

Automation within reach in 2023

Connecting supply chains, optimising workflows and redefining online sales



Introduction



In a competitive retail sector, with the consumer seeking stock availability and fast delivery, ecommerce operations need to be as efficient as possible to keep up with this customer demand, as well as agile rivals.

With the UK facing a recession and record high inflation, consumers shopping habits are likely to change, as will the demand on retailers.

While a downturn might not seem like the best time to invest in retail operations, it is sadly often the businesses that sit still that are left behind.

Warehouse innovation, both software and hardware, has the potential to give retailers and wholesalers of all sizes the power to keep up.

Introducing the right solutions gives retailers visibility of their whole operations, and while it may not help them predict the next macroeconomic event it can prepare retailers for further supply chain disruption, demand change or the latest trend.

It can even help transform warehouses into places where people want to work, in a sector blighted by labour shortages.

It may seem like a big leap from legacy systems to connected automation, but it doesn't have to be.

Not all technical solutions will be the right for retailers, but those who are early adopters of innovation will reap the benefits.

As technology advances automated solutions become increasingly accessible to a range of businesses.

Once seen as the reason the big retailers succeed, automation might, in fact, be the reason small and medium UK retailers survive.

Katie Searles
Editor at DeliveryX



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Sponsor's introduction



The distinct contrast to the way consumers approach shopping now compared to just five years ago has revolutionised how all types of sellers operate. Especially when it comes to technology. Paired with the rapid growth of ecommerce,

meeting demand whilst navigating external market factors requires a forward-thinking approach. From connecting the customer journey to unifying supply chains, the right technology can provide organisations the tools to stay on top of demand.

Whether it's fast shipping, real-time updates, promotions that meet their needs or recommendations that suit their usual behaviour, consumers expect a seamless experience however large or small the purchase. With the right solution, all of this can be achieved if businesses make their data actionable and use analytics to better understand their customers' habits.

For retailers, wholesalers and trade sellers alike, the importance of keeping up with market expectations is a critical part of staying ahead. And that's not just with customer expectations. With ongoing supply chain disruption causing major labour and stock shortages, the demand for forward-thinking solutions is greater than ever.

Powered by technology and data, organisations of all sizes have the capability to optimise their day-to-day operations whilst finding a reliable partner to support them through the challenges and milestones of a growing business. Whether that's overcoming supply chain challenges, expanding internationally, or simply optimising processes for peak performance, finding the right solution can be the making of any business.

ERP software provides the tools to take time-consuming tasks such as stock allocation, courier assignment, financial reporting and other associated activities and complete them within a few clicks. As well as saving time and resources, your operation benefits from utilising real-time data across your supply chain. Out-of-sync data not only hinders your ability to keep customers informed but prevents your business from making smart decisions on purchasing and effectively managing orders - two areas of vital importance as the industry keeps up with demand.

As Sales Director at OrderWise, I've spent over 20 years helping businesses of varying sizes and industries drive forward long-term, profitable and scalable growth. I've witnessed first-hand the power and success that automation can bring to a business. Whether that's a 570% increase in online orders or 242% increase in annual turnover, the power of finding the right solution cannot be understated.

Jon Roberts
Sales Director at OrderWise

ORDERWISE®

ORDERWISE

For businesses with complex stock requirements, the primary concern of their operation is managing products and orders across the supply chain. This requires specialist functionality to not only improve stock transparency, but reporting, accuracy and planning as well.

Built for growing enterprises in wholesale, distribution, retail and manufacturing, OrderWise automates and streamlines stock-centric operations within a single end-to-end solution. By drawing from multiple data sources, OrderWise helps organisations to manage their everyday business activities whilst providing the tools to make more informed decisions on forecasting and strategising. Uniting supply chains, order management, stock control, distribution, financial processes and more, our solution channels all business processes into a connected hub.

As well as synchronised reporting and automation to reduce the need for disjointed systems, OrderWise offers critical insight into how to cut costs and increase efficiency, providing the information to make real-time decisions. By collecting and comparing metrics across departments, businesses are provided with a complete view of performance, with immediate visibility into how time and money is being spent or saved.

