By Catherine Larkin

# Retail logistics: Finding the right balance between in-house and outsourced operations

A shopper who finds an empty shelf or receives an order two hours late with half the items missing is unlikely to ask who handled the retailer's logistics. They blame the name on the shopfront. More than ever, deciding which supply chain functions to keep in-house and which to outsource demands careful thought, given how much of a retailer's reputation is on the line when those operations fall short.

For a long time, cost has been central to the outsourcing debate. Can a third-party logistics provider (3PL) move and store goods more cheaply than the retailer's own operation? But a spreadsheet does not tell the whole story.

Archie Vermeulen

Archie Vermeulen, managing director at RAM Supply Chain Solutions, says the pandemic and wars in Ukraine and the Middle East have forced businesses to rethink their supply chains. Managing them is no longer only about the lowest cost per unit.

"Business unusual is the new norm," he says. "You need to have the goods in stock to have the ability to expose them to the risk of sale."

Undeniably, the past few years have delivered some big challenges to contend with, ranging from a changing labour landscape to rising fuel and property costs. Amid all this, the e-commerce boom has brought new demands for faster, more flexible delivery.

"The pandemic and wars in Ukraine and the Middle East have forced businesses to rethink their supply chains. Managing them is no longer only about the lowest cost per unit.

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Mark Wyllie,

Mark Wyllie, CEO of Nightwing SA, believes the starting point should be the outcome the retailer wants to achieve.

"The retailer knows its product, its customers and its market. The logistics provider should know logistics. The real value comes from a meeting of those two minds."

## Muscle and brain

Craig Pitchers

Craig Pitchers, CEO of The Courier Guy, reduces the decision to a single question: does the function touch the customer relationship or does it move a box?

"Anything that shapes what the customer sees and feels – merchandising, pricing, the promise you make at checkout – you keep. Anything that's pure execution – physical movement, storage, delivery – is a candidate for a specialist," he says. "

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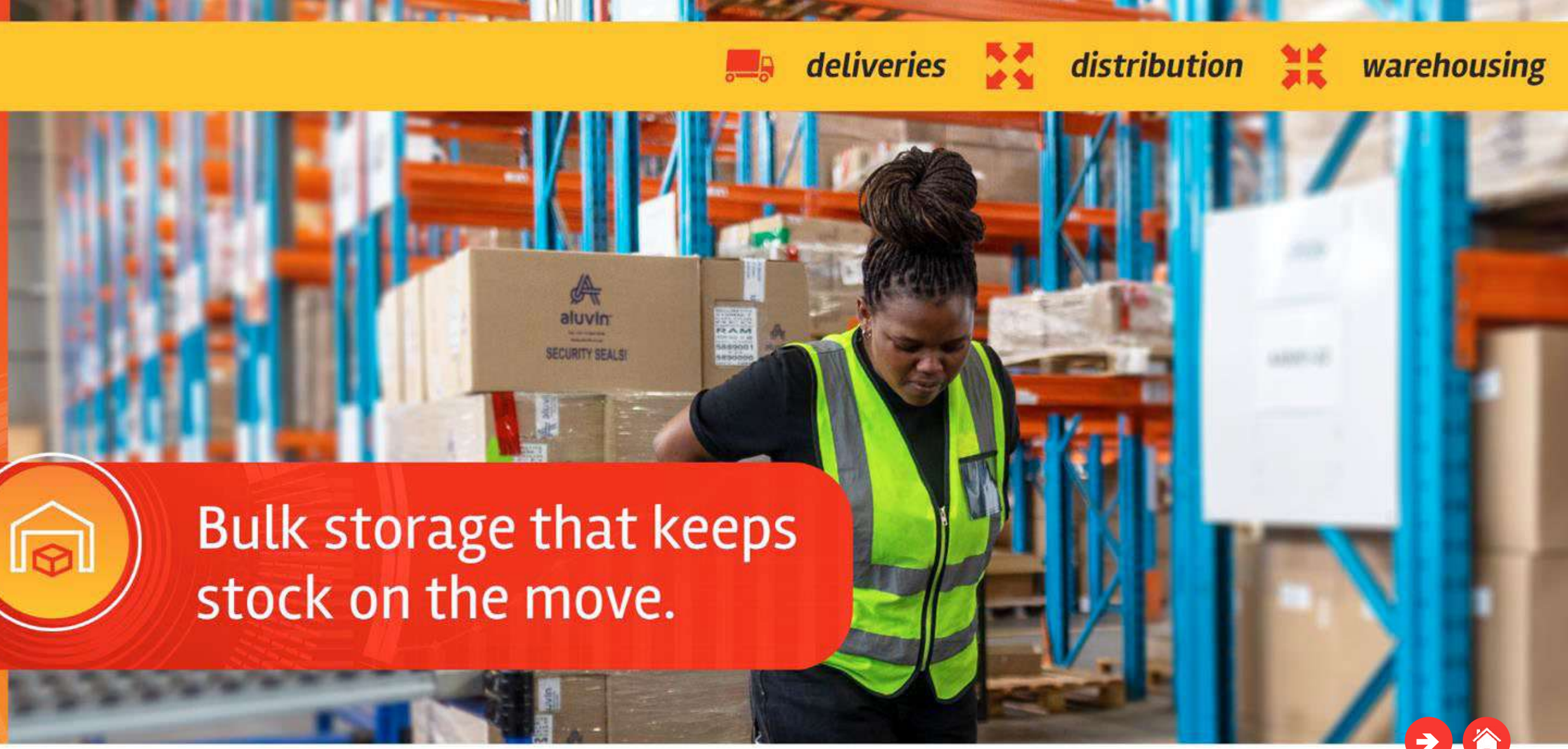


