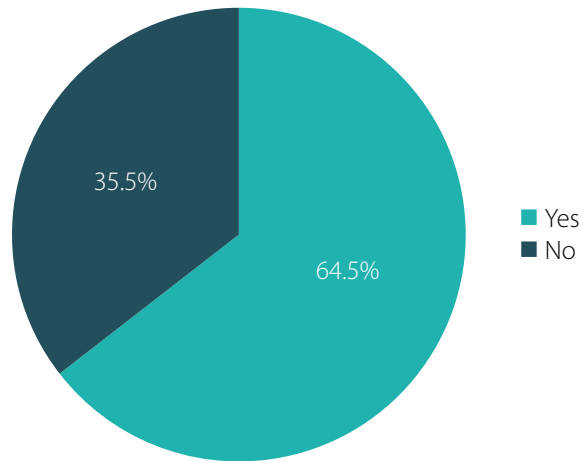


33%
Manufacturer, Retailer
or other user of
transportation/logistics
services (Shipper)



27%
Other (Consultant,
Press, Academic, Financial
Services, Real Estate,
Technology
Provider etc)

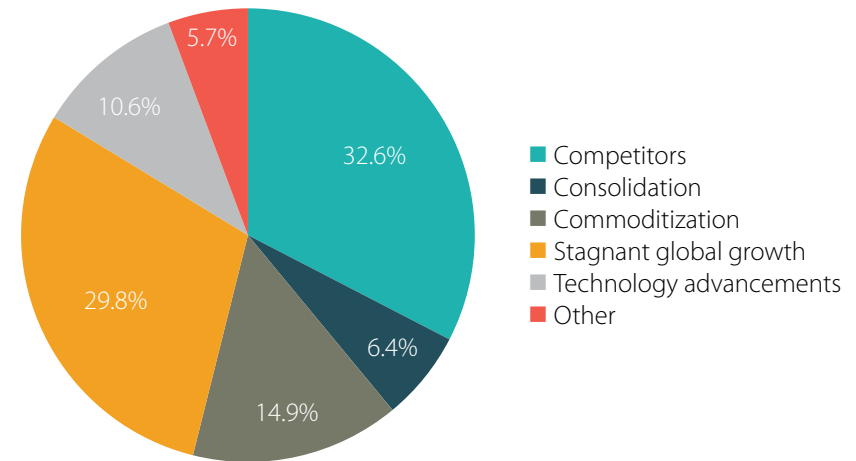
Is your logistics organization asset owning?



141 respondents to the 2016 Global Logistics Survey represented logistics companies. Of these respondents, 65% were asset-owning, with the majority of asset-owners owning both trucks and warehouses. Despite reports suggesting a move away from assets in logistics – especially with truck production and sales numbers down – there are a number of other factors driving LSPs to such investments including capacity fluctuations, high inventory and increasing demand for warehousing because of eCommerce.

The combination of challenges in global growth and a shifting logistics landscape encapsulate the threats respondents identified as affecting them the most. However, the top rated threat identified by logistics providers was their competitors. If you look below, you'll see why this is the case: far and away, the biggest source of new business for logistics providers is from each other.

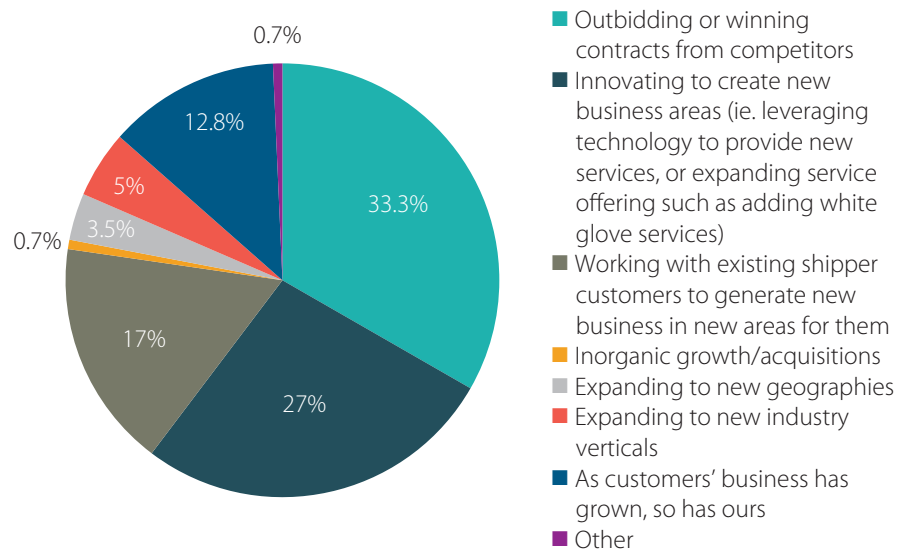
What's the biggest threat to your business growth in 2016?



If we dig deeper into the answers provided for this question, we can begin to see how many challenges LSPs are facing heading into 2016. For example, 11% of respondents felt that technology advancements in the form of automation and intelligent software was a potential threat to their business. In fact, it only ranked just behind commoditization, which has traditionally been one of the major threats to the industry.

When we consider how deep a threat stagnant global growth is alone (it was the second highest ranked threat) we see a very difficult year shaping up for logistics providers.

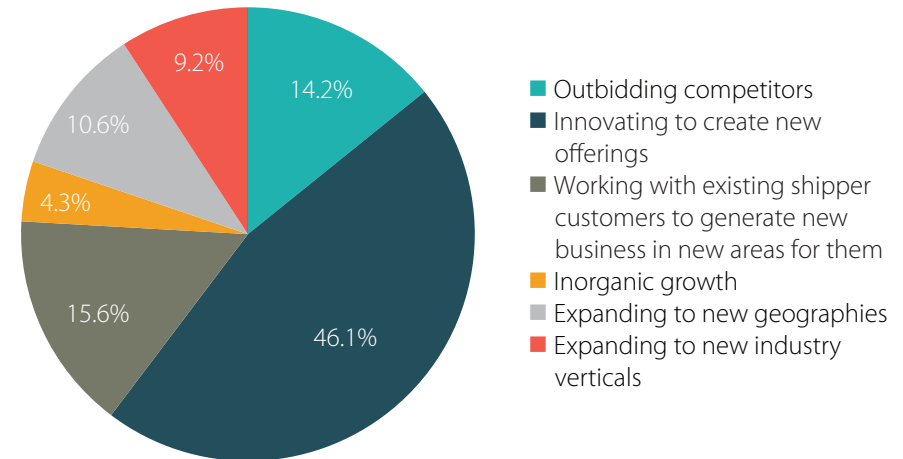
How did you gain most of your new business in the last 12 months?



In summary, logistics providers see each other as the biggest threat to business. Additionally, they've used each other as the biggest source of new business in the last 12 months. Where are they set to gain new business then moving forward? Innovating.

The most popular area by far for new business over the next 18 months was innovating. Outbidding competitors drops to 14% in this respondent projection with other traditional areas of generating new business also ranking lowly including inorganic growth, expansion to new industry verticals and expanding to new geographies. This is in spite of growth being reported regionally, especially in North America as well as in different industry verticals including eCommerce.

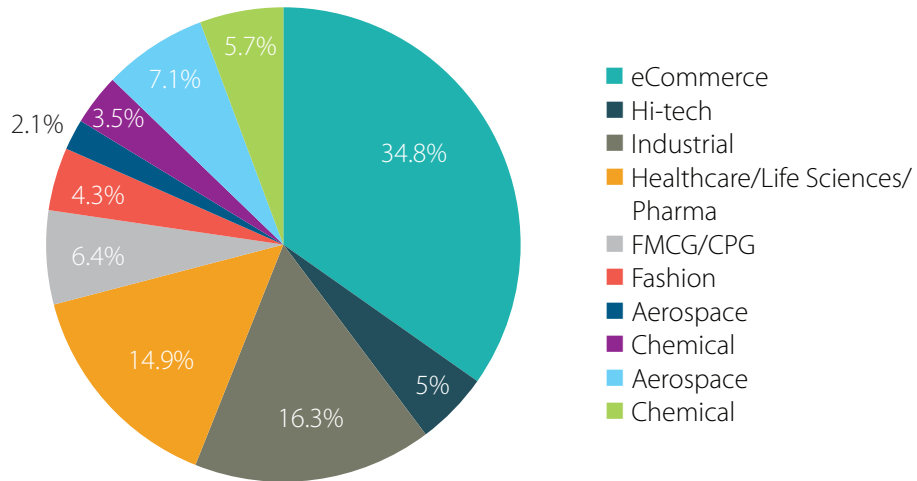
How do you expect to gain the most of your new business in the next 18 months? (Shipper perspective)



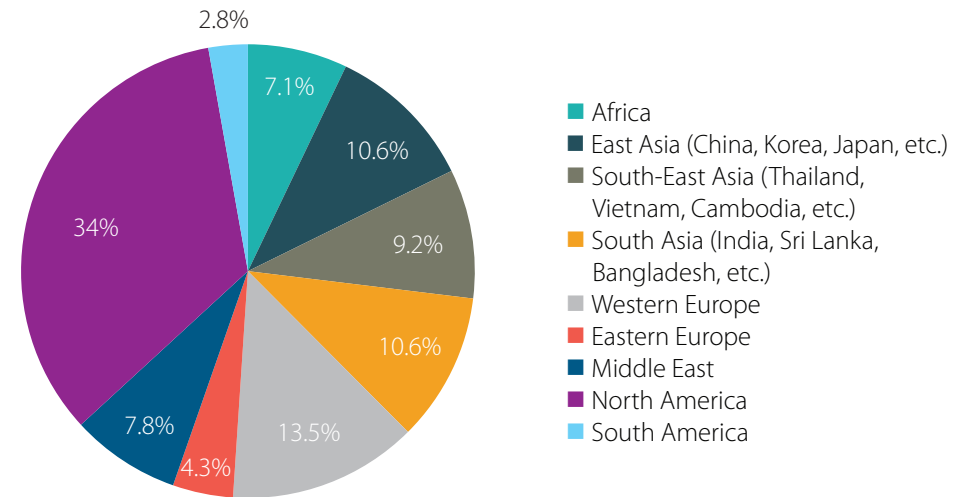
With only 27% of respondents reporting to have gained new business through innovation in the last 12 months, how is innovation going to take the brunt of business generating power sought by LSPs? It's difficult to say. In asking where LSPs come up short most often, their customers identified 'innovation'. In addition, when benchmarking their logistics providers, 'innovation' was ranked 4th with only 8% of respondents rating its importance. Effectively, shippers (manufacturers and retailers that ship products) either don't value innovation from their LSPs or don't see innovation from their LSPs.

Furthermore, LSPs realize that they aren't exactly at the cutting edge either. LSPs themselves rate themselves towards the laggard end of the scale when it comes to adopting new cutting-edge technologies, a sentiment echoed to an even greater extent by their customers.

