DACHSER magazine

DAWN OF A NEW ERA LEADERSHIP CHANGE AT DACHSER

INTERLOCKING WORKING WITH THE HEALING POWER OF NATURE EUROHUBS NETWORK AGILITY

IN NEW DIMENSIONS

"Nothing is more powerful than an idea whose time has come"—this famous saying is attributed to French novelist Victor Hugo (1802–1885). That's true, even if it sometimes takes a little while to really move the world.

6 kilometers as the crow flies across the Bristol Channel is what separates Flat Holm Island from the Welsh mainland. "CAN YOU HEAR ME" was what 23-year-old Italian inventor Guglielmo Marconi telegraphed over this distance in 1897 as the first wireless message. The spark-gap transmitter he developed began the unique triumphal march of wireless communication, ultimately leading to Wi-Fi, mobile telephony, and mobile internet. Today, more than 3.2 billion people have a smartphone, although without spark-gap transmission—this was outlawed in the 1920s because of its susceptibility to interference.



atom is the size of the smallest transistor in the world. This quantum electronics component, which switches an electrical current by controlled repositioning of a single atom, was developed at the Karlsruhe Institute of Technology. It represents a further milestone in the history of electrical engineering. Building on the pioneering work of Julius Edgar Lilienfeld in 1928, the engineers at Bell Laboratories were able to create the first model for large-scale production in 1947. Their transistor, however, was as large as a grapefruit. Nowadays, state-of-the-art smartphones have chips that contain up to 15 billion transistors.

eyeglass lenses were the key to opening up a view of the universe. In 1608, children playing in the workshop of spectacle-maker Hans Lipperhey stacked two lenses together to see more clearly, and the idea for the first telescope was born. Galileo Galilei picked up the concept and turned it to the heavens, fundamentally changing how we view the universe and our place in it and paving the way for completely new discoveries.





"notes" is what British mathematician Lady Ada Lovelace wrote on an article about the Analytical Engine in the mid-1840s. One of these contained the world's first algorithm, presented as a diagram. This historic intellectual achievement was not acknowledged during her lifetime. In fact, it was not until the end of the 20th century that Lovelace was recognized as the first programmer—for a computer that was never built.

tons was the weight of the world's first locomotive. Unfortunately, that was too heavy for the first tracks. It was developed by Richard Trevithick 21 years before the first passenger train, with a locomotive built by George Stephenson, traveled from Stockton to Darlington. Trevithick died penniless and was honored for his pioneering work only posthumously.

> **12.5** square centimeters was all that was necessary in the 9th century to stay on course and safely navigate the Mediterranean. In the absence of GPS and satellite navigation, Arab sailors used the kamal. This small wooden board had a hole bored in the middle through which was threaded a string with knots. The helmsman placed one end of the string in his teeth and, holding the board at eye level, maneuvered it until the lower edge was even with the horizon and the upper edge touched the North Star. Counting the number of knots would reveal the ship's position. Sailors used this simple yet extremely handy tool for more than 1,000 years.

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OFANEW ERA

On January 1, 2021, a new Executive Board is taking over management at Dachser. The handoff to the next generation was planned well in advance, and is fully in keeping with the family-owned company's tradition of forward-looking change.

rom a one-man company to a worldwide logistics network in 90 years: as described by economic historian Professor Paul Erker, Dachser's history is characterized by the courage to take calculated risks, make decisions, and follow paths that were contrary to majority opinions and bucked industry trends. Dachser's is a culture of its own strength and of problem-solving by its own efforts. The foundation for this is a values-based, forward-looking corporate organization and a business model that is stable and robust, even in times of crisis. This "inheritance" is a hallmark of the various phases in the development of the familyowned company, each one building on the next. \rightarrow Looking to the future: Outgoing CEO Bernhard Simon, future CEO Burkhard Eling, and Michael Schilling, outgoing COO Road Logistics

CONTRACTOR

Era 1 From a one-man company to the leading transportation company in southern Germany

Dachser's journey began in 1930 as a one-man transportation company, and continued right up through the 1970s as it became one of southern Germany's leading freight forwarders. The war and reconstruction, Germany's "economic miracle," the Cold War, and European integration were signposts along this far-reaching transformation process. In 1952, the first rebranding took place as the company launched international operations: it was now known as "Thomas Dachser, Internationale Spedition." During this phase, fixed rates specified by the government and limited concessions for long-distance transport intended to protect the railways established the framework in Germany for transport policy. For freight forwarders, this meant obtaining concessions. Money was earned primarily through transport and using a company's own assets. With the introduction of swap-bodies and cost accounting, Dachser was already taking the first steps toward becoming a systems logistics provider.

Era 3 O Systematic management of the logistics network

Dachser instituted a direct charging system designed exclusively for process costs, which regulated the compensation between those branches that were involved in each value-added process. At the same time, automated and IT-supported processes were managing the logistics network, thus making it possible to eliminate human error and risks of misinterpretation as far as possible. The network discipline this produced was the key to making network quality a reality. Another contributing factor was the integrated transport and warehouse management system that Dachser developed in-house. The company created the barcode identification system, based on the open EAN standard, as well as ActiveReport (automated supply chain event management). With all this combining to lend Dachser excellence in its network management, the company achieved a sustainable competitive advantage.

Era 2 Developing network thinking

A ruling by the European Court of Justice in the mid-1980s reorganized the transport market. This opened the door to providing services within the European Economic Community and to regulating the conditions for transport companies' approval to operate in other EEC member states. The sudden freedom to set prices and the elimination of concessions led to an entirely different market model. Logistics systems, not just pure transport, now took center stage.

At this point, Dachser completed its paradigm shift and became a groupage systems logistics provider. From then on, top priority went not to partial loads, but groupage. Sets of rules for managing the systems no longer scheduled the departure times solely in line with a truck's maximum degree of capacity utilization, but in advance according to fixed arrival times. The introduction of a systematically functioning timetable that unified the network, along with a clear promise of transit time, amounted to a "cultural revolution." This included the expansion of electronic data processing.

