



Snippets: Digital Supply Chain Market Analysis

An Analysis by Draup

Conceptualized and Developed: September – 2021


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01	Market Overview
02	Digital Supply Chain
03	Themes of Digitalization
04	Region wise Analysis
05	Vendor Analysis

This section provides an overview of:

- Overview Supply Chain Market
- Trends in Supply Chain
- Traditional and Emerging Technologies
- Business Initiatives

 Topics covered only in the Full Report

Supply Chain Market Overview: The digitization of the supply chain helps businesses to manage new customer demand, supply-side difficulties, and residual expectations for efficiency improvement

- Supply Chain technology has been one of the fastest-growing segments. The booming information technology and its introduction of sophisticated databases to track inventory levels and shipments via the Internet have created vast transport and logistics efficiencies
- The global demand for digital supply chain is expected to rise in the next years, owing to factors such as time and cost effectiveness, increased use of digital media devices, and enhanced service quality over time
- The rapid growth of the e-commerce sector and the rise of the Internet of Things (IoT) trend are likely to create new opportunities for market players. However, the market's expansion is hampered by a lack of security and hacking

Key Use Cases – Digital Supply Chain

Lead Time and Cycle Time Variability Measurement

Logistics Service Provider Optimization

Sensor Enabled Behavior Analysis

Issue Detection Management

Risk Alert Monitoring

Safety Stock Reduction

Order Cycle Time

Downstream or Upstream Network Impact

COVID-19 Impact

- The supply chain market is increasing focus on the continued supply of essential commodities, creation of supply chain stabilization to fight COVID-19, and growing demand and distribution of personal protective equipment
- Blockchain-as-a-Service (BaaS) platform enhances supply chain food traceability amidst the raising safety concerns following the COVID-19 outbreak

Key Players



Key Service Players



Trends in Supply chain: From digital twins to blockchain to Control Towers, key players are leveraging these important supply chain technology trends



Blockchain

- Blockchain's biggest potential is for facilitating track-and-trace applications that help companies document the chain of custody of goods
- Pairing blockchain with IoT can help logistics companies gain more insights about the transportation conditions and add additional preventive measures against counterfeiting
- The ocean freight industry can massively benefit from the adoption of blockchain. Specifically, it can enhance all the trade documentation and administrative processing for ocean freight shipments



Real-time Route Optimization

- By harnessing a combination of technologies like AI and ML, companies can automate warehouse operations, improve delivery times, proactively manage inventory, optimize strategic sourcing relationships
- ML helps with real-time route optimization. It tracks weather and road conditions and gives recommendations on how to optimize the route and reduce driving time.
- This way, trucks can be diverted any time on their way when a more cost-effective route is possible



Advanced Analytics

- Through advanced analytics, a supply chain can leverage more insights with more accuracy. Optimize inventory space and value by forecasting demand with accuracy
- Advanced Analytics is used to locate geographical growth opportunities by visualizing all order, delivery- and customer-locations.
- It can assess failure patterns of production machines to understand which drivers are recurrently causing failure



Supply Chain Control Tower

- The control tower uses real-time data to identify weaknesses and strengths within the supply chain, using predictive analytics to guide the network toward greater efficiency and improved processes
- Supply chain control tower can instantly aggregate data from inventory, production, and warehousing centres to guide improvements and mitigate exceptions with an efficiency that traditional freight distribution management infrastructures lack



Digital Twins


- In the shipment sector, digital twins can be used to collect product and packaging data and use that information to identify potential weaknesses and recurring trends to improve future operations
- Delivery networks could use the technology to provide real-time information that will improve delivery times and further aid autonomous vehicles in their routes