Market context

Will 2023 be the year retailers, and wholesalers, of all sizes turn to technology to keep up with demands in uncertain economic times?

Retailers and wholesalers have faced years of uncertainty, from a global pandemic to the current energy and cost of living crisis, events outside their control which have created a number of challenges.

Changing consumer behaviour and the switch to ecommerce, with online shopping taking an increasing share of UK retail revenue, has seen many long-standing UK retailers finding their methods out of touch.

The shift in balance between physical retail and online shopping may have recently started to slow compared to the height of the pandemic. But even as people return to their local High Street, the share of ecommerce sales is still predicted to hit 38.1% in 2023, and be pushing 38.6% by 2025.

This balance has, of course, resulted in an increased demand on ecommerce operations. This combination has strained inventory, the people who work in the sector and the warehouse space needed for stock.

It was recently reported that Amazon had taken a quarter of all UK warehouse space leased in 2020 and 2021, even if the ecommerce giant has admitted this was an overextension. As it plans to offload

some of its property there is a chance for smaller retailers to catch up.

Andrew Jones, chief executive of urban warehouse owner LondonMetric Property, told the Financial Times that warehouse demand was likely to continue to outstrip supply, due to a rush to onshore supply chains and the growth of smaller ecommerce businesses^[1].

This demand for space combined with the increase in stock volume has put pressure on more traditional fulfilment and warehouse operations. For example, manual picking processes with printed out paper and labels quickly become unworkable, while businesses try to make the most of the capacity they have.

“A lot of companies, retail and wholesale, were really caught short footed,” notes Jon Roberts, sales director, OrderWise.

TECHNOLOGICAL AGE

This has led some of the “big players” to invest in technology, whether it is software or hardware, to ease the manual burden. Retailers working across apparel, grocery and other key sectors are looking to follow suit. A McKinsey survey saw more than 80% of respondents indicating that they intend to increase automation investments over the next two to three years^[2].

It also found that 80% of retailers plan to concentrate their supply chain spending on addressing the constant demands on ecommerce fulfilment. While, automating warehouse roles is the top digitisation and automation priority for 64% of retailers.

But for small and medium businesses such an investment can feel out of reach to firms of their size.

However, technology development and a range of automation choices, from Warehouse Management Systems, to handheld scanners, racking solutions, website back office software and self driving robotics, could offer warehouse automation for every size of retailer or wholesaler. It is more a case of selecting what is right for each business.

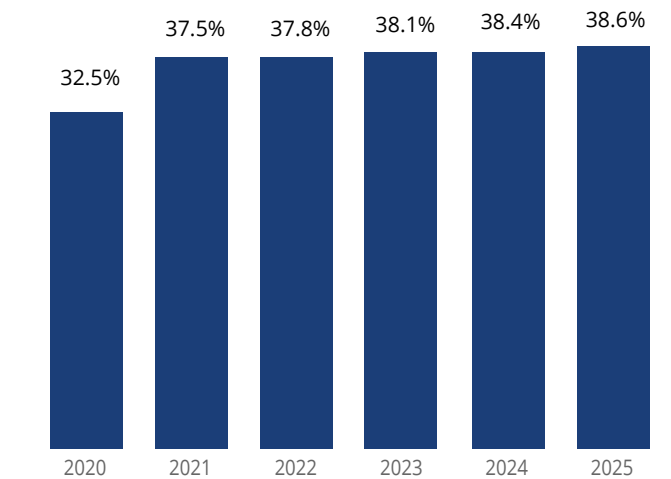
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Ecommerce share of retail revenue in the United Kingdom

2020 - 2025



Source: Statista

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Labour shortages: no easy fix

Warehouses across the UK are struggling to fill vacant positions, while technology can provide some relief it can't do everything.

The recent ecommerce boom and resulting demand for home delivery has changed the UK warehouse landscape. A recent study commissioned by the United Kingdom Warehousing Association (UKWA), and completed by real estate firm Savills, found a 614% increase in warehouse demand by online retailers^[1].