Era 4 Spread across Europe

In the mid-1990s, Bernhard Simon, a grandson of company founder Thomas Dachser, took over management of the strategic focus program "Mobilization for Europe," or MOBILE for short, in the newly created division for strategy and corporate development. He joined the management board in 1999, and in 2005, after a period of nonfamily management, the company welcomed Mr. Simon as head of the management board. Also in 1999, Dachser took over one of the leading French logistics companies, Transports Graveleau. This step put the final seal on Dachser's strategy to develop the European Single Market itself as a "Euro-national market." In keeping with this strategy, Dachser rolled out entargo: a new product line with clear, uniform value propositions across Europe. This was followed by systematic development of all European regions. The same processes, systems, and quality standards were implemented everywhere. Under the leadership of Michael Schilling, the most deeply integrated European logistics network emerged; with the acquisition of Azkar in 2013, it achieved an essential degree of maturity. Dachser rounded off its network with further acquisitions and integration projects.

Era 5 One world, one company, one network

As Dachser sought to systematically advance its internationalization strategy, it injected fresh momentum into its sea and air freight activities. The "one world, one company, one network" slogan gained particular relevance with the decision to completely integrate logistics processes around the globe by means of the Othello transport management system. An elaborate change management process systematically transformed Dachser Air & Sea Logistics into a systems logistics provider. This was the prerequisite for the decision to integrate logistics networks worldwide and manage global supply chains while consistently tapping the new opportunities offered by digitalization.

Dachser's structural development

Era 6 Organizational development, leadership, and resilience

In 2014, Dachser did justice to its advanced level of internationalization by becoming a societas Europaea (SE), or European public company. The management of a company that at this point employed more than 25,000 people in 42 countries was revamped: Dachser set up eight business units, each with clearly assigned responsibilities for its activities and its role in the overall system. This was how the company opted to reflect the necessity of ensuring further agility upon a broader framework of responsibility. Come 2021, the move to having a CEO from outside the family, Burkhard Eling, and reassessing the role of the Supervisory Board will set new signposts. Dachser's independence as a family-owned company is thus ensured for coming generations.

Dr. Andreas Froschmayer



A TRANSITION PLANNED WELL IN ADVANCE

"We didn't tell people what they should do. We communicated to them a conviction that they should create one of the most renowned networks to span to the globe" For several decades, CEO Bernhard Simon and COO Road Logistics Michael Schilling held leadership positions at family-owned company Dachser and helped turn it into a global logistics player. With the handover of operational responsibility to a new generation and their move to the Supervisory Board, both leaders are seeing the start of a new era. In this interview, they take a look back and a look ahead.

On January 1, 2021, a new Executive Board headed by Burkhard Eling is taking over management at Dachser. Now that the transition is almost here, are you feeling any pangs of parting?

Bernhard Simon: Truly good developments are painful and wonderful at the same time. I'll no longer be seeing and working on a daily basis with the people who shared my passion for making Dachser the major player it is today. That's naturally having an effect on me. At the same time, I'm delighted to see how successful this long-prepared transition is turning out to be. Not many entrepreneurs have the privilege of looking beyond their own period of active work, refining the business concept anchored in their company's identity-forming values further, and designating successors in good time.

Does this feel like more of a farewell to you, or a new beginning?

B. Simon: A beginning. We're not cutting our ties to the company. Rather, by moving to the Supervisory Board, we are very deliberately taking on a different role that offers opportunities to influence how Dachser will develop.

We spent more than three decades at the helm, heavily involved in shaping all of Dachser's locations and their particular characteristics in cooperation with the people there on-site. We had a major impact, and we couldn't have done it without people ready to fight alongside us to make the company succeed. Over the past eight years, together we built up and secured Dachser for the future. Now it's time to take the next step with a new generation. We need to entrust them with shaping the future just as others entrusted us at the start of our Dachser careers.

Michael Schilling: Every generation has its own challenges, tasks, and development paths. Our time on the Executive Board was marked primarily by internationalization and creating the network. And not just the physical network, but I specifically mean a network of people, too. I feel the same way Bernhard does: to no longer see these people regularly does actually hurt a little. In a company with the size, complexity, and dynamics of Dachser, there's really no true end point to a development. However, we have reached a point of maturity that allows us to hand over the reins to a new generation and let them build on what we have achieved. There are always new opportunities for developing a company.

Are you thinking of any in particular?

M. Schilling: For one, it is hugely important to get deeply involved not only in questions of geography, but also in the interlinking of processes with our customers and between the business fields. This is just one of a wide variety of tasks facing the next generation. Topics like these have already been on the agenda for some time; after all, we're not enacting this transition at a full gallop, but instead took plenty of time to consider when would be the right point for the handover and which arrangement of people made the most sense.

B. Simon: As we move from the Executive Board to the Supervisory Board, which has oversight and consulting functions, we are carrying out our duty to the family-owned company by making it fit for the future across generations. To this end, it is necessary to revisit and adjust the structures on the Supervisory Board and in the next generation of shareholders so that they align with the dimensions of Dachser's growth.

What was it like when you took the helm?

B. Simon: Back then in the late '90s, the Chairman of the Supervisory Board was Werner Kirsch, who was an excellent sparring partner and coach to have at our side. He was a professor of business administration and strategic leadership at Ludwig-Maximilians-University Munich and he \rightarrow

Bernhard Simon and Michael Schilling have always known how important face-to-face conversations are. In times of coronavirus, these haven't always been possible. For Simon, one thing is clear: "All this social distancing slowly depletes your emotional reserves. It's about time that we were able to get together again." As they did for this interview in the Dachser magazine-though keeping the proper distance could not mask the genuine closeness.

The Dachser of the future is ready for the **next** step

Bernhard Simon, CEO Dachser

> often invited the "new guys" to his house on Lake Ammersee to have long, intense discussions about the future of Dachser.

> M. Schilling: Back then, the company was experiencing major upheaval. The '90s presented us with properly handson challenges. For example, the fall of the Berlin Wall and the opening of the borders in Europe completely changed the markets. At this point, Dachser was struggling with its financial situation and a lack of focus in its strategic orientation. For us as the designated new generation of leadership, it was a fairly heavy burden on our shoulders, but also an exciting task to take on.

How did you handle the pressure?

B. Simon: I wouldn't call it pressure. It was a major challenge, but one that we as young managers were eager to tackle. We had a clear idea of how the company should develop and we wanted to make it a reality. To do that, we rebuilt the executive units and turned our attention to sustainable progress based on our creed of quality. By making an uncompromising commitment to standardized processes, including sophisticated process management, and to customer satisfaction, we were quickly able to secure profits. In addition, we created the MOBILE strategic focus program, in which we jointly drew up the strategies for systematically developing the European network. All this is reflected in the structures and strategies that still shape Dachser today.

