

Scaling Success FMCG Experience Applied to Combined Transport

*Lessons from a fast-moving industry to
accelerate logistics transformation*

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What is Combined Transport

Definition, characteristic and benefit

Combined Transport uses multiple transport modes, with the main leg on rail, inland waterways, or sea, and short road legs for first/last mile.

Key Characteristics:

-  Multimodal movement
-  Sustainable main leg via rail or sea
-  Short road haulage (<100 km)
-  Terminal-based transfers

Why It Matters:

-  Lower emissions & environmental impact
 -  Reduced congestion & long-haul costs
 -  Higher service predictability
- EU Supports EU sustainability goals

Challenge in Scaling in Combined Transport

Current limitations and opportunities in scaling combined transport systems.



Fragmented Infrastructure

Lack of harmonized terminals, uneven capacity, and inconsistent intermodal connections reduce reliability and limit network scalability.



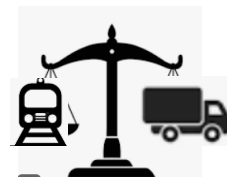
Operational Variability

Different processes, documentation standards, and handling practices create inefficiencies and slow down throughput across nodes.



Limited Digital Integration

Poor data-sharing, low real-time visibility, and siloed systems make it difficult to optimize flows or plan at scale.



Cost Competitiveness vs. Road Transport

Intermodal solutions often struggle to match the flexibility and short-term cost profile of road transport, especially on short distances



Inconsistent Regulatory Frameworks

Differences in national policies, incentives, and rules across countries hinder cross-border scaling and reduce investment certainty.

Fast-Moving to Forward-Moving

Key FMCG mindset principles



Speed & Agility

Rapid decision cycles, short reaction times, and fast execution enable immediate adaptation to market shifts.



Standardization at Scale

Common formats, harmonized processes, and replicable routines drive efficiency, predictability, and cross-market scalability.



Customer-Centric Focus

Deep understanding of consumer needs, service expectations, and usage patterns ensures solutions that are relevant and resilient.



Continuous Innovation

Relentless improvement, experimentation, and adoption of new technologies sustain competitiveness and unlock new value pools.



Data-Driven Discipline

Real-time insights, forecasting accuracy, and performance tracking enable optimized planning and proactive decision-making.

From Fast-Moving to Forward-Moving

Key data points of FMCG principles to accelerate transport transformation



VOLUME-DRIVEN SCALE

High and consistent shipment volumes enable stable capacity planning, unlocking predictable combined-transport flows and lower unit costs.

STANDARDIZED PROCESSES

FMCG-style harmonization (packaging, coding, handling routines) reduces operational variability and improves compatibility across intermodal nodes

DATA CENTRIC PLANNING

Real-time demand visibility, forecasting, and SKU-level analytics support optimized routing, better asset utilization, and fewer empty runs.

FAST REPLICATION CYCLES

Proven FMCG practices scale quickly across markets, helping combined transport adopt repeatable models that accelerate transition and reduce risks.

Bridging Two Worlds

Translate FMCG best practices into equivalent logistics strategies



FMCG best practices

Logistics strategies

SKU Simplification → Route & Asset Standardization

Reducing complexity in product portfolios translates into harmonized load units, repeatable routing patterns, and interoperable assets across networks.

Forecast Accuracy → Capacity & Flow Stabilization

Advanced demand planning becomes optimized capacity booking, smoother flow orchestration, and reduced variability in intermodal chains.

Agile Execution → Faster Turnaround & Cycle-Time Reduction

Fast decision loops inspire streamlined terminal operations, quicker handovers, and reduced dwell times across modes.

Lean Processes → End-to-End Efficiency Gains

Continuous elimination of waste informs synchronized schedules, improved equipment utilization, and lower unit transport costs.

Consumer-Centric Mindset → Service-Driven Network Design

Understanding demand patterns shapes flexible transport offerings, service-level segmentation, and more adaptive multimodal solutions.



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When Agility Meets Integration

Short real industry case showing tangible results of applying FMCG principles to logistics.



Unilever – SKU Rationalization → +10–15% Logistics Efficiency

Unilever reduced the number of SKUs across several European and African categories.

Impact on logistics:

more homogeneous loads

- better truck and pallet utilization
 - reduced warehouse and replenishment variability
- Result: 10–15% logistics efficiency improvement + fewer stock-outs.



Procter & Gamble – Forecasting Excellence → –20% Inventory & More Stable Transport

P&G is known for leading demand forecasting and planning accuracy.

