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Global Warehousing & Logsitics Survey 2023

A GLOBAL VIEW

Warehouse Operators

We asked what the REAL issues facing our contacts were on a daily basis.

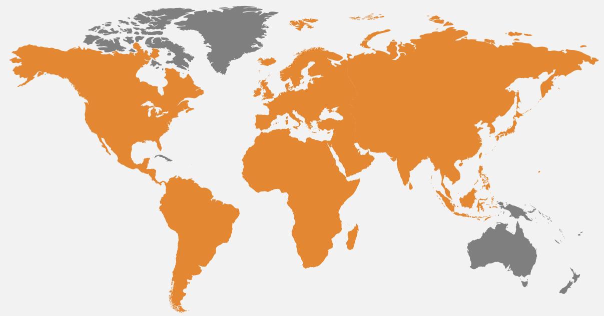
Current Challenges

We wanted to see how common today's challenges were for our audience.

Future Expectations

We wanted to see how Warehouse Operators thought the future would look.

Country Locations



Data Market

71%

Africa

16%

Central Asia

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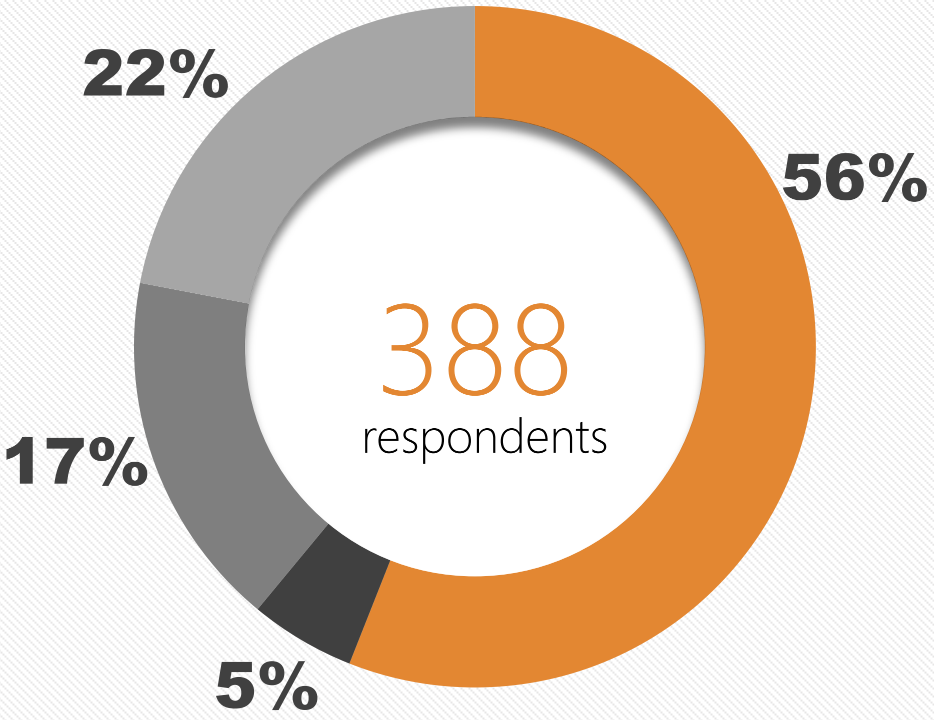
THE SURVEY



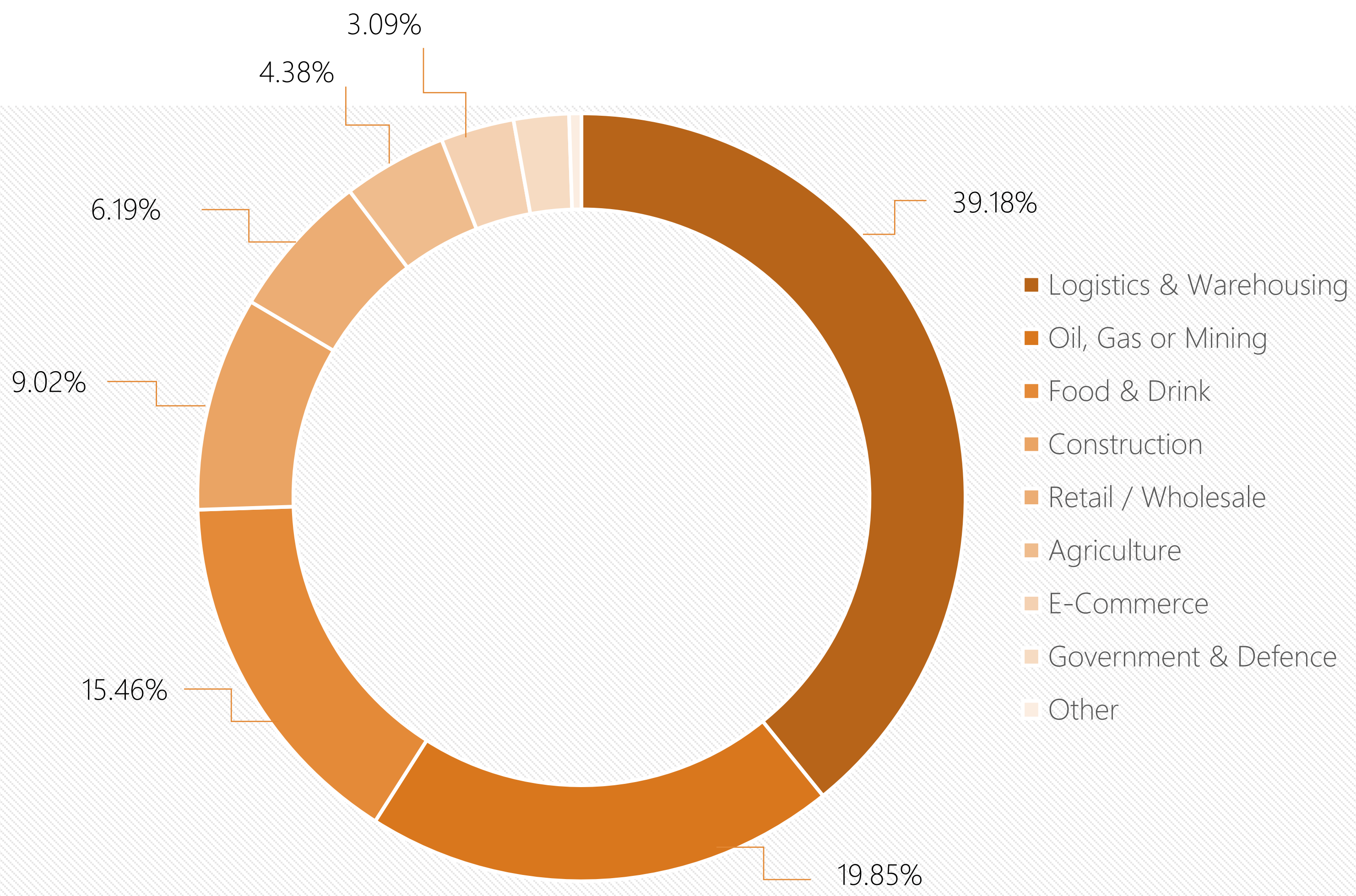
Logistics/Operations/Supply Chain Managers (56%): The majority stake in our survey, their insights reflect a deep understanding of the end-to-end supply chain and its operational demands.