M. Schilling: The network we inherited, which concentrated on Germany and its closest neighbors, was at that point still far removed from the European-network mindset—plus all its standards and quality trademarks—that today we take as a matter of course. To remain viable for the long term in expanding markets, we had to put in place the physical as well as the IT conditions. We made sure we had integrated processes everywhere, which took an enormous amount of effort. By the way, this applies to both the business lines, European Logistics and Food Logistics, in equal measure. We also needed thorough change management that would ultimately allow us to convince all our employees in Europe to collaborate within an unparalleled network. The success among our European customers showed we were right. It was the driving force behind an international Dachser culture that resonates around the world and is now helping us to closely interconnect our global networks.

Why did you give yourselves so much time for that, and why did you invest so much time and effort in change management? As the Executive Board, you could have simply "ordered" the integration, right?

B. Simon: That doesn't fit with our understanding of leadership and shared responsibility. We have created a culture that encourages debate, which has proven itself time and time again and played a key role in Dachser's success. I'm sure that this culture will continue to be maintained at Dachser in the future. At its core is particularly attentive listening. With it, managers can hone their "seismographic sense" for intuiting whether new developments or structures were perhaps not fully understood properly, and whether somewhere there is resentment growing that in the end will lead to imbalances in the system.

How do listening and mutual support function on the very different company and management levels?

M. Schilling: I'm thinking here for example of the "Find, lead, retain" project that we launched in 2018 as part of our Idea2net strategic focus program. This project puts the focus of sustainable company management on the role of our logistics operatives. We board members took this directly to the branches, held roadshows, and talked with many of the employees one on one.



Michael Schilling, COO Road Logistics Dachser

B. Simon: This was well received, and by both sides. I heard over and over again how proud the employees are to be part of a greater whole and not just replaceable cogs in a machine. That had a big effect on me. The key to opening the door is open, trusting communication. And in past years, that perhaps fell short here or there. We have to keep fighting together to ensure transparency and openness at every hierarchical level. This lets us understand what people's concerns are, and how we can apply those findings to bring the company and every individual employee forward. M. Schilling: That also includes the message to our service partners and service providers that Dachser will always be a reliable partner for them-even amid changes such as those caused by the coronavirus crisis. Our message to the market is "You can count on Dachser." That's why we didn't leave our partners hanging during the lockdown; we helped get them through these complicated times.

B. Simon: During the pandemic, it's important to our customers for the Dachser network to remain fully and constantly available. While others shut their networks down temporarily to save on costs, this step at Dachser was expressly prohibited—restrictions or extra "corona fees" that put the burden on our customers were and are not an option for us. Keeping the network ready and manageable is more important than everything else. This robustness is a basic requirement for being able to respond to unforeseen developments whenever they happen. And this is possible only with smoothly functioning systems and people who know what they're doing, where they want to go, and what they want to achieve together. The coronavirus was the litmus test for how we can manage the company in all its dimensions.

What will your lives be like after January 1?

B. Simon: Handing over the operational business to the next generation will free me up to ensure that governance at

Dachser is ready for the future. When I step into my new role as chairman of the Supervisory Board in mid-2021, I will stay out of day-to-day business. Instead, I will critically examine how we can reliably achieve our stated objectives and how we can maintain our culture of mutual respect—as well as whether this is understood and implemented everywhere in the company. Furthermore, I look forward to advancing our corporate social responsibility topics and to connecting these with climate protection projects.

M. Schilling: Over the years, I have always felt like a member of the Dachser family and experienced a certain appreciation that goes along with that. I want to pass this on to others by asking them the right questions so I can support them in their own decision-making processes. Besides that, I want to use my newfound free time to spend more time with my family and do some more traveling.

B. Simon: For 31 years, we always pulled together, but we had our times of conflict as well. And that's a good thing, because this energy flowed into the company, where it ended up adding some high-intensity value. In this phase of the transition, it's nice to see not only what we achieved together with and for Dachser, but also that the way we did it will continue on.



MORE EFFICIENT IN SWARMS

Better stick together: Demonstrated by the evolution of shoals of fish and flocks of birds, and now also scientifically confirmed by robots.

Researchers have known for a long time that swarm behavior offers many benefits, including protection from predators. But now, using robot fish of its own design, a group of German and Chinese researchers has shown for the first time that individual fish in a shoal also have a very energy-efficient means of locomotion. When each fish beats its tail at the same frequency as its neighbor—regardless of relative position and distance this optimizes the shoal's flow conditions so as to minimize resistance against the forward motion of each individual member. According to the researchers, creating such a collaborative swarm vortex significantly helps fish stay in formation and accelerate quickly.

The researchers then fed the data they collected into machine learning processes. This allowed them to make predictions about where individual members of a shoal should position themselves to benefit from the optimized flow conditions. Observations of groups of goldfish show that they really do position themselves as predicted in a variety of environmental situations. This confirms that sticking together makes life easier. And not just for fish.



E-COMMERCE AMID CORONAVIRUS BLUES

Just because physical stores are hurting from the coronavirus pandemic doesn't automatically mean that online shopping is booming.

The Händlerbund e-commerce association recently put this supposed trend under the microscope, surveying 220 small and medium-sized online retailers in Germany about returns, shipments, and packaging. The results indicate that the pandemic continues to adversely affect the availability and delivery of goods.

Although the number of online shoppers has increased overall, one in three (33 percent) of the retailers surveyed complained that order levels were too low. Some sectors were hit harder than others. Demand was particularly low for party supplies, gifts, and promotional items. The survey also found that border closures and delays in production have made life difficult for online retailers and logistics providers.

A majority (59 percent) of the retailers surveyed experienced losses due to the increasing number of returns. Online retailers also reported instances of returns from people who ordered items just for fun with no intention of buying them. Some 67 percent of these returned goods were damaged, which leads to an average markdown of 39 percent from the original price. Training

COUNTING ON THE NEXT GENERATION

At the start of the 2020 training year, 600 trainees and 25 students across Germany took the first step on their career paths at Dachser.

The logistics provider is thus sending a deliberate signal in uncertain times: it is investing in its people, who keep Dachser's robust and efficient network running and, in turn, global supply chains.

Especially popular this year among the young people are the business apprenticeships in forwarding and logistics services as well as training as a warehouse specialist. "We view training as a long-term commitment. That's why, even in these challenging times, we continue to invest in qualifying and supporting the next generation of logistics employees," says Dachser CEO Bernhard Simon.