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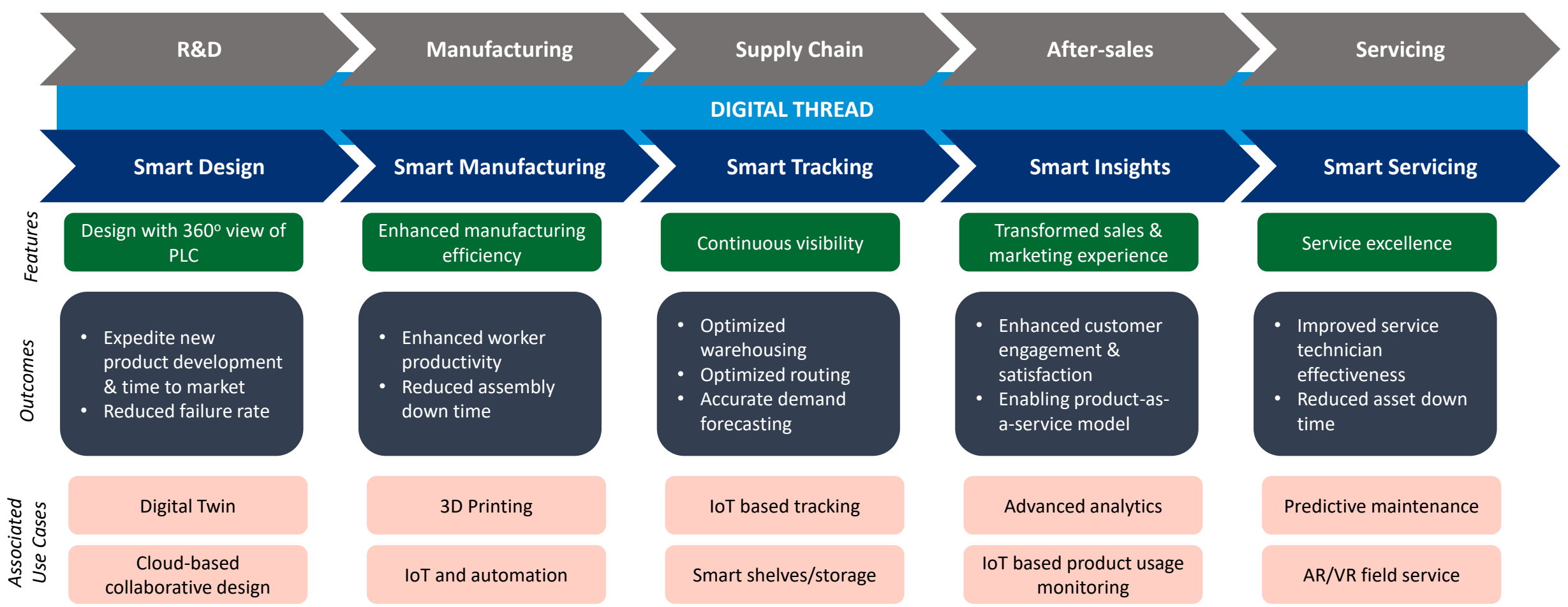
This section provides an overview of:

- Digitalization Journey
- Digital Framework
- Digital Supply Chain Function
- Practical Use cases

