

# Zarządzanie budżetami w obliczu rosnących kosztów transportu

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# Carlsberg Group in numbers

## 14 BILLION

LITRES OF BEER BREWED IN 2021



## 150

MARKETS REACHED  
BY OUR PRODUCTS



PASSIONATE PEOPLE

## 40,000

## 140

BRANDS



**Our global portfolio consists of 140 brands,  
each with a unique character**



**A SELECTION  
FROM OUR WORLD**

# Carlsberg Poland

Jesteśmy jednym z trzech największych graczy na polskim rynku piwowarskim. W browarach o wieloletniej tradycji warzymy piwa najwyższej jakości. Stanowimy część duńskiej Grupy Carlsberg, jednego z globalnych liderów branży.

To my wprowadziliśmy na polski rynek m.in. pierwsze piwo w puszcze oraz markę Karmi, która zainicjowała rozwój segmentu piw bezalkoholowych



**TOGETHER  
TOWARDS  
ZERO**



Carlsberg Polska w 2022 r.

**19,2%**

udziału w wolumenie  
sprzedaży piwa  
w Polsce



**26,05%**

udziału w wolumenie  
sprzedaży piwa  
bezalkoholowego  
w Polsce



**1 319**

pracowników



**44 kraje**

importujące  
nasze piwa



**8 335**

aktywnych dostawców  
zakupowych i niezakupowych



# Logistics network



#1 – the BIGGEST FMCG category on the market



growing customers expectation



+ 800 **Delivery points**



+ **2000 transportation lanes**



+ 90 000 **shipments**



FTL, LTL, groupage deliveries, own collection,  
whs. shuttles, empties management, inbound deliveries,



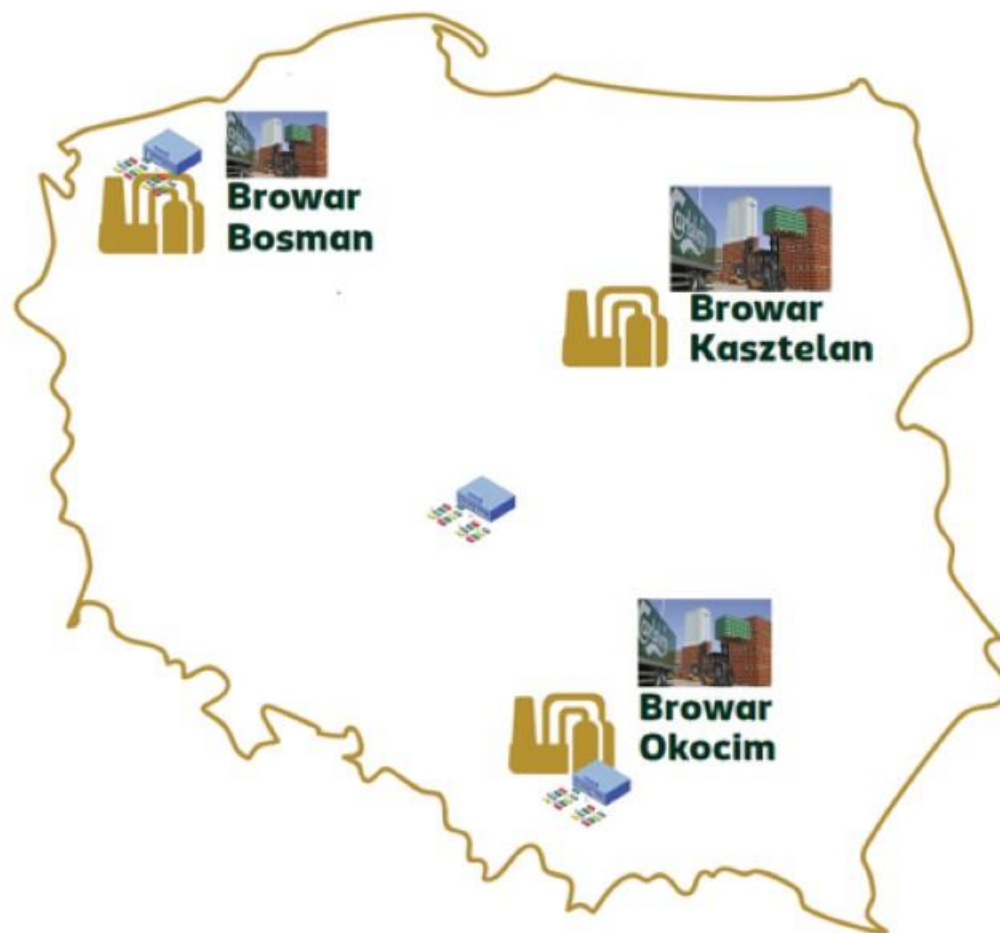
**Processes:** Order entry, load processing & optimisation, track & trace, financials, reporting/master data/ process