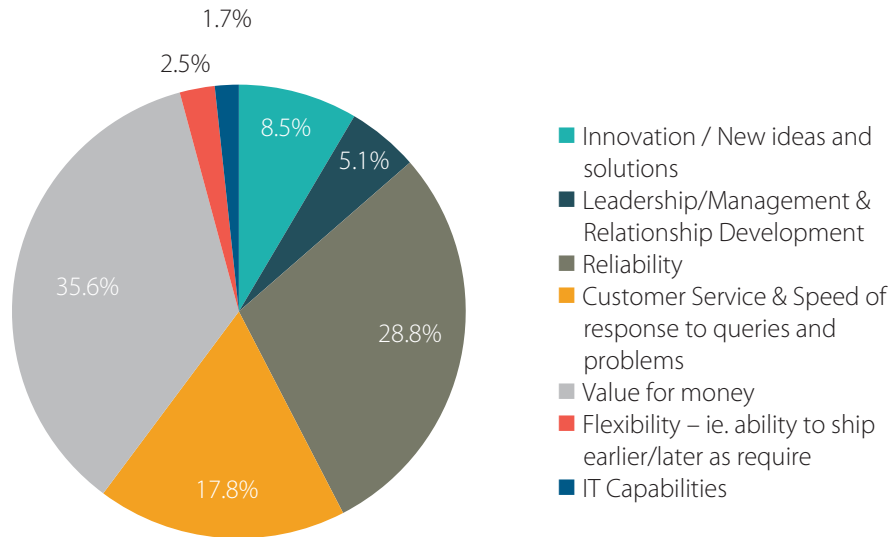
In which vertical are you seeing most growth?



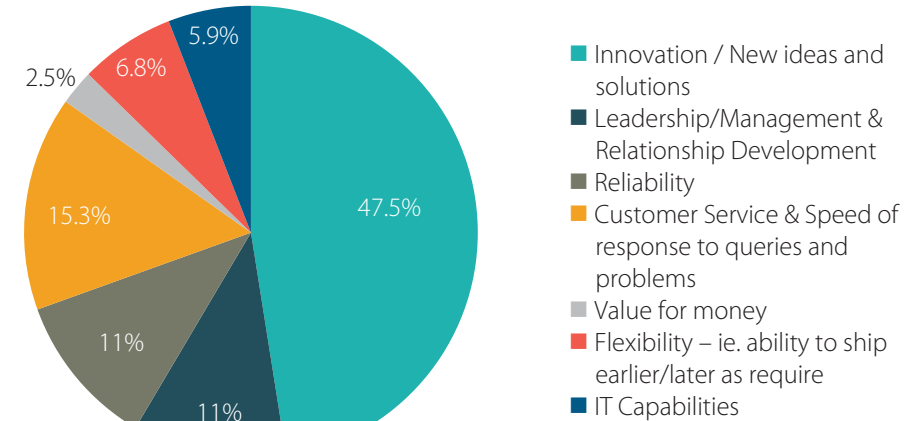
In which region are you seeing the most growth?



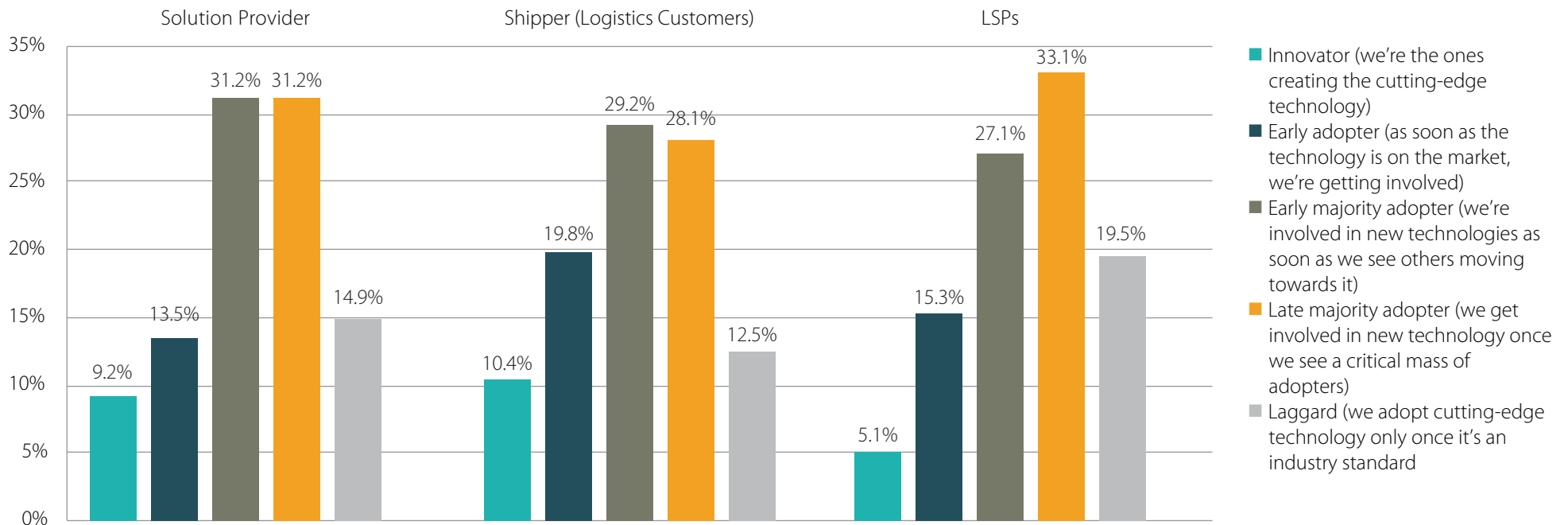
When benchmarking your logistics providers, which metric do you think is the most important?



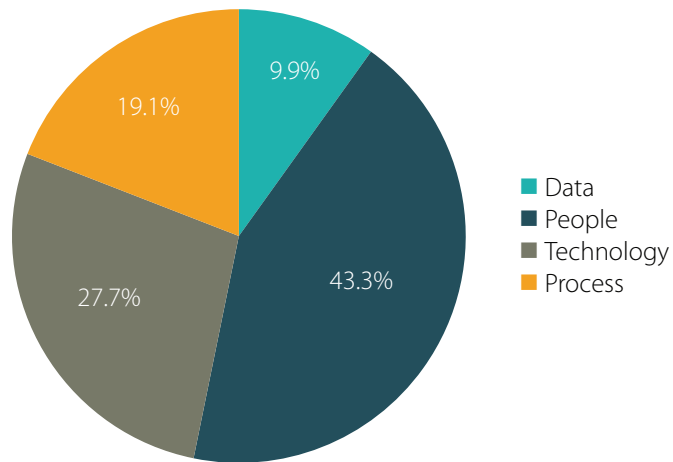
Where do LSPs most often come up short?



When it comes to cutting-edge technologies (drones, driverless vehicles, 3D printing, etc.) what type of adopter are you?

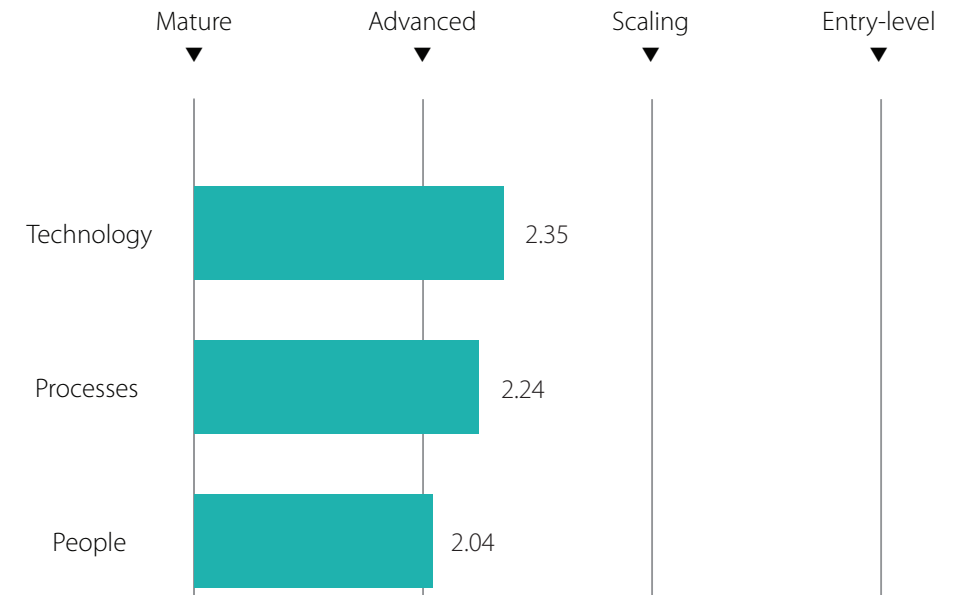


What's more important to a logistics organization in 2016?



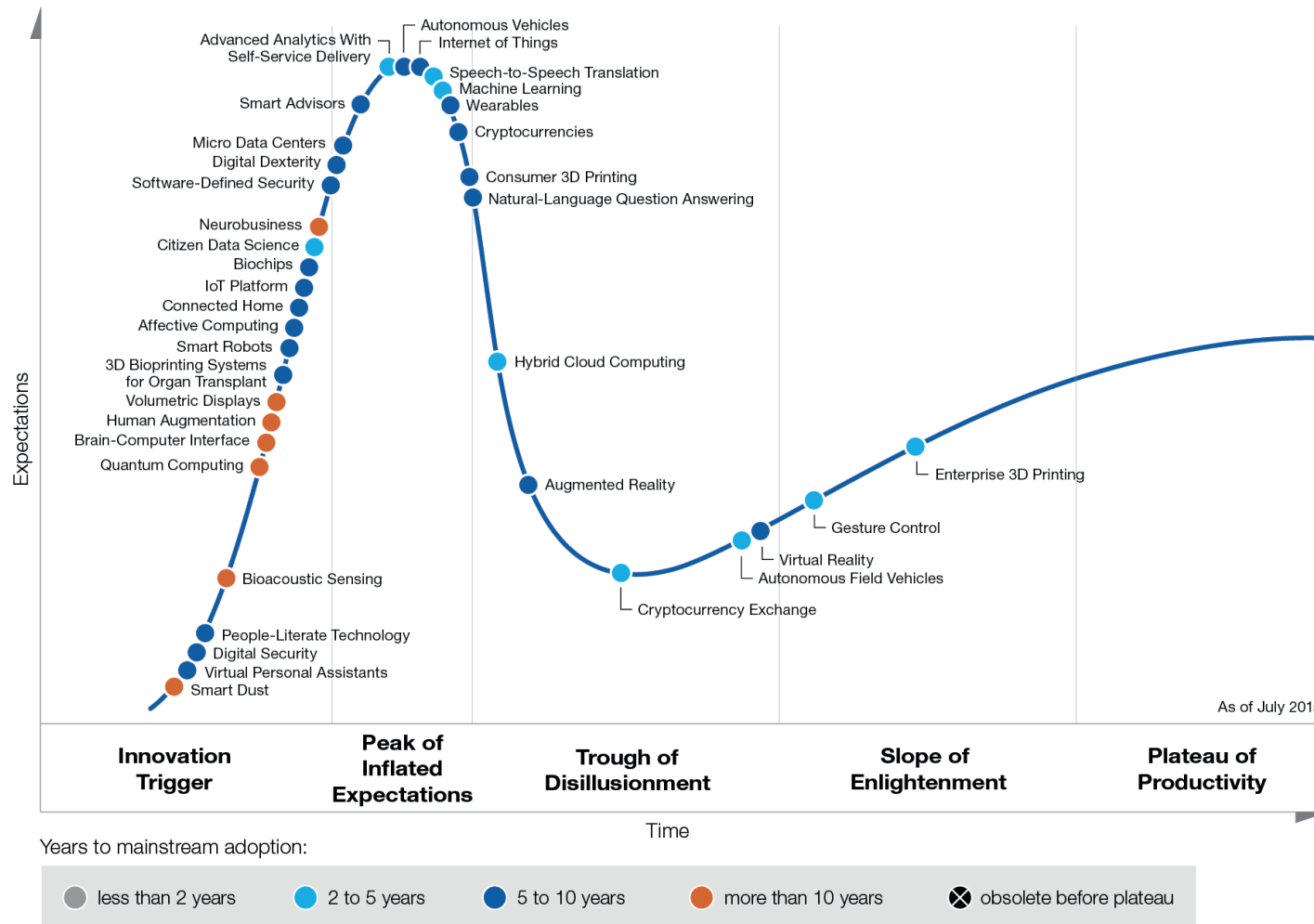
With extensive talk of the digitization of the logistics business and disruptive technologies from predictive analytics to asset-light tech start-ups, it seems like traditional logistics is under-attack. One of the themes we've heard extensive analysis on is the role data is playing in redefining the logistics business. That being said, respondents predominantly continued to define their organization as 'people'-centric, that is to say as a business that places its talent as its most important asset when ranked against technology, processes and data. Industry

When it comes to change management, how would you rank each of the following at your organization?



observers and solution providers agreed with their logistics counterparts, but did rank data 3% higher. While undoubtedly logistics is a people business, as automation and digitization continue to drive significant ROI, we might start to see this scale shift.