 Topics covered only in the Full Report

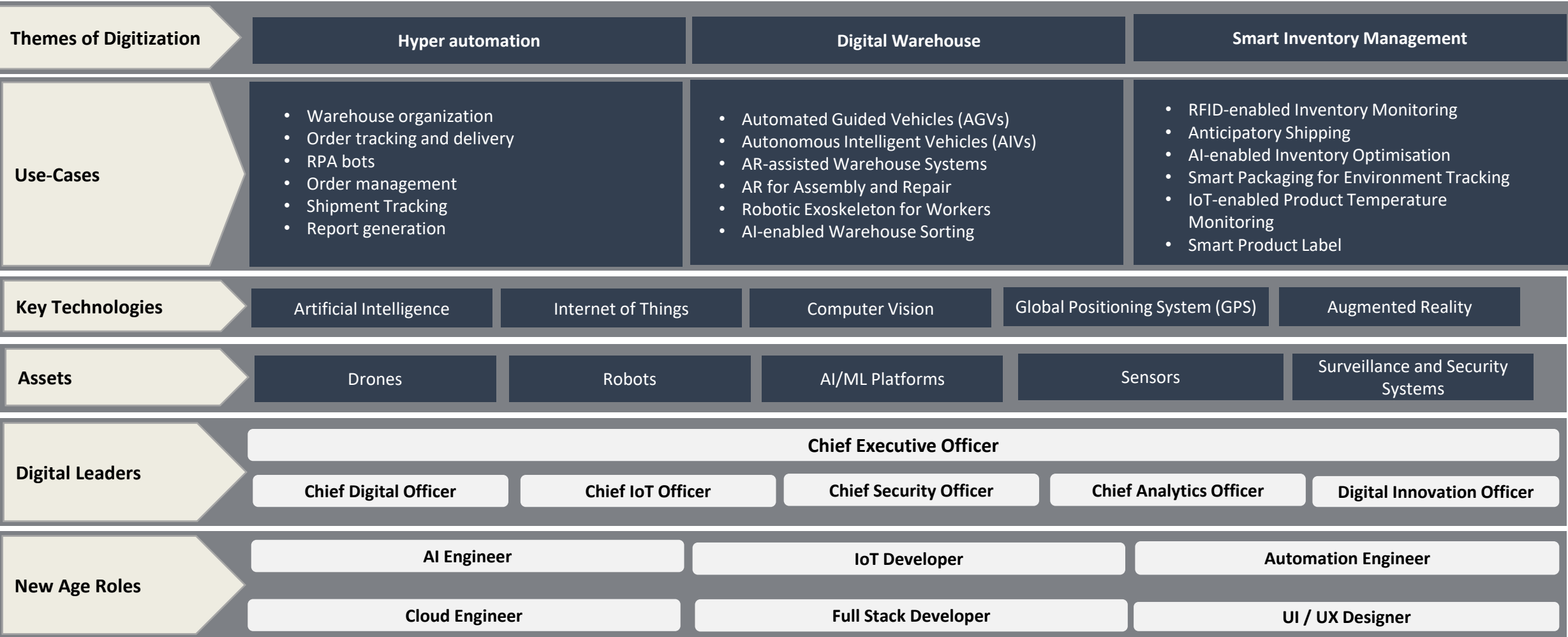
Digitalization Journey: The rapid development of new technologies vitalizes supply chain as companies focus on the improvement of overall performance of the entire supply chain to actualize close coordination and seamless connection

- The digitalization journey supply chain ecosystem will be based on full implementation of a wide range of digital technologies like cloud, big data, the Internet of Things, 3D printing, augmented reality, and others
- They are enabling new business models, product and service digitalization, and the digitization and integration of every link in a company's value chain



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Digital Framework: Companies are leveraging technologies such as AI/ML, AR, and IoT to deploy new age-solutions for shipment tracking, inventory optimisation, and real-time monitoring



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Source: Analysis is based on the DRAUP’s proprietary engineering database, updated in September 2021.


Note: Primary and secondary research sources have been used to align the Digital themes and use-cases. The above mentioned Themes are not exhaustive.

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This section provides an overview of:

- Hyper Automation
- Digital Warehouse
- Smart Inventory Management

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Hyper Automation: Hyper automation leverages AI driven process models to streamline the workflow between different departments, human workforce, RPA bots and other intelligent tools

Trends

Warehouse Organization

A warehouse management system can coordinate product slotting, making the best decision at any given time and contributing to efficient, error-free organization.

RPA Bots

Bots can create lists of ready-to-ship items for logistics service providers and generate email updates on delivery status. It can even capture proof-of-delivery documents from websites to update transportation management systems

Shipment Tracking

Inventory has to be monitored and maintained by manufacturers and suppliers in order to ensure that they have enough material to meet customer demands

Order Tracking and Delivery

To provide customers with more accurate delivery times or inform them of expected delays. Hyper automation can improve the management of transportation fleets, taking into account updated traffic information

Order Management

An RPA bot then takes the data and inputs it into the company's accounting software to generate an order, execute payment and send the customer a confirmation email

Report Generation

Supply chain companies can use RPA tools to auto-generate regular reports that are required to inform managers and ensure everyone in the company is aligned. RPA solutions can easily auto-generate reports, analyze their contents and based on the contents, email them to relevant stakeholders

Key Initiatives



Digital Transformation with Hyper automation

A strategic partnership to enable end-to-end process automation spanning robot-driven, analytic and data-driven processes. The resulting impact eliminates manual hand-offs in data pipelines and between groups



Automated Storage and Retrieval Systems in Warehouses

Hellmann Worldwide Logistics developed LogiMat, the perfect solution for the storage and selection of small pieces. It offers efficient use of space which helps to reduce energy and storage costs



Robust Intelligent Automation Program

Blue Prism's intelligent digital workforce automated ABB's repetitive, administrative work and allowed its employees to shift their focus to more value-added work like process improvement and training colleagues