Assistant Warehouse Managers (5%): While a smaller representation, these respondents play a crucial role in the survey, providing an on-the-ground perspective that's vital for operational success.

Other (17%): A diverse group encompassing various roles within the industry, offering a broad range of insights that add depth to our findings.

Warehouse Managers (22%): A significant segment of our survey, these professionals bring forth the practical challenges and strategies from the heart of warehousing operations.

INDUSTRY SECTORS



39% of respondents selected that their industry sector is Logistics and Warehousing.

19.85% of respondents selected that their industry sector is Oil, Gas or Mining.

15.46% of respondents selected that their industry sector is Food & Drink.

9.02% of respondents selected that their industry sector is Construction.

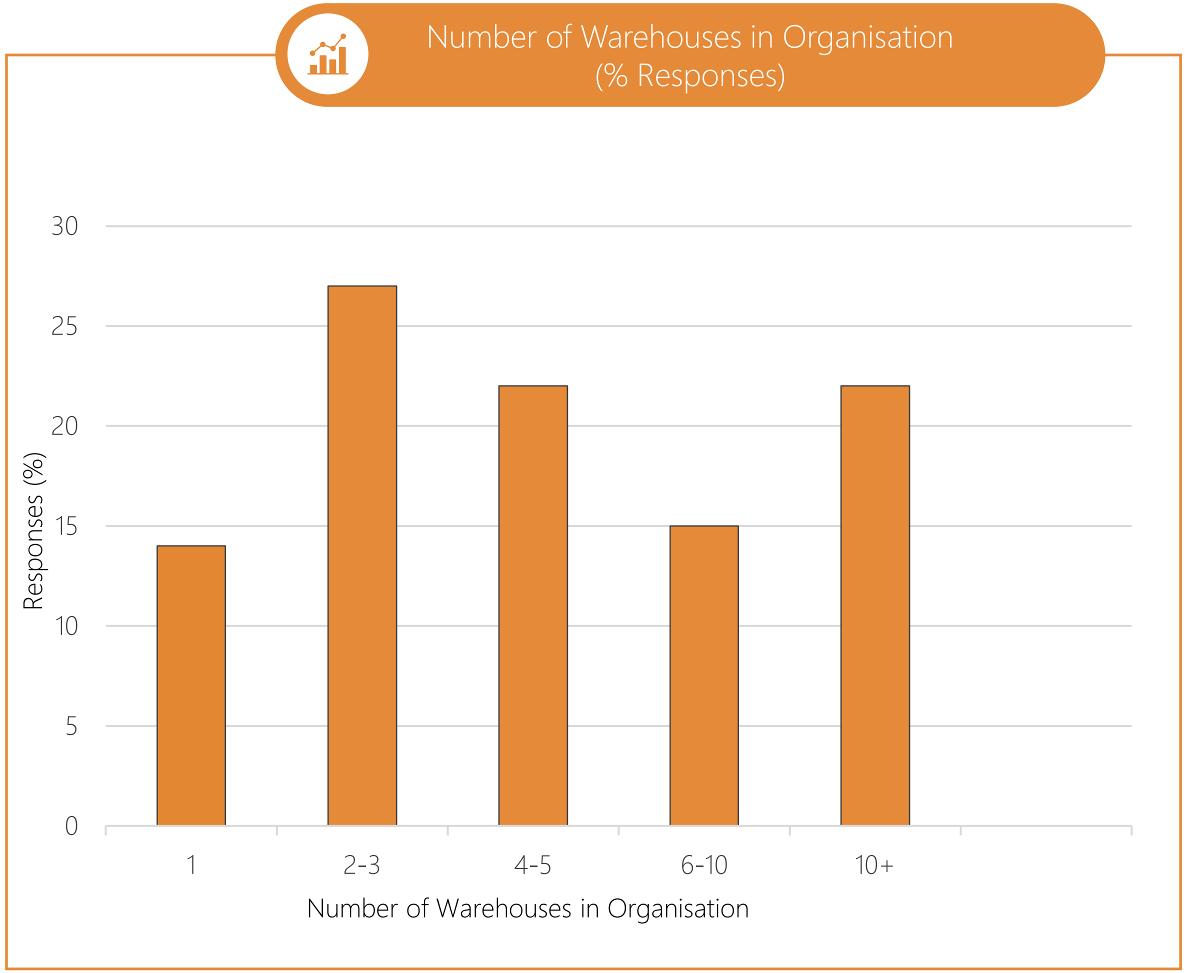
6.19% of respondents selected that their industry sector is Retail/ Wholesale.

4.38% of respondents selected that their industry sector is Agriculture.

3.09% of respondents selected that their industry sector is E–Commerce.

This demonstrates that the majority of respondents work within Logistics and Warehousing.

COUNT OF WAREHOUSES WITHIN YOUR ORGANISATION?