Emerging Technology Hype Cycle

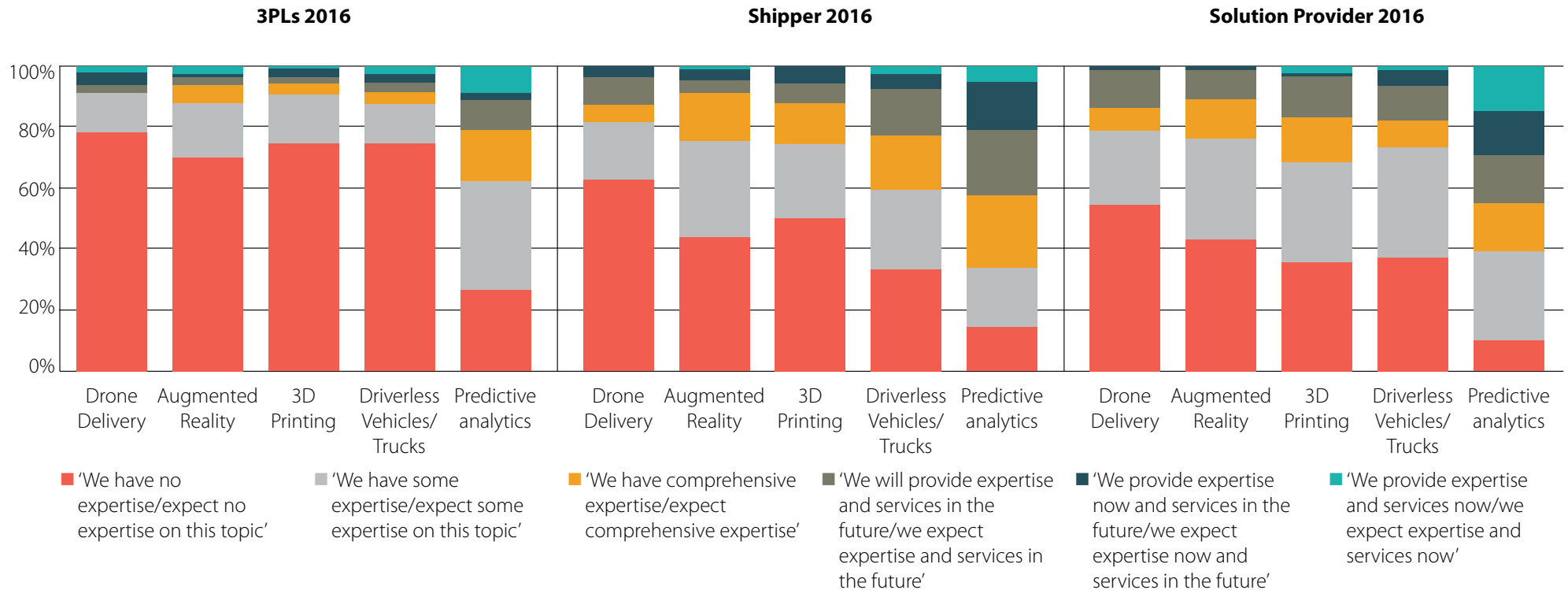


Source: Gartner

Over the last 2 years, we've been tracking the adoption of cutting-edge technologies (namely drones, augmented reality, 3D printing and driverless vehicles) to better understand how receptive the logistics community is to the buzz these technologies seem to be creating. Over the last several years, we have tracked a progressive 'warming' to these technologies throughout the surveys we've conducted. This year seemed different, however, as adoption shrunk or stayed the same. One of the main reasons for this is likely the lack of visible

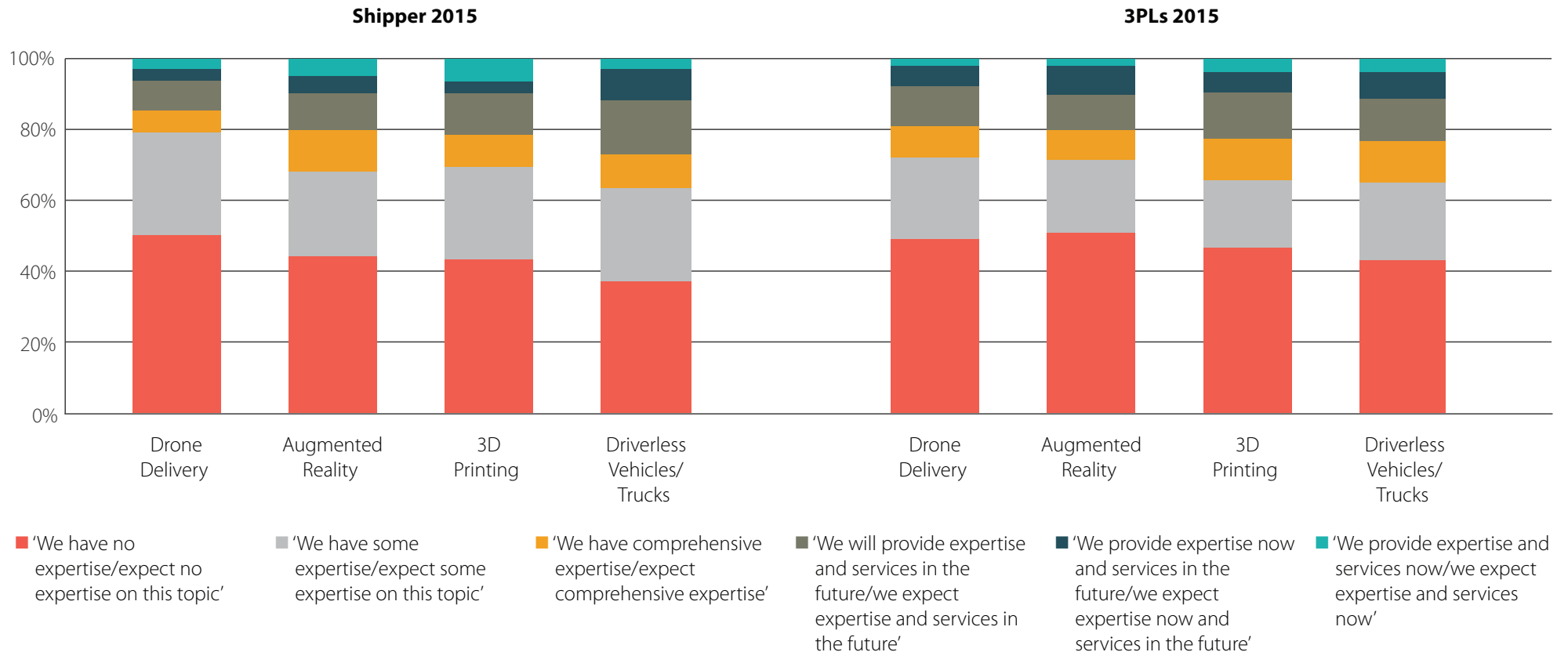
progress in many of these technologies - 3D printing and drone delivery especially - as well as their accessibility to most logistics providers. If we consider Gartner's hype cycle, some of these technologies might be in the 'trough of disillusionment' stage.

Do you expect to provide either expertise and/or services to your customers in each of the following areas?

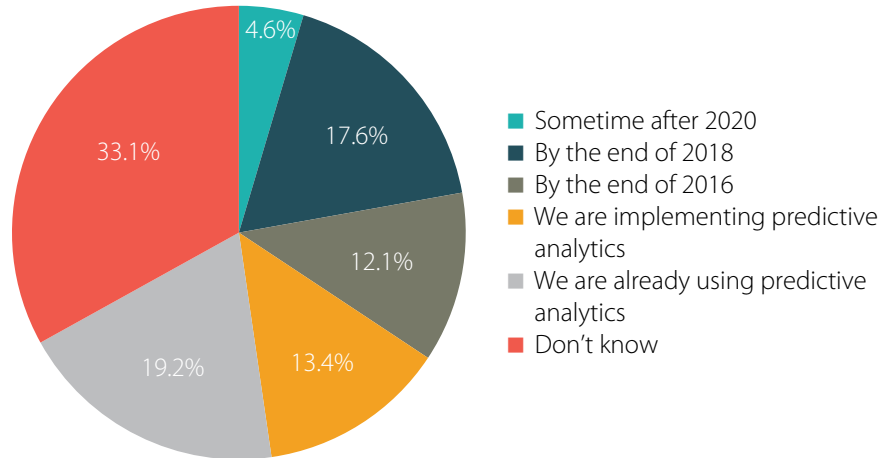


We added a new technology into the mix this year - predictive analytics - which is already gaining some traction in the industry. This is reflected in respondent's input as the results proved significantly more positive. In fact adding this technology into the mix might have helped skew answers in that predictive analytics has a much higher adoption rate than any of the other technologies.

Do you expect to provide either expertise and/or services to your customers in each of the following areas?



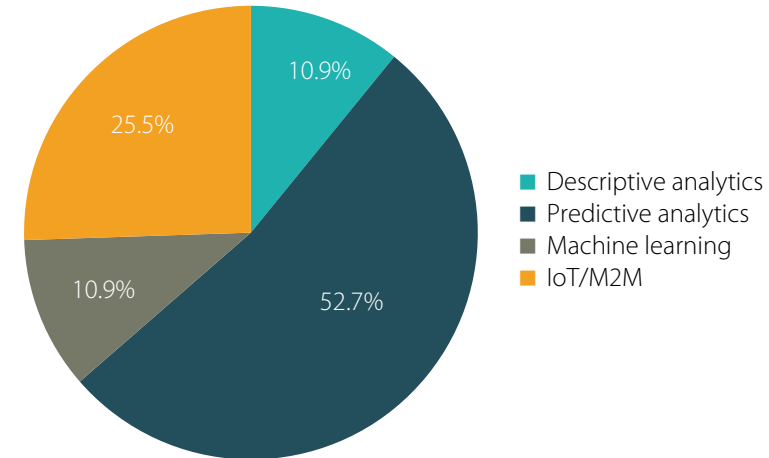
How far away is your organization from implementing/utilizing predictive analytics?