Savills also found that investment volumes in the retail warehouse sector reached £3.67bn in 2021, the most active the market has been since 2015. This warehouse investment, whether in brand new sites or into existing sites that retailers are working to modernise, has also created job opportunities. However, many of these remain unfilled.

“There is no easy fix anymore for businesses in terms of dealing with increases in sales and trying to match that back to adding more labour into the warehouse to deal with it” explains Jon Roberts, sales director, Orderwise.

Data from Office for National Statistics (ONS) highlights that the rate of growth in new businesses has outpaced the rate of job creation in the sector.

While the number of business premises has almost doubled in the last 10 years, employment in the ‘transport and storage’ sector, which covers haulage, warehousing, and postal and courier activities, was only 20% higher in December 2021 compared with the same month in 2011^[2].

ONS added the difference in growth rates could reflect an increased number of small businesses, recent worker shortages, or the potential automation of some occupations.

In fact, the number of small warehouses, haulage, and postal and courier firms continues to grow.

The percentage of ‘transport and storage’ premises with fewer than five employees increased from 67% in 2011 to 79% in 2021.

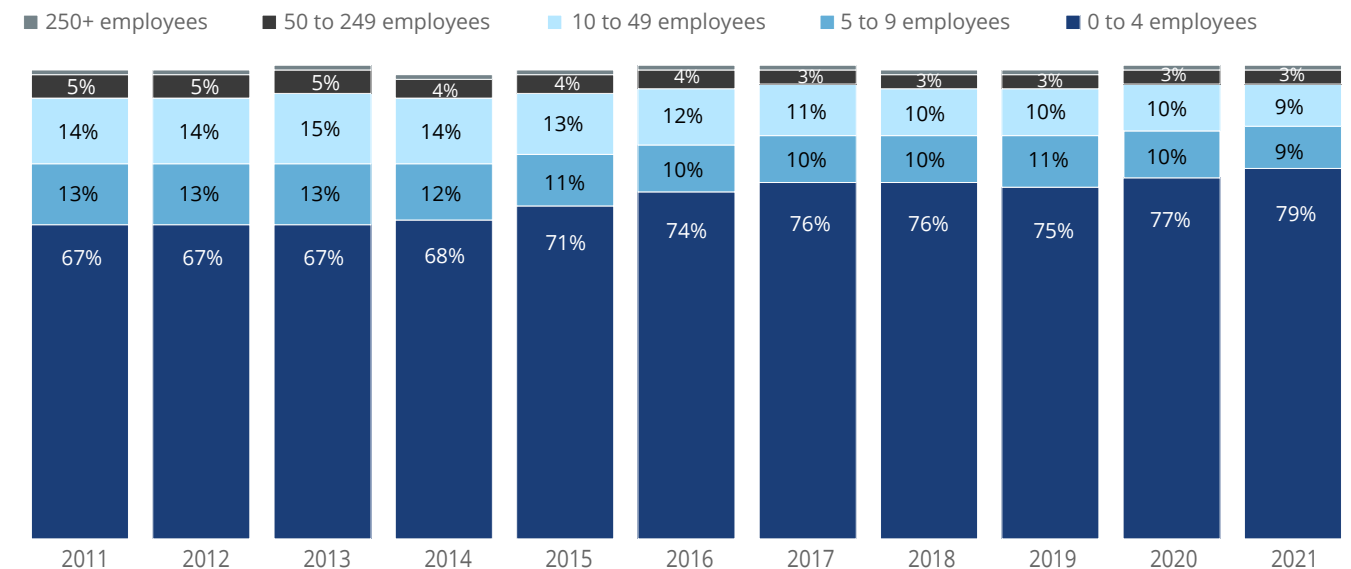
BREXIT TO BLAME?

Whatever the size of the retail warehouse operation, businesses have been plagued by labour shortages. The Chartered Institute of Logistics and Transport in the UK - CILT (UK) - reported last summer that 86% of companies have experienced warehouse operative staff shortages in the past two years.