**Customer Collaboration Program** x-functional logistics  
cooperation with customers ( incl sales, planning, customer service)



**Tools:** TMS, SAP, PowerBi, PowerApps,



- Mainly FTL, 100% outsourced
- 3 brewery whs.
- 2 external whs.
- 1 groupage location
- 2 LTL operators

A photograph of three men sitting at an outdoor cafe table, each holding a glass of beer. They are all wearing sunglasses and smiling. Above each man is a thought bubble. The man on the left has a brown bubble with '1. TENDER'. The man in the middle has a maroon bubble with '2. OPERATIONS MANAGEMENT'. The man on the right has a dark green bubble with '???'. At the bottom center, a large black box contains the text 'HOW to...?'.

**1. TENDER**

**2. OPERATIONS  
MANAGEMENT**

**???**

**HOW to...?**

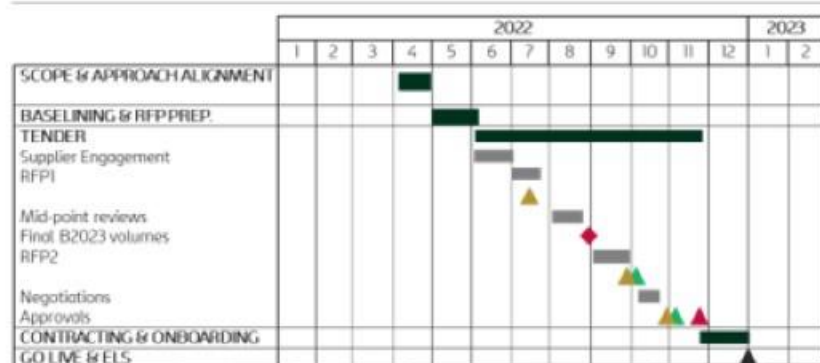


# Tender management

# Tender approach

## 1 Scope

## 2 Timeline



## 3 TOOLS

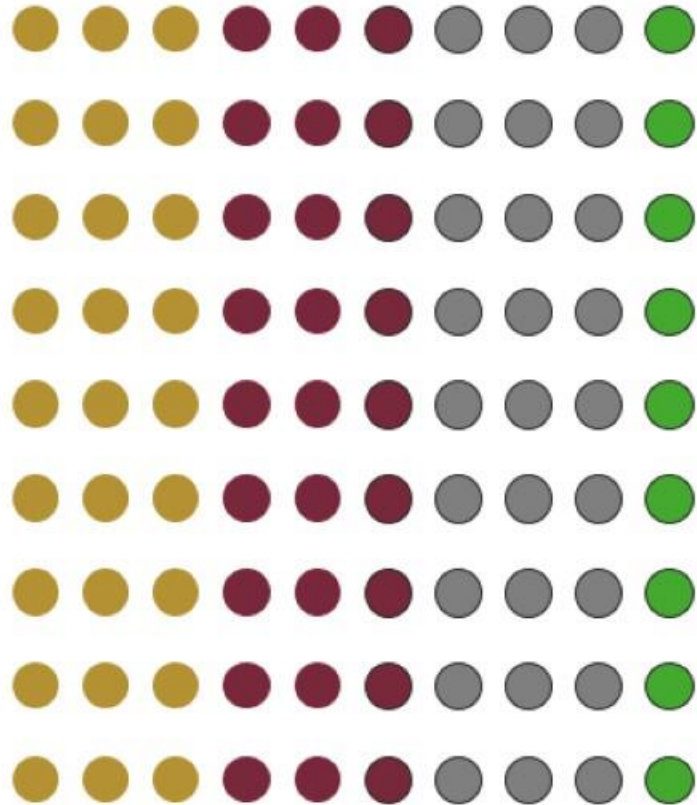
Sourcing Optimizer for bidding, advanced scenario analysis & optimization