Impact on logistics:

15–20% inventory reduction

- smoother and more predictable transport flows
 - improved intermodal capacity planning
- Result: reduced variability, higher asset utilization, lower total cost.



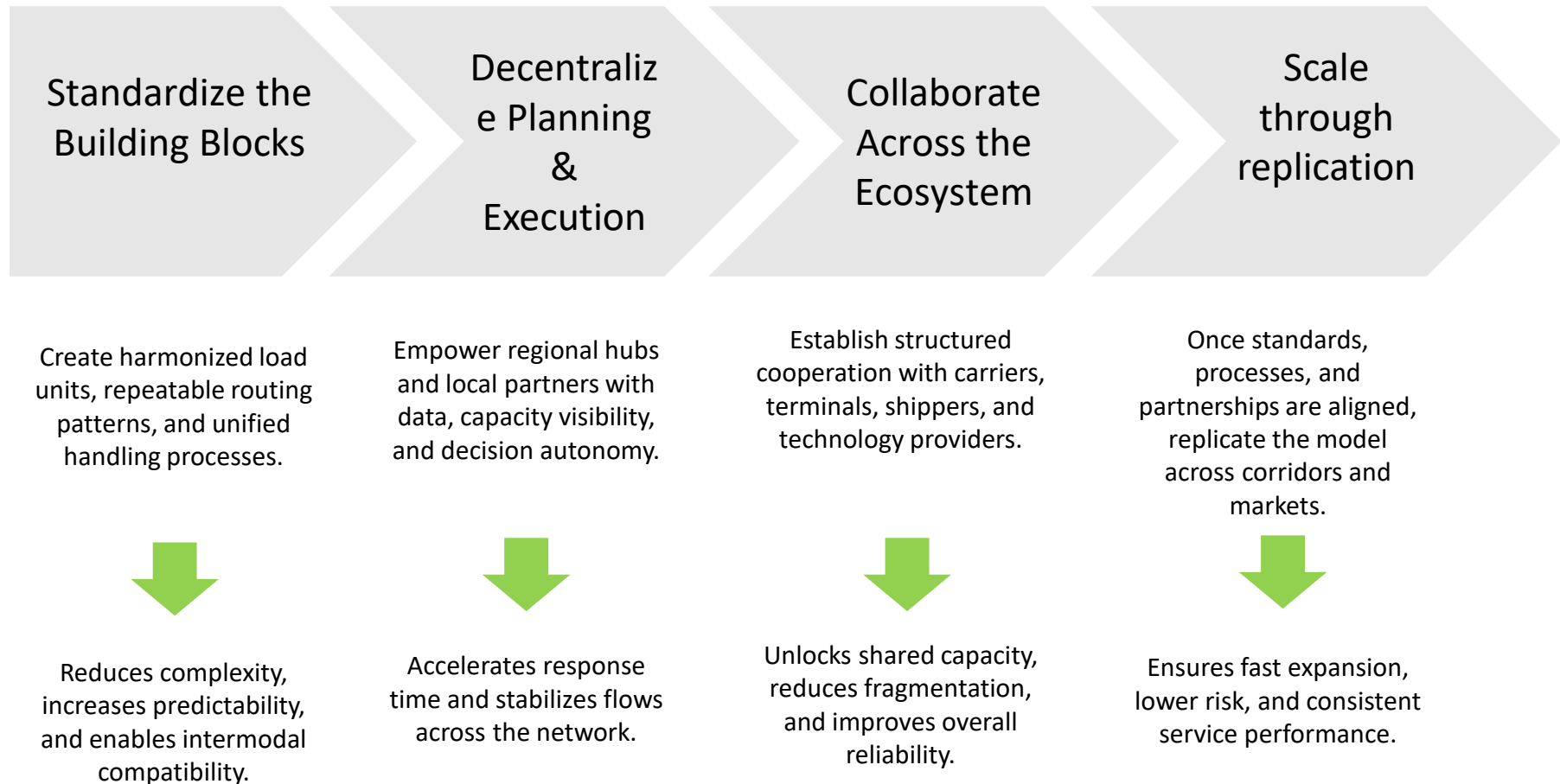
Coca-Cola HBC – Route Standardization & Lean → –12% Transport Cost / Lower CO₂

Coca-Cola HBC implemented a network model based on:

- standardized load units and pallets
 - repeatable routing (milk-runs, shuttles)
 - structured collaboration with intermodal partners
- Result: 12% transport cost reduction and significant CO₂ savings.

A Scalable Model for Combined Transport

Roadmap



What Makes Scaling Possible

Key enablers

Clear roles, responsibilities, and accountability ensure consistent execution and fast decision-making

Structured engagement with carriers, terminals, and third-party logistics providers unlocks capacity, harmonization, and efficiency.



