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Reverse logistics ... The return flow in South African retail distribution

“ Forward logistics gets the budget and the board time.

The goods that travel the other way — returns, recalls, end-of-life stock
— decide margin, compliance and reputation. ”

Rising fuel costs, tighter service-level agreements, and retail customers who expect shelf availability in real time. South African distribution networks are under pressure from every direction, and the industry response has focused, correctly, on forward flow: cross-docking, last-mile performance, telematics, end-to-end visibility.

But a distribution network moves in both directions, and the return flow is where most of the industry is quietly carrying a cost it does not see.

Reverse logistics is the discipline of managing goods that travel backward through the supply chain — returns, product recalls, damaged stock, obsolete ranges, end-of-life packaging, and anything else that needs to come off a shelf or out of a depot. In Fast Moving Consumer Goods (FMCG) retail the volumes are substantial and the decisions are complex: what gets refurbished, what gets redistributed, what gets recycled, and what must be responsibly destroyed and documented. Historically, the industry has underinvested here because the return flow rarely has a single owner. Warehousing looks after forward inventory, marketing owns the brand, compliance owns regulation, and the goods in between fall through the cracks — until they surface on a stock reconciliation or a recall notice. Between returns, obsolete and damaged stock, recall handling, end-of-life disposal, and the working capital stranded inside all of them, the reverse-flow cost line rarely sits neatly in one budget.



A well-run reverse flow does several things at once. Goods are uplifted from store or depot on a planned cycle, not as emergency ad-hoc collections. At a sortation site they are triaged against a clear decision logic: stock that is commercially viable is reconditioned or repacked and redistributed through appropriate secondary channels; stock that cannot be resold is stripped of brand identity, then either redirected for industrial reuse or routed into the correct recycling stream. Regulated and hazardous material is handled under licence. Every movement is documented so the retailer or brand owner has a defensible audit trail — particularly important during product recalls, where debranding and destruction certificates protect against grey-market leakage. Done well, reverse logistics also feeds data back into the forward side: return reasons, failure rates and regional patterns help buyers, category managers and demand planners make sharper decisions next season. It is an intelligence function as much as a logistics function.

Two forces have moved reverse logistics from nice-to-have to unavoidable. The first is regulation. South Africa’s Extended Producer Responsibility (EPR) framework, issued under the National Environmental Management: Waste Act, places direct obligations on producers and importers across fast-moving consumer goods (FMCG), consumer electronics, and general merchandise — requiring them to evidence what happened to their products and packaging after the point of sale. Retailers carry the pressure adjacent to it, through their buying relationships and private-label ranges.

The second is the circular economy: the principle that materials and products should keep their value in circulation through reuse, refurbishment and recycling rather than being discarded after a single use. Retail partners, investors and consumers are all applying pressure in this direction, and waste events or recalls that used to be operational problems now travel quickly as brand risks.

A high-performance distribution network is not complete if it only moves in one direction. Antel Solutions has been building the reverse side of that capability for South African FMCG clients since 2016, across seven provinces, with more than 89 years of combined logistics experience on the team, and represents the Reverse Logistics Association of South Africa. If your forward distribution has a clear owner and your reverse flow does not, that is where to start.

Reverse logistics is an intelligence function as much as a logistics function

Antel Solutions designs and operates reverse logistics and end-of-life management programmes in the circular economy for FMCG brands and retailers across South Africa.



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Complex, costly and unpredictable

The new reality of retail distribution

Few of us think about it while pushing a trolley down a supermarket aisle, but every product on every shelf has already completed a complex journey – one that is becoming harder, more expensive and far less predictable by the day.

Retail distribution is no longer just a back-end logistics function. It has become a competitive battleground where cost, speed and service are constantly being traded off against one another.

Behind the scenes, distribution networks are under strain. Rising fuel costs, volatile operating conditions and demanding delivery windows are forcing retailers and their logistics partners to rethink how goods move from warehouse to store, and ultimately to the consumer.

In South Africa, the challenges are even more pronounced. With the country's main port infrastructure centred in Durban, its economic hub 500km inland and long distances to smaller and rural towns, logistics is not only operationally complex but inherently expensive.

