

# L'AUTOMAZIONE, UN VALORE AGGIUNTO PER MIGLIORARE L'EFFICIENZA E L'EFFICACIA NELLA LOGISTICA HEALTHCARE

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We are the

**#1**

contract logistics provider

managing Supply Chains  
to reduce complexity



**~1,500**

Locations – all major  
cities covered



**~160,000**

FTE



**3,000+**

Digitalization projects  
live to date



**50+**

Countries covered



**>1bn**

New business  
signings in 2021



**94%+**

Contract retention rate



**~50**

Net Promoter Score  
(NPS) continuously  
measured

# DHL Supply Chain Italy Group

## 2022 REVENUE € million

**482**

*Consolidated*

**520**

*Not Consolidated*



## CUSTOMERS

**140**

*DSC*

**500**

*EDF*

**700**

*MIT*

## FACILITIES

**51**

*Campus & Sites*

**825,000**

*Square meters*



## PEOPLE



**2,400**

*Direct Employees*



# Specialization by industry Sectors



**TELECOMMUNICATIONS**



**ENGINEERING & MANUFACTURING**



**AUTOMOTIVE**



**CONSUMER FMCG**



**ELECTRONICS**



**FASHION**



**MEDICAL DEVICES**



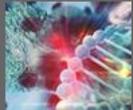
**PHARMA RETAIL & BEAUTY CARE**



**HOSPITAL & SPECIALTY PHARMA**

# Transformational trends in the Life Sciences & Healthcare industry offer opportunities but require also new strategies and solutions to address the challenges

## ADVANCED TREATMENTS



New technologies such as mRNA or Cell & Gene Therapies enable advanced treatments



- Shift to BioPharma requires intelligent cold chain storage and transport solutions

## PATIENT CENTRICITY



Value Based Care and Healthcare Consumerism put patient experience as success factor



- Higher focus on patient centricity requires new direct X delivery models and processes

## DIGITAL HEALTHCARE



Digitalization becomes key value driver for diagnostics, treatments and patient engagement



- New analytical methods to address supply chain visibility, security and compliance and to support warehouse design

## NEW ECO-SYSTEMS



New players and more collaborative value creation connecting specialist providers



- Need for effective orchestration of “end to end” supply chain to deliver healthcare

## RESPONSIBLE BUSINESS



In an already highly regulated industry, meeting ESG criteria is becoming critical



- Decarbonization of supply chains and circularity models as differentiating factors

# Business needs are becoming more complex and go beyond costs

Rising customer needs...



## Flexibility

“Flexible scaling to conquer Black Fridays and meet our **omni-channel** demands”

*Global consumer and professional products manufacturer*

## Speed

“Next day delivery as new normal”

*Manufacturer of baby-care products*

## Sustainability

“Carbon neutral Supply Chain as table stake”

*Consumer chemicals company*

## Resilience

“Stock-outs due to logistics cannot be afforded”

*Global pharma company*



...while costs stay in focus

## Cost

“Cost remain our key focus in logistics”

*Apparel company*



# We provide added-value to every Customer

## Cost efficiency

We provide optimized and integrated distribution networks that **decrease our customers' cost**

## Resilience

We provide scale and capacity to protect our customers from **demand and supply shocks**

## We solve Supply Chain complexity

## Sustainability

We ensure that our customers' Supply Chains are **compliant with ESG standards**

## Increased Speed

Our automation capabilities and ops excellence ensure **faster delivery times**

## Increased flexibility

We are the largest provider of individually tailored **storage space** for our customers

## And this how we do it

- 1 Strong, tailor-made product portfolio
- 2 Standardized back-end with automated and digitalized operations
- 3 Leading ESG capabilities

# We have defined and scaled 12 focus technologies with clear benefits

**12** Focus technologies identified along entire logistics process

Assisted Picking Robots 	Inventory Management Robots 	Intelligent Process Automation 
Goods-to-Person Robots 	Robotic Arms 	Algorithmic Optimization 
Wrapping Robots 	Smart Operations 	Supporting Robots 
Indoor Robotic Transport 	Wearable Devices 	Asset Tracking & Monitoring 

**Investment of choice**  
Productivity and utilization increase, cost reduction

**Provider of choice**  
Customer satisfaction increase

**Employer of choice**  
Employee attraction and retention, overall satisfaction

# of digitalization projects live



# DHL Supply Chain Italy deployment journey strategy

01

SPECIALIZED LOGISTIC FOR  
SPECIALTY-HOSPITAL AND  
CHC-RETAIL



02

UNIQUE INTEGRATED SOLUTION  
END-TO-END COLD CHAIN  
MANAGEMENT



03

DIGITALIZATION TO ACCELERATE  
THE CUSTOMER EXPERIENCE  
AND CENTRICITY



# Italian top digital initiatives

## CUSTOMER SERVICE TOOL



Connects our people to our strategic systems, for better control of our operations, and delivery against the customer promise.