Dachser currently has a total of about 1,800 future logistics experts who are either in training or are completing a course of study. As a global player, the family-owned company readies the next generation of employees for working in international logistics and offers them career prospects in a future-proof industry that is resilient to crises.



Committed to training professional truck drivers

The logistics provider's commitment to the education and training of professional truck drivers has seen positive development as well: 99 future drivers, including 18 women, are currently starting their training at Dachser. In addition, 47 drivers, 5 of them women, completed their training in summer 2020, and 19 professional drivers finished their partial qualification (TQ1) in commercial freight transport.

Dachser has traditionally placed great value on high-quality training with knowledge sharing and support. "Training the next generation as valuable and motivated employees and then hiring them for the long term is part of our corporate culture," Simon says.

FROM THE LABORATORY OF THE FUTURE

Tracking & tracing SATELLITE-BASED POSITIONING

GPS, the Global Positioning System, is the basis for tracking & tracing vehicles and shipments. New systems like Galileo offer several promising possibilities, but even in the future, satellite-based positioning will not be suitable for all applications in logistics.

The "From the laboratory of the future" feature presents findings from the Research & Development division, which works in close collaboration with various departments and branches, as well as the Dachser Enterprise Lab at Fraunhofer IML and other research and technology partners. Where am I? Transporters of goods have been asking this question for more than 2,000 years. Sailors aboard merchant vessels determined their position using landmarks, lighthouses, and reliable nautical charts. That was the only way to find the fastest route and estimate the time they would arrive at their destination. The ability to calculate the optimum route and a highly accurate estimated time of arrival (ETA) is still greatly valuable to logistics companies today. To do so, they need to determine the location of all means of transport and shipments—as continuously and as precisely as possible. But nowadays, logistics looks not to landmarks, but to a wide range of wireless beacons.

GPS data susceptible to disruption

The best-known of these is positioning by means of a global navigation satellite system (GNSS). For more than 20 years, most of the receivers in vehicles, tracking devices, or smartphones have been processing signals from about 30 US GPS satellites, which orbit the earth at an altitude of 20,000 kilometers. These receivers also make use of positioning data from Russia's GLONASS or China's BeiDou system, but only a handful of receivers already use data from the EU's Galileo satellites. Setup of the Galileo system began in 2011 and is still incomplete; 26 of the planned 30 satellites are in orbit, with the final steps scheduled to finish by 2021-2022. By then, Galileo will be the most advanced GNSS, offering top reliability and the greatest degree of accuracy. But the US continues to gradually upgrade the first and second generations of its GPS satellites, so that in the medium term, all systems will deliver more or less the same data quality.

First- and second-generation GNSS can achieve positioning accuracy of 10 to 15 meters; more sophisticated satellites like Galileo will be able to improve that to 4 to 8 meters. However, several factors can have a negative impact on this precision; signal reflection, for instance, especially in urban canyons. These reflections distort the satellite signal's exact time of flight, which is necessary for accurately calculating the position. Tests at Dachser revealed the weaknesses of using GPS to determine, say, which loading gate a semi-trailer is located at. In this use case, GPS alone was unable to achieve 99.9 percent reliability.

New "beacons"

One possibility for using GPS to determine a position with greater accuracy (to within 20 centimeters) and reliability is offered by a differential GPS (DGPS). In this system, the transmitter sends an additional signal that is then processed on the ground. The disadvantage of this wireless service is that it is not available everywhere, usually incurs a charge, and causes greater power consumption in the receiver. For these reasons, DGPS is usually a viable solution only in very specific cases. With its High Accuracy Service (HAS), Galileo plans to offer an additional signal directly from orbit to achieve precision to within 20 centimeters. In contrast to the original plans, this service is intended to be free of charge for users. Still, this does not solve the reflection problem, and the HAS will most likely not be able to offer centimeter-level precision for real-time applications, since processing the additional signal can take up to 30 minutes. At any rate, there have been no practical tests of the HAS because it is not yet available.

Over the next few years, satellite positioning will deliver more precise position data, but for technical reasons, there will still be inaccuracies and restrictions. Inside buildings or in structures such as sea containers, GPS and similar systems will be unable to supply truly precise data even in the future, due to the strong signal shielding. However, logistics players can make use of alternative or complementary "beacons" for positioning, especially cellular base stations, Wi-Fi routers, BLE beacons, RTLS, SLAM, or optical systems—every technology has its own pros and cons. That's why in the future, there won't be "one" localization technology for logistics companies. Instead, they will seek out the right mix of technologies for each use case, always searching for the best way to answer the question: "Where am I?"

Andre Kranke

Department Head R&D Research & Innovation Management



Dachser Enterprise Lab

RESEARCH FOR THE LOGISTICS NETWORK

The Fraunhofer Institute for Material Flow and Logistics IML and Dachser have extended their collaboration in the Dachser Enterprise Lab for a further three years.

D achser's network is the focus of a unique research and development partnership between the company and the scientific community: in the Dachser Enterprise Lab, Dachser logistics experts are working with scientists from Fraunhofer IML in mixed teams to research digital technologies such as data science and artificial intelligence (AI), real-time locating systems (RTLS), 5G and the Internet of Things (IoT), autonomous vehicles, and adaptive warehouse systems. Initially launched in October 2017, this collaboration has now been extended for a further three years until October 2023.

Insights into new processes and services

"The first step in our joint research work in the Dachser Enterprise Lab is to gain a detailed understanding of new technologies and their potential for logistics. Then we build on that to develop prototypes and concepts that add tangible value for Dachser and our customers, turning them into innovations," explains Stefan Hohm, Corporate Director Corporate Solutions, Research & Development at Dachser, who will head the new IT & Development executive unit as of January 1, 2021. "So far, the work we've done together has proven that we can transform research results from the Dachser Enterprise Lab into new processes and services throughout the entire logistics network," Hohm says.

"We're delighted that Dachser is continuing its collaboration with Fraunhofer IML. Our research results up to now and our new research contracts show just how important applied research is for logistics and supply chain management," says Professor Michael ten Hompel, Managing Director of Fraunhofer IML. "We're particularly proud that the lab teams have continued to work effectively despite the restrictions imposed by the coronavirus pandemic," he continues. "Of course, technical aids such as video conferences and collaboration tools have been a great help. But above all, it's the extraordinary commitment and motivation of everyone working at the Dachser Enterprise Lab that is key to successful research in challenging times."