In a survey earlier in the year, we gained insight into the adoption of predictive analytics within the logistics community and discovered that the vast majority of respondents were already implementing the technology, or had plans to implement it between now and 2018. In fact 21% of respondent shippers expected their 3PL to be able to provide expertise and services in the area of predictive analytics in the future with a further 15% expecting their 3PL to have expertise in this area now, and to provide services in the near future. This contrasts significantly against the other listed technologies where LSP expectations were more muted.

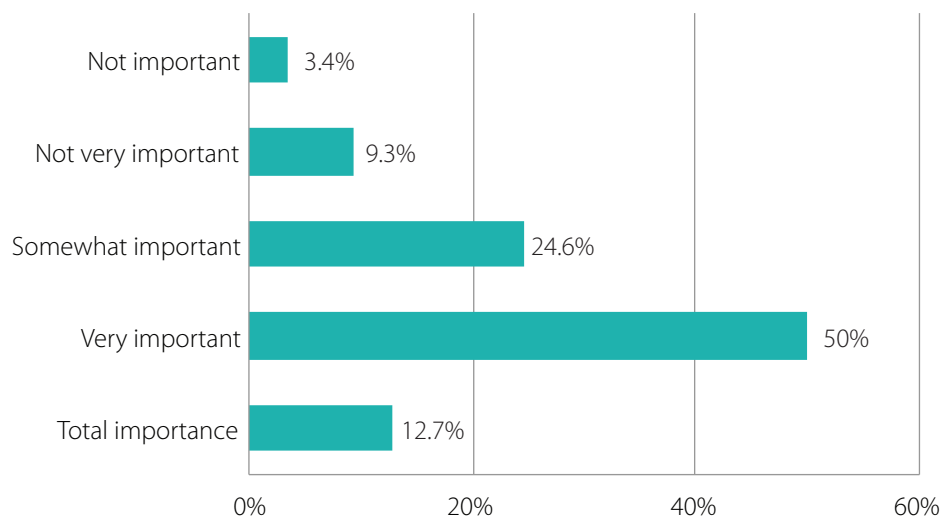
A number of upcoming factors though will see a shift in these numbers. The huge sums of money and effort going into driverless vehicles is going to begin changing trucking fleets. In fact it's difficult to imagine another solution to the truck driver shortage affecting North American and Europe other than

Which of the following technologies do you think will have the biggest impact on supply chain this decade? (2010-2020)



automation. A number of players are also continuing to push ahead with drone usage in logistics, from yard management to rural deliveries. As trials continue to happen and hone the capabilities of this technology, it might begin to prove its business case. 3D printing and augmented reality might have less certain paths. 3D printing has the potential to play a significant role in spare part logistics and some minor manufacturing, however the business case hasn't been fully realized with material limitations and few major logistics providers adopting the technology. Augmented reality is also a slow technology to develop. Most notably, it has been providing some warehouse workers with increased efficiency. However, it can also be argued that AR is just a stop-gap between current warehouse processes and full automation.

How important is it for your solution provider to be 'Full-service' ie. a one stop shop for all your logistics needs?



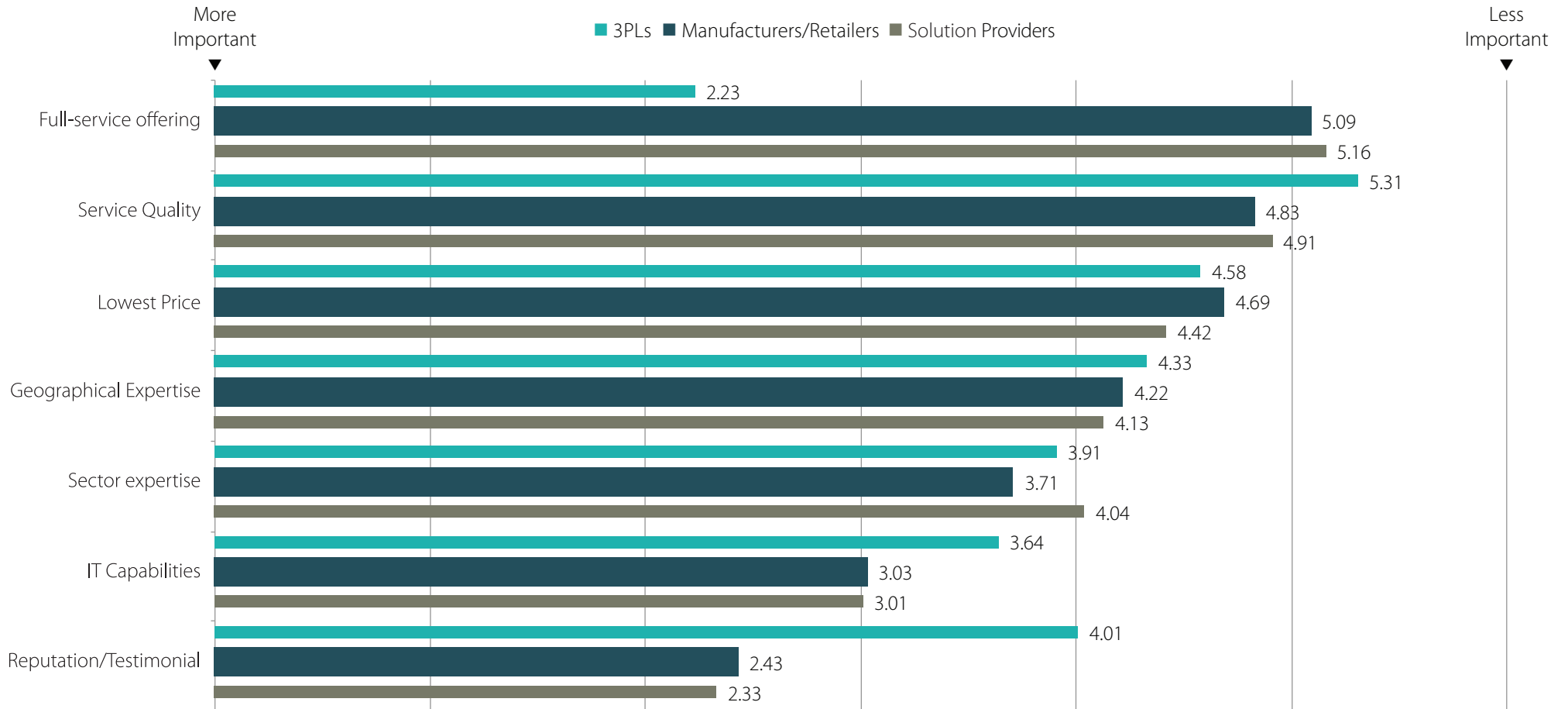
One of the key areas we analyse in our research into logistics providers is their relationship with their customers. Over the years this has been a significant area of dissonance.

We asked logistics providers, industry experts and shippers to rank their priorities (or their perceived priorities) when it comes to selecting a 3PL. All involved were in alignment for the top criteria with Service Quality, Lowest Price and Sector Expertise being consistent through each respondent type. Things then begin to differ. Shippers in fact rank Geographical Expertise on almost the same level as Sector Expertise. In fact, it was the most popular third choice for respondents, but due to weighting of rankings fell to fourth overall. The good news here for 3PLs is that geographical expertise is a specialization they use to attract new business.

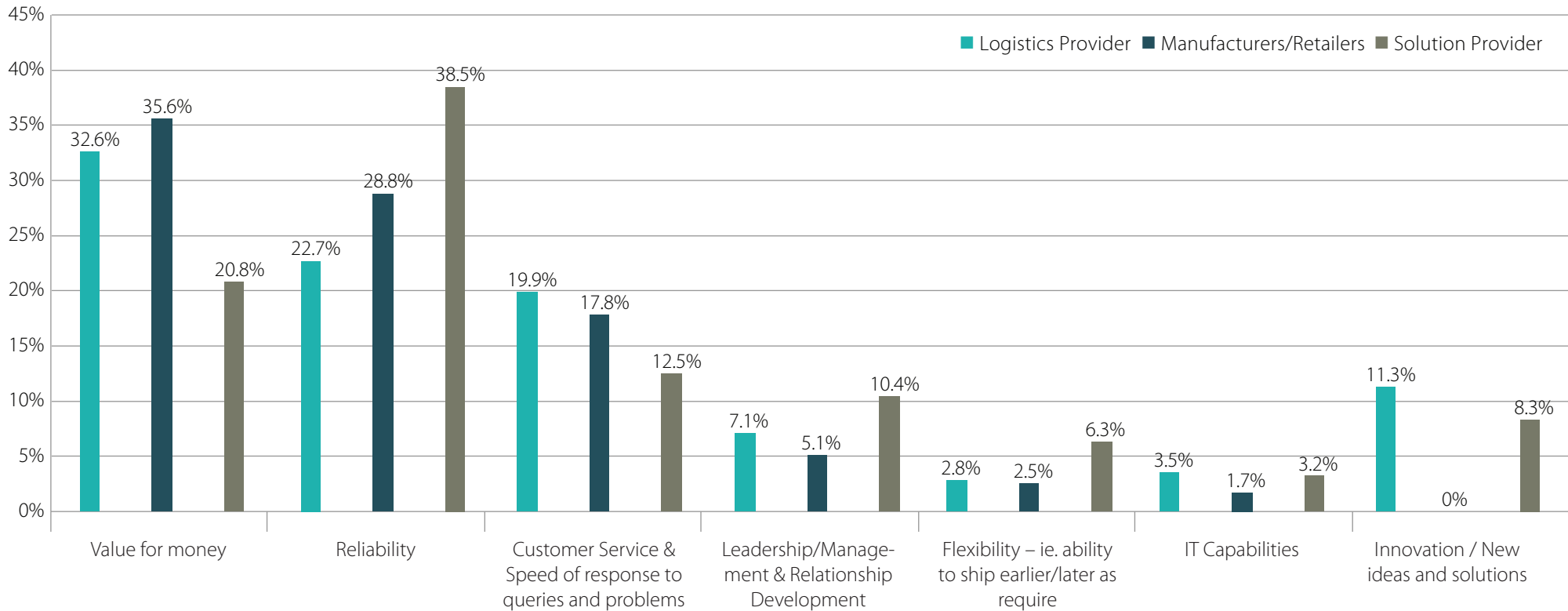
The full-service logistics provider has received significant attention in recent months as industry consolidation has meant many of the major players in the marketplace have added capabilities to their arsenal allowing them to provide more and more services for their customers, end-to-end. This has been especially evident in terms of eCommerce. Shippers did include full-service offering into the top 5 criteria they use in selecting a 3PL..

While full-service wasn't the most important deciding factor for shippers when determining their 3PL, it was clear that it was a significant expectation.

What do manufacturers/retailers look for when choosing a new 3PL?



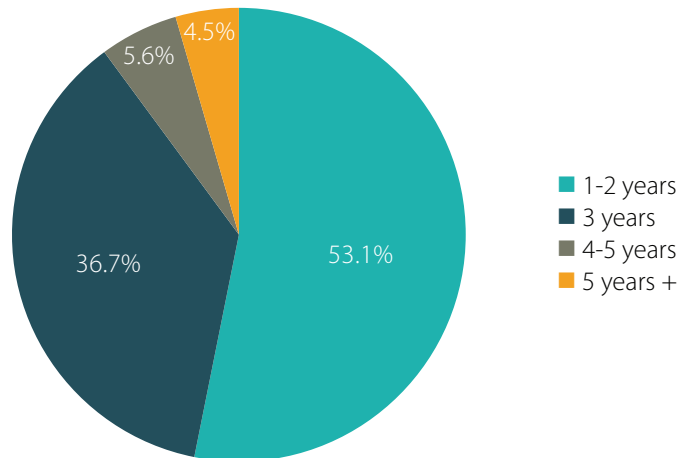
When benchmarking logistics providers, which metric do manufacturers and retailers rank highest?