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Njabulo Ngcobo

Njabulo Ngcobo, Managing Director of Ngcobo Molapo Logistics (NML), puts it more bluntly: "Outsource the muscle, never the brain." But retaining control requires more than deciding what stays in-house. He warns that retailers underestimate the work involved in managing an outsourced operation.

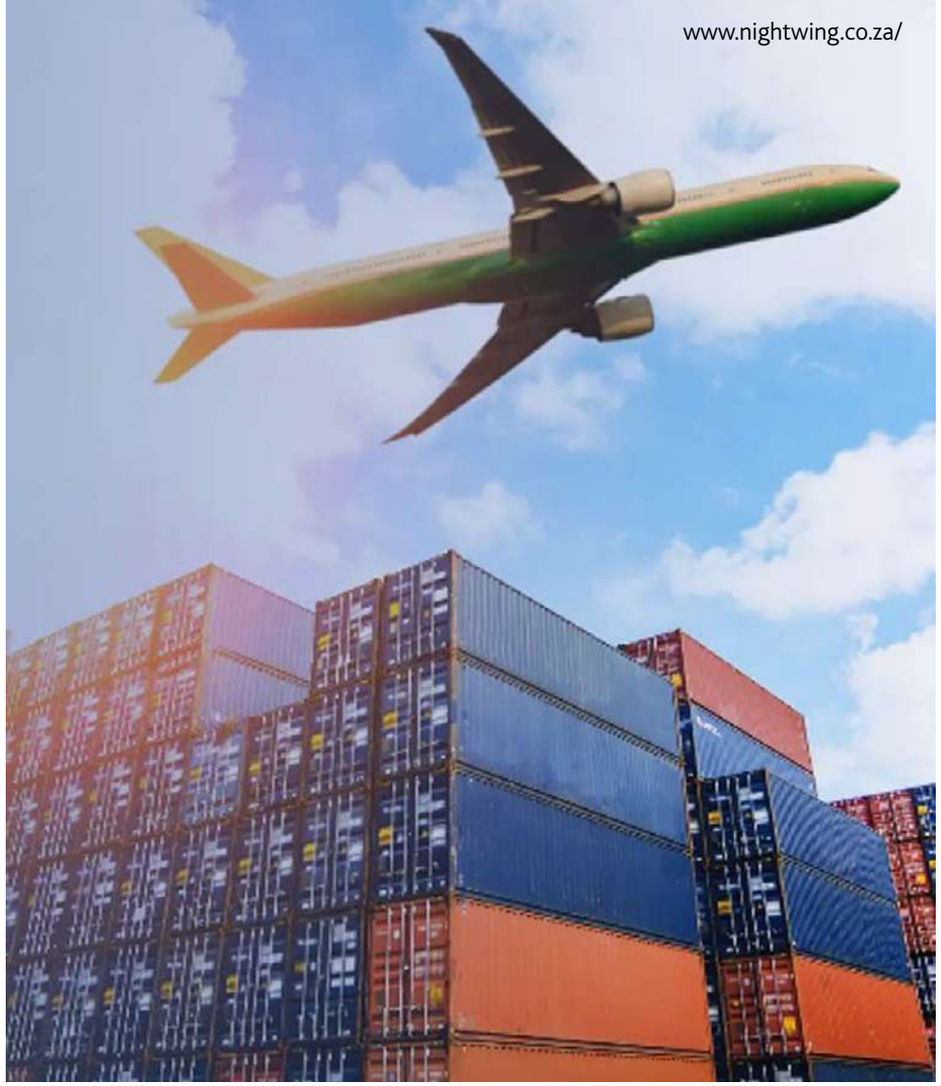
"Outsourcing doesn't remove management. It changes what you manage. Instead of trucks and people, you manage performance and data."