Some in the industry cite Brexit as a key reason. It was estimated that in a ‘typical’ UK warehouse

Small businesses increasingly dominate the transport and storage industry

Share of transport and storage business units by number of employees, UK, 2011 to 2021



Source: Office for National Statistics — Inter-departmental Business Register

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around one in five workers were EU migrants, which will have resulted in a 20% cut post Brexit.

This is perhaps a reason behind Logistics UK’s 2022 performance tracker reporting that more than 18% of businesses are now reporting severe to very severe problems recruiting warehouse staff. A 5% jump from 13% in 2021, while in 2020 zero respondents reported facing recruitment challenges of this scale [3].

IMAGE PROBLEM

While Brexit could be blamed for such a sudden decrease in the number of available warehouse operatives, there is a wider problem closer to home. Despite the logistics sector employing over 2.6 million people, over 90% of people have never considered a career in the logistics sector, according to Generation Logistics.

The campaign aims to tackle the recruitment crisis and bring new talent to the sector. Clare Bottle, CEO of UKWA hopes the programme will increase awareness by 25% and positive sentiment by 40%.

Getting people interested in a career in the warehousing sector may be a challenge however. Generation Logistics’ 2022 benchmark research found “demanding” and “boring” were among the most common words associated with warehouse work, at 37% and 30% respectively [4].

Roberts stresses that there is a need to “demonstrate to people what the world of warehousing actually is now and what it will be over the course of the coming years. There is a very big gap in people’s perceptions and the actual reality of it.

“There needs to be a re-education across the workforce to help them understand what a modern warehousing or logistics role actually looks like in many businesses today.”

Would a modern, tech-driven warehouse be more likely to entice people into such job roles? Recruitment website Indeed certainly thinks so. Its December 2022 survey of front-line retail and warehouse workers across the UK found employer investment in technology is making jobs easier and boosting job satisfaction.

More than half (55%) of respondents said technology is making their day-to-day jobs easier and 44% got increased job enjoyment and satisfaction.

KNOWLEDGE GAP

While investing in technology can take some of the manual strain of warehouse work by making daily tasks easier, there is the need to be “tech-savvy”. The previously mentioned Generation Logistics benchmark research featured “skilled” as the word most associated with warehouse work.

Retailers, and warehouse operators, can’t simply invest in the software or hardware, they also need to invest in staff training for such solutions. Or they need to be selective in choosing systems which are easy to use. Intelligent systems have the power to increase productivity and allow retailers to “retain staff, redeploy them, make them more flexible”, explains Roberts.

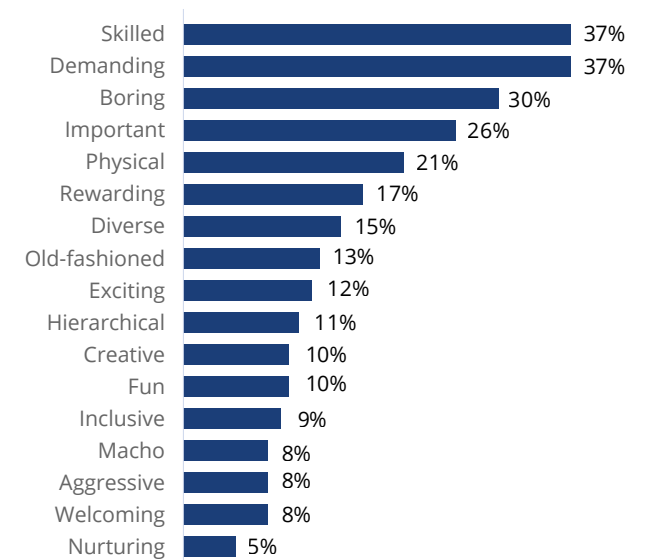
As Roberts stresses there is “no easy fix” to the ongoing labour shortage within the UK warehousing

sector, while technology can ease the strain it is a balance between automation and human interaction that is required. “People are still critical to the sector,” stresses UKWA’s Bottle.

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 [4]<https://generationlogistics.org/blogs/research22>

Words associated with logistics



Source: generationlogistics.org

Accessible automation

Will 2023 be the year when warehouse automation is within reach for retailers of all sizes?