Shippers and their logistics partners were in-line with each other when it came to benchmarking logistics services. Value for money was far and away the most important benchmark with reliability and customer service and support ranking highly. Service providers, and other industry players outside of LSPs and their customers differed highly on this matter, ranking reliability as the most

important metric. This discrepancy can likely be attributed to their outsider perspective not considering the commoditized nature of a number of logistics services thus making 'value for money' less critical.

What is the average length of a renewed 3PL contract according to 3PLs

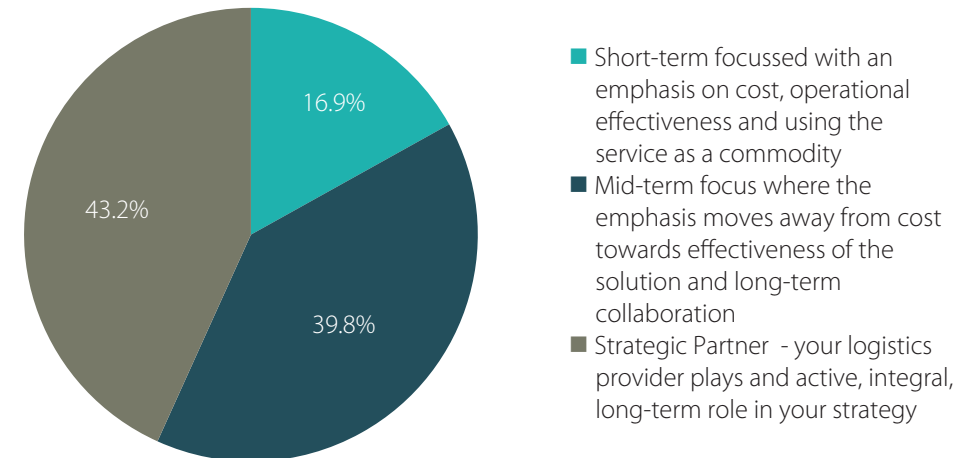


Innovation has played heavily in this report, as it was identified as a key area that logistics providers need to hone in order to drive new business heading into the next 18 months. Understanding the difficulties that logistics providers face in this area, we thought we'd ask them to identify what they could do to improve to better serve their customers. Understanding customer businesses better was the top selection. We can postulate that this need to understand the customer business is just the first step in driving innovation. How can you innovate for a business you don't understand?

That being said, if LSPs are aware of this conundrum, what barriers are they facing when it comes to better understanding their customers' businesses?

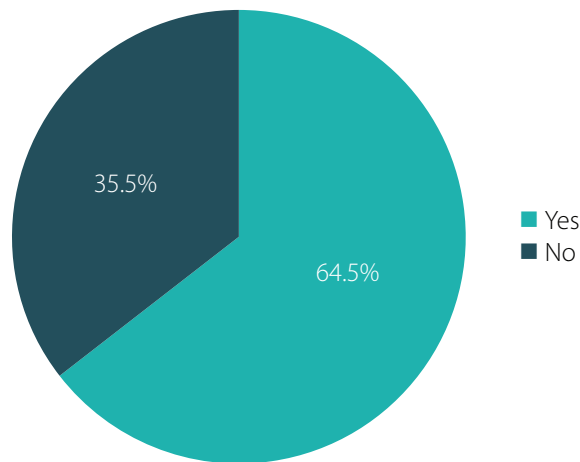
In past years, we've identified a cycle of short-term contracts preventing LSPs from implementing a long-term strategy and from getting better acquainted

How would you classify your relationship with your logistics provider(s)?



with their customers' businesses. This year, however, we asked shippers to classify their relationship with logistics providers. We expected this to reflect the short-term contract conundrum ie. their relationships with their providers are also short-term. This was short-sighted of us though; as given our past reports, we have seen that despite the short contracts, their renewal rate is very high. As recently as 2014, 36% of LSPs reported that over 90% of their contracts are renewed. Consequently, shippers look at most of their 3PL relationships as strategic – that is to say long-term and integral to their strategy. Only 17% of shipper respondents reported short-term focussed relationships. The challenge facing logistics providers is to maintain their strategic relationship through multiple contracts. This becomes even more difficult when such strategic relationships require long-term or significant investments on the part of the LSP on behalf of their customer.

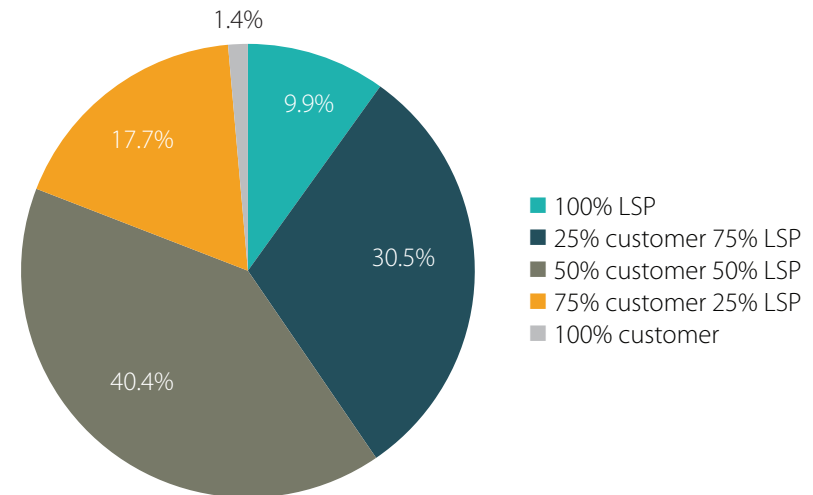
Is your logistics organization asset owning?



One of the areas in logistics that has been most impacted by technological advances over the last 5 years has been risk. Telematics has played a significant role in how actuaries have assessed risk in vehicles and the connectivity of the supply chain in addition to expanded data analytics have allowed companies to better understand the risk they might be exposed to throughout their operations. It has also allowed businesses to spread risk in more ways.

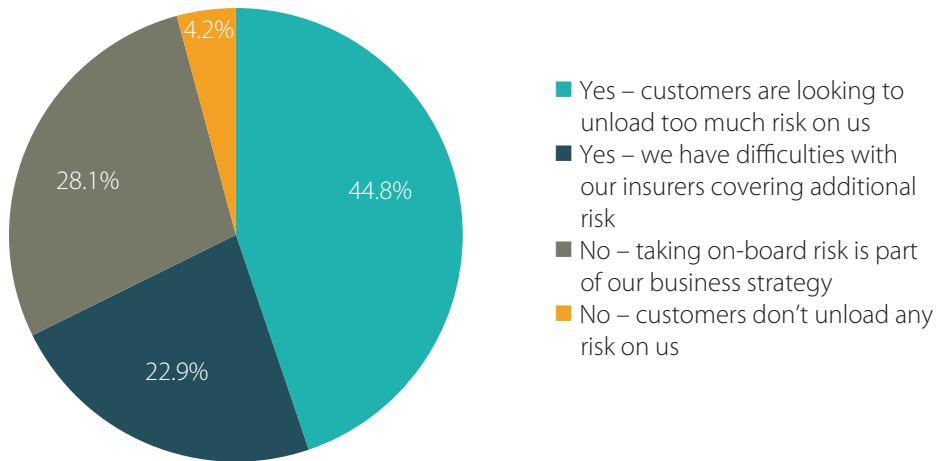
In speaking with a number of frustrated LSPs on the amount of risk they were expected to cover on behalf of customers, we thought we'd explore the issue of liability further.

When it comes to allocating risk between yourself and your customers, what is the usual division?



Over 40% of LSP respondents said that their customers were allocating the majority of their risk on them. Another 40% said that they split the risk 50-50. According to shippers, the breakdown is significantly more allocated towards them – 38% saying that they allocate 25% of their risk to LSPs only. That being said, up to 19% of respondents did say they were allocating the majority of their risk to their logistics provider. A further 45% of shipper respondents indicated that risk allocation was very important for them when selecting an LSP.

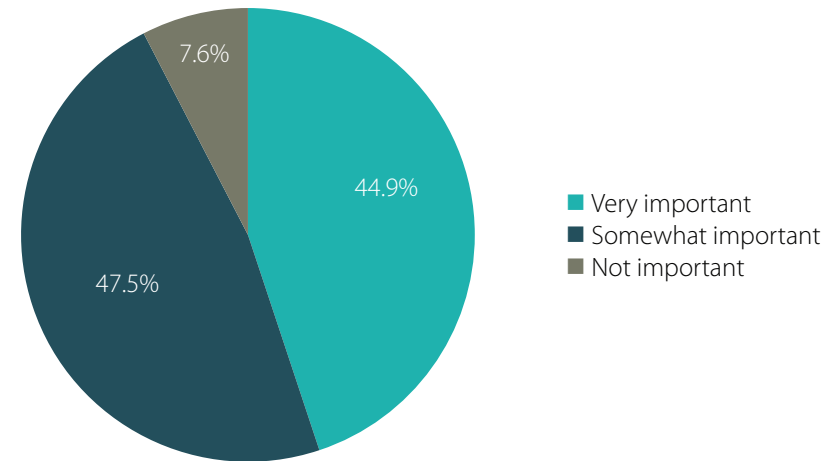
Do you find risk allocation to be a challenge for LSPs' relationships with customers?



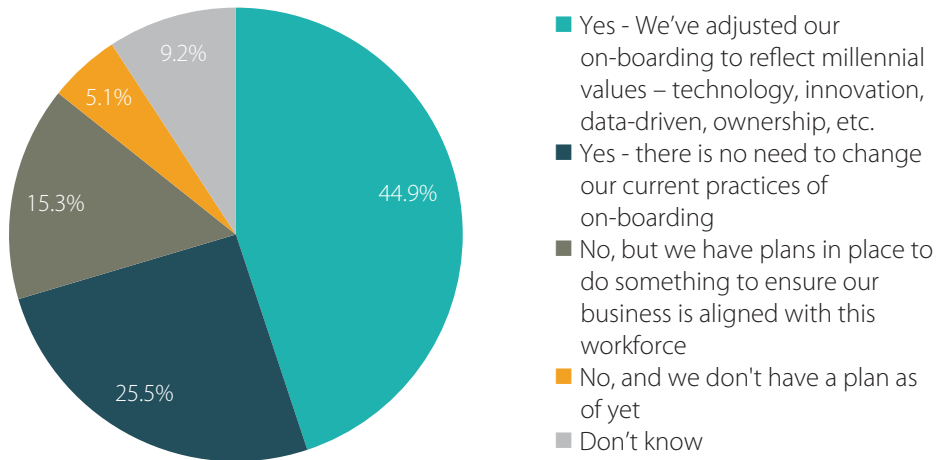
How are 3PLs coping though?

61% find risk allocation to be a challenge. The predominant source of this challenge is from customers looking to offload too much risk on LSPs. Technology and data are clearly playing a significant role in allowing companies to reduce their insurance premiums. Logistics providers could increasingly leverage these technologies alongside insurance offerings to provide comprehensive risk solutions to their customers.

