

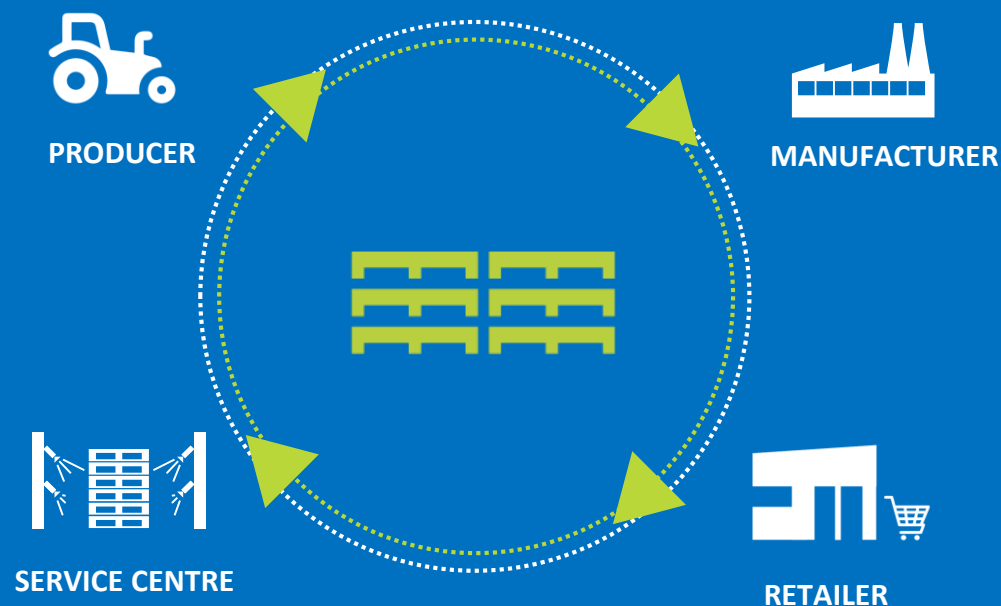


CHEP

A Brambles Company

Helping the world
move **more with less**

About us



“ Our pioneering vision is built upon share and reuse. And this circular model defines not just how we do things but who we are. ”

60 countries

12,500 people

>550 million platforms

850 service centres

\$5.5 billion revenue

55,000 customers

Our structure

Brambles

“Connecting people with life’s essentials every day”

CHEP

A Brambles Company

8XB

DIGITAL
A Brambles Company



Wooden
& plastic
pallets &
dollies



Automotive
& Industrial
FLCs &
KLTs



Liquid & dry
intermediate
bulk containers
& accessories



Stainless
steel
kegs

Delivering smarter and more sustainable supply chains



A Zero Waste World

CHEP
A Brambles Company

“ Zero Waste World is a new working collaboration for leading companies committed to creating smarter and more sustainable supply chains. ”

Graham Chipchase, Brambles CEO

 Zero Waste World

1. Eliminating waste

CHEP

A Brambles Company

91%

Of world's plastic packaging isn't recycled

30%

Of world's food is wasted each year, but every \$1 invested in food waste policies brings **\$14 in return**

91%

Tonnes of paper and cardboard packaging were wasted in the EU alone between 2006 and 2015

2. Cutting out inefficiency

6%

Enhanced supply chain visibility can increase the level of demand-fulfilment by 4% to 6%

79%

Of companies with high performing supply chains achieve greater growth than their industry average

20%

Outpace by companies with integrated supply chains

3. Eradicating empty transport miles

78%

Of retailers see reducing road miles as a significant opportunity

20%

Of kilometres run by trucks in Europe are empty

120,000

The equivalent of 120,000 trips to the Moon

We all need to share more

CHEP

A Brambles Company

People want more

Europe's supply chains face their greatest challenges in living memory:



More online deliveries



More goods being transported



Consumer behaviour is changing rapidly



Increasing urbanization

The world needs less

Government and Society want a reduction in NO_x and CO₂

Estimated 25% of all Greenhouse Gas (GHG) emissions are generated by the Road Freight Sector

Trend to more frequent but smaller deliveries

UK currently 55,000 drivers short

Brexit 60,000 EU drivers in UK these drivers are now looking at alternative options

Average UK driver age 53 projected 250,000 to retire in next 20 Years Over 50s represent 47% of all drivers

Low margins

Logistics staff turnover 26% against a UK average 15%

Only 2% of employed drivers are under 25 compared to 12% of total employed population

Our Challenge



Total amount of goods lifted in the twelve months period ending June 2018 by GB-registered HGVs operating in the UK