Mpudi Maubane

At SPAR, supply chain is a fundamental part of the business model. Its wholesale, warehousing and distribution operations serve independent retailers. Mpudi Maubane, Group Head of PR, Communications and Sponsorships, says the useful question is which capabilities are strategically important to retain. "Execution may be outsourced, but accountability for the customer ultimately remains with the retailer."

Dr Eric Mogire

Dr Eric Mogire of the University of Johannesburg's Institute of Transport and Logistics Studies (Africa) is wary of treating outsourcing as the answer to everything. Each function should be judged on its merits, he says, rather than following an industry trend. "Outsourcing the wrong function for the wrong reason often creates new problems for the retailer."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Hennie Serdyn

Hennie Serdyn of FLOW Advisory warns that some supply chain costs originate elsewhere in the business. Buying and allocation decisions can create unnecessary expense and outsourcing may put more distance between the people making those decisions and those dealing with the consequences.

In his view, warehousing and inventory management depend on close cooperation between buying, planning, sales and supply chain teams. He argues that retailers should outsource only when their volumes are too low to achieve economies of scale themselves. Even then, he notes, a shared provider may also be serving their competitors.

## What it really costs

Before deciding whether outsourcing will save money, retailers need to establish what their existing operation actually costs. Comparing a provider's rate card with vehicle costs and driver wages leaves much of the expense out of the calculation.

According to Wyllie, businesses often underestimate the true cost of running logistics internally because expenses are spread across the profit and loss statement rather than accounted for in one place. Even the floor space occupied by the walkway to the warehouse bathrooms forms part of the cost, alongside less obvious expenses, from something as mundane as packing tape to something as costly as a replacement vehicle when one breaks down.

Scale also affects the comparison. "Does a retailer operating its own small fleet buy enough fuel to receive the same discounts as a logistics operator? If a vehicle breaks down, does it own spare capacity or hire another vehicle?"

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Vermeulen adds that internal operations can be cross subsidised by other parts of the business, leaving retailers without a clear picture of what their logistics really cost.

On the other hand, the outsourced price needs the same scrutiny. Mogire warns that additional charges, contract changes, service failures and integration costs can erode the expected savings. Retailers need to understand the total cost of the arrangement rather than focus only on the provider's contract fee.

Ngcobo argues that the comparison must also account for the service delivered. "Stop comparing a truck rate with a driver's salary. Compare the cost of a case delivered on time and in full."

Diederick Stopforth,

Diederick Stopforth, Managing Director of Internet Express and Citi Sprint, says a major advantage of outsourcing is converting a substantial portion of fixed infrastructure costs into variable costs, allowing retailers to buy capacity as they need it.

"There is also a management opportunity cost. The question is not simply, 'Can we deliver this parcel ourselves for less?' It is, 'Is operating a logistics fleet the best use of our capital and management resources?'"

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## Managing the fleet

With October marking Transport Month, fleet management is a timely part of the outsourcing discussion. Retailers running their own vehicles must consider how well they use them throughout the year, alongside the demands of maintenance and driver management. Outsourcing changes those responsibilities, but retailers still need to agree capacity and service standards with their providers.

"Transport is the natural candidate," says Ngcobo. "We started NML with a single 15-ton truck and grew to a fleet of superlinks moving freight for some of South Africa's biggest manufacturers. We could do it more cheaply than they could because we carried loads on return trips and filled our trucks across several clients. A retailer running its own fleet on one-way trips can't match that."

However, predictable routes can justify retaining an internal fleet. Stopforth says a retailer may keep its own vehicles for store replenishment or strategically important deliveries, while outsourcing variable volumes or deliveries beyond its usual network.

Running an internal fleet means managing the operation beyond the vehicles themselves. Ngcobo's list includes maintenance, licensing, overtime and kilometres driven empty. Stopforth adds recruitment, training, absenteeism and accidents. Route optimisation, real-time tracking and electronic proof of delivery require further investment – costs that a specialist provider can spread across its clients.