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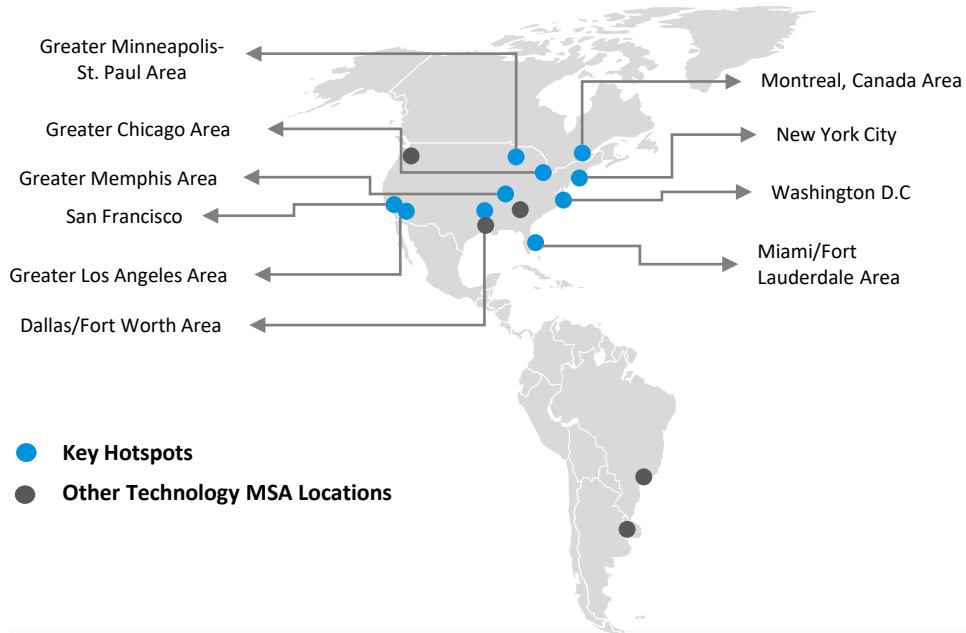
This section provides an overview of:

- Americas Region
- EMEA Regions
- APAC Regions

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Americas - Region Analysis: United States dominates the global Supply chain technology workforce at Americas region

Americas - Hotspots



Innovation Centers

United States Postal Service:

- *Location:* Alexandria, Virginia, United States
- *Focus Areas:* Deliver a World-Class Customer Experience

Ryder System, Inc.:

- *Location:* Miami, Florida, United States
- *Focus Areas:* Risk Management for supply chains

United Parcel Service, Inc.:

- *Location:* Atlanta, Georgia, United States
- *Focus Areas:* Healthcare and life-sciences logistics

BNSF Railway:

- *Location:* Fort Worth, Texas, United States
- *Focus Area:* Direct rail service to multi-customer

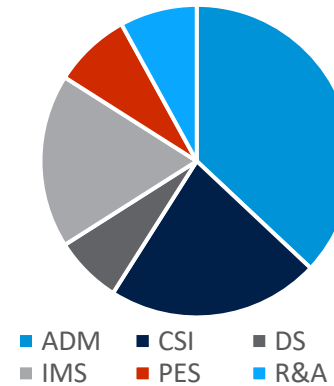
Major Companies



Key Workloads

- Develop a scanning and accountability tracking database to identify and analyze gaps in mail scanning
- AR technology to support lean process engineering initiatives for logistics providers, manufacturers, e-commerce, and remote workforce businesses

Demand for Sub Vertical



Outsourced Micro Verticals:

- Application Development & Maintenance
- Software Testing
- System Integration
- Server, Network, Desktop Management
- IT Consulting
- Business Intelligence

Major Start-ups




1. CSI: Consulting & Service Integration
2. ADM: Application Development & Maintenance
3. IMS: Infrastructure Management Services
4. R&A: Reporting & Analytics
5. DS: Digital Services
6. PES: Product Engineering Services

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This section provides an overview of:

- Vendor Analysis Overview
- Analysis by Sub vertical
- Key Service Provider Snapshot

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Vendor Analysis Overview: Application Development & Maintenance and Software Testing are the Key outsourced sub verticals in supply chain