- **Single Warehouse Operations (14%):** A segment of the organizations operate with just one warehouse, likely favoring streamlined operations within a concentrated geographical area.
- **Small-Scale Networks (2-3 Warehouses, 27%):** Over a quarter of the respondents manage a compact network of 2 to 3 warehouses, suggesting a strategic approach that balances reach with operational control.
- **Mid-Scale Operations (4-5 Warehouses, 22%):** Nearly a quarter are in charge of a mid-sized network, indicative of organisations that are possibly expanding their logistic capabilities while maintaining a strong presence in their markets.
- **Growing Networks (6-10 Warehouses, 15%):** Entities with 6 to 10 warehouses account for a substantial fraction of the sample, pointing towards a more complex logistics infrastructure with wider market engagement.
- **Large-Scale Operations (10+ Warehouses, 22%):** Matching the mid-sized category, a significant 22% of participants are at the helm of expansive operations, emphasising a robust presence with potentially global distribution networks.

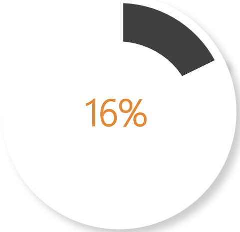
HOW MANY WAREHOUSES ARE YOU RESPONSIBLE FOR?

1 Warehouse

Signifying focused operations, one in five respondents oversee a single warehouse, often tailoring their strategies to specific, localized demands.

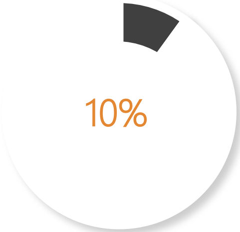
2-3 Warehouses

The majority of respondents, more than a third, manage a small network of warehouses, which may allow for greater agility and operational efficiency.



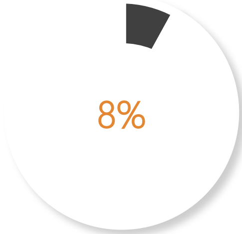
4-5 Warehouses

Representing a significant portion, these respondents handle a moderate number of warehouses, indicative of expanding regional presence and capabilities.



6-10 Warehouses

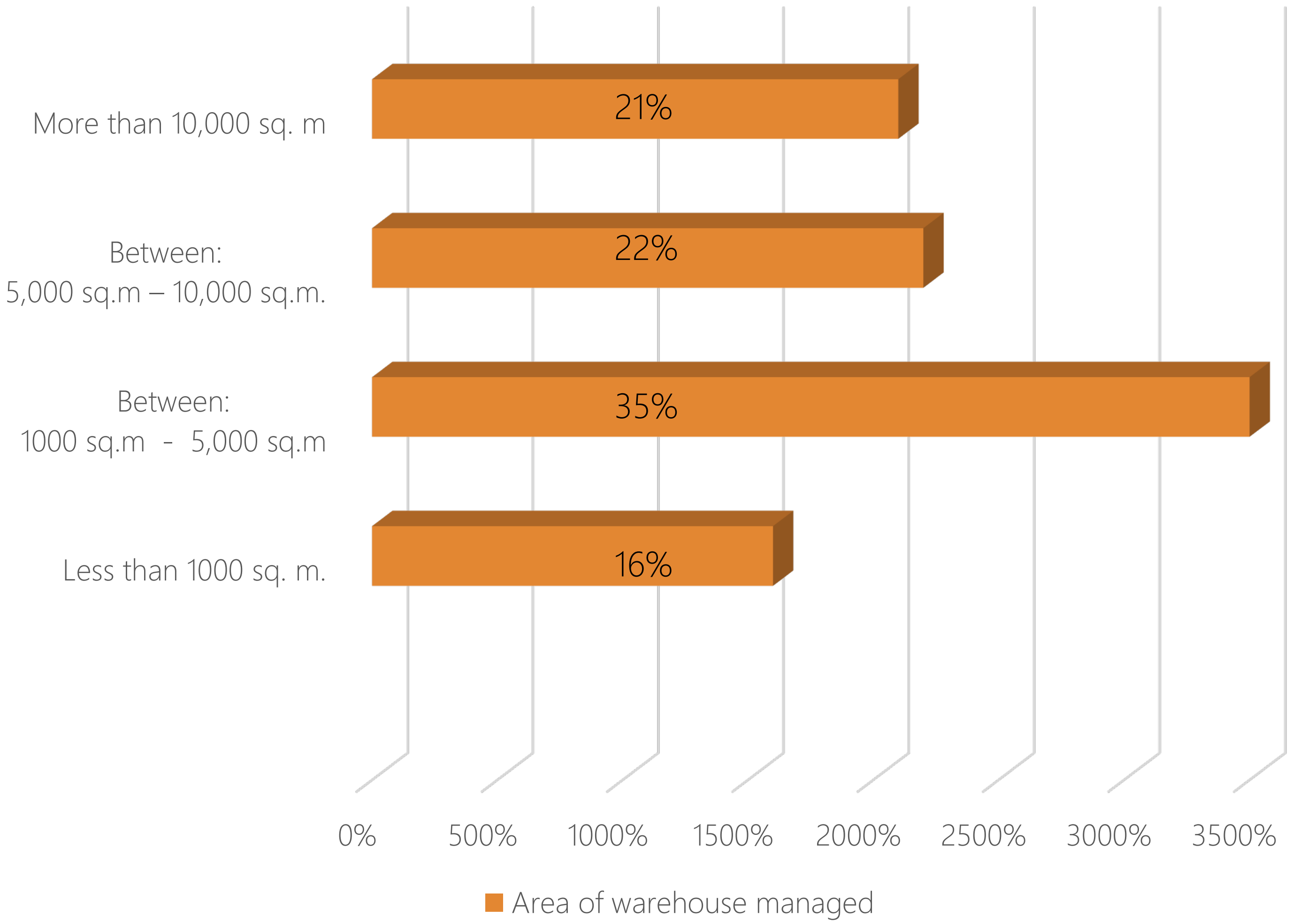
A smaller yet notable group of respondents are navigating the complexities of managing a larger network, possibly catering to a national or international market.



10+ Warehouses

A small but vital contingent of our respondents are responsible for extensive networks of 10 or more warehouses, indicating operations with a significant breadth and likely a strong global reach.