What was once a relatively linear supply chain is now far more exposed. Factors that were once considered nice-to-haves have become critical to whether a business succeeds or not.

Consumers are not only no longer willing to wait for their goods, but they are also more and more unwilling to pay more for the privilege.



Over 50,000 runners from around the world filled the streets of London as they set out to complete the 2024 TCS London Marathon. Together with a team of volunteers, DSV local colleagues were responsible for ensuring that the participants' belongings were safely transported from the start to the finish line. This entailed collecting 17 truckloads of personal items and driving them to the finish line, where the runners could pick them up after completing the 42.195 km long race past some of London's most iconic landmarks. <https://www.dsv.com/en-za/>



Steven Sutherland

This is making retail and FMCG distribution environments far more difficult to manage, says Steven Sutherland, General Manager Enterprise at Powerfleet Africa.

“ Operators must simultaneously manage facility efficiency, transport performance, regulatory compliance and product integrity across highly dynamic supply chains. ”

An example, he says, is a distribution network that can involve multiple warehouses, cross-docking facilities, long-haul transport routes and last-mile

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delivery vehicles. "Without a connected view across these layers, inefficiencies and operational blind spots quickly emerge."

Another challenge is maintaining consistent service levels while managing operational risk. Temperature-sensitive goods, driver safety, vehicle utilisation and delivery reliability all need to be monitored continuously. When systems operate in isolation, decision-making becomes reactive rather than proactive, he says.

"Increasingly, retailers and logistics service providers are focusing on building connected ecosystems where transport fleets, warehouse assets and cold-chain equipment are visible within a single operational environment."

The strain on the system is clearly visible in how fleets are managed and how goods are moved across the country. Predictable volumes, fixed delivery cycles and stable routes are falling away, replaced by models that demand far greater flexibility in how cargo is transported and delivered.

Put simply, goods need to move more fluidly – without driving up cost or compromising efficiency. That is a difficult balance to strike at the best of times. In South Africa, it is even more challenging.



Riaan Kleinhans

According to Riaan Kleinhans, Director of Operations at DSV South Africa, fleet strategy has already shifted from a fixed replacement cycle model to a more dynamic, cost-conscious approach, prioritising operational efficiency and spend control over routine fleet renewal.



A DSV team was faced with an interesting challenge when Hyundai Engineering asked them to transport a 950-tonne oil distilling component. Adding to the challenge of shipping this large cargo was the short timeframe. This needed close collaboration with the customer and between DSV teams across the world. Just six days after the cargo was loaded in the port of Kuantan, Malaysia, it was safely delivered to its destination in Balikpapan in Indonesia. www.dsv.com/en-za/

“ We are moving the same or greater volumes in smaller, more frequent consignments to more locations, which increases both cost and complexity. ”

"The transformation has been profound and has completely changed our daily operations," he tells Supermarket & Retailer.

As little as five years ago, retail replenishment relied on planned bulk deliveries. Volumes were predictable, the routes stable and the frequency relatively reasonable. Today, delivery frequency has increased across virtually every retail category, with drop sizes smaller and more delivery points.