Family-owned companies connect the past with the future

BUSINESS

With the advent of industrialization, the typical combined unit of workshop, dwelling, and family fell apart

NESS

WITH THE POWER OF GENERATIONS

Family companies serve as the backbone of the economy in many countries, even today. And yet this archetype of all company forms was originally simply a necessity—and has been on the brink of extinction over the course of millennia.

hen steel galvanizer Heylmann Dresseler paid his dues for the local smithy in 1502, he had no idea that people would still be talking about it half a millennium later. Yet this neatly documented payment recently allowed historians to pull off quite a coup: they were able to show that the roots of German steel galvanizer The Coatinc Company (TCC) date back much further than was previously thought. Now the company, headed by Dresseler's great-great-great-great-greatgreat-great-great-great-great-great-great-greatgreat-great-great-great-great-great-great-greatgreat-great-great-great-great-great-great-great-greatgreat-great-great-great-great-great-great-great-greatgreat-

This is a highly prestigious title in a country that, more than almost any other, draws its economic strength from companies like TCC: nine out of ten German companies are family-run or have a family that holds a controlling interest. Together they generate half the revenue of all companies and employ nearly 60 percent of the workforce. This group includes thousands of small businesses but also highly specialized SMEs and global groups, such as carmakers VW and BMW, supermarket giants Aldi and Lidl, and pharmaceutical heavyweights Merck and Boehringer-Ingelheim.

Between nobility and workers

The continued success of the family-owned company, which can be observed in other countries as well, is a curious phenomenon. Pundits like to praise the family business as the fountainhead of all economic activity, but actually for a very long stretch of human history, they were nothing more than a necessity. All members of the family simply had to pitch in so that the farm, workshop, or local shop produced enough for their survival. And what else should the children do except follow in their parents' footsteps?

Multigenerational companies did not truly come into their own until the High Middle Ages, when urbanization gave a boost to craftsmen's workshops. Family and business life remained closely intertwined, although no longer out of economic necessity; this lifestyle increasingly became a way for a family to gain social standing. A person who took over the business from their parents took on social status as well, and between the nobility and the working class, a new social class began to emerge that gained more and more influence.

Yet with the advent of industrialization, the combined unit of workshop, dwelling, and family that had thus far prevailed fell apart. Countless handicraft and merchant companies disappeared, replaced by factories built for mass production. A few families in continental Europe were able to drum up the necessary investments on their own, but dozens and dozens of family-owned companies in England and the US were taken over by shareholders. This marked the birth of many a multinational company.

And yet in many cases, the remaining family-owned companies and ones established since then have done more than survive: they are also often better at weathering the storms of economic life—and in the process, they gain the loyalty of employees as well as customers for longer than average. In addition, planning on the scale of generations versus quarters protects the companies from some risky maneuvers.

Arriving in the digital age

Many economic analysts see family-owned companies, which are generally considered to be more traditionally minded, to be hopelessly disadvantaged in an age of digital transformation. Yet this underestimates those companies' drive for constant reinvention. A meta-analysis that evaluated studies from 42 countries found that while familyowned companies have smaller R&D budgets on average, they are especially innovative nonetheless. One reason for this: the flat hierarchies that agile start-ups pride themselves on are common practice at family-owned SMEs. Good ideas rapidly reach those at the top, and they are often willing to invest in promising projects even if the payoff isn't expected for years or even decades.

At The Coatinc Company, too, the current CEO (born in 1974) has put digitalization at the top of the agenda. Together with a start-up, the company of 1,400 employees is currently developing an app that lets customers use a smartphone to automatically measure components and place orders. In the meantime, TCC is staying firmly anchored in the physical world—it might be 2020, but software hasn't replaced steel girders yet. **S. Ermisch**



Family companies live longer. Japanese hotel Nishiyama Onsen Keiunkan is reported to be the oldest company in the world. It opened in 705 and has been in the same family for over 52 generations. At the heart of the hotel experience is the "onsen," a hot spring that has offered guests healing and relaxation for 1,300 years.

NATURAL REMEDIES ON SAFE PATHS

Healthy international supply chains are vital to the pharmaceutical sector. In its collaboration with A.Vogel, a manufacturer of natural remedies, Dachser has applied its own interdisciplinary, quality-driven consulting approach to designing and implementing a value-added logistics solution.

The purple coneflower (Echinacea purpurea), a member of the sunflower family, stimulates the immune system ature itself is the best physician—this bit of wisdom is credited to Hippocrates, a physician in Ancient Greece often referred to as the "Father of Medicine." The healing power of plants has been recognized for millennia. For Swiss pioneer of natural health Alfred Vogel (1902–1996), nature was his "best-loved university." That is why the company he founded, A. Vogel, makes plantbased remedies and invigorating nutritional products and supplements based on fresh, organic ingredients, delivering them to many countries around the world. \rightarrow



Also called phytotherapy, from the Greek root "phyton" meaning "plant," herbal medicine has become a market worth billions. These plant-based remedies are often the choice of those suffering from the common cold, but they are also popular for treating and preventing other respiratory conditions, easing digestion, and soothing nerves.

From a logistics perspective, these products are anything but easy to handle. They are subject to the same pharma quality standard of good distribution practice (GDP) that other medications are. "We are seeing that the pressure—from various authorities, both here in Switzerland and abroad, but also especially from customers on the companies in this field is constantly growing," says Samuel Haller, Country Manager Air & Sea Logistics Switzerland.

Increasingly tough competition

Large pharma corporations have entire departments devoted to meeting quality standards, but this issue pushes many small and medium-sized pharma companies to their limits. Such businesses often simply don't have the resources to map and review the quality processes in logistics, leading to higher costs amid increasingly tough competition.

A.Vogel, too, began early on with ramping up quality processes in its production operations. However, it quickly became clear that more was involved. "We realized that we need rapidly available, tailored logistics solutions for optimizing the supply chain and maintaining quality standards," says Bernhard Bärtschi, Head International Markets at A.Vogel. And that is what drew the company to Dachser about three years ago.

"The idea was to reduce the number of interfaces and generate economies of scope so as to cut costs and ensure that the quality processes run properly," Haller recalls. This means the consulting approach has to take all transport types into account. He emphasizes that "this did not necessarily mean that Dachser would always be handling each transport itself." Instead, the focus was on finding a complete solution across all carriers.