WHAT AREA OF WAREHOUSE SPACE DO YOU MANAGE?



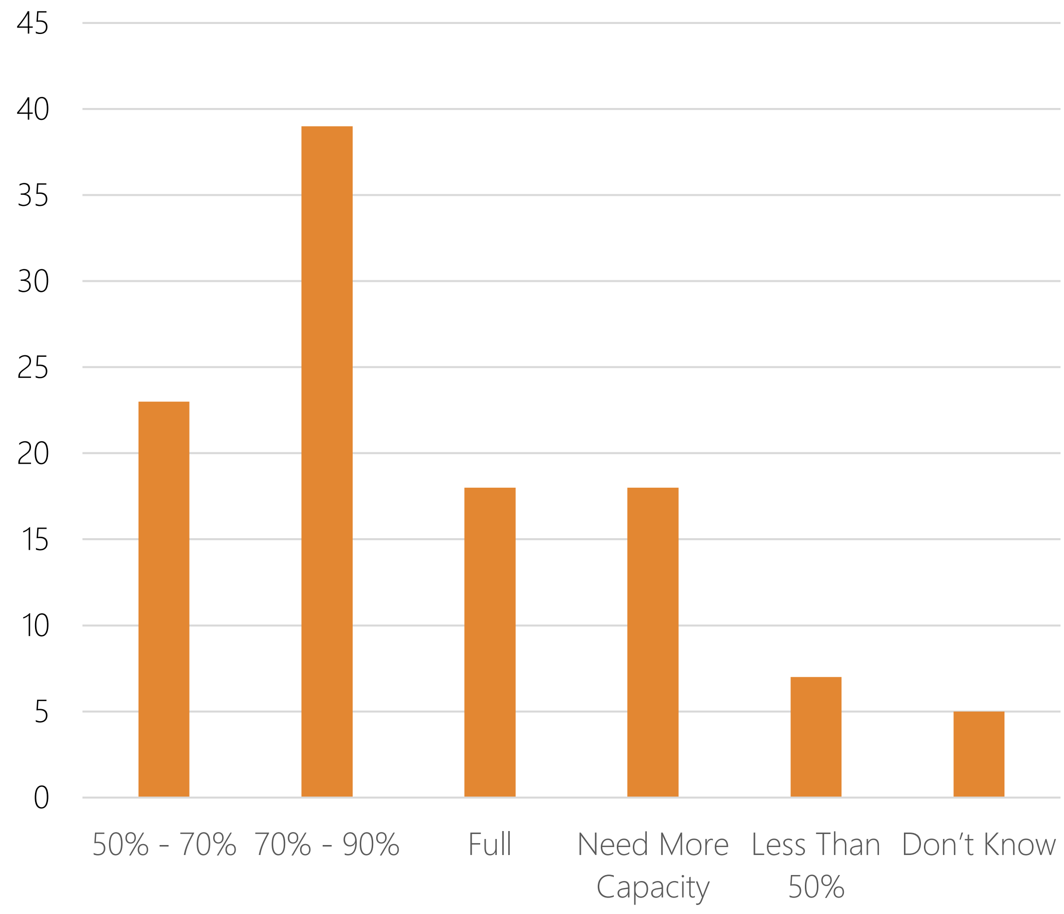
- **21% of respondents manage warehouse spaces larger than 10,000m².** This group likely represents large-scale logistics or storage businesses that require extensive space for their operations.

- **22% of respondents are responsible for managing warehouse spaces between 5,000 and 10,000 m².** This size category suggests a significant operational capacity, suitable for medium to large businesses.

- **The majority, 35%, oversee warehouse spaces between 1,000 and 5,000m².** This indicates that a substantial proportion of respondents are involved with moderately sized warehouses, which are possibly the most common size for a broad range of businesses.

- **16% of respondents manage warehouse spaces smaller than 1,000m².** These respondents are likely to be small business owners or those who require less space for their warehousing needs.

CAPACITY OF WAREHOUSE SPACE



Lack of space is a key concern with many operators.

23% of warehouses are filled between 50% to 70% capacity, which may suggest a moderate use of available space.

The highest percentage, 39%, have their capacity filled between 70% to 90%, indicating a high level of usage nearing full capacity.

18% of warehouses are at full capacity, which might lead to operational challenges such as storage limitations or increased need for inventory management.

9% indicate a need for more capacity, suggesting they are over capacity and potentially unable to handle additional inventory without expansion or optimisation.