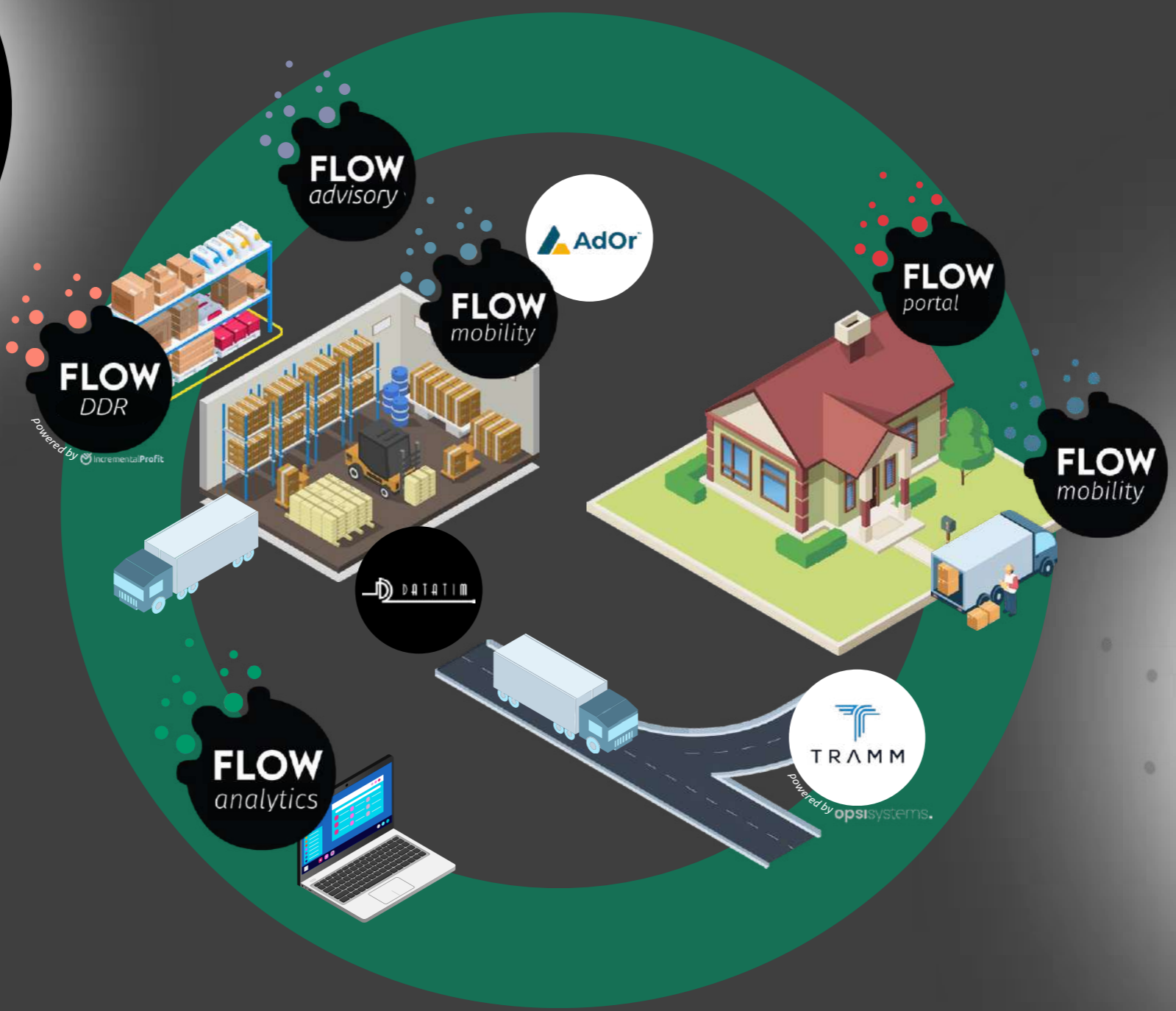
Hennie Serdyn

Supply chain optimisation, says Hennie Serdyn, Partner and Advisor at FLOW Advisory, is a meticulous task. "It requires breaking down silos between departments. It means procurement, planning, warehousing and distribution must all understand their impact on the end-to-



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end chain. Without this shared understanding, decision-making often becomes reactive, with the loudest voice determining the process, frequently leading to sub-optimal outcomes.”