1.39

Billion tonnes
of goods lifted

150

Billion tonne km
of goods moved

18.8

Billion km
travelled

BUT



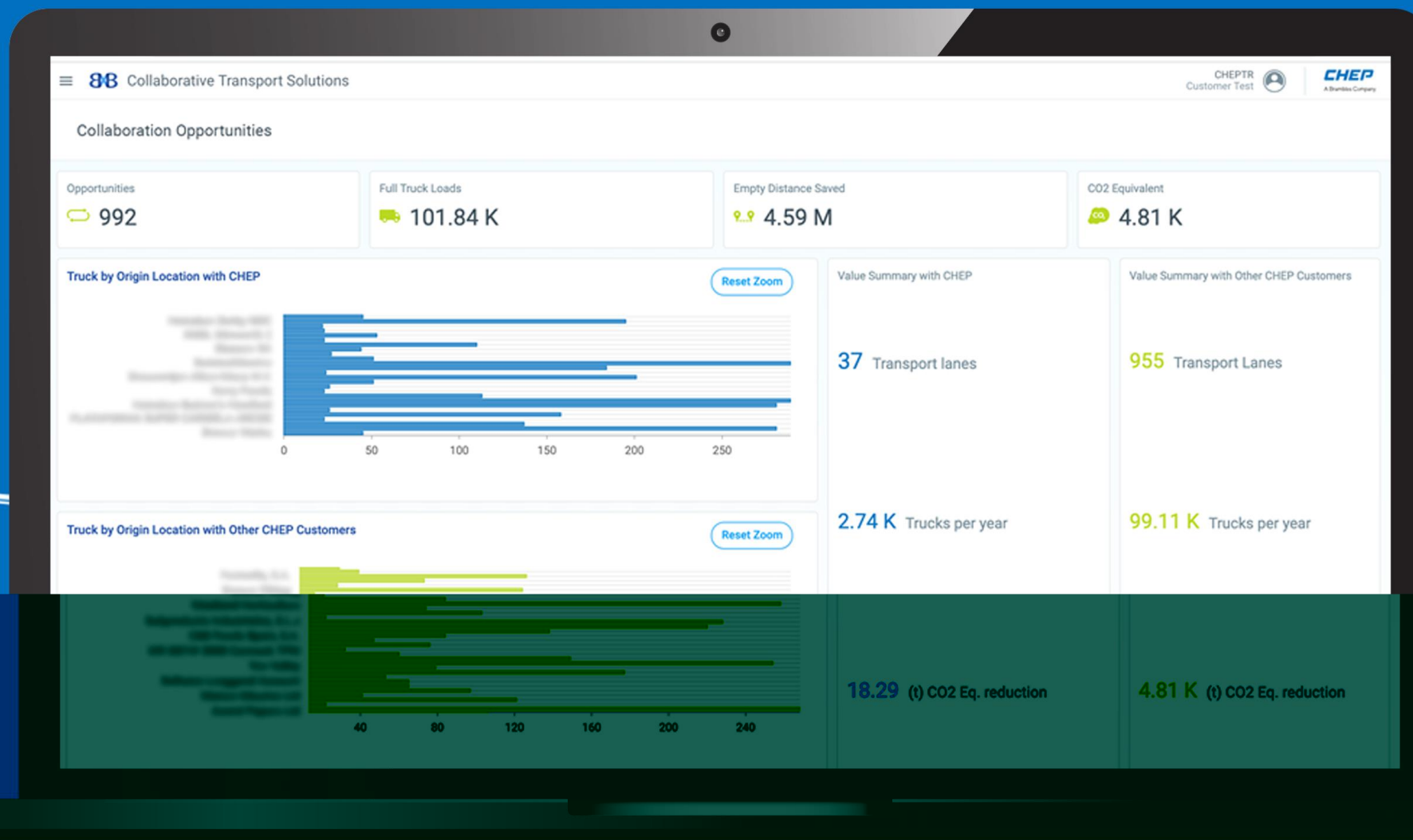
29.8%

> 5,559bn kms
of journeys are empty

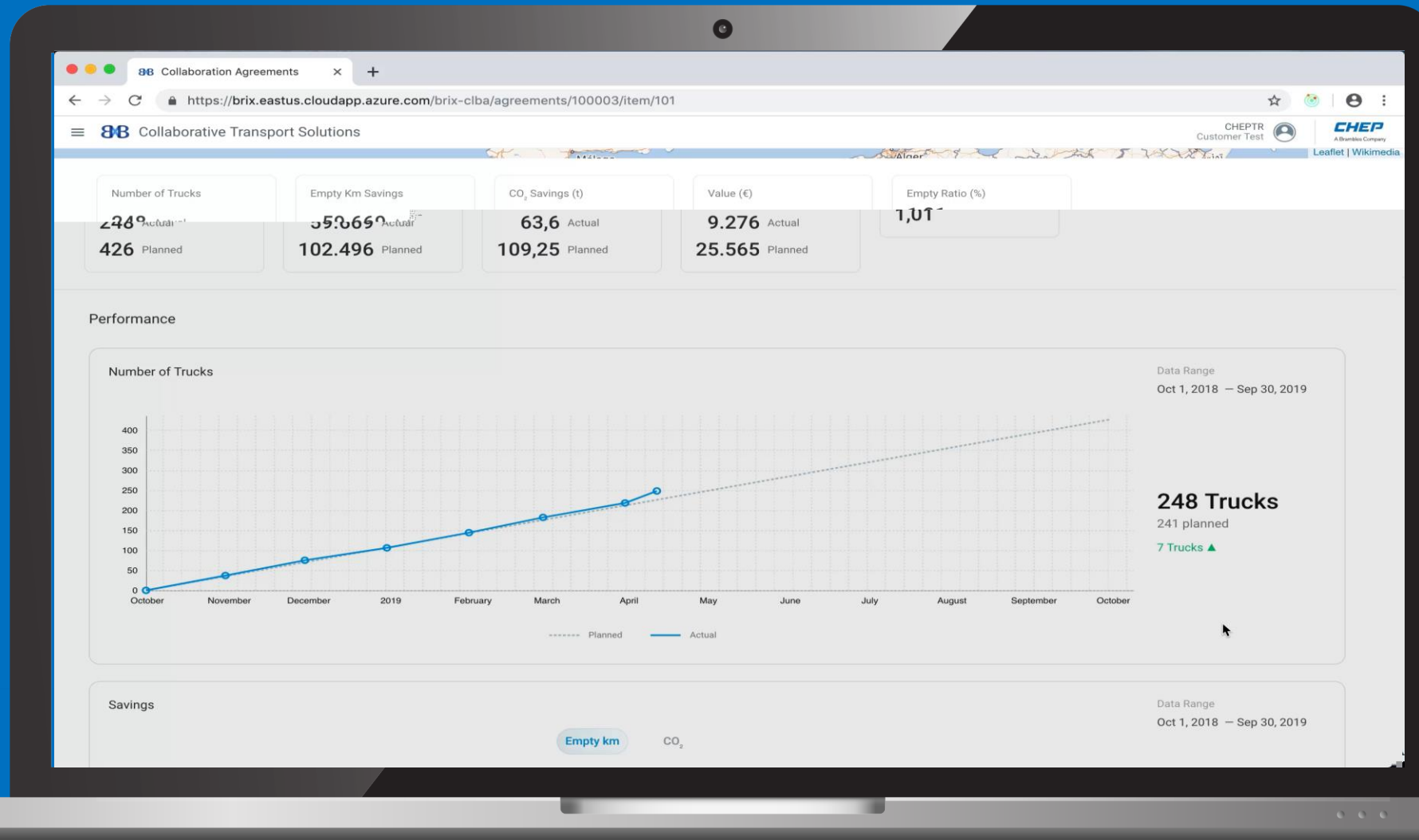
£5.5bn

£0.30 per km
Est cost of wasted
journeys travelled
annually

How CHEP uses customer declaration data to create value



How CHEP helps to track progress



What difference did it make?



Example of a project with Mahou and 13 partners: ▶

13

Collaboration partners involved

6

Figures shared savings

370

Of CO² emissions eliminated

3,700

Trucks involved and secured

337,000

Kms of empty miles saved



DANONE

Example of Multi modal cross border with Danone: ▶

2

Collaboration partners involved

6

Figures customer savings

381

Tonnes of CO² emissions eliminated

811

Trucks replaced by empty wagons

476,000

Kms of empty miles saved

Europe Figures YTD 2018 / 19

145

2,900

47,379

2,900,000

Customers already
signed up to CTS

Tonnes of CO₂
emissions avoided

Trucks saved

Kms of reduced
empty truck journeys

UK Figures YTD 2018 / 19

24

1,050

13,250

1,050,000

CHEP
A Brambles Company

CHEP Collaborative Transport Solutions also helps clients network with others in the industry, improve their understanding of flows, learn from other supply chain providers, and increase internal negotiation power.