"Many manufacturers underestimate the indirect costs that arise in transport at the interfaces of the various carriers," Haller explains. Transshipment, waiting times, and delays in transmitting the data would often cost more than the companies originally wanted to admit. This used to be the case at A.Vogel, as it works with various providers along its supply chains. "In the freight forwarding business, a manufacturer can choose between normal freight and exclusive freight," Bärtschi says. But this is not always the most cost-effective option.

Natural remedies are fragile

A large part of A.Vogel's overseas business consists of deliveries to Canada and South Africa. GDP requirements mean that transport to either of these countries is not easy. A risk analysis of the transports showed that the focus should be on questions about the herbal remedies'



Bernhard Bärtschi, Head International Markets, A.Vogel AG

shelf life and temperature sensitivity. "We discussed this complex issue with Dachser at great length," Bärtschi remembers.

To investigate the matter, test shipments were first placed in normal containers and the temperature of the contents was measured at short intervals. These tests discovered major temperature fluctuations of up to 25 degrees Celsius, for example on sea freight transports that cross the equator on the way to South Africa. In air freight, temperatures can become critical during temporary storage on the tarmac in, say, Dubai. Looking at these factors, the use of standard containers was not A.Vogel's first choice. However, reefer containers alone were also not the solution, as they would have driven up costs considerably.

Dachser's solution: maximum flexibility. Today, the herbal remedies are packed into different transport boxes depending on the time of year. In the summer months they go into reefers, and starting in October, transports to South Africa can make use of conventional containers. Goods dispatched via air freight go only via direct flight to avoid transshipping and waiting times in the Dubai heat. "Together with Dachser, we found a happy medium that was perfect for us," Bärtschi says.

A unique and networked approach

"When implementing flexible logistics solutions, it's imperative to also think from an interdisciplinary and multimodal perspective," Haller advises. This meant incorporating various groups at the relevant consulting and development steps: quality and GDP experts, for example from life science and healthcare (LSH), as well as specialists in container and full truckload services from Dachser Air & Sea Logistics and experts from Dachser Cargoplus Food. "There aren't too many logistics providers who can offer such a networked approach, and in the context of our Interlocking strategy, it really sets Dachser apart," Haller says.

The exchange of ideas between Dachser and A.Vogel continued for about a year, covering everything from risk assessment and measures for damage control to process definitions and the formalization of those processes. Both sides provided advice and discussed, reviewed, and relaunched processes. "The customer always has the final word on what will be done," Haller says. Bärtschi is delighted that one result was a significant reduction in supply chain complexity, a major benefit of which is lower costs. Today, A.Vogel makes use primarily of Dachser's sea freight services, although air freight is also in the mix. Meanwhile, Cargoplus Food services bring the goods in full truckloads to Greece, Ireland, the northern United Kingdom, and Sweden.

Overall, Bärtschi reports that the integrated solutions approach has improved the quality of deliveries. "Transport is a commodity, but Dachser's consulting service turns it into one component of a comprehensive logistics concept," he says. The result is an optimized supply chain in which pharma quality standards are maintained and seamlessly documented all the way to the end customer. A.Vogel has made fast and reliable delivery another one of its selling points. A. Heintze



A.Vogel AG was founded in 1963 by naturopath and phytotherapy pioneer Alfred Vogel (1902–1996) in Roggwil, Switzerland. Today, it is one of the country's largest manufacturers of herbal medicines and nutritional products. Counting A.Vogel's partner companies, approximately 500 employees around the world work on its product range. With production facilities in Roggwil (Switzerland), Elburg (Netherlands), and Colmar (France), the group recently generated revenue of CHF 130 million.

www.avogel-company.ch/en/

"No one pays any attention to them; they silently and simply blend their juices to prepare a remedy that can improve the health of many and even save lives," wrote Alfred Vogel in his book The Nature Doctor. It is still a classic health reference work around the world. He was writing about a supposed weed growing by the wayside: "The pale, ashen cheeks of many a child would recover their ruddy glow if their parents knew what a wonderful tonic is to be found in the unjustly scorned nettle."

EVERYTHING IN HAND

A new handheld device featuring an app developed in-house by Dachser provides the company's drivers with a comprehensive assistance system that guides them intuitively and reliably through all the logistics processes for short-distance transports.

t looks a little like a normal mobile phone—albeit one of the sturdier ones you might use for outdoor activities—but as far as short-distance transport logistics are concerned, the device is nothing less than a technological revolution. Introducing the Short-distance Assistance Mobile, or SAM for short. In keeping with the age of digitalization and app technologies, Dachser has developed a new assistance system to support local transport drivers. Set to be rolled out across Europe in less than two years, it will replace Nahverkehr-Online (NVO), the mobile communication tool used for short-distance transport to date

The termination of support and updates to the Windows CE operating system that NVO runs on was just one of the reasons behind the decision to redesign the handheld device's software and hardware. "It was the right time to switch to a new system. We had just analyzed and redefined the entire short-distance transport system and its processes as part of the Idea2net project Short Distance 2.0. The introduction of a new generation of devices marks a further milestone in our digitalization journey," explains Thomas Schmalz, Head of Production Management at Dachser. He and Eva-Maria Marcour, Head of Systems Management TMS & Operations, set the wheels in motion for the Europe-wide switch to the new devices and system. A total of 8,823 devices in use at 144 facilities across Europe are due to be replaced by September 2021. \rightarrow

The new handheld multifunctional device can do (almost) everything



Users of the Zebra TC77 SAM handheld devices enjoy a comfortable, mobile operating experience similar to that of a modern smartphone. The touch computers have been specially designed for professional use in harsh environments such as warehouses, shop floors, or outdoor areas. They are connected to DOMINO, **Dachser's in-house** transport software, at all times via Wi-Fi or LTE (in the field). Their high-performance batteries have a quick-charging function and provide up to 15 hours of power.

Maximum flexibility in short-distance transport

"Switching to a new generation of devices and to the Android mobile operating system paves the way for future developments in mobile computing," says Thomas Herkommer, Department Head TMS Road at Dachser. This provides the long-term security of being able to update software and apps. "It gives us maximum flexibility planning certainty regarding future requirements for mobile digital solutions," he adds.

Compared to the current devices, SAM offers a whole host of new features to make life easier for drivers, branches, and also customers. Topping the list is the device's intuitive operation. "You don't need a manual to understand and use SAM. All the functions are self-explanatory and available in the languages spoken at Dachser," explains Dominik Schnatterer, Department Head Production Processes & Development.