Whether it is to help deal with the short supply of labour, or to keep up with the demand on warehouses following the ecommerce boom, businesses could see 2023 as the year they invest in automated technology to streamline their processes.

Many small and medium sized enterprises who had previously only watched as the ecommerce giants deployed such solutions will be looking to keep up.

“The demands that retailers have within that industry, predominantly driven by the Amazons of this world who set customer expectations, really forces retail and retailers to invest in technology and automation. [They] look at tools that could enable them to do things smarter with better quality data and make more informed decisions,” explains Roberts.

A recent survey highlighted that 2023 will be the year to introduce such tools for the majority of firms. Logistics Management’s Annual Warehouse and Distribution Centre Equipment Survey 2022 found 60% plan to invest in new equipment or upgrade its systems in the next 12 months ^[5].

It also reported that 45% of decision makers are looking to invest in information hardware and software, while 18% are considering enterprise applications such as ERP, CRM and WMS.

The same report stressed that this year there is “less hesitancy” to introduce technology to operations. The number of companies responding that they were “holding off” on system decisions had dropped from 19% in 2021 to 16% in 2022. Those taking a “wait and see” approach also declined, from 37% to 33%.

WHY NOW?

This lack of hesitation may come as a surprise with the current economic uncertainty, record high inflation and a cost of living crisis that could slow ecommerce growth significantly. But retailers, and wholesales, are not only dealing with macroeconomic events and customer demand, they are also operating in a very competitive environment.

“We’ve got to a point now where you cannot expect to maintain what you are doing. If you are not investing in technology, because everyone else is doing it, you are going to fall behind very, very quickly,” stresses Roberts.

Keeping up with competition is important when maintaining a share of the market, but becomes critical when trying to grow. Deloitte’s Supply Chain Leadership analysis found 96% identify innovation as “extremely important” to growth.

WAREHOUSE TECH GLOSSARY

Before companies can choose what tech is right for them, they need to recognise the acronyms:

AGVs & AMRs Automated Guided Vehicles follow predefined paths using automation software. They are perfect for transporting goods between lines and workstations. While, Autonomous Mobile Robots are not limited to a specific route, these unmanned systems can make navigational decisions in real-time.

AS/RS An Automated Storage and Retrieval System is designed to buffer, store, and retrieve product and inventory on demand. AS/RS technology consists of shuttles, cranes and aisles, horizontal and vertical carousels, Vertical Lift Modules (VLMs), and stockers.

ERP Enterprise Resource Planning software automates company activity across all departments. It is used to collect, store, manage, and interpret data from product planning, cost and development, manufacturing, sales, inventory management, shipping, and payment.

WMS Warehouse Management Systems control the movement and storage of inventory. It uses barcode scanners, mobile computers, wireless LANs, and radio frequency identification (RFID) technology to accurately track the movement and storage of products to intermediate storage locations, or to a final customer.

EFFICIENCY GAINS

Technology will help drive such growth due to its power to drive productivity and potentially save on operational costs.

According to research by Aberdeen Group, warehouses using automated systems were 76% more likely to boost inventory accuracy to 99% or higher. These businesses were also 36% more likely to have reduced labour costs at an average of 3% per year, and 40% more likely to consistently ship within one day of an order's placement.

The study stated that best-in-class distribution operations were able to achieve 94% on-time deliveries, 1.5 times more often than average [6].

These efficiency percentages will inspire confidence in those looking to adopt automation this year. And that is likely to be no small number if predicted uptake is anything to go by, with the warehouse automation market worth \$2.54bn in 2023 and predicted to grow further to hit \$3.9bn by 2025.