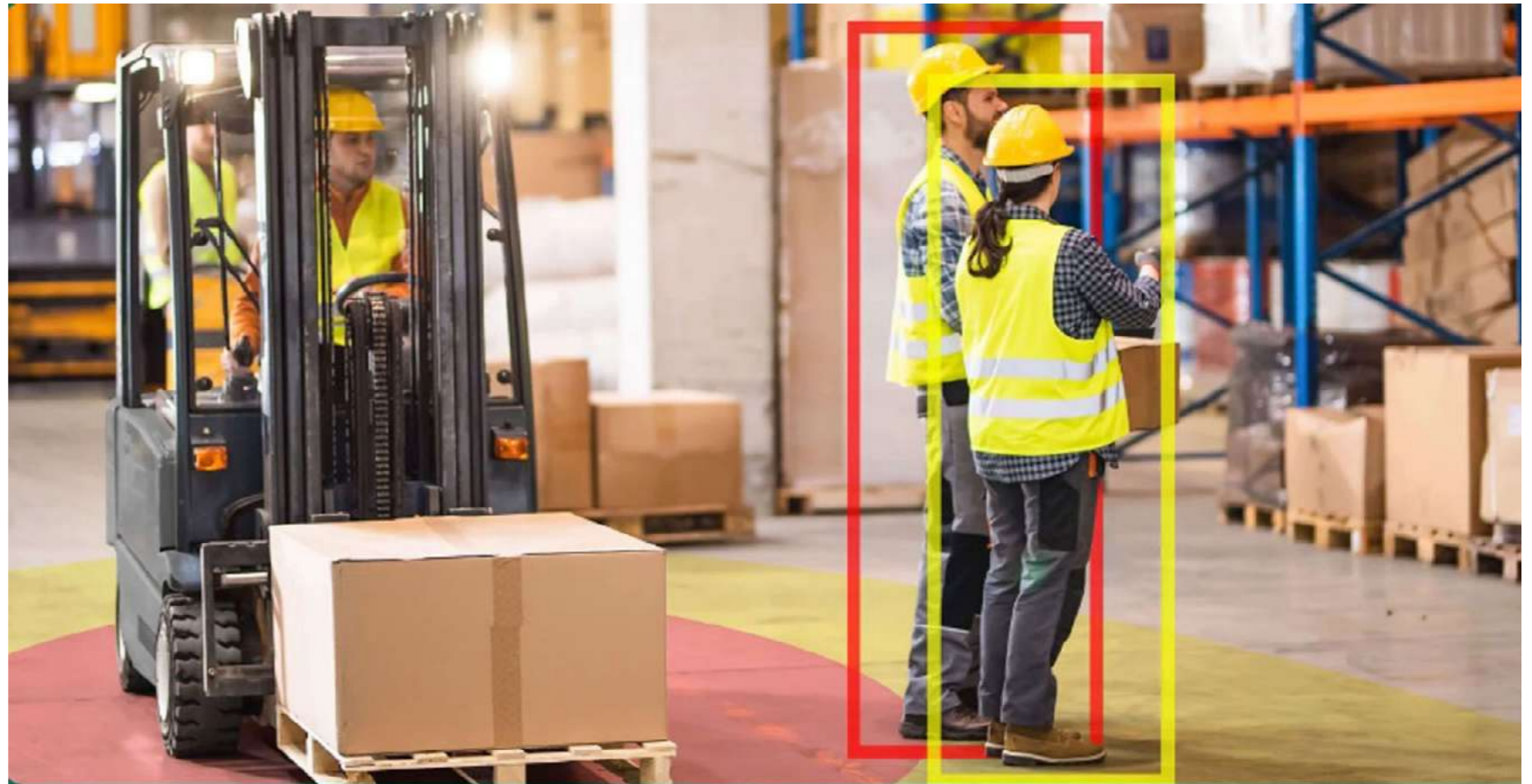
He says decision-making needs to be driven by data rather than instinct. Logistics service providers need to focus more on in-depth data analysis, looking beyond the averages. Serdyn explains ...

“ They often hide the costly exceptions that drain a business. Because the supply chain represents the entire journey of merchandise from origin to customer, every department must be integrated. ”

Companies can no longer rely on their trusted methods of service. Robust strategies that define how traditional retail and e-commerce coexist are a must. He explains ...

“ For instance, will you fulfil e-commerce orders from existing stores or a dedicated dark warehouse? The models present vastly different considerations and the strategy must determine whether a single unified supply chain is viable or if a separation of channels would be more advantageous. ”

In effect, managing the supply chain in parts is no longer viable. It has to be treated as a single, connected system if retailers – and their consumers – are to be kept happy.