SAM offers an impressive list of advantages: the new handhelds are at the cutting edge of mobile technology, the scanning function has been significantly improved, and there is an integrated telephone function. The system also provides for optimized, digital handling of packing aids. "Drivers can now record packing aid discrepancies digitally for the first time. This means that discrepancies in the packing-aid exchange can be processed paperlessly, which makes life much, much easier for everyone involved," Schnatterer explains.

More and more hands-on benefits for drivers

Dachser will continue to refine the system and add new functions. Release 2 will roll out even more handson benefits for drivers, including a photo function for documenting any damage to shipments or the accompanying documents, integrated navigation, and a translation function. And a chat feature will let drivers communicate with their branch office.

To develop SAM at Dachser, IT and short-distance transport experts worked in close collaboration with the branches and drivers. "We were all as open and honest as possible with each other in our communication and worked together on the closely intertwined steps—or in many cases leaps—toward the innovative product, and that's what enabled us to develop and roll out SAM in such a short time. It's not often you get such a powerful driving force behind an innovation as complex as this," Schnatterer says, pleased.

"We designed SAM with the drivers in mind at all times, so we rode with them and shadowed them on their routes to gain an understanding of their perspective," Schnatterer continues. Learning from everyday practice to benefit everyday practice was the name of the game. "It was important for us to really get to know the users and incorporate their experiences with the latest communication technology," he explains. "What you learn from using apps on a smartphone every day helps make it easy to operate the devices at work." The introduction of a new generation of devices marks a further milestone in our digitalization journey

Step-by-step rollout across the European network

For technical and organizational reasons, rolling out the devices and system across Europe involves more than the tap of a button—it calls for a step-by-step approach. Dachser tested the first application on the new handheld device at its Öhringen and Bad Salzuflen facilities in Germany in May 2019. The findings were incorporated into the first SAM version, which went into pilot operation at the German branches of Langenau and Hof and the French branch of Niort in October 2019. Rollout and replacement of the devices have been in full swing since May this year.

Thomas Schmalz, Head of Production

Management at Dachser

"Until SAM has arrived at every last branch, we're having to operate the SAM and NVO systems in parallel without compromising quality," Schmalz says. The consistently positive feedback from drivers and the branches proves that this approach was the right one, he explains. "And that's reason enough to be proud of what we've achieved." M. Schick



INFO

Idea2net project Short Distance 2.0: Rethinking short-distance transport

Short Distance 2.0 was launched as part of Dachser's Idea2net strategic focus program. Managed by Thomas Schmalz, Head of Production Management, the project was all about reviewing the procedures and processes involved in shortdistance transport and then revising them one step at a time, all the while taking four different perspectives into account: that of the dispatcher, the transit terminal staff, the driver, and the customer. Automation of work processes and the associated new digital technologies—mostly developed in-house play a key role. The aim of the project is to make existing processes more efficient, simplify the work of everyone involved, and thus improve the whole experience from all perspectives.



Downtown Freiburg

EMISSION-FREE DELIVERY

DACHSER Emission-Free Delivery is making delivery of groupage shipments sustainable, now also in central Freiburg.

n the city center of Freiburg, Germany, Dachser has designated the post code 79098—which encompasses parts of the city's Altstadt, Neuburg, and Oberau districts—as an emission-free delivery area. Effective immediately, B2B and B2C customers in this roughly 1.5 km² zone will receive all their groupage shipments completely emission-free. "We successfully introduced electrically assisted cargo bikes two years ago, so this is



now the next logical step in doing our part to improve the quality of the air and of life in Freiburg's downtown," says Michael Gaudlitz, General Manager of Dachser's Freiburg logistics center.

On two and four electric wheels

To make these emission-free deliveries, Dachser will immediately deploy a 7.5-ton all-electric FUSO eCanter, a light truck that will deliver goods either directly to customers or to the microhub operated by partner VeloCARRIER / Roc-Ket Cargo Bikes, located close to downtown. There, smaller shipments are transferred to electrically assisted cargo bikes or StreetScooters for the delivery runs. The charging station for the electric truck is located at Dachser's branch in the Breisgau industrial park south of Freiburg, which—like all the logistics provider's branches in Germany—purchases 100 percent hydroelectric power.

Taking transportation as a whole—collection and line-haul are performed with conventional diesel trucks this new service reduces CO_2 emissions per shipment by 26 percent on average, particulates emissions by about 47 percent, and nitrogen oxide emissions by about 41 percent.



Rotterdam: the gateway to the world

+++ MORE LOGISTICS SERVICES IN ROTTERDAM +++ Dachser is expanding its contract logistics capacities in the Netherlands. The new warehouse at the Doelwijk A12 logistics hotspot offers 17,278 m² of storage capacity for more than 30,000 pallet spaces. Its strategic location, 40 kilometers from the port of Rotterdam and 45 kilometers from Schiphol Airport, together with 90 daily departures to all destinations in Europe, allows customers to serve the European market directly and easily. As a result of this expansion, Dachser's Rotterdam Logistics Center now has a total of approximately 93,000 m², of which more than 50,000 m² is warehousing space. +++



+++ CROSS-DOCKING IN FINLAND +++ Dachser Finland has started operations at its first transit terminal in Kerava. Conveniently located in the town's industrial park, the logistics terminal features a cross-dock terminal measuring 4,000 m² as well as 600 m² of office space. Dachser Finland will handle all import and export shipments at the new location, as well as distribution across the greater Helsinki area. A majority of Finnish companies are based here in this conurbation. +++

+++ DACHSER RHEINE EXPANDS CAPACITY

+++ Dachser's Rheine logistics center has launched operations at a new warehouse. The heart of the facility is a 20,800 m² terminal with 26 loading gates for trucks and up to 36,800 pallet spaces. In addition, there is some 1,200 m² of office space. Dachser Rheine will use this modern new facility to consolidate existing warehouse locations in the surrounding area. With this expanded capacity, the company is optimiz-

ing transport flows and operating conditions for customers in various sectors, including the manufacturing industry, healthcare, DIY, and the textile trade. +++