The benefits

CHEP

A Brambles Company

Real-world
financial savings



Significantly reduced
empty truck journeys
and half loads



CO₂ emissions
reduced by
thousands of tonnes



Foster networking
with key players



Secure Transport
Capacity



Europe Figures YTD 2018 / 19

145

2,900

47,379

2,900,000

Customers already
signed up to CTS

Tonnes of CO₂
emissions avoided

Trucks saved

Kms of reduced
empty truck journeys

UK Figures YTD 2018 / 19

24

1,050

13,250

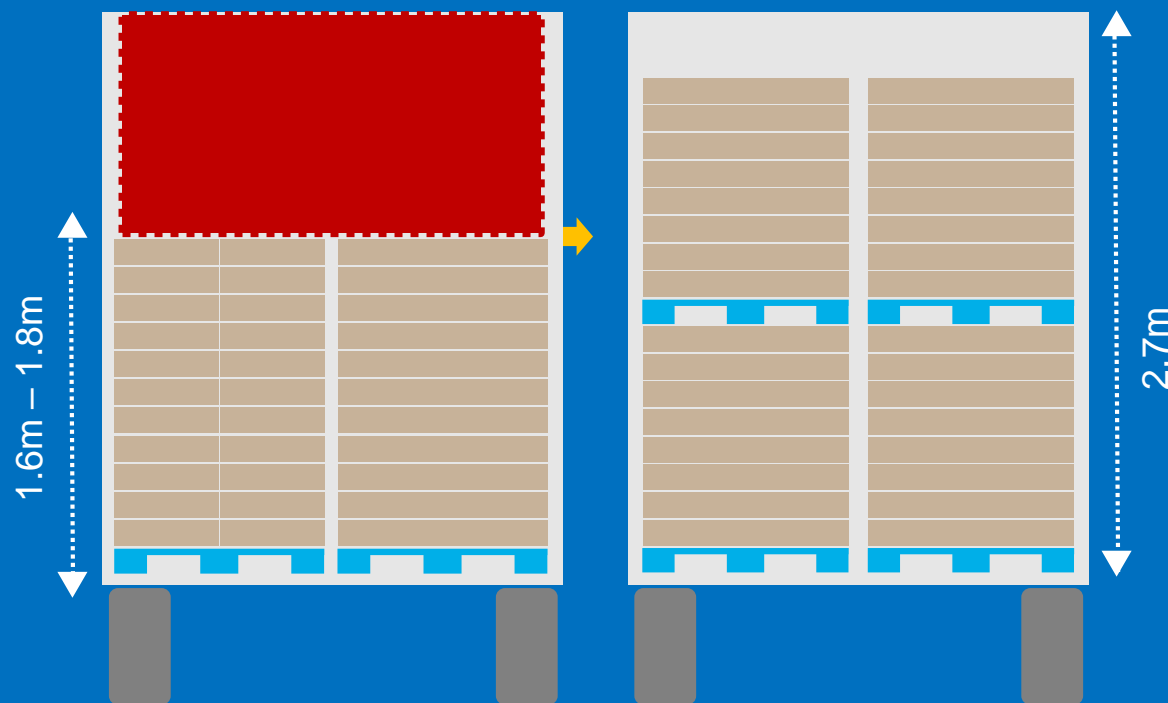
1,050,000

CHEP
A Brambles Company

CHEP Collaborative Transport Solutions also helps clients network with others in the industry, improve their understanding of flows, learn from other supply chain providers, and increase internal negotiation power.

An E2E opportunity

Double Stacking



- + 30% more product per truck
- + 30% lower transport cost
- + 30% fewer trucks

Applicability:

- + Weighing out (20%)
- + Order sizes (30%)

The other 50%

- Why not already?

- + Product damage
- + Retail acceptance
- + Just not the standard...



It is already the standard in Sweden & Finland

The voice of the customer

“ We need to collaborate to obtain efficiencies. ”

“ We need to have a trusted partner to enable collaboration. ”

“ We need to start collaboration in a quick and easy way, identifying the size of the price. ”

Logistics collaboration has been talked about for years as being the key to unlocking many of the problems in our supply chains. Yet hardly anyone is doing it. Because the complexities involved in aligning logistical flows make even exploring collaboration incredibly difficult and expensive.

Is it truly possible for us to establish collaborative relationships with both customers and suppliers?

Here's what we need...



These are some of the benefits we could share in...



This could result in...

More resilient supply chain
Competitive advantage

So....

Given benefits of collaboration why is it so hard to implement.
What can we do to implement at pace.



Thank you.