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E-commerce drives smaller, faster, more complex flows

Covid-19 marked a turning point for retail. As consumers shifted online during lockdowns, e-commerce moved from being a growing channel to a core part of how goods are bought and delivered.

It shows no signs of slowing down – if anything, e-commerce is accelerating and continuing to mature, changing distribution in the process. E-commerce is no longer limited to online-only retailers, but has changed how most retailers operate.

Omnichannel models have become the norm for both large and small players. While this has helped level the playing field in some regard, it has also introduced a far more complex operating environment.

Distribution networks now have to support both

store replenishment and direct-to-consumer fulfilment, often from the same facilities and using the same fleet, says Kleinhans.

“Running two distinct fulfilment models – one designed for bulk store delivery and the other for individual customer orders – in parallel is a growing challenge.”

Sutherland adds that this is also changing how distribution networks are structured. “Retailers are now expected to support higher order volumes, shorter delivery windows and more frequent replenishment cycles,” he says.

In many cases, networks that were designed around bulk store deliveries are having to support a hybrid model that includes direct-to-consumer fulfilment alongside store replenishment.

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This is placing additional strain on fleet scheduling and communication between distribution centres and transport operations.

He says rapid restocking has become the norm as leaner inventory levels mean retailers can no longer absorb late or incomplete deliveries. What was once a minor inconvenience, now means empty shelves, lost sales and even financial penalties.

The pressure on transport planning, vehicle availability and driver scheduling is constant. Expectations around deliveries have also changed. Retailers now want far more accurate delivery times and expect to be warned in advance if something goes wrong or deliveries are going to be late.

“What was once considered a premium capability has become a baseline requirement,” says Sutherland. “Many operators are still putting the systems in place, implementing tracking technologies and customer-facing systems to meet the expectations of their customers.”

Visibility expectations reshape transport operations

It is these rising expectations that are changing how transport operators manage service delivery. For many customers, the issue is not the delay itself, but the lack of certainty around it. They want to know when a delivery will arrive, if there is a problem and what to expect ahead of time.

Renko Bergh, co-founder of CtrlFleet, says this is the level of service customers now expect. He says:



Renko Bergh

“Customer demands are increasing and access to real-time data has become both the norm and a key differentiator in service delivery. This comes at a cost, either through additional resources or, more efficiently, through the implementation of the right technology.”

According to Bergh, transporters are expected to provide continuous updates on order progress. This includes accurate estimated time of arrivals (ETAs), as well as any deviations from original plans. While this can be done manually through spreadsheets, emails or messaging platforms, it quickly becomes resource-intensive as operations scale.

Bergh says this is why many operators are turning to digital platforms and customer portals to automate these processes. “Clients expect an ‘Uber-like’ view of their deliveries, with real-time visibility on vehicle movement.”



For many households, the real cost of driving is already higher than they think. Calculations based on South Africa’s three most popular cars, using coastal prices, the Automobile Association’s current vehicle rates show that a typical 7.5km round trip (the average return journey for a Checkers Sixty60 delivery) would roughly cost ...

- A Volkswagen Polo Vivo running on petrol: R51.30 per trip at R6.84 per km.
- A Ford Ranger running on diesel: R66.37 per trip at R8.85 per km.
- A Toyota Hilux running on diesel: R78.37 per trip at R10.45 per km.

By comparison, Checkers Sixty60’s R36 delivery fee means customers could save up to R42 per trip, depending on the vehicle. These savings margins are set to increase even more, as Sixty60’s delivery fee will remain unchanged despite the April fuel price hikes. Instead, Checkers will continue to absorb rising fuel costs within its delivery network, including adjusting rider fuel subsidies in line with monthly price changes.

Since launching nearly seven years ago, the Sixty60 delivery fee has increased by just R1, from R35 in 2019 to R36 in 2025.

<https://supermarket.co.za/>



Fuel is fast becoming one of the biggest pressure points in transport. Rising costs and ongoing global uncertainty are putting margins under strain, forcing operators to rethink how fuel is managed across their operations. But, for many, fuel still sits outside the core system – planned separately, executed manually, and only reviewed after the fact.