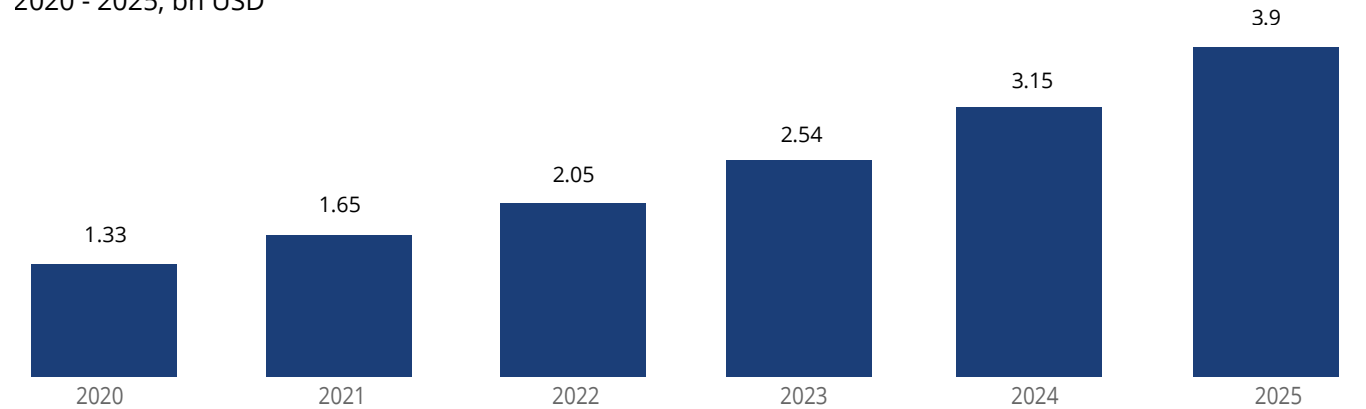
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Size of the warehouse automation market in the United Kingdom

2020 - 2025, bn USD



Source: Statista

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Dynamic data

Working from paper print outs or from various spreadsheets is not an option for retail businesses looking to invest in automation.

Making the switch to a partly or even fully automated system in 2023 is something many retailers and wholesalers will be considering. No matter the scope of the system integration they are looking at, they must first ensure that they have the right kind of data.

In a modern retail environment there are data sets coming from a range of sources or partners, and as a result data can come in a variety of configurations. Information can sometimes be incomplete or isn't granular enough.

"A lot of businesses, even the big retailers, can on the front end of it give a visual appearance of something that's very well orchestrated. But in the back, there's a lot of legacy systems, a lot of patching of information to try and make things work together, and a real disconnect in terms of the data that's being generated. Whether it's in store, whether it's a warehouse, whether it's in finance or in procurement," explains Jon Roberts, Orderwise.

He notes that it is surprising "the amount of spreadsheets that still fly around businesses of all sizes in order to try and make business decisions."

Even if retailers are working off something more high-tech than a spreadsheet, some do not have a connected system into which this data is fed.

"Companies out there may well have data, but it's too siloed. They don't get that view of the end-to-end process or how that data flows through their business and how something in one area impacts something else," says Roberts.

Without looking at the whole picture, retailers can find themselves unable to react to ever evolving situations. Through an overreliance on flat data that is not dynamically adapting to incidents such as a change in demand, businesses are dependent on staff making manual decisions.

A connected system using analytical data gives retailers the power to adapt to changing stock levels or to varying product lead times. And while it may not be able to predict the next macroeconomic event, it can provide retailers with a little foresight.

Roberts concludes: "Having an integrated system that works across multiple departments where the data flows - just by people doing their job, by pulling in orders and data gathering as a matter of course - it is much richer, and it allows you to actually analyse that data in a way that makes more sense and allows you to make better decisions in real time."

NOT READY FOR ROBOTS?

The introduction of collaborative mobile robots into warehouse environments is not a new thing, Amazon acquired Kiva in 2012. But for many UK businesses AGVs and AMRs might not be the right fit... yet.

As tempting as it is to try and keep up with the ecommerce giants, robotics solutions come at a price. "You need deep pockets," according to Roberts.

Furthermore, businesses using legacy systems or still using paper can't just make the jump to robotics.

"It's just not possible, the gap is too big. Robotics relies on quality data, that is what drives it. Data is king in everything, but even more so when it comes to robotics," explains Roberts.

"For a lot of companies, the first step is to have a good quality WMS that can allow them to have the quality of data and that makes the move into robotics much smaller."

The good news is that technology is constantly evolving, mobile robots are becoming increasingly flexible and in turn increasingly cost effective. 2023 could be the start of an automation journey for many retailers.