PowerBI app, integrated with Sourcing Optimizer, for scenario analysis



# Awarding / scenario analysis



● Carrier „A” ● Carrier „B” ● Carrier „C” ● Carrier „D”

## Topics for consideration:

- ✓ Market specific situation
- ✓ 2 rounds, feedback & negotiations
- ✓ 2000 lanes x #no of carriers invited
- ✓ Scenarios: risk vs savings
- ✓ It is time consuming
- ✓ Lane by lane award
- ✓ Incumbents vs challengers
- ✓ Complexity & #no of carriers
- ✓ Minimum award
- ✓ Key customers allocation
- ✓ Carrier's service level and capacity guaranteed
- ✓ Alignment with stakeholders



	Higher risk →		
	A Incumbents	B. Prospective (tested)	C. Prospective (untested)
1. Asset-based	A1	B1	C1
2. Freight forwarders	A2	B2	C2
3. Digital	A3	B3	C3

(\*) dummy data & visualization

# Decisions on volatile market

LOW FREIGHT VOLUMES + AVAILABLE CAPACITY = LOWER SPOT RATES \$

HIGH FREIGHT VOLUMES + TIGHT CAPACITY = HIGHER SPOT RATES \$\$\$

## Available Capacity

- in the European market has been on an upward path since May 2022
- Capacity index increased by **19.0% year-on-year**

## Spot price:

- has been on a downward trend since August 2022
- decreased by 10.6%** compared to the LY,

## The contract price index:

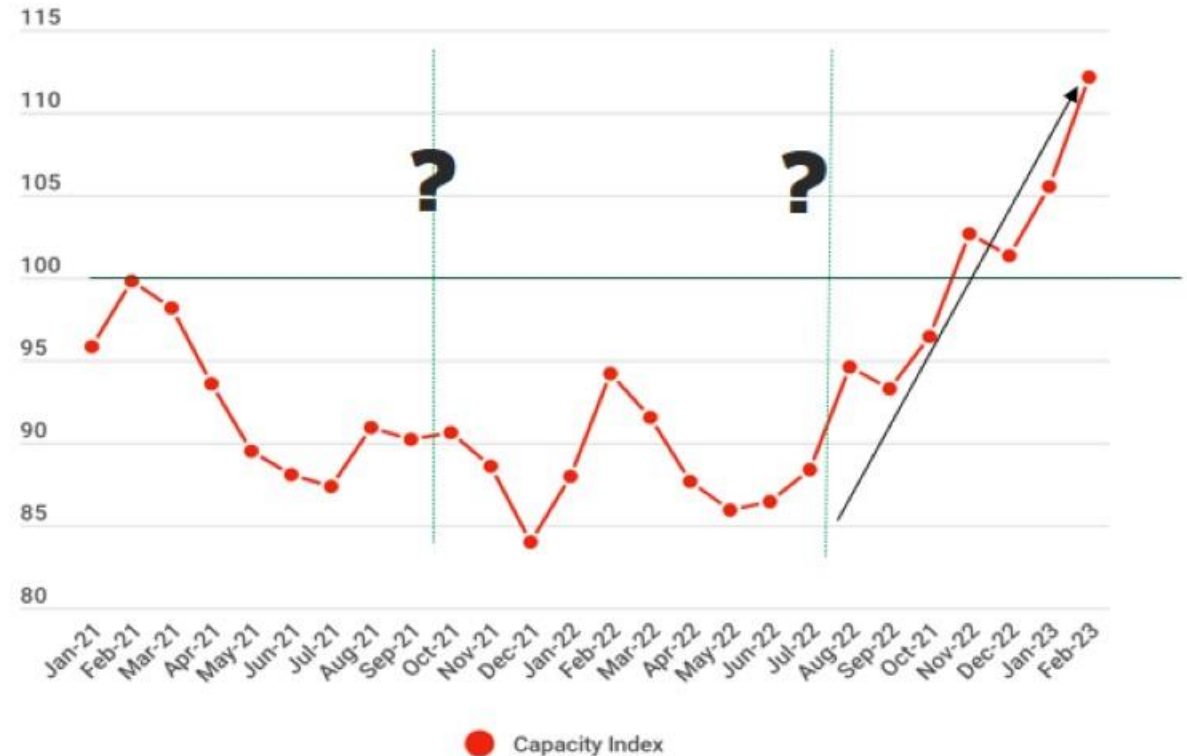
- has been falling since September 2022
- more moderate and less volatile has **increased by 10.4% year-on-year**,

For shippers it is **better to diversify their rate strategy** and optimize their freight procurement by selecting different contract types

**The exciting question is here: how long-term that change is?**

Source: Transporeon & <https://www.ti-insight.com/>

European Road Freight: **Capacity Index** (Monthly)





# #million PLN question: the right balance

McKinsey  
& Company

Travel, Logistics & Infrastructure

## A balancing act: How ~~trucking~~ shippers companies can find the optimal spot-contract mix

Road freight carriers and brokers could improve EBIT by 15 to 30 percent by leveraging data for decision making—here's how.