## SMART OPERATIONS

## ASSISTED PICKING ROBOTS

**~30-180%**

Efficiency savings in picking productivity (units picked/ hour)

Co-working balancing and flexibility - working in parallel with manual picking



and, for the first time in Italy...

# Automation, our **Value Added** to transform logistics in Life Science & Healthcare



**Quality efficiency**  
through an automatic  
control above the line



**Improve picking accuracy**  
and increasing  
productivity



**Reduce**  
Peak work timing



**Improve working  
conditions**  
Reduce walking and  
physical tasks not  
compromising on safety



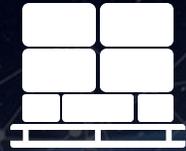
Improve recruitment  
and retention with  
a more **attractive  
working environment**



**Increase female  
employment**  
and employing people on  
high value activity



> PRODUCTION  
CAPACITY



> QUALITY  
RESULTS

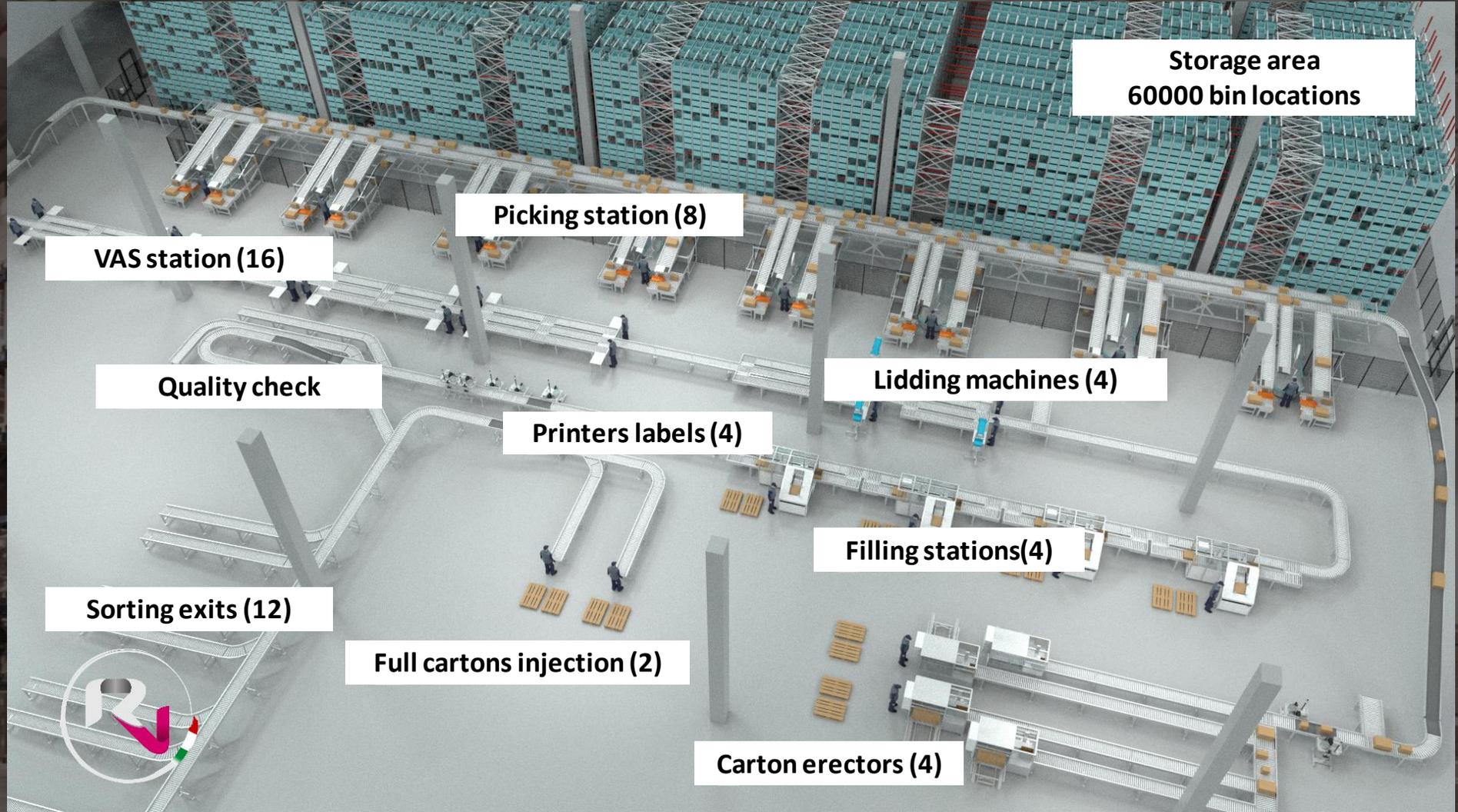


> SUCCESSFUL RESPONSE TO  
VOLUME PEAKS



> PRODUCTIVITY





THANK YOU