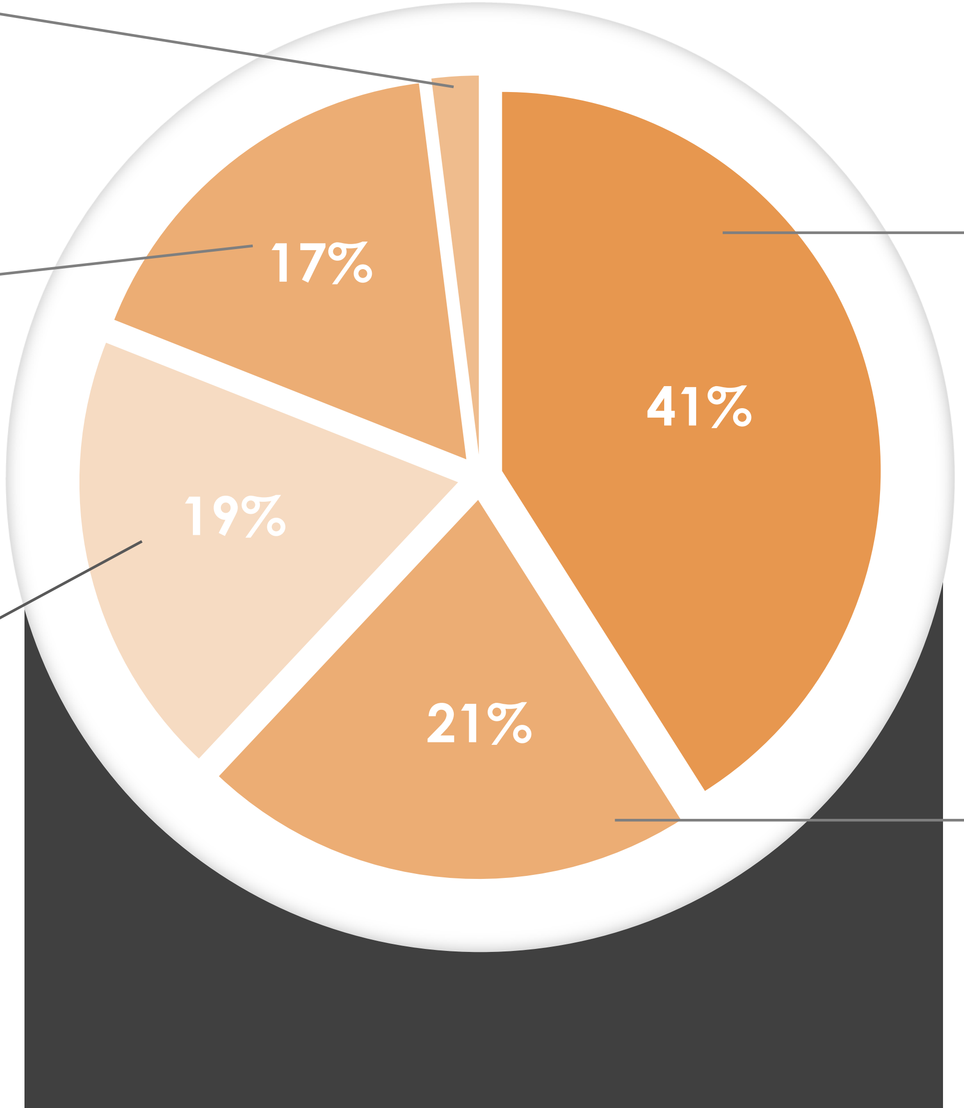
7% are below 50% capacity, which could imply under utilisation of available warehouse space.

5% of the cases are unspecified, labeled as 'Don't know', highlighting a lack of data or uncertainty regarding warehouse capacity usage.

WHAT TYPE OF STORAGE DO YOU USE IN YOUR FACILITY?

2% of customers use other types of storage within their warehouse.

17% of customers use individual items within their warehouse.

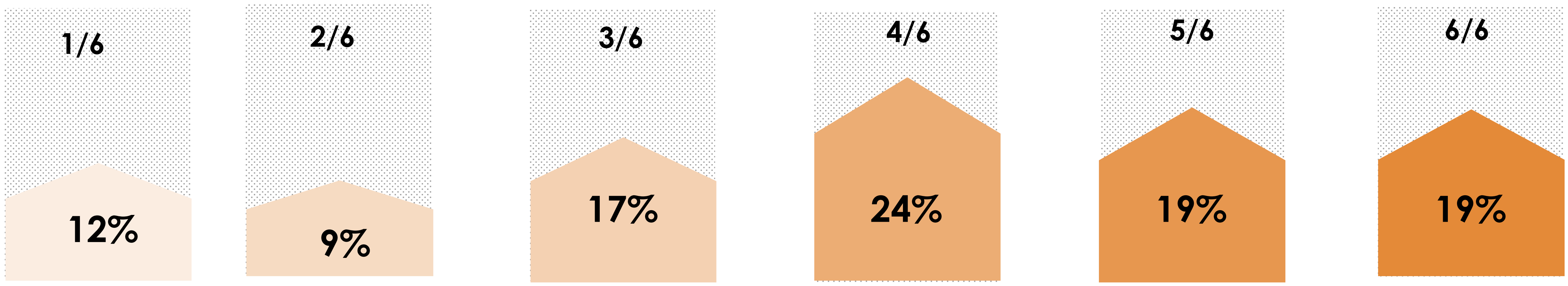


41% of customers use Pallet Storage within their warehouse.

19% of customers use Box Storage within their warehouse.

21% of customers use Bin Storage within their warehouse.

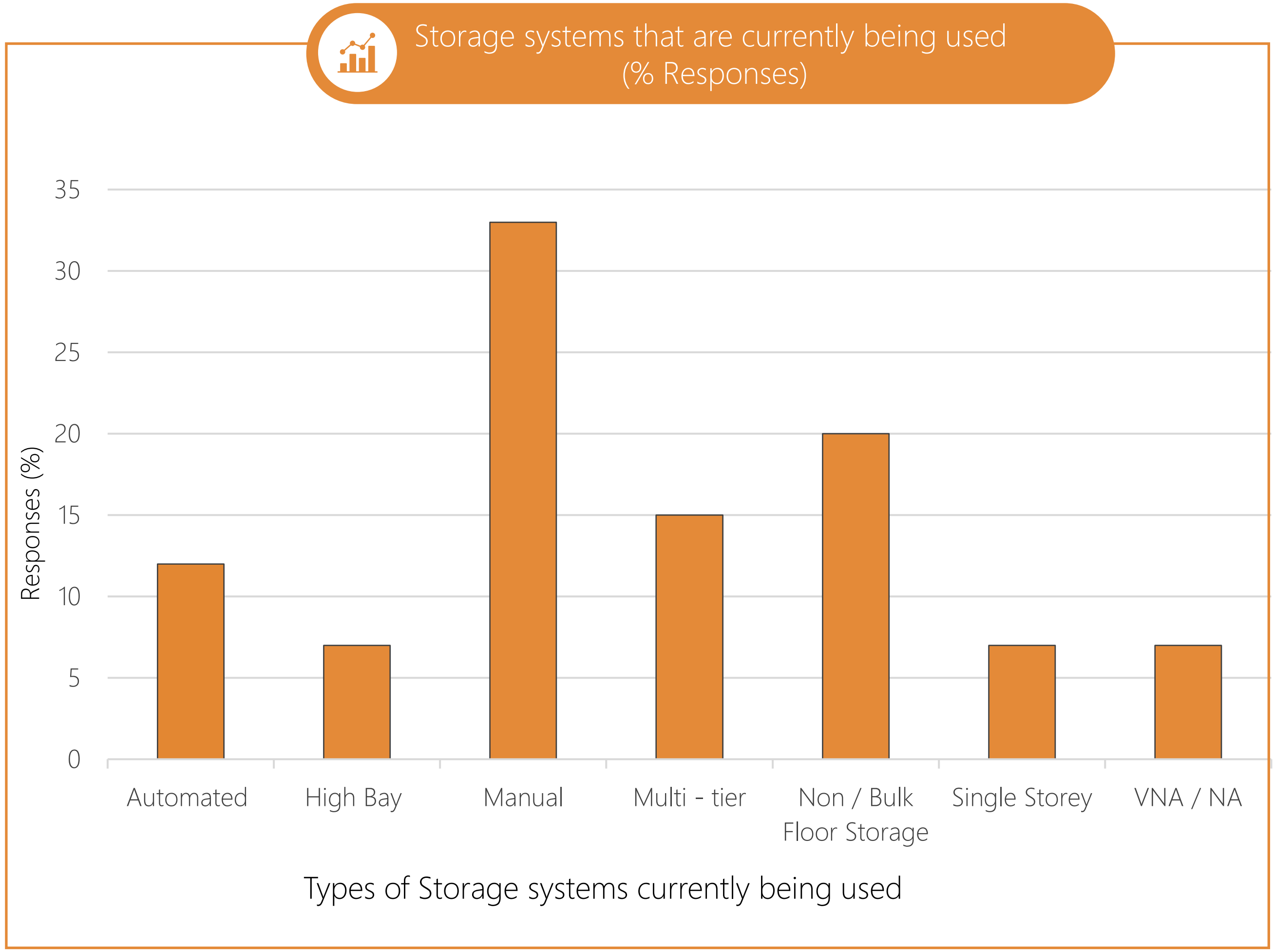
LIKELINESS OF CARRYING OUT IMPROVEMENTS WITHIN YOUR WAREHOUSE?