That gap between planning and execution is where inefficiency creeps in. There is a shift towards more connected approaches, where fuel is no longer treated as a separate function, but as part of the broader operational flow. <https://ctrlfleet.co/>



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Using integrated systems, transporters can easily provide instant updates from a single control point, improving service while keeping operating costs in check. He adds that system integration is a critical factor if embarking on this road ...

“ In many cases, transporters still need to recapture client order data into their own planning tools and then update progress manually across multiple platforms. ”

This duplication creates unnecessary administrative burdens and increases costs.

For Bergh, integration between client ordering systems and transporter platforms is key to reducing inefficiency.

It is, however, not as simple as buying software, implementing it and expecting logistics to thrive.

“ South Africa has several challenges that add layers of complexity to operations.

Load shedding, congestion at ports and on the roads, as well as an infrastructure deficit, all make logistics harder – while also making it more difficult to provide the answers customers are asking for: when and where. ”

From rural towns far from each other to dense metropolitan areas, operating conditions vary significantly, each presenting a very different challenge compared to more stable environments.

Adding to this is the impact of e-commerce, which is placing additional pressure on last-mile logistics and making an already complex environment even harder to navigate.



Kenbert Long Haulage, a transport company specialising in freight movement across regional and national routes, partnered with CtrlFleet to address limited visibility and time-intensive manual processes in their operations. By implementing a centralised system for planning, tracking, and communication, the team gained real-time operational visibility, improved driver accountability, and significantly reduced planning errors. This shift not only streamlined workflows and reduced administrative effort but also enabled faster decision-making and more responsive customer service. <https://ctrlfleet.co/resources/kenbert>

Maxeen Naidoo Bharath, Imports Manager at SkyNet South Africa, says the effect is being felt across the board, with growth reshaping last-mile delivery.

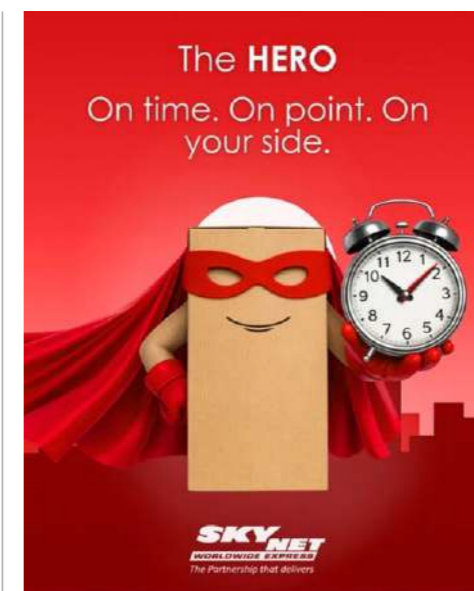


Maxeen Naidoo Bharath

“ Not only has there been an increase in volumes for local delivery, but we are also seeing significant shifts in service expectations and delivery frequency. ”

She says higher parcel volumes require scalable logistics, all while customers expect faster, more reliable and transparent delivery options, including same-day or next-day service.

Bharath explains that this move to smaller, more frequent deliveries, often multiple times a week,



SkyNet imagery shows them working behind the scenes to keep packages moving quickly and safely across local and international routes. From urgent shipments to everyday deliveries, their network is built to keep you on schedule. www.skynetworldwide.com/za/

has increased the importance of last-mile innovation and urban logistics.

“To meet these evolving demands, companies are investing in advanced tracking, route optimisation and more seamless cross-border and domestic coordination.”

For Kleinhans, any successful distribution network now depends on route optimisation and effective transport planning. He says ...

“ A well-optimised route can save 15–25% in fuel and vehicle time. That is significant for a large fleet operating daily. ”

Route optimisation reduces fuel consumption, mileage, vehicle wear and delivery times, while improving both cost control and service levels. But it is not enough on its own.

“Transport planning upstream is similarly important,” he says, “as poor planning creates inefficiencies that route optimisation cannot fix.”

In the South African context, this becomes even more critical. Load shedding affects traffic flow, poor road conditions impact vehicle life and congestion slows the movement of goods.