Agrigem

Agrigem, a supplier of agrichemicals and fertilisers to numerous markets, including sports, horticultural, equine and forestry, were looking to streamline their operations. The Lincoln-based company wanted “everything in one place”.

With 1,500 products, 15% of which are their own range, and selling on their own website, as well as on Amazon, eBay, marketplaces and The Range, with an introduction into B&Q coming in 2023, Agrigem needed to move away from a manual website back end system which involved printing out.

“You find in any sort of small/medium business that a lot of time is wasted on administration, data collection and input,” explains David Best, operations manager at Agrigem.

As the company had seen a pre and post-covid ramping up of ecommerce demand, it had started looking at investing in a more coherent system.

Over the past three years, Agrigem has worked to put automated solutions in place.

TAKES TIME

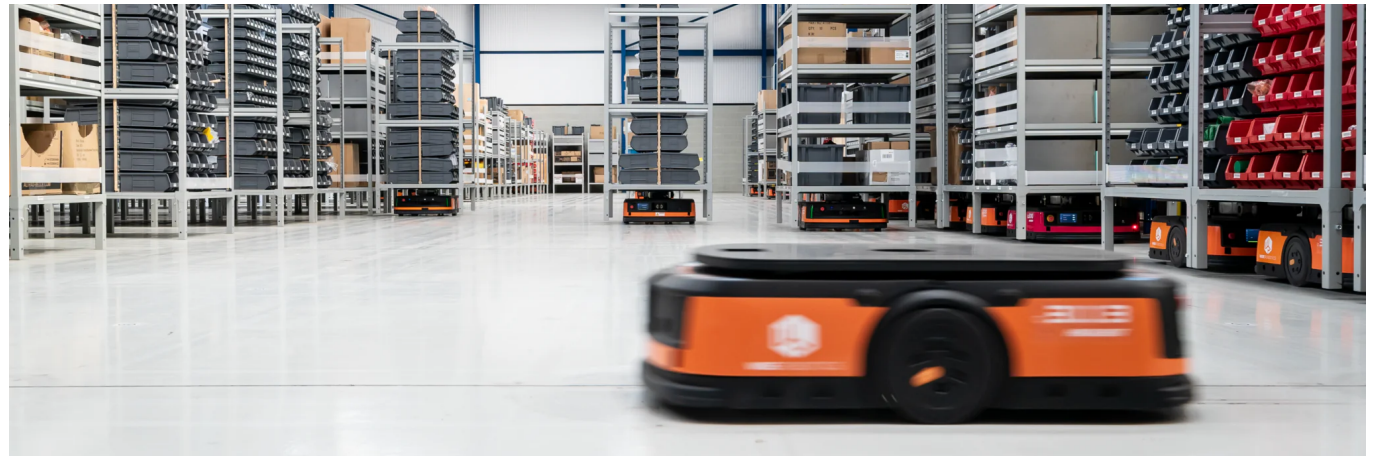
Like many new undertakings, and as is often in agriculture, it took time to reap the benefits. Best notes: “Anything like this, it takes a good year to get it in place and everybody trained upon it. Then you’ll want another year to really tinker. We found the past 12 months is when we really got the most benefit.”

A measurable example of this is introducing handheld terminals, which has resulted in a 99.98% pick accuracy. This is particularly helpful when the business relies on seasonal members of staff. By having an automated system in place, new employees can be brought in and trained up ready to go within a day.

The scalable solutions have also given Agrigem some adaptability, the tech enables them to be very quick to respond to macroeconomic events such as Covid, Brexit and now inflation, allowing them to keep up with the competition. With three years of data inputted into the software, they now have a better understanding of stock, even for remote workers in the middle of a field.

“Without it, I don’t think we would’ve been in as a strong position” states Best. With the hard work done, Agrigem will continue to use its current automation solution to weather any ecommerce storms in 2023, and see how the land lies before investing further.





L&S Engineers

Retailer of spare parts for the construction, plant hire and ground care industry, L&S Engineers was aware of ecommerce giants such as Amazon deploying technology, including warehouse robots, to help them keep up with demand. However, the 50-year-old firm didn't consider itself in the same league: "We never really thought our size of business would ever have access to that," explains Ian Shay, commercial director.