1 = Unlikely
6 = Very Likely

The survey findings reveal a spectrum of confidence levels among respondents regarding their prospects for warehouse improvements, ranging from skepticism to unwavering optimism. While a notable portion of respondents express high confidence in their ability to enhance their warehouse operations, a significant number also harbor doubts or hold more moderate views. These varying attitudes underscore the need for tailored approaches and support strategies to address the diverse needs and expectations of individuals and organisations seeking to make improvements in their warehouse management processes.

WHAT STORAGE SYSTEMS ARE YOU CURRENTLY USING IN YOUR WAREHOUSE?



Automated (12%): Automated storage systems are currently utilised by 10% of respondents, indicating a moderate adoption rate which suggests room for growth in automation technology within storage solutions.

High Bay (7%): High bay storage systems are the least utilised among the respondents, with only about 7% reporting their use. This may reflect the specialised nature of High bay storage or possibly a trend towards more compact and efficient storage solutions.

Manual (33%): Manual storage systems are the most popular, with over 30% of respondents relying on them. This highlights the ongoing preference for traditional, hands-on storage methods in many sectors.

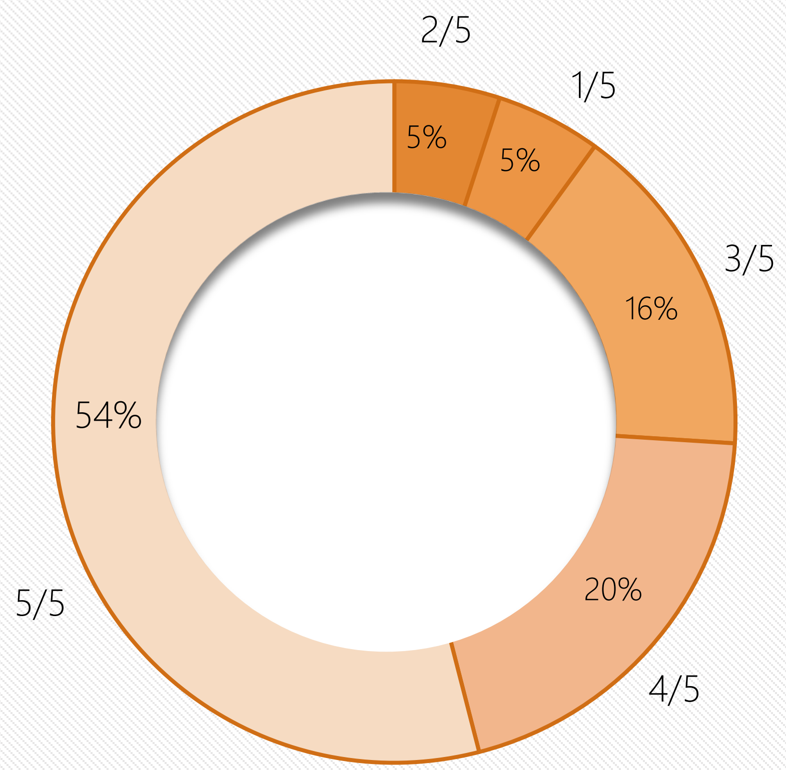
Multi-Tier (15%): Multi-tier storage systems account for approximately 15% of the responses. This indicates a significant use of vertical space in storage facilities, optimising the available footprint.

None / Bulk Floor Storage (20%): Non or Bulk floor storage systems are used by roughly 20% of respondents, showcasing a preference for easily accessible, at-grade storage options.

Single Storey (7%): Single storey storage systems are utilised by 7% of the respondents, aligning with automated systems and suggesting that a segment of the market prioritises simplicity and ease of access.

Very Narrow or Narrow Aisle (7%): The least common among the options are VNA or Not Applicable storage systems, with only 7% usage. This could indicate a niche application or perhaps a shift away from this type of storage system.

HOW IMPORTANT IS PRODUCT QUALITY TO YOU?