+++ NEW LOCATION IN NEUMÜNSTER +++ This summer, Dachser integrated a new location into its network: the Schleswig-Holstein logistics center. Located in Neumünster, the center will handle industrial goods and food. With investment worth some EUR 17.4 million, Dachser built a logistics terminal measuring 7,000 m². Of this area, 5,000 m² is dedicated to handling industrial goods, while 2,000 m² is refrigerated for food logistics. "Our new branch in Neumünster is one of the most advanced logistics facilities in our network," says Alexander Tonn, Dachser's Managing Director European Logistics Germany. +++

NETWORK ACC

A day shift at night: Eurohubs in full swing

Logistics networks are governed by the standards defined for goods type and for processes. The more closely the individual hubs are connected, the more robust the networks are and the greater the flexibility they can offer customers in all sectors—even in times of crisis. Certain hubs take on additional, highly functional consolidation tasks—at Dachser these are known as Eurohubs. \rightarrow

ife is like riding a bicycle. To keep your balance, you have to keep moving," wrote Albert Einstein in a letter to his son Eduard in 1930. That's also true for complex logistics networks like the Dachser Road network, which spans all of Europe. Around the clock, Dachser trucks are en route to destinations all across the Continent. Setting the pace and the tempo are the three Eurohubs in Überherrn, Bratislava, and Clermont-Ferrand. It is at these nodal points that Dachser bundles groupage for regular pan-European scheduled services when no direct route is available.

The Eurohubs literally turn night into day. So every night sees a frenzy of activity in the main offices and warehouses, with goods coming and going all the time. Eurohub operations focus on supplying the overall European network. "Eurohubs are non-profit centers without their own customer base. Their sole purpose is to connect all European branches with a tightly packed schedule of transports," explains Jens Lengefeld, Head of Partner Hub & Traffic Organization at Dachser. Lengefeld adds that this allows Dachser to offer its European logistics customers added value by enabling them to quickly reach any destination in Europe, no matter how remote. Depending on distance, deliveries are made in 24, 48, or 72 hours.

Integrating all European destinations

Keeping the network in balance is a challenge. "Achieving operational and planning excellence in network management is the only way to deliver the necessary levels of quality, service, and responsibility," says Michael Schilling, COO Road Logistics and chief architect of Dachser's pan-European network. "Our goal is to selectively and systematically consolidate loads so that we can drive the connectivity of our Eurohubs, expand them, and integrate all European regions. In this way, we can better utilize capacity and thus improve the profitability and environmental sustainability of our transports," he continues.

Überherrn became the Dachser network's first Eurohub in 2002. Its location on the Franco-German border very quickly made it a key hub for both countries and their European target markets. In 2011, another Eurohub was added in Bratislava, which expanded opportunities in Eastern Europe. That same year saw the start of Eurohub operations in Clermont-Ferrand, which allowed Dachser to successfully finalize its three-Eurohub strategy for comprehensive European coverage with guaranteed transit times. "The centrally managed Eurohubs function as the backbone of the European logistics network," Lengefeld says.



Eurohubs in the Dachser network grow with their tasks: In 2020, Clermont-Ferrand expanded its warehouse space by 2,200 m² to some 8,000 m². Bratislava added 3,000 m² to its transit terminal at the end of 2019 for a total of 6,000 m². And at the end of 2020, Überherrn increased its handling space by some 5,000 m² to just under 14,000 m².



At the gates to Europe: Everything ready for the network Nantes, France

Eurohubs – Consolidation hubs for Europe

Driving the Dachser ROAD network: Every day, Überherrn receives 3,500 shipments, Clermont-Ferrand 3,900 shipments, and Bratislava 900 shipments.

Stryków, Poland provides an example of possible connecting routes into the network. A daily direct line exists between the location and, say, the branch in Hamburg, while other shipments are routed via the Eurohub in Überherrn. There they are bundled for onward transport; in our example, to Nantes in western France.

> Überherrn Eurohub, Germany

> > DACH

DACHSER

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Clermont-Ferrand Eurohub, France

EXPERTISE: EUROHUBS





- Überherrn Eurohub: 106 arrivals / 113 departures a day
- Bratislava Eurohub: 46 arrivals / 26 departures a day
- Clermont-Ferrand Eurohub: 102 arrivals / 84 departures a day

Jens Lengefeld, Head of Partner Hub & Traffic Organization at Dachser Dachser's Eurohubs are a tower of strength during the coronavirus pandemic

Dachser's European network draws its strength primarily from the approximately 2,450 domestic and 1,400 Euronational direct lines between branches—a strength that is enhanced even more by the Eurohubs and the connection of all European regions that these allow. "We help branches that have few direct routes by offering a transport plan that is carefully scheduled down to the minute. This lets them offer their customers all export destinations," Lengefeld says. He adds that expanding Clermont-Ferrand's portfolio to include, for example, import and export transports, elevated this France hub to a hub for all of Europe. This in turn makes it a particularly important hub for French customers with European destinations as well as European customers with target markets in France.

Keeping an eye on the big picture

Lengefeld says that the various players in the network must always look beyond their locations and keep an eye on the big picture: "The Head Office in Kempten gives Eurohub managers clear rules and guidelines, which creates a balance between the interests of the network and those of their hub." As non-profit centers, Eurohubs must always serve the entire network and provide the high level of quality that this entails. Customers benefit not only from the reliability of the system, but in a Eurohub-optimized network, they can also save themselves the cost of regional warehouses while still supplying many countries with firm transit times.

The coronavirus pandemic, and the repeatedly disrupted and sometimes entirely broken supply chains that came with it, turned keeping the network balance into a real challenge, but also an opportunity. "During the crisis months earlier this year, the Eurohubs were a tower of strength," Lengefeld reports. "They took over tonnage from the branches as these were forced to halt direct transports practically overnight because of reduced business. This ensured that the network continued to serve its customers well—without any drop in quality or extraordinary markups. The network can rely on Eurohubs to always keep things moving, quickly and effectively, and always with the same high quality standards." M. Schick



Ogistics

SAFETY THROUGH VISIBILITY

This year, a new flashing light concept was rolled out to improve the visibility of Dachser trucks in Europe. Affixed to the sides of the trailers, these additional flashing lights help minimize the risk of accidents when trucks are turning—in particular during the darker months of the year. This in turn further increases safety for all road users, especially cyclists.



EVERYTHING ON HAND. DACHSER Contract Logistics

Intelligent logistics and interlinked processes – with efficient warehousing, tailored value-added services and a global transport network. Benefit from optimally coordinated flows of goods and information in our globally interconnected DACHSER warehouses.