### Key takeaways:



Understand lane differences



make decisions lane by lane,  
rather than adopting a “one size fits all” approach



Make the decision on contract / spot mix a  
dynamic one. Find the right balance.



Leverage demand forecasting to improve decisions  
and predict cost



RFQ approach: tools, efficiency & frequency

CONTRACT

SPOT





# Operations management

# Key areas - Supply Chain



## People



## Quality

Brew & deliver  
high quality  
products



## Service

OTIF

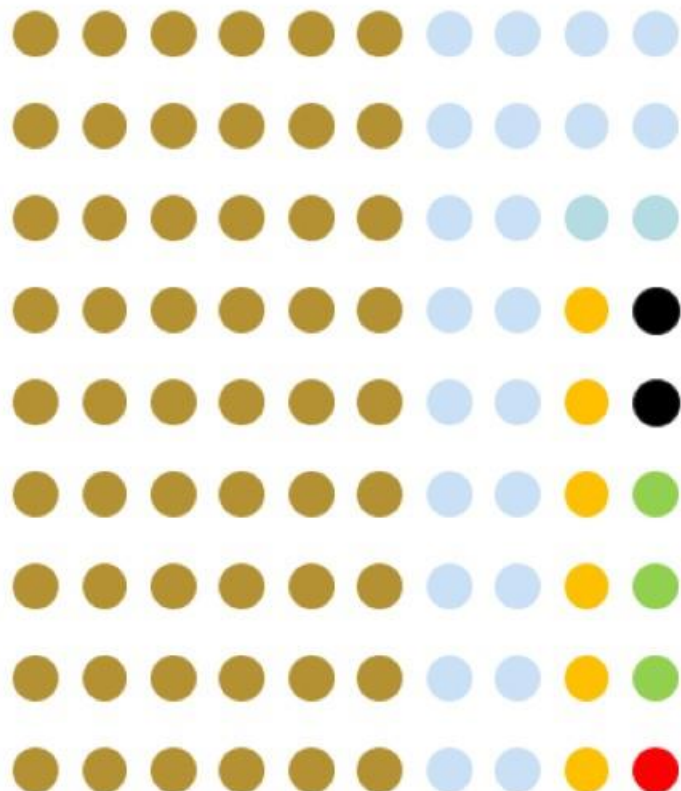


## Cost

Optimal costs

# Understand your dots

in tight margin sector & operations



Base rate



Fuel surcharge



Spot surcharges



Road tax / viatoll



Weekend deliveries



Demurrages

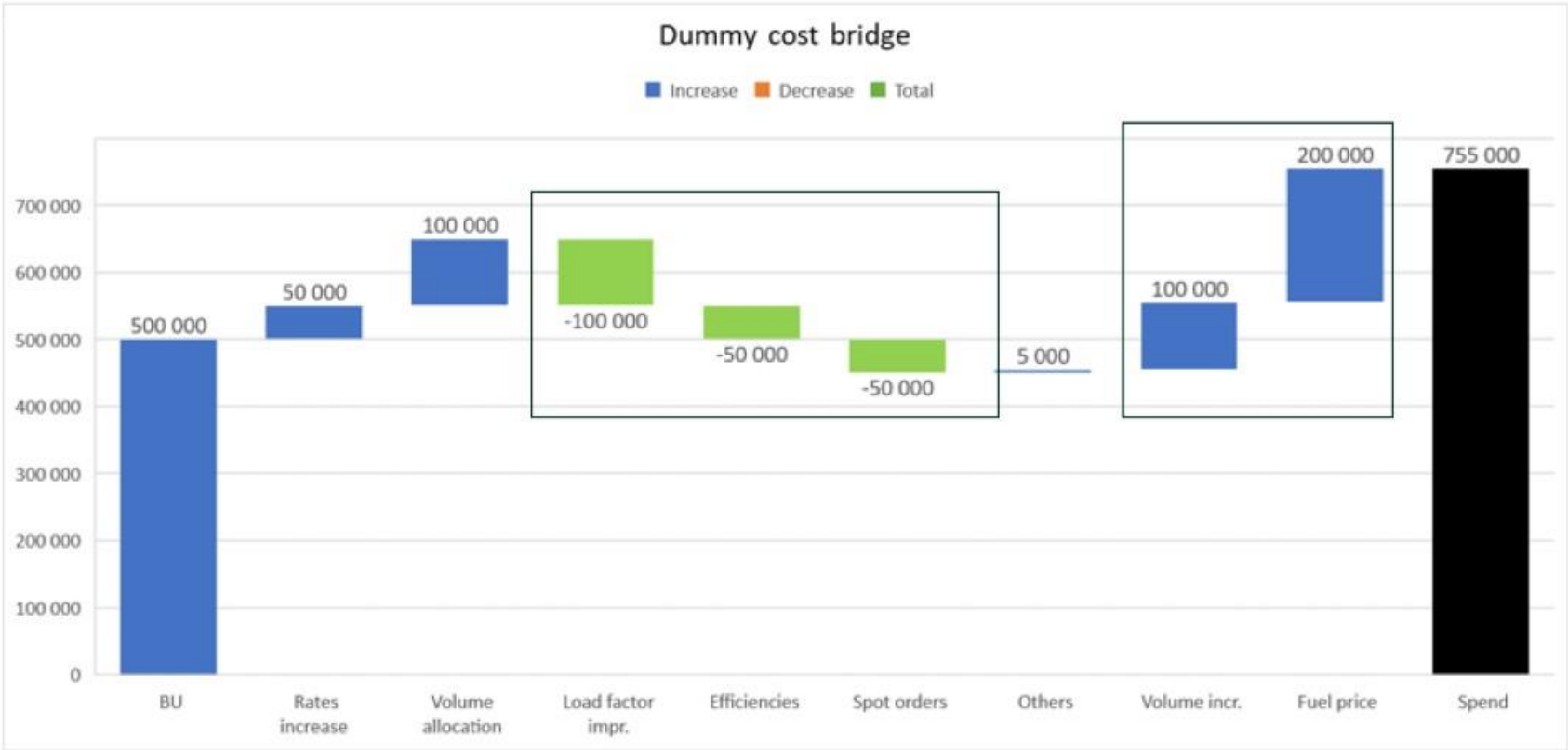


Others

(\*) dummy data & visualization

# Measure and explain it right

BU	500 000
Rates increase	50 000
Volume allocation	100 000
Load factor impr.	-100 000
Efficiencies	-50 000
Spot orders	-50 000
Others	5 000
Volume incr.	100 000
Fuel price	200 000
Spend	755 000



(\*) dummy data & visualization

# Strengthen carrier relations to optimize costs

- 01.** Reduce dwell time  
 To help, keep the carrier's wheels turning, best-in-class shippers adhere to appointment times. Carriers will provide higher quality of service to shippers who are considerate of their drivers.
- 02.** Tender with longer lead times  
 Increasing lead times between load tender and pick-up allows carriers to better optimize their networks. For shippers means spend less as lower scale of rush orders.
- 03.** Plan for surge volumes  
 Proactively communicate changes to your volume forecasts.  
 Give carrier partners time needed to react and help shipper avoid the spot market.
- 04.** Honor incumbents  
 Carriers need to maintain balance and consistency in trucking lanes to match their assets to freight flow. Instead of increasing spot, shippers often can negotiate rates with incumbents.
- 05.** Stick with transparency  
 Data and forecast improve bids,  
 Tender - shared source of truth that smooths negotiations.
- 06.** Attract and Retain Capacity  
 Healthy carrier relationships result in long-lasting, mutually beneficial outcomes.  
 Shippers can negotiate rates that outperform the market while maximizing service levels.

# Never ending tasks, no matter what

## Key takeaways:

- 🎯 Detailed cost structure, analysis & transparency enables optimization. Tender is enabler.
  - 🎯 Market insights
  - 🎯 Transparency
  - 🎯 Measure the right things
  - 🎯 Time do redefine tenders and contract management (contract / spot)
  - 🎯 Building relationships matters. Close contact & touch points with carriers
- Breathe & deliver :)**



THANK  
YOU