1 = Not Important
5 = Very Important

54% of people rated the quality of a product as 5 out of 5 in terms of importance

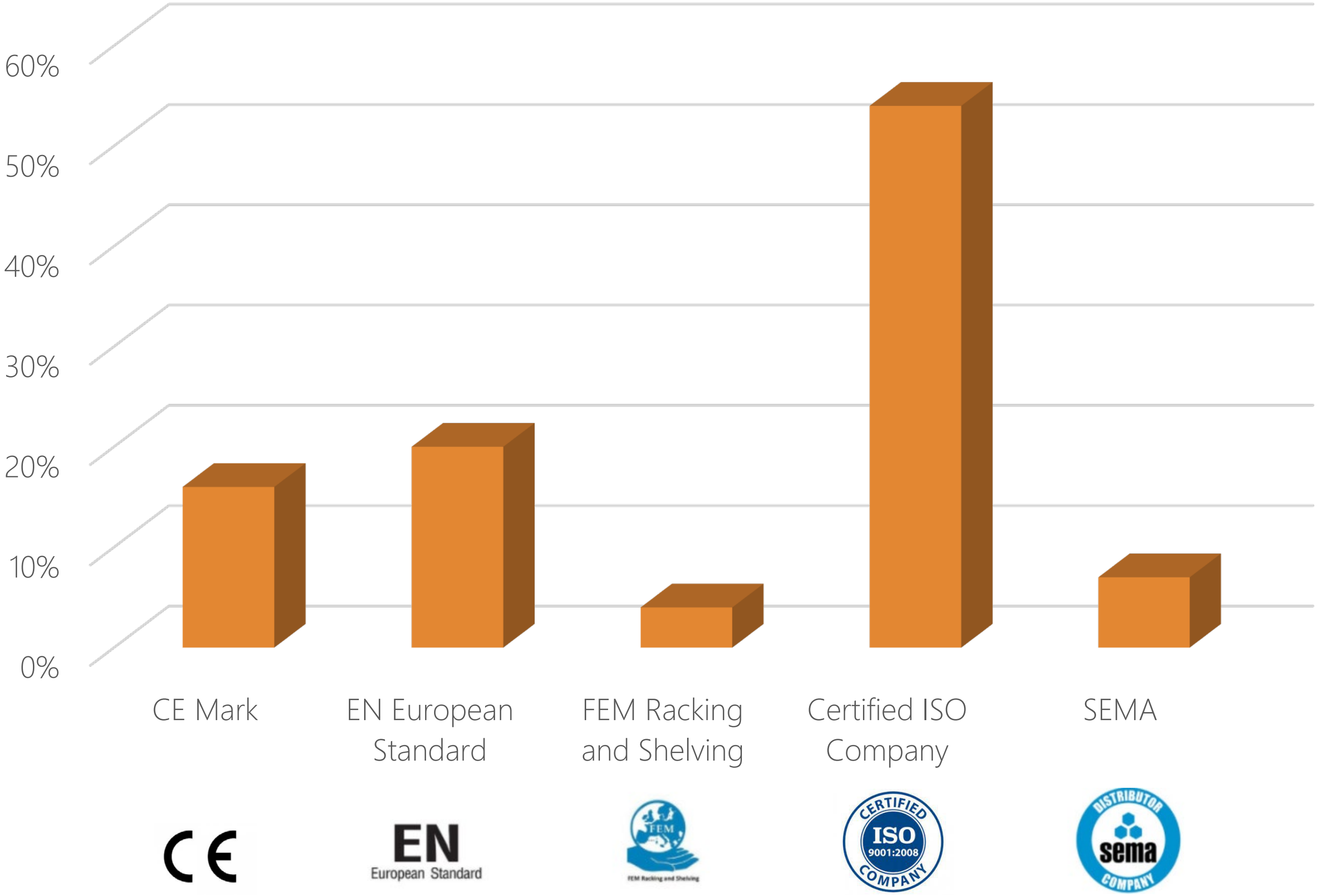
5% of people rated the quality of a product as 1 out of 5 in terms of importance

5% of people rated the quality of a product as 2 out of 5 in terms of importance

16% of people rated the quality of a product as 3 out of 5 in terms of importance

20% of people rated the quality of a product as 4 out of 5 in terms of importance

WHAT PRODUCT STANDARDS DO YOU RECOGNISE? (%)



CE Mark: **16%** of individuals selected that they recognised CE Mark as a product standard.

EN: **20%** of individuals selected that they recognised EN as a product standard.

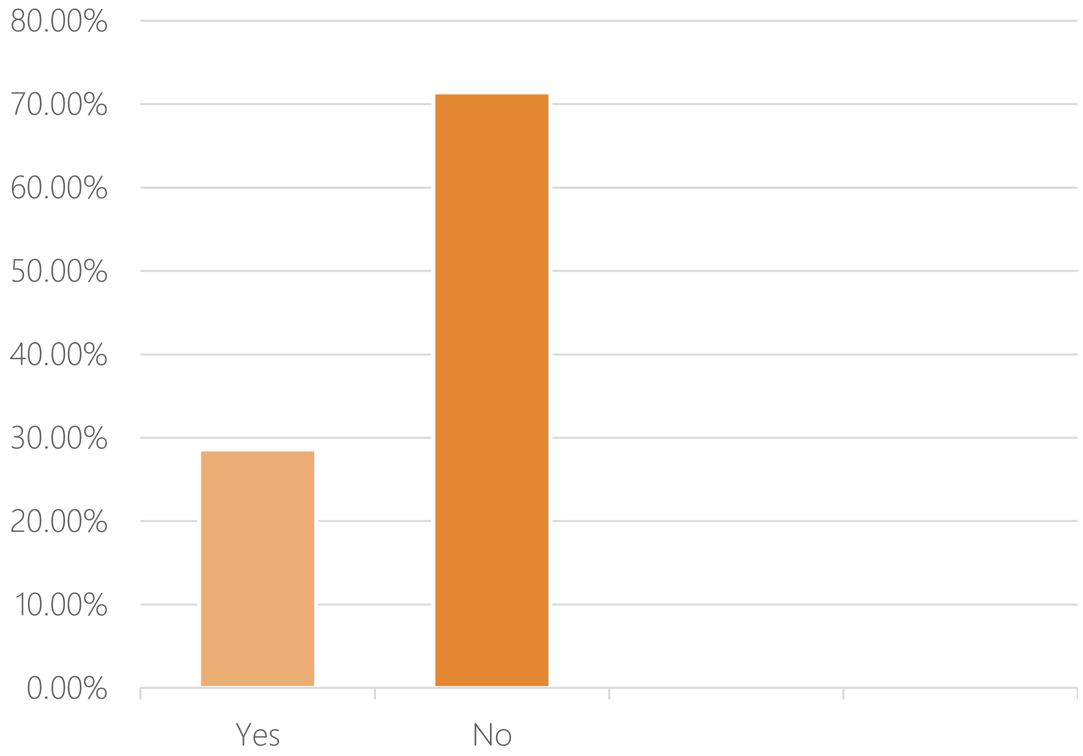
FEM: **4%** of individuals selected that they recognised FEM as a product standard.