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Fleet capacity also needs to match demand, says Ngcobo, who recommends dedicated capacity, owned or contracted, for everyday volumes, with additional external capacity for peaks. "The key is to agree peak capacity and pricing in advance. Carriers remember which clients called them in a panic in December and which ones planned with them in September."

Outsourcing does not, however, guarantee that vehicles will be available when every retailer needs them. Serdyn cautions that unless a retailer's peak differs from the rest of the industry, outsourcing offers no silver bullet. He also argues that ...

> "Retailers outsourcing their delivery fleets should retain control over routing and dispatch. In his view, providers paid by the kilometre or hour have little financial incentive to reduce either, making the commercial arrangement an important part of fleet efficiency."

Vehicle productivity also depends on what happens at loading and receiving points, explains Ngcobo. "Retailers themselves should be measured on loading and offloading times, receiving processes and timely payment, alongside the carrier's delivery performance. Accountability has to run both ways. Many 'provider failures' start at the retailer's own receiving dock," he says.

Waiting time is one example. "As an operator, I can tell you that waiting time is a huge hidden cost on both sides. A truck standing at a DC for five hours costs somebody money and it usually ends up back in the rate."

## Inside the warehouse

When it comes to outsourcing, warehousing is far less clear-cut than transport. It also involves more than finding a large space to store stock. Retailers need to consider how orders will be fulfilled and whether the provider can support their operating requirements.

Maxeen Naidoo Bharath

Maxeen Naidoo Bharath, International Specialist at Skynet SA, says the choice depends on the individual business. "Warehousing and fulfilment can either be outsourced or managed internally depending on the retailer's size, volumes and requirements."

Although outsourcing reduces some direct control, retailers can hand over the physical work without handing over inventory decisions. Bharath identifies inventory strategy and demand forecasting as functions retailers generally benefit from retaining, even when a specialist handles fulfilment.

Stopforth says warehousing and fulfilment can be outsourced successfully where a provider demonstrates the required scale and systems integration. Its systems must work with the retailer's own, allowing information to flow between the businesses rather than leaving each with a different picture of the operation.

One advantage of an outsourced warehouse is the experience gained from serving multiple clients, says Vermeulen. Different customer requirements give providers a range of solutions to draw on when designing a service for a retailer.

Providers may also have upgraded facilities, automation and warehouse management systems that would require substantial capital investment from the retailer.

However, Vermeulen cautions that there is no one-size-fits-all solution and says the capabilities available must match each individual operation's requirements.

Maubane advises retailers to also look at arrangements that can respond to promotions, seasonal periods and unexpected changes in demand while maintaining service and availability.

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That need not mean outsourcing the entire warehouse. Vermeulen suggests using an external operator to store slower-moving stock, freeing space in an existing internal facility for higher-demand lines. This can improve flow without requiring the retailer to move its whole operation outside.

## Combining the two

"Hybrid models have become more popular in the post-Covid years as customer demands have changed," says Vermeulen. The practical question then becomes how to manage the work across both operations in a hybrid model. It starts with very clear operating parameters. Responsibilities need to be defined, particularly where stock and information pass between the retailer and its provider.

"The important part is that the different pieces operate as one supply chain rather than a collection of disconnected suppliers," says Wyllie.

That requires more than agreeing who does the work, says Vermeulen. "Both parties must understand how performance will be measured and what happens when things go wrong. They need to agree the time allowed to rectify failures and any penalties that apply. Both sides must also measure performance from the same reports. Otherwise, a discussion about resolving a problem can become a dispute over whose figures are correct."

In a combined operation, the handover needs as much attention as the work on either side. The retailer may decide what stock is required while a provider stores and dispatches it. Both need to understand where their responsibility begins and ends, including who can authorise a change when the original instructions cannot be carried out. Otherwise, each business can complete its own task while the order still falls short of what the customer expected.

"A service-level agreement (SLA) without active operational governance is simply a document," says Stopforth.

Wyllie adds that people on both sides need the authority to solve problems, supported by agreed escalation procedures. The purpose of measuring performance is to improve the operation, rather than simply produce a scorecard at the end of the month.

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Ngcobo has experienced this arrangement first-hand as an owner-driver contractor within a major manufacturer's distribution network. He says it only works when standards are clear, systems are shared and payments are reliable.