Real-time tracking, demand forecasts, and KPI monitoring allow proactive planning and risk mitigation.

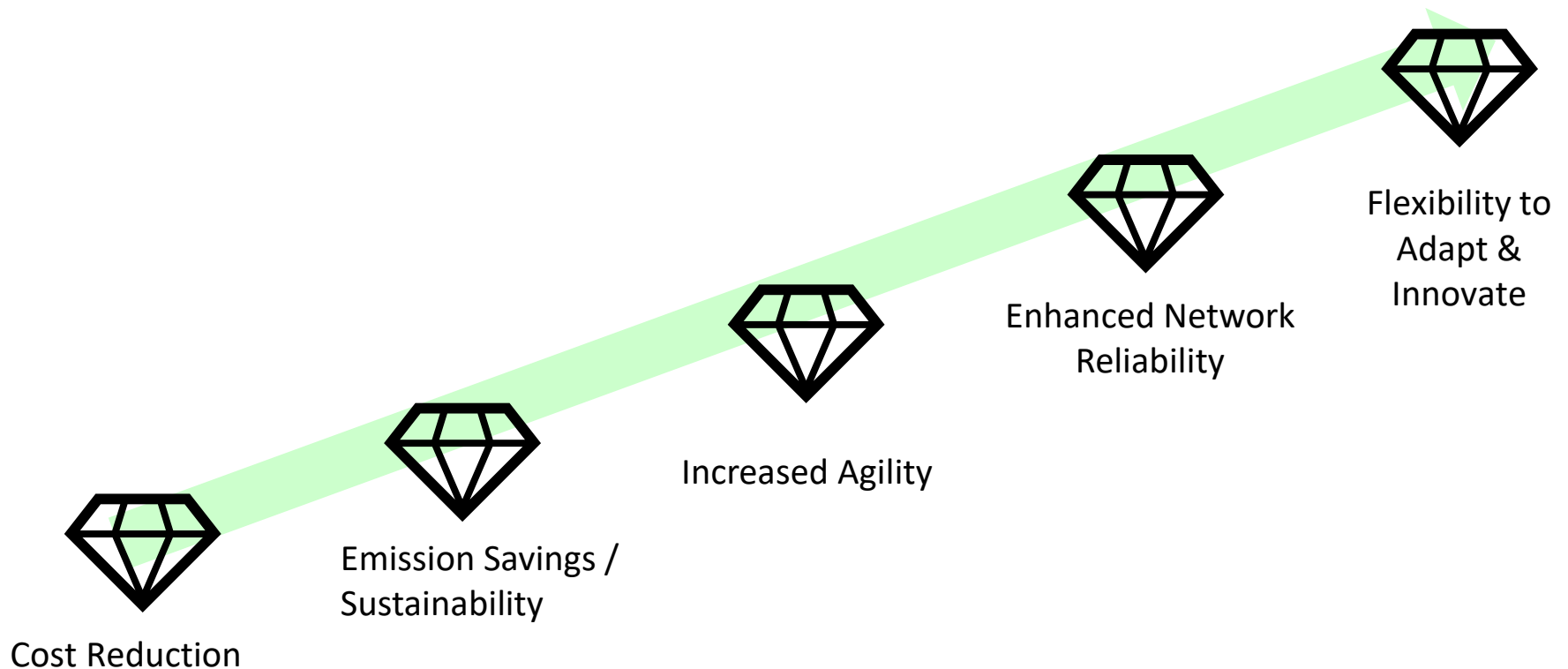
Repeatable operational routines, harmonized load units, and standardized documentation reduce variability.

Forward-Thinking Mindset

A culture oriented to scalability, continuous improvement, and innovation enables fast adoption and replication.

From Efficiency to Resilience

Outcomes and benefits



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Classification: Public

The Road Forward

Summary of Value

- FMCG Principles Drive Scalable Logistics >> Speed, standardization, data visibility, repeatable processes enable forward-looking combined transport
- Collaboration & Governance Are Critical >> Strong partnerships, clear roles, and integrated ecosystems unlock scale and reliability.
- Tangible Benefits Are Within Reach >> Cost reduction, emission savings, agility, and innovation achievable through structured implementation.

Questions thinking where you can start ...

-  How can FMCG- standardization to your current combined transport flows?
-  Which partnerships or data integrations are needed to unlock scalable combined transport?
-  What are the quick wins and long-term initiatives to deliver measurable outcomes?

Thank You

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