ISO: **54%** of individuals selected that they recognised ISO as a product standard.

SEMA: **7%** of individuals selected that they recognised SEMA as a product standard.

ARE YOU AWARE OF UK EXPORT FINANCE (UKEF) SUPPORT?

388 Survey Answers



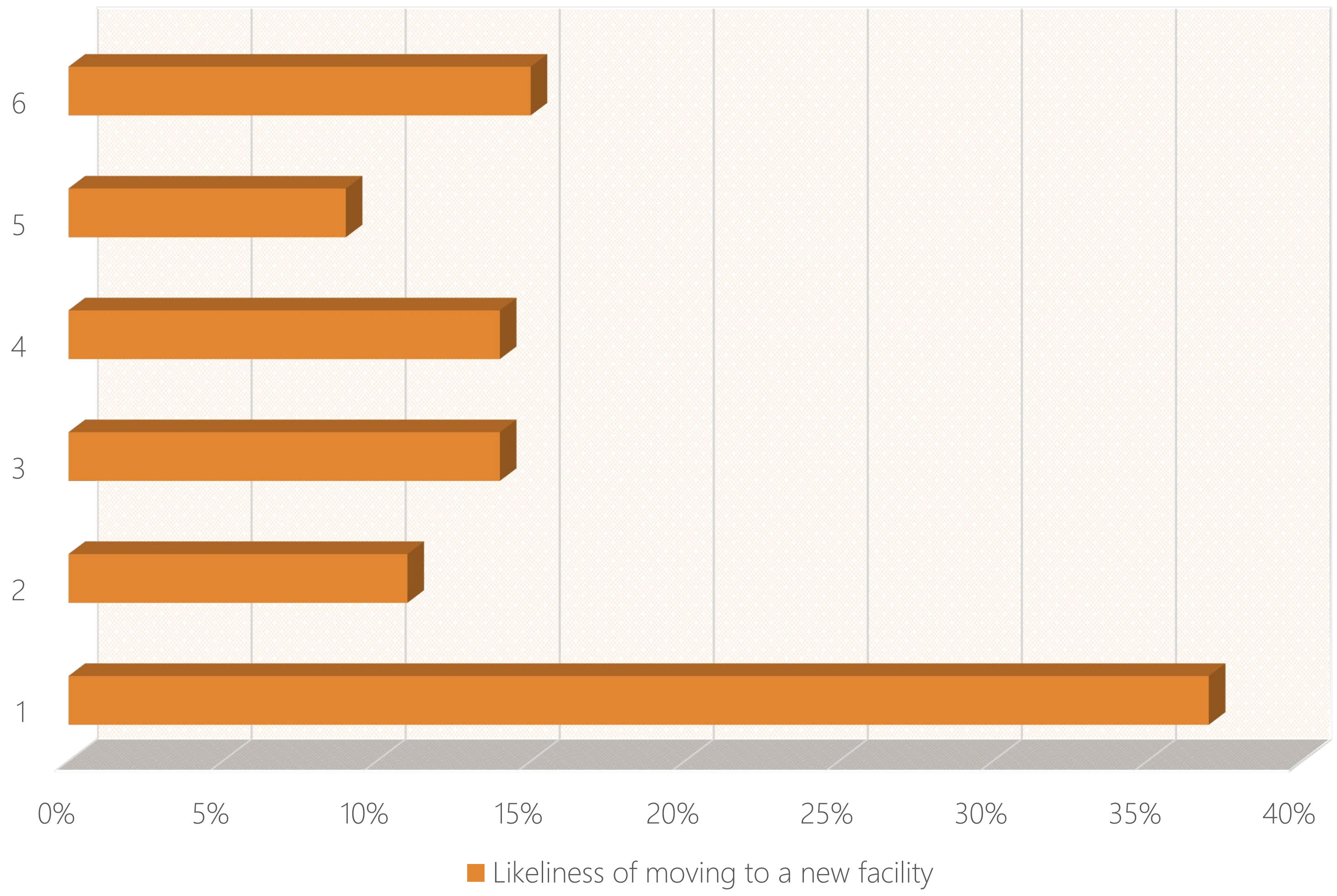
The survey results highlight a significant divide in awareness regarding UK Export Finance among the respondents. Out of the 388 participants, 111 individuals indicated that they were aware of UK Export Finance, while a substantial majority of 277 respondents expressed their lack of awareness about this financial entity.

This contrast underscores the need for increased efforts in disseminating information and raising awareness about UK Export Finance to ensure that a broader audience becomes familiar with its services and opportunities.

UK Export Finance

UKEF Works With Banks To Offer Flexible, Innovative, and Competitive Financing Solutions.

HOW LIKELY ARE YOU TO MOVE INTO A NEW FACILITY IN THE NEXT 6 MONTHS?



1 – Not Likely
6 – Certain

Notably, **37%** of respondents, the largest proportion, perceive a mere 1/6 chance of moving, indicating a sense of skepticism or reluctance towards such a move.

Additionally, **11%** of respondents rated their chances as 2/6, reinforcing the notion of a low likelihood of relocation.

Meanwhile, **14%** of respondents each opted for 3/6 and 4/6, reflecting a more neutral stance on the possibility of moving.

Interestingly, 9% of participants expressed a relatively higher likelihood of 5/6, and **15%** exhibited unwavering confidence with a 6/6 rating, indicating a significant range of perspectives within the surveyed group regarding the prospect of transitioning to a new facility.

These findings highlight the diversity of opinions and attitudes towards potential facility moves among the respondents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