“Route optimisation and transport planning are continual, live actions rather than periodic exercises. They keep our fleet running reliably in an unpredictable environment.”

Fragmentation and system duplication slow progress

The changing environment, however, is not without its challenges. One of the key issues is that technology adoption is not happening at the same pace across the supply chain.

“In many cases, retailers are adopting technology faster than their transport partners, which places additional pressure on operators and can lead to duplication of effort,” says Bergh.



He points to order management systems and driver applications as examples. Retailers often require track-and-trace visibility and digital proof of delivery, but instead of transport operators implementing these systems, retailers introduce their own platforms.

This creates a snowball effect, forcing transporters to adopt multiple systems across different clients, increasing complexity and administrative burden. The solution lies in transport operators taking greater ownership of their technology environment, says Bergh.

“By implementing integrated systems, operators can deliver consistent service outcomes across multiple clients without duplicating processes.”

While technology is helping address some of these challenges, it is not the only pressure point.

Security is another growing concern in the retail space, particularly cargo theft involving high-value FMCG goods, says Kleinhans.

At the same time, however, retailers are pushing towards just-in-time replenishment models.

“Stores with leaner inventory profiles require smaller, more frequent deliveries, with near-zero



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tolerance for late or incomplete shipments,” he says. Retail consolidation is also increasing buying power, raising expectations around delivery speed, order accuracy and supply chain transparency.

These demands are being driven by changing consumer behaviour, particularly the rise of e-commerce.

“Same-day and next-day delivery expectations have filtered through the entire retail value chain, placing additional pressure on distribution networks and fleet operations,” says Kleinhans.

Operators are having to balance cost efficiency with high service levels in an environment that is becoming more demanding.

“There are no shortcuts – success depends on controlling costs, investing in the right technology, building skilled teams and maintaining operational discipline.”

Fleet efficiency strategies come into focus

Against this backdrop, attention is turning to how fleets are managed more efficiently. Sutherland says a number of strategies are helping organisations improve utilisation.

Better demand forecasting is one of them, allowing operators to better align transport capacity with distribution needs. Dynamic routing is another, helping to reduce empty return trips and make better use of available vehicle capacity.

Many organisations are also using telematics data to identify underused assets and adjust fleet deployment accordingly.



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Bharath says SkyNet uses a range of solutions to improve fleet efficiency, including advanced route planning, load consolidation, dynamic scheduling and telematics. Hub-based distribution, logistics partnerships and flexible vehicle options also form part of this approach.

“We want to reduce empty miles, lower costs and boost overall productivity,” she says.

For Kleinhans, waste reduction strategies that

target every level of the organisation are essential. Planning remains critical at this stage. “Knowing what needs to move, when and where before a vehicle leaves the yard prevents reactive scheduling that wastes kilometres and resources.”

At DSV, existing routes are evaluated regularly against delivery data, traffic trends and client density, he says.

This helps avoid maintaining routes that may have worked in the past but no longer fit the current network.

“ Mapping technology has proved beneficial. Planners can examine delivery points, volumes, time windows and road conditions on a live map. ”

Backhaul optimisation is another key opportunity, he says.

“ One of the easiest ways to minimise cost per kilometre is to ensure that a vehicle returns with cargo instead of running empty. ”

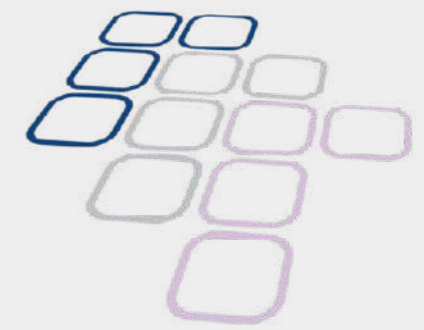
In practice, this reduces empty kilometres, fuel use and operating costs, while improving overall efficiency.

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Integration replaces siloed systems

But, improving efficiency is not only about how fleets are managed, but also how systems work together. Customer demands on transport operators – and the supply chain overall – continue to increase.

Bergh says access to data has become a key differentiator in service delivery, but meeting these expectations comes at a cost. “The accessibility and need for data has become the norm and the differentiator for customer service,” he says.