However, during the pandemic the business continued to grow as a result of the switch to online, and as L&S sell "essential products". The spare parts business had also invested in a new warehouse and had an opportunity to create efficiencies from this automated site.

L&S found investing in its facility and such technology not only doubled its throughput but also improved working conditions for its team.

A BETTER JOB

Due to the investment employees no longer have to drag around trolleys, or cover up to five or six miles of walking daily. Shay explains the "goods come to them", with operators no longer being worn out after a shift.

This is especially important when there is an ongoing issue in recruiting and keeping warehouse employees.

"There's a labour problem! But what we've managed to do is to hang onto our staff, because we've got a better job to offer them. A more advanced job," says Shay.

Furthermore, he explained that by introducing technology into its operations the site itself is a better place to be. He notes: "The whole thing is a lot calmer. Instead of 20 people all racing around a warehouse bumping into each other, trying to

get the orders out, it honestly doesn't look like anybody's doing any work. And yet we're doing even more than we were doing before."

JUST DO IT

Such a transformation has "unlocked growth" and extra capacity. The business can now handle more stock due to automation's dense use of the space. But Shay stresses that they don't plan on stopping there. "Build it, and they will come" he jokes, as the retailer is seeking planning permission to extend its new facility.

He also hopes its site can act as a demonstrator to prove to other "smallish" businesses that they should take the automation leap. He says: "My advice to the decision makers and people looking at this sort of technology is don't overthink it. Just get on with it. It definitely works. It is the future."

Leon Paul London

Leon Paul

Only six years ago, Leon Paul was picking from 4,500 sport fencing products with a selection of various paper printouts. This had led to a demoralised team, a phone ringing off the hook with customer enquiries and a lack of stock management.

While the London-based manufacturer had accounts and ecommerce software in place, there was no connected system and too many manual processes.

The fourth generation family firm needed a connected system, one which would bring efficiency to the warehouse, help manage products and purchasing, and in turn would clean up the customer experience.

“For me it was just about applying a level of organisation, traceability, accountability, efficiency, and stop the phone ringing,” explains James Fay, commercial director. To this end, Leon Paul invested in an ERP solution, WMS system and business intelligence software.



GROWING PAINS

While Fay knew something had to be done, and investing in a solution was necessary to advance the business, such a transition and the implementation was strenuous.

“We had three months of utter pain” admits Fay, due in part to the unique nature of the business. Not only do Leon Paul offer over 4,000 physical products, these can make up to 150,000 sales options for their customers, they need to be able to bring entire kits together.

The team had to find ways and workarounds to get what they needed from Orderwise’s solution.

Fay notes: “We’ve just got on and figured it out. You then make these things work for you. The system itself is very good. The information it has is very good. It is not necessarily the easiest product to use first out of the box.

“But then I would always ask, do you remember the first time someone asked you to make an Excel spreadsheet?” questions Fay

In fact, many members of the Leon Paul team have become system back office experts, and want to learn even more.

FOUR-DAY FUTURE

Fay now hopes his team can be “energised” and become more efficient in using the solution to such an extent that a four-day week may be a possibility in the future.

“If we can have the systems and the processes in place to make sure that people’s work rates are more efficient, so they can produce more without doing more, we can send them home the other day,” says Fay.

Conclusion

Automation and technology isn't just for the big players, investing in innovative systems can level the playing field.

Businesses across a range of sectors have been embracing technology, whether it is software, hardware or a combination of both, with many early adopters coming from within the retail and warehousing industry.

It is often the giants of the industry, the Amazons for example, that have the capital to make leaps into automation. Following suit and trying to keep up with such tech firms may have seemed like a gamble before.

However, doing nothing and trying to maintain more traditional operations might, in fact, be more risky.

"It's the businesses that aren't actually embracing technology and investing in technology, they're the ones that are falling by the wayside, the ones that are not making the grade and the ones you see shutting up shop," notes Orderwise's Jon Roberts.

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