How important is risk allocation when you select your LSP?



LSPs: Is your company prepared for a future change in workforce... i.e. more millennials?

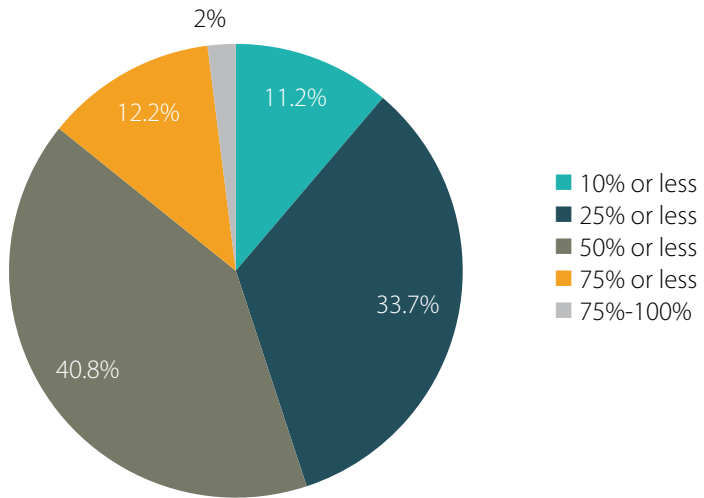


Logistics providers predominantly look within their own industry for hiring. Given the difficulties logistics providers face in terms of better understanding their customers' businesses, it is somewhat surprising to see less than 10% of respondents looking to their customer bases for talent.

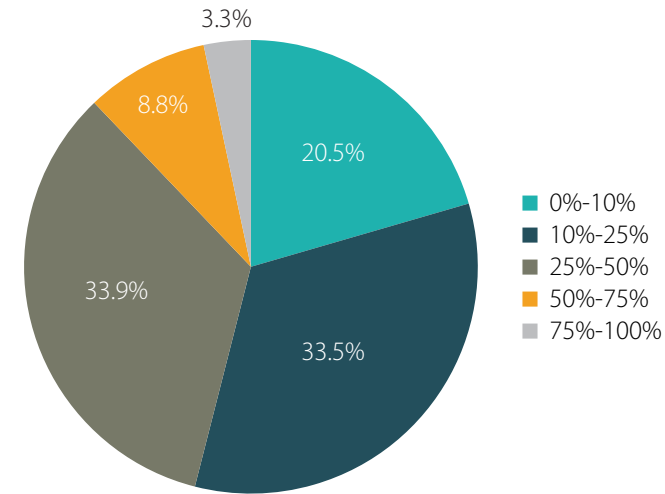
Innovation is another area logistics providers are facing significant challenges. To better understand how some providers might be looking to tackle this challenge by way of talent, we explored how LSPs were looking to millennials to fill their ranks. In our Q4 2015 hot-trends survey, we discovered that LSPs are more likely than their shipper counterparts or solution provider peers to have millennials in their workforce. They are also more likely to have adjusted their on-boarding to align with millennials with over 80% stating that they are prepared for a future workforce of millennials.

The industry as a whole sees millennials as not only driving changes in consumer behaviour but also driving innovation by way of their understanding and embrace of technology. As such, it could be interpreted that the eagerness of LSPs to incorporate millennials into their ranks is indicative of an effort to integrate more innovative thinkers into their ranks. In addition to hiring younger workers, LSPs were focussing on providing their employees with workplace autonomy as a key method for retaining talent.

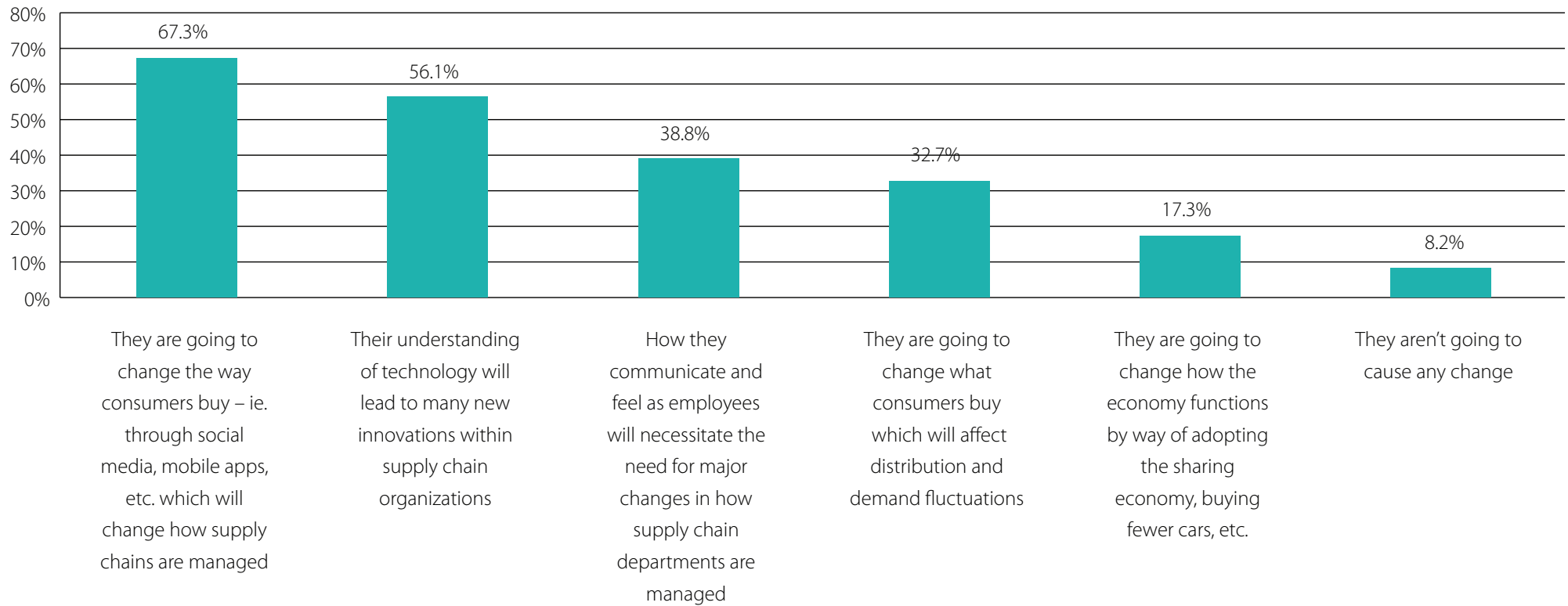
LSPs: What percentage of your supply chain/logistics workforce are millennials? (Employees under age 33)



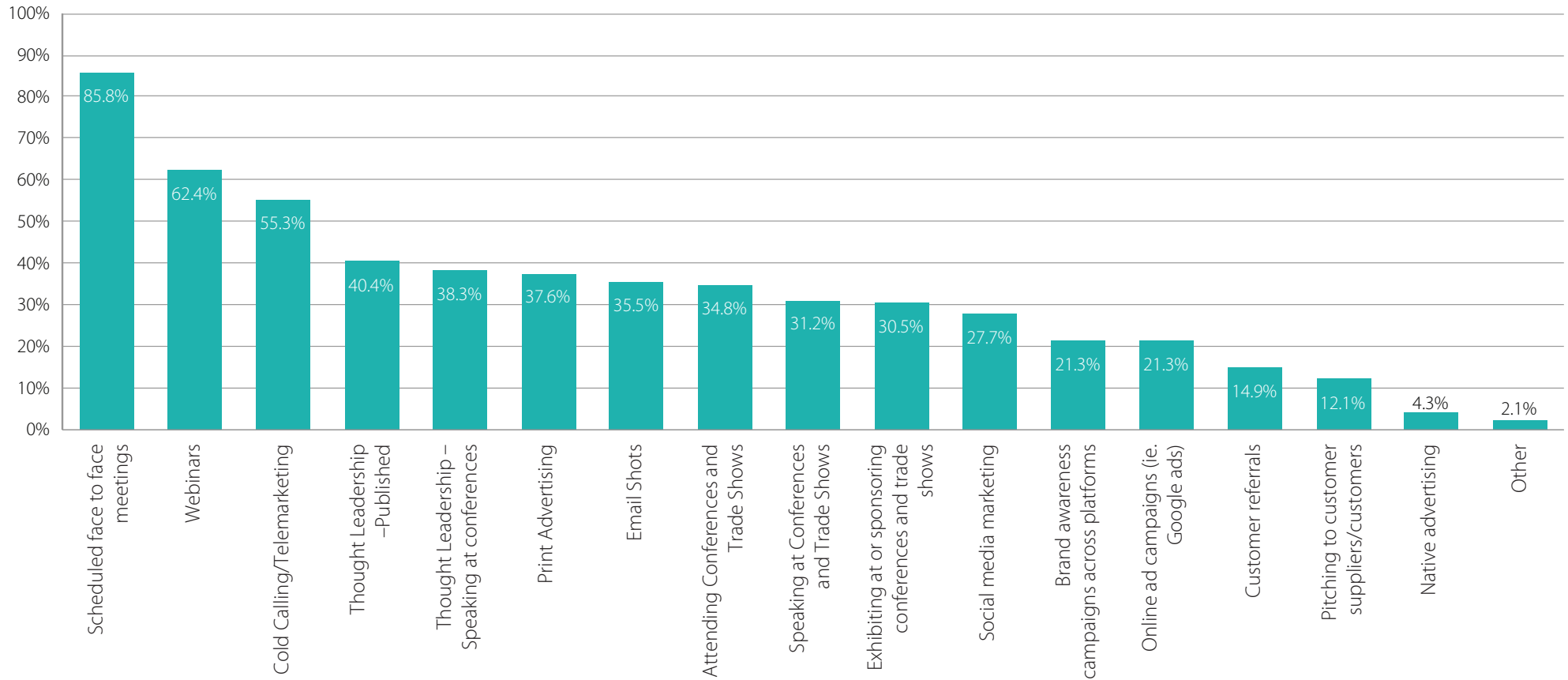
Shippers: What percentage of your supply chain/logistics workforce are millennials? (Employees under age 33)



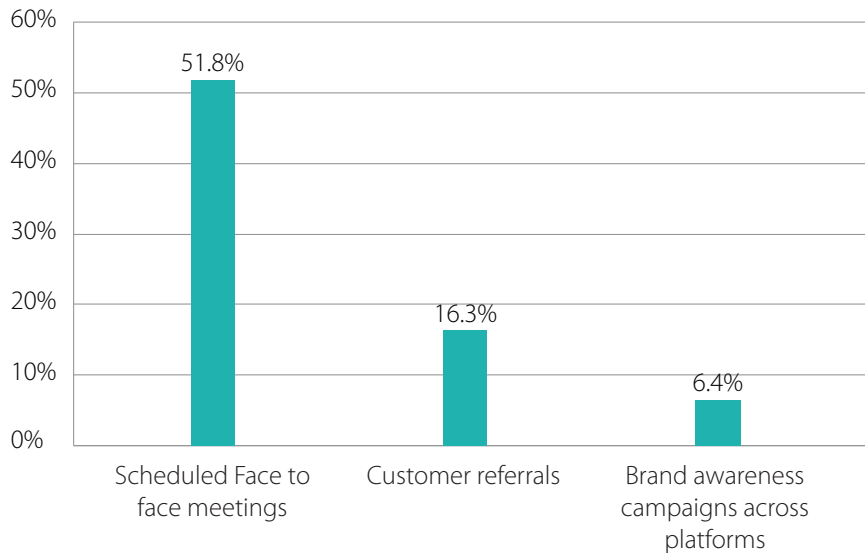
LSPs: What impact are millennials going to have on the supply chain?