"It breaks down when purchase orders, payments and all the risk get pushed onto the smallest operator in the chain. The model is sound. The discipline of the retailer or main provider running it is what makes it succeed or fail."

## Getting the balance right

The test of a hybrid arrangement rests on whether it can deliver the service the retailer needs at a cost it understands. Vermeulen argues that internal and external operations should be assessed against the same customer-service measures. Otherwise, retailers risk judging the two models by different standards.

For Maubane, consistent service should remain the priority, whether a function is managed internally or through a partner. "Retailers need clear performance measures covering availability, order accuracy, delivery times and customer service."

According to Pitchers, delivery speed alone cannot give retailers a complete picture of performance. They also need to know whether deliveries

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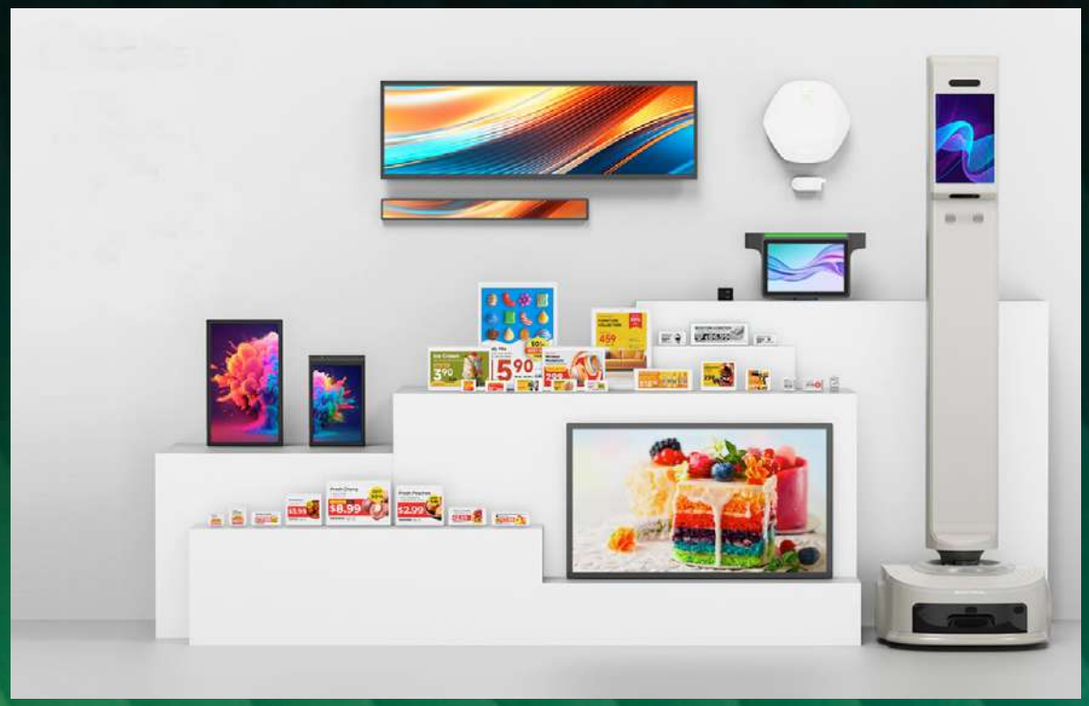

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succeed on the first attempt, how quickly exceptions are resolved and whether tracking information is accurate.

"A late parcel is recoverable, a wrong tracking update that tells a customer their order arrived when it didn't is a trust problem."

He also warns against treating the arrangement as 'set and forget'. Service levels need regular review as the retailer's requirements change, rather than remaining fixed at what was agreed when the contract began.

A missed delivery does not necessarily mean outsourcing was the wrong choice, just as owning the vehicle does not guarantee a better result. The retailer needs to establish where the failure occurred. Ngcobo's earlier example of a truck waiting at a receiving dock shows why – changing the carrier would leave the delay unresolved if the receiving process stayed the same.

## When things go wrong

Supply chains notably have a habit, however, of testing even the best-laid plans. When things go wrong, retailers need more than a penalty clause to fall back on. Penalties may hold a logistics provider accountable, but they cannot get goods moving if that provider can no longer deliver.

According to Mogire, retailers must identify which functions would be affected if a provider suddenly became unavailable, then establish alternatives. These could include backup providers and capacity where possible, supported by clear exit arrangements.

Ngcobo recommends keeping a second carrier available for critical routes, providing both a fallback and a benchmark. Pitchers, however, cautions that splitting work across providers can add complexity and reduce the volume-based rates that make outsourcing worthwhile. The alternative, he says, is "contractual and technical portability", systems and contracts that let a second provider take over without a lengthy transition.