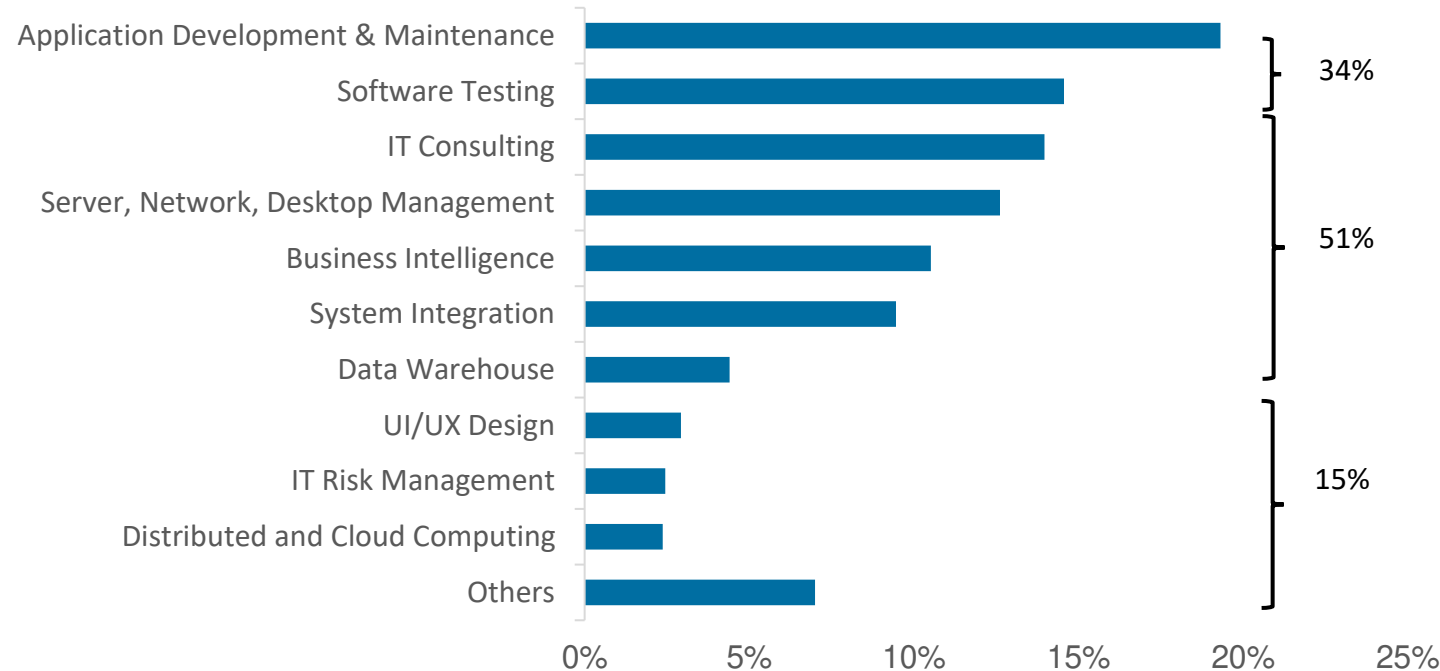
Number of Clients Analysed

211

Total Workforce Analysed

80K – 85K

Sub Verticals Intensity



Key Service Providers



Key Clients



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Key Vendor Snapshot (1/3): Capgemini is a company that provides consulting, technology, and outsourcing services. It designs, develops, and implements technology projects that cover complex systems integration and IT application development



Year Established
1967

Headquarters
Paris Area, France

Delivery Centres
283

Delivery Headcount
200K- 250K

Revenue
Euro 15.8 Bn

Client	Area	Delivery Location	Project details/ Activities
	Business Intelligence	Hyderabad Area, India	<ul style="list-style-type: none"> Access the mainframe to extract the reports SB01, S237 Si32, YH02 report run and download them from FTP Using AA Excel macro will be used to format and segregate the downloaded report Automation will connect and read the consignments to be processed
	Application Development & Maintenance	Mumbai Area, India	<ul style="list-style-type: none"> Creation of high-level technology architecture and identified the components Design and develop the Kafka Stream components using spring boot, Spring Data Cassandra Create the high-level architecture for cloud deployment
	System Integration	National Capital Region, India	<ul style="list-style-type: none"> Analyze the application/Apex code and provide better solution Integration Between Jenkins, Sonarqube and Salesforce Deployment in Salesforce using ANT, Jenkins

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