Many operators are still working with multiple systems that manage different parts of the operation, from fuel and maintenance to scheduling and invoicing, but these often operate in isolation.

This limits decision-making across the business. “By linking these systems through overarching platforms that aggregate and visualise data, operators can gain a consolidated view of their operations,” he says.

For Bergh, the solution lies in more integrated use of technology. “Organisations need to embrace technology across planning, scheduling and execution, while integrating systems into a single point of control.”

This shift is also changing how transporters and retailers work together, with closer integration becoming more common.

Kleinhans says early signs of artificial intelligence are already visible, particularly in areas such as route planning and maintenance.

He expects broader applications in forecasting and network management to follow.



These all-electric Maxus E-Deliver 9 are cruising their way through Chile,

“Electric vehicles will also begin to influence urban and regional distribution models,” he says, noting that infrastructure constraints remain a factor in South Africa.

Greater integration across transport, warehousing and replenishment systems is also expected to improve responsiveness across the supply chain.

“When systems are connected, distribution becomes faster, leaner and more resilient.”

Sutherland agrees that technology will play a growing role, but says the real shift lies in how organisations use the data these systems generate.

“Many businesses still operate with fragmented visibility – strong data in one area but blind spots in another.”

Those that succeed will be the ones that bring these insights together into a single, usable view. Ultimately, technology creates the conditions for better decisions, but it does not make them.

“When operational teams have clear, integrated visibility across their assets, they are better positioned to improve safety, efficiency and overall performance,” he says.



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The next phase of retail logistics

Taken together, these developments are reshaping how supply chains are built and managed – and what will be required to remain competitive.

Most players in the supply chain are clear about where they are heading and what needs to be done to get there.

But, says Kleinhans, the operators who will stand out are those who remain genuinely engaged. “Curiosity is what drives the constant improvement that makes operations exceptional instead of just good.”

“The focus will be on companies that invest in data and visibility, get their network design right and continuously refine it. They will also need to view technology as a competitive investment rather than a cost, stay engaged with emerging developments and support the growth of their people. Electrification, AI-driven planning and tighter supply chain integration are already moving from concept to practical application.”

“We anticipate significant transformation in fleet management and operations in the retail sector over the next five years,” says Kleinhans.

AI is expected to become a core tool in areas such as route planning, forecasting and maintenance.

Sutherland says fleet management in retail and FMCG distribution will become more intelligent and more connected, although the pace of change will vary depending on how quickly organisations move from fragmented systems to more integrated platforms.



DSV’s new 34 000 sqm Venlo 5 logistics warehouse in the Netherlands. The two-storey facility is the first of its kind to be built by DSV in Europe and will add to their existing 235 000 sqm of storage capacity in the city of Venlo. In addition to the warehouse, Venlo 5 has a 19 000 sqm cross-dock terminal and over 7 000 sqm of office space. It has been designed to support customers from a wide variety of industries and includes advanced automation and temperature-controlled storage solutions. The new facility boasts 7 500 solar panels, which will harness renewable energy to power the facility. Additionally, it is Breeam Excellent certified and compliant with high sustainable construction standards. www.dsv.com/en-za/

ment are no longer just compliance concerns, but part of how retailers are assessed by partners and customers.

“The organisations that will be best positioned are those that treat technology as an interconnected ecosystem,” says Sutherland.

For shoppers, the retail experience has become easier

“Over the next five years, AI and predictive analytics will shift from emerging capabilities to standard expectations,” he says.

Retailers and logistics providers that have already invested in connected technology will be able to achieve more with less, improving efficiencies.

“We will see them optimising routes, predicting maintenance needs and managing risk with a level of accuracy that was not feasible even a few years ago,” says Sutherland.

Sustainability will remain an increasingly important operational consideration. Fuel efficiency, emissions tracking and responsible fleet manage-

– many now simply click a button. Behind the scenes, a very different picture is unfolding.

Dealing with rising costs and shifting expectations, getting goods from point A to point B – on time, in full and at the right cost – is where the real challenge lies.

It is anything but simple. **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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