There is no simple fix and every fallback comes with its own trade-offs. The crux is knowing where the supply chain is vulnerable and having a workable plan ready before a disruption forces one's hand.

"Retailers should ask their provider directly what the failover plan looks like on both sides, before there's a crisis to test it in," says Pitchers.

Bharath adds that any and all contingency arrangements must be tested regularly. Alternative transport routes, backup warehousing capacity and emergency communication procedures need to work when called upon, rather than exist only on paper.

## Keeping the information and the ability to move

But, having another provider available is only part of the preparation. The retailer also needs access to the information required to transfer the work. Changing carriers becomes harder, for example, if delivery records and operational history remain locked inside the outgoing provider's systems.

Pitchers says tracking information and delivery windows should therefore always feed into the retailer's own systems rather than remain confined to a provider's platform. "The test is simple. If the provider relationship ended tomorrow, does the retailer still own everything it knows about its customers? If not, that's a contract problem to fix now, not later."

Ngcobo says that access should extend to delivery times, proof of delivery, exceptions and

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damage records. Agreeing data formats upfront allows retailers to change providers without losing their history. This does not mean retailers must own every technology platform. Mogire distinguishes between a provider operating the systems and the retailer retaining ownership of its customer, sales, inventory and operational data.

The information should also help improve the operation while the partnership continues. Wyllie gives an example. "We may identify that 80% of a particular product is being sold into one region. Rather than simply reporting those numbers, our job should be to ask whether moving 70% or even 50% of that inventory closer to the demand would improve delivery speed and reduce transport costs," he says. "The warehouse cost may remain largely unchanged, but suddenly the retailer can offer its customer a faster and more cost-effective service. Customers should absolutely have visibility of their information. But a good logistics provider should add interpretation to that information and turn data into practical opportunities."

## The return journey

The modern-day retail environment is not just about getting products to a customer. Supply chain decisions are as much about the return as the delivery. As e-commerce grows, this will become increasingly important. If goods come back, someone must collect them, return them to a warehouse, process them and ensure the customer receives the credit due. Those responsibilities need to be clear whether logistics are outsourced or kept in-house.

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Vermeulen says reverse logistics has seen exponential growth in recent years and can either be a promoter or a detractor. It has to be considered from collection through to that final credit. He warns that the processing of credits has not kept pace with order delivery, making returns an important part of the outsourcing decision.

"Returns are equally important," says Stopforth. "In e-commerce, the reverse-logistics experience needs to be almost as convenient as the original delivery."

Serdyn argues that the best strategy for returns is prevention. Clear product descriptions and sizing guidance help customers choose correctly, while suitable packaging reduces the risk of damage. Much of this sits outside the supply chain team, although it is often left to deal with goods coming back.

Returns also test the division between the decisions a retailer retains and the work it hands over. A carrier can collect an unwanted item, but it cannot correct an unclear product description or poor sizing guidance.

## Looking ahead

There is no single answer to what a retailer should keep in-house, but doing everything itself is increasingly hard to justify. An arrangement that looks economical in a quiet month may struggle during a promotion, while capacity built for the busiest period can sit underused for much of the year. Retailers need to test those demands before committing and reconsider their choices as the business changes.

Going forward, Mogire expects more selective outsourcing rather than a wholesale move away from internal operations. Providers able to spread investment across several clients will remain attractive, but retailers will continue building capabilities where they need direct control, particularly over customer information, he says.

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The arrangement must reflect the expertise the retailer can and will retain. Ngcobo's warning that outsourcing changes the management task is relevant. Buying a service still requires people who understand the operation well enough to challenge poor performance and recognise when the requirements have changed. A retailer that loses that knowledge will find it harder to judge whether its provider is delivering value.

For Wyllie, that also changes what a logistics provider must offer. "The successful logistics providers of the future will therefore need to offer much more than trucks, warehouses and rates. They will need to understand the customer's business and demonstrate how logistics contributes to that customer's success."

For the retailer, that contribution is the ultimate test – whether the arrangement helps it serve customers reliably at a cost it can sustain. **SR**

**Catherine Larkin** is a communication and marketing professional, specialising in Logistics, Transport and Supply Chain. Her company, CVLC Communication, is a corporate public relations, communication, marketing and events consultancy. Its services range from full secretariat support, project management and administration.

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