What are you doing to get noticed by prospective customers?



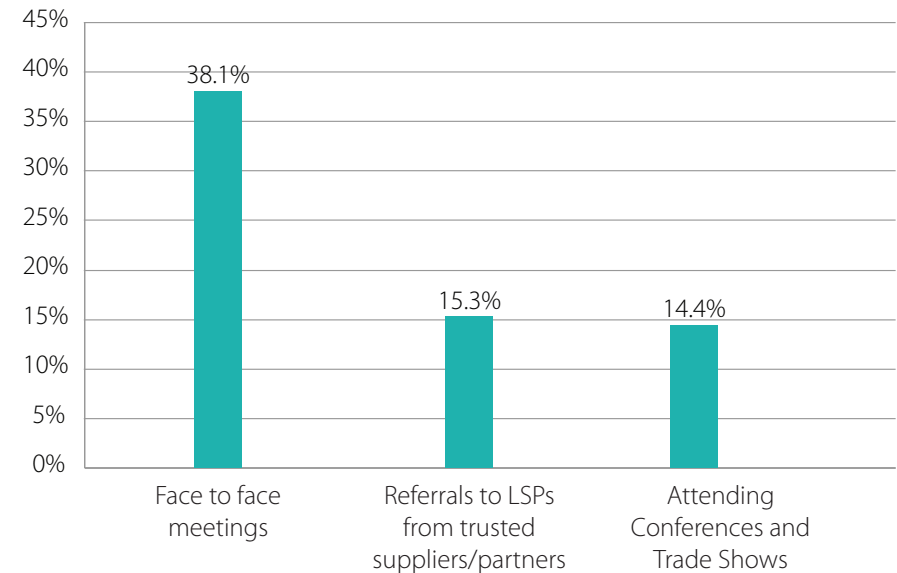
LSPs: What is the most effective way to get new customers? Top 3 Answers



Logistics providers have a tendency to seek new business by competing directly with each other. They look to secure this new business by way of face to face meetings with potential customers. Most respondents also find this to be the most effective way to gain new business as well. Given what their customers are saying, this strategy is working. Some 38% of shippers have identified face to face meetings as the main way they find out about LSPs. A further 14.4% use referrals from trusted suppliers or partners, also in alignment with LSP strategy.

That being said, the third most important area shippers use to learn about LSPs is conferences and trade shows, an area only 2% of logistics respondents considered effective.

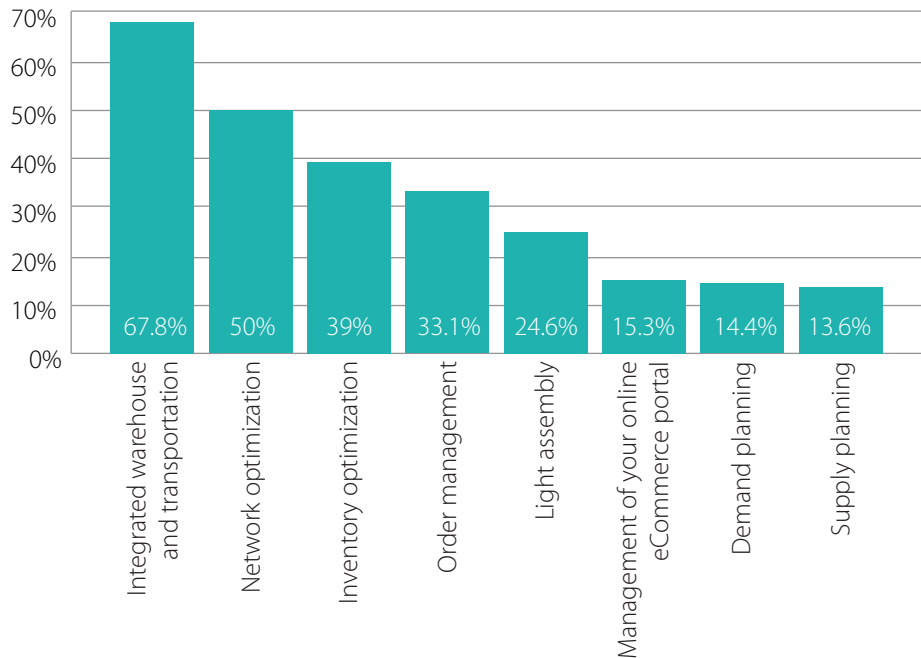
Shippers: Where do you mostly find out about logistics providers? Top 3 Answers



In addition, 44% of shippers mentioned that they conduct in-house research to determine which LSPs they would extend RFPs/RFQs to. The second most popular choice for shippers when it came to RFPs was to send them individually to logistics providers from past experiences. What is clear here is that LSPs need to ensure they are getting in-front of their customers. Shippers work from their own knowledge and experience which they gain from conferences, referrals and face to face engagement. As an LSP, if you're not using these mechanisms to get in front of shippers, then you're likely to face significant challenges when it comes to gaining new business.

Shipper perspective

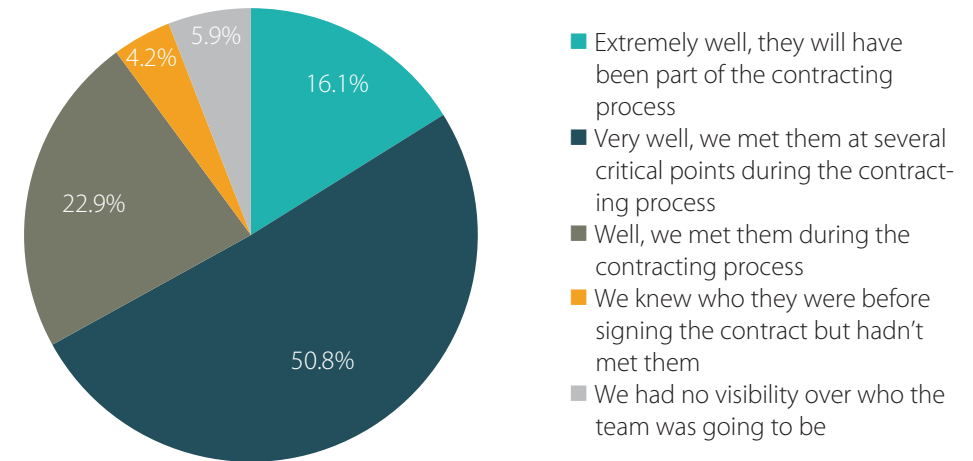
In addition to Warehousing and Transportation services, what other services would you like to see an LSP offer?



One of the most revealing parts of the 2016 Logistics Survey is the perspective shippers have on the logistics business.

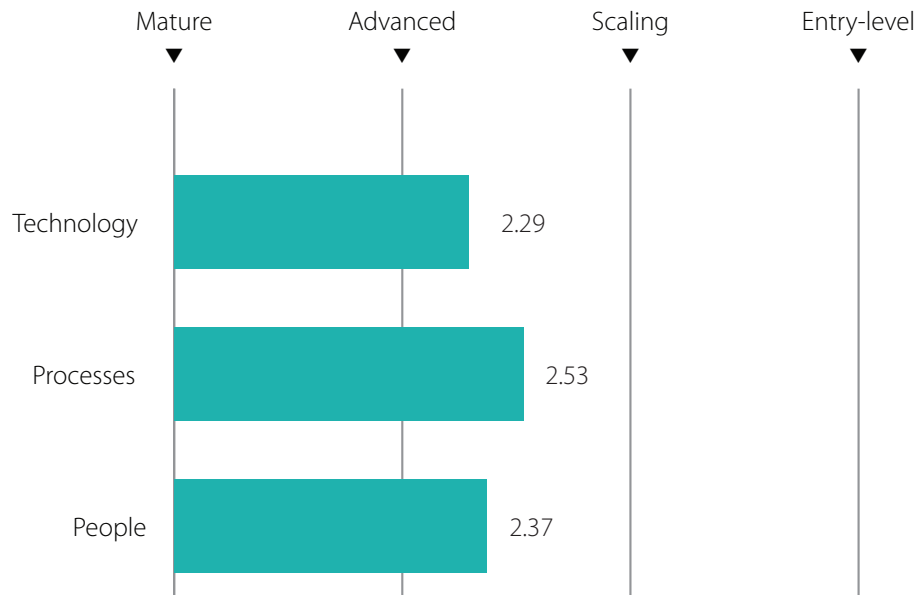
Beyond warehousing and transportation, shippers were looking for a number of other services. Included were integrated warehousing and transportation, network optimization, inventory optimization and order management. Over 15% of respondents were even looking to their logistics provider to help manage their online eCommerce portal. In essence, there are a number of services that LSPs can look to for additional revenue beyond traditional warehousing and transportation.

How well do you know the operations team you're going to be working with before signing up with your LSP?



In an effort to understand why there is a disconnect between logistics providers and their customers, we looked to find out how well shippers knew the operations teams at LSPs in the lead-up to contract signing. Most shippers reported having significant familiarity with the operations teams they would be working with, with most reporting they had met them several times at critical points during contracting. There was just over 10% of respondents that had very little contact or visibility over the operations team they would ultimately work with. While not a major percentage over-all, it is a significant number of logistics providers that still have such little contact with the team that they end up working with.

When it comes to change management, how would you rank the capabilities of your logistics provider in helping you through this process in each of the below?

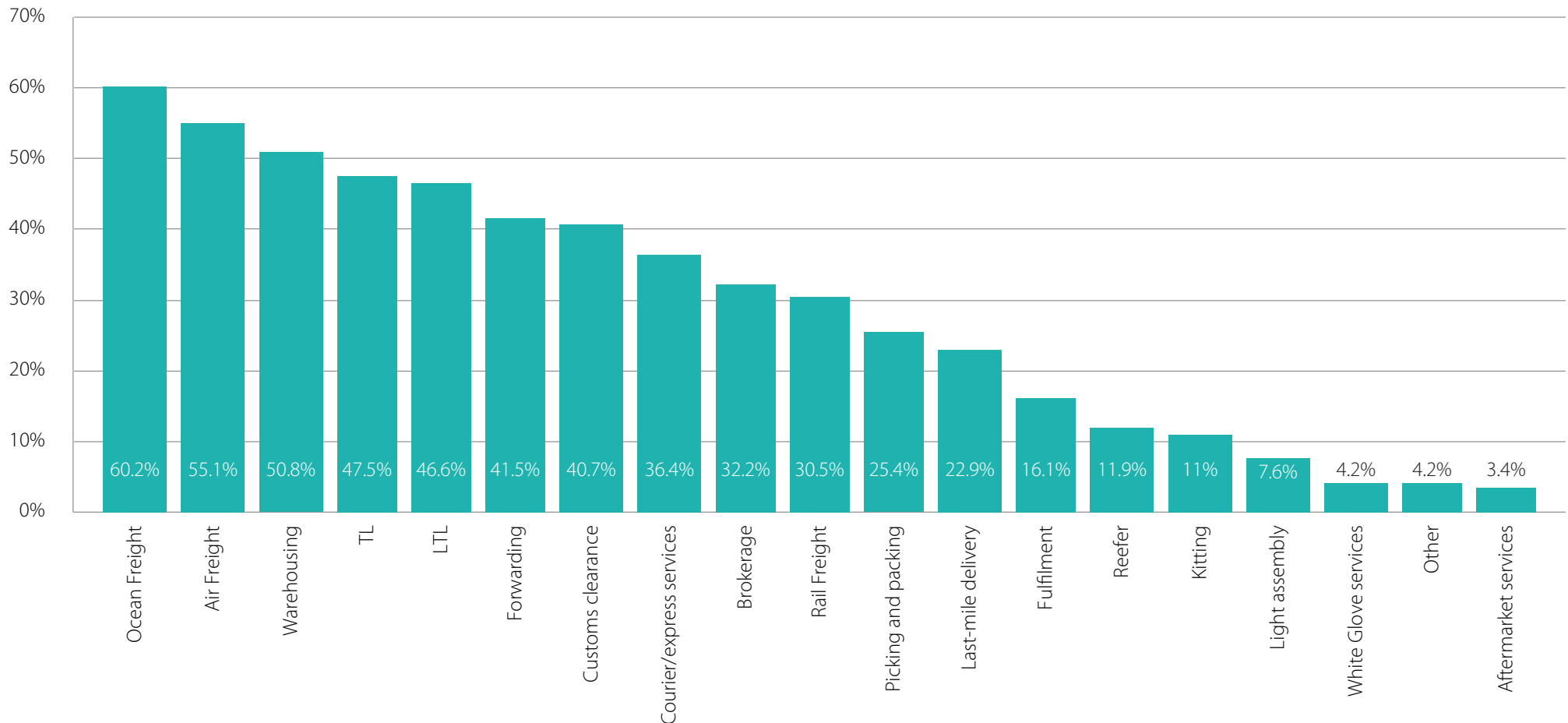


Given the important role LSPs play in shipper operations, we explored how well logistics providers were equipped in assisting their customers through managing change. Interestingly, weighted scores indicated that technology was the least advanced capability logistics providers had on offer. This is consistent with the rest of the survey where customers indicated that they felt LSPs fell short on innovation while logistics providers themselves indicated that they were generally toward the laggard side of the new technology adoption scale. As much as 8% of respondents felt that their LSP's technology capabilities for helping them manage change was entry-level. This can be contrasted with the 2% of respondents ranking processes. Overall, most LSP processes were in the scaling to advanced range, with only technology falling on the scaling side of these two choices. Clearly logistics providers are going to continue their efforts to embrace technology and the ways this meshes with their customer's businesses.

One of the reasons logistics providers find themselves in an innovation glut is the competition trap they find themselves in. If the biggest source of new business is coming from other LSPs, this likely indicates a high concentration of commoditized services. In fact 50% or more of shipper respondents only indicated 3 services as commoditized including ocean freight, air freight and warehousing.

This is an interesting selection of services, especially with regards to warehousing, which is going through a significant change at the moment by way of eCommerce. It is also an area that is going through a lot of innovation in terms of automation, and reimagination within businesses as more and more stock is needed nearer to urban centres, especially in the retail industry.

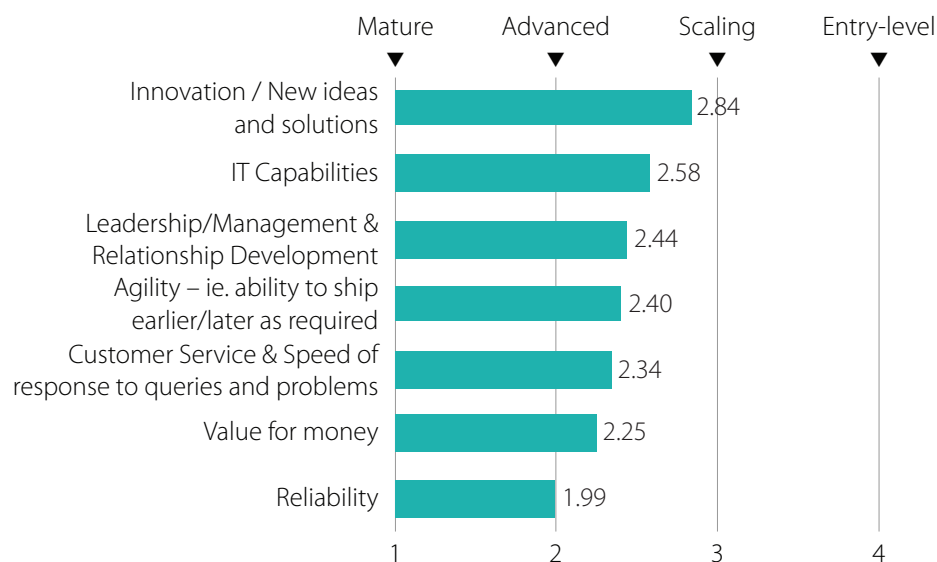
Which of the following services that you use by way of an LSP would you consider commoditized?



On the other end of the spectrum, aftermarket services and white glove services represent the least commoditized services. These highly-specialized services are often associated as value added services or as revenue streams. They also help reject the notion that logistics is commoditized as a whole.

One of the things that the responses shippers submitted to this questions of commoditization is the fact that there is very little consensus on which services are commoditized. Effectively, LSPs have a lot to work with in terms of innovation as well as maintaining and creating sustainable margins in their businesses.

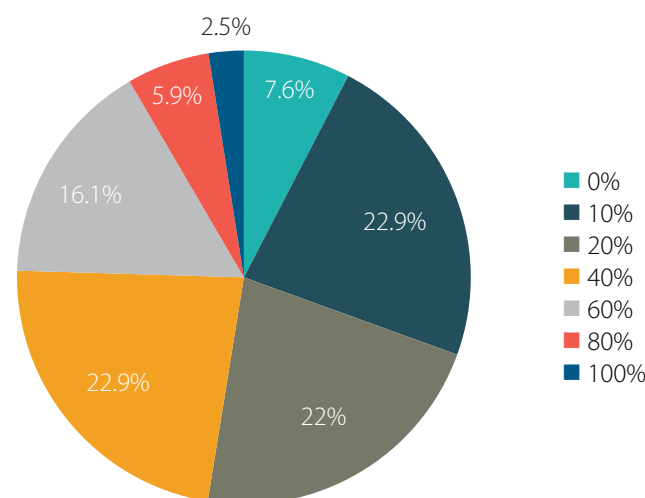
Rank your current logistics provider(s) in each category on the below scale



There is clearly room for improvement when it comes to LSP services. With the exception of reliability which is classified as 'advanced', shippers felt their service providers were scaling to some degree. Once again, innovation and new ideas rank last, with only 24% of respondents suggesting their LSP might be advanced and 17% suggesting their LSPs as being entry-level in this area.

Cost-creep was something that almost every shipper respondent indicated as a reality. However, most felt this was at a limited level, with almost 50% of respondents seeing this in less than 20% of contracts. In looking at shipper reviews of LSP services, value for money is the second highest ranked area after reliability. As such, it is not that surprising that cost creep is relatively limited.

Generally speaking, on contracts you have with LSPs, what percentage of them end up with cost-creep?



Logistics providers have clearly not mastered their current service levels as far as shippers are concerned. That being said, with supply chain advancing at perhaps its quickest pace in decades, LSPs are going to be relied upon to keep pace. The full-service LSP is one of the significant expectations shippers will have of their LSPs with 21% expecting this to be a wholly-owned service offering. Another 15% of respondents see tech-based disintermediators (think 'Uber of trucking') as another type of future alternative. 9% even see sharing-economy based providers as a possible future iteration of the LSP.

Conclusion

Redefining logistics services

EFT has delivered a wealth of new insights on emerging trends in logistics services as we enter 2016. We can summarize the individual findings into a few key areas:

- Innovation is an important tool to avoid commoditization
- Technology is maturing as a key enabler for growth and maintaining a competitive edge
- eCommerce continues to be a significant growth area
- Companies who attract, retain and enable the best talent will prevail

Innovation helps grow your business

29.8% of survey respondents say that stagnant global growth is the biggest threat to their business growth in 2016; 32.6% say it's their competitors. And in directly competing for each other's customers in a stagnant economy, they are in effect commoditizing themselves. 14.9% already see commoditization as the biggest threat to their growth.

So how can LSPs maintain margin in a market with increasing commoditization? Through innovation. The survey reveals that 33.3% of respondents said innovating to create new business areas was how they gained most of their new business in the last 12 months. And a stunning 46.1% of respondents say that innovating to create new offerings is how they expect to gain the most new business in the next 18 months.

Technology is an important enabler

EFT defines innovation as leveraging technology to provide new services or expanding service offerings, such as adding white glove services. 2016-2017 is going to be critical as cutting-edge technologies that have grabbed headlines over the last 5 years start to become significantly more strategic and begin driving increased ROI. Further, the growing focus on innovation and the adoption of enabling technologies help LSPs play a more strategic role to their customers. Leading LSPs can now offer the breadth of capabilities that customers need to adapt to a rapidly evolving market.

eCommerce changes the customer relationship

In addition to the maturation of cutting-edge technologies, major shifts in supply chain verticals create significant opportunity for innovative logistics providers. 34.8% of respondents say eCommerce is the vertical in which they see the most growth potential. Other verticals, including Healthcare/Life Sciences/Pharma and Industrial, continue to show strong growth potential but eCommerce prompts logistics providers to help shippers redefine how they interact with their end-customers by becoming more responsive to their needs.

It's important to note that while LSPs see innovation as essential to differentiating their services and avoiding commoditization, "value for money" is the most important metric (35.6%) used by shippers when selecting an LSP. eCommerce is a strong growth segment but fulfilling profitably can be one of the biggest challenges for the industry. Utilizing a fully integrated warehouse,

transportation and order management strategy is a critical initiative for solving the profitability challenge. In fact, the vast majority of shippers (67.8%) who responded to the survey said that integrated warehouse and transportation services is the capability they most desire from their 3PLs.

A new generation of talent

While only 14.2% of respondents said millennials (employees under age 33) had become a majority in their workforce, 44.9% said they've already adjusted their on-boarding processes to reflect millennial values. Those values include preferences for how they like to interact with technology, embrace innovation, use data for decision making and take more ownership of their work, among others. This is critical for not only attracting new employees but retaining them. Innovation is the key to making the logistics workplace millennial-friendly.

Navigating through the coming year

The new insights provided by the EFT 2016 Global Logistics Report confirm what we believe is the best approach for 3PLs to navigate their way through the coming year. Six key steps can help combine the positive vision of 3PLs becoming strategic partners to their customers with the realities of what it takes to put the necessary capabilities in place:

1. Gain as much information as possible about what systems, technologies and cloud platforms are available in the marketplace.
2. Hold executive-level meetings with customers to learn what their strategic objectives are and not just their tactical needs.
3. Honestly assess internal capabilities and capacities, and compare this with what is needed to support customers' strategic objectives.
4. Engage outside experts and/or technology vendors to identify options, costs and timeframes for filling the gap between current capabilities and customers' strategic visions.
5. Implement the new solutions as quickly as possible, considering the best deployment options, including cloud platforms, that meet both your financial objectives and customers' strategic needs.
6. Repeat these steps on a regular basis to make sure your capabilities continue to support customers' strategic objectives.

2016 is going to be an exciting year in logistics services. We're looking forward to seeing the many positive trends revealed in this new study come to fruition.

Todd Johnson

Chief Customer Officer
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