Last Mile LEADERS
Hosted By FarEye

Keynote Address



13-15 October 2026 | Amsterdam

1950

THE WORLD RAN ON SHIPS

After world war 2

World was rebuilding itself

Trade was leading this change



But the challenge was cost & time



In 1950s

525 Mn

TONNES



SOURCE: UN, DEVELOPMENT OF WORLD INTERNATIONAL SEABORNE TRADE, 1950–67

In 2026

12.72 Bn

TONNES



SOURCE: UNCTAD, REVIEW OF MARITIME TRANSPORT 2025

Global trade in goods and commercial services (maritime)

$80
Billion



$20
Trillion

SOURCE: WTO, WORLD TRADE STATISTICS 2025 (GOODS + COMMERCIAL SERVICES)

How did we get here?

What made this scale possible?

Did ships become dramatically faster? No.

1950S



Speed: **16–19**

Knots

MODERN SHIPS



Speed: **18–20**

Knots

The ship spent too much time standing still.



MANUAL HANDLING

LABOUR

DELAYS

COST

The container.



A simple box of metal built an entirely new system

One standard changed the system.

$5.83

per ton of cargo loaded

→

$0.16

per ton of cargo loaded

75+ years later



Eye on the Last Mile: EMEA 2026



4,000+

data points

500+ respondents

EUROPE | MIDDLE EAST | AFRICA

Predictions from 2025

THE ECONOMICS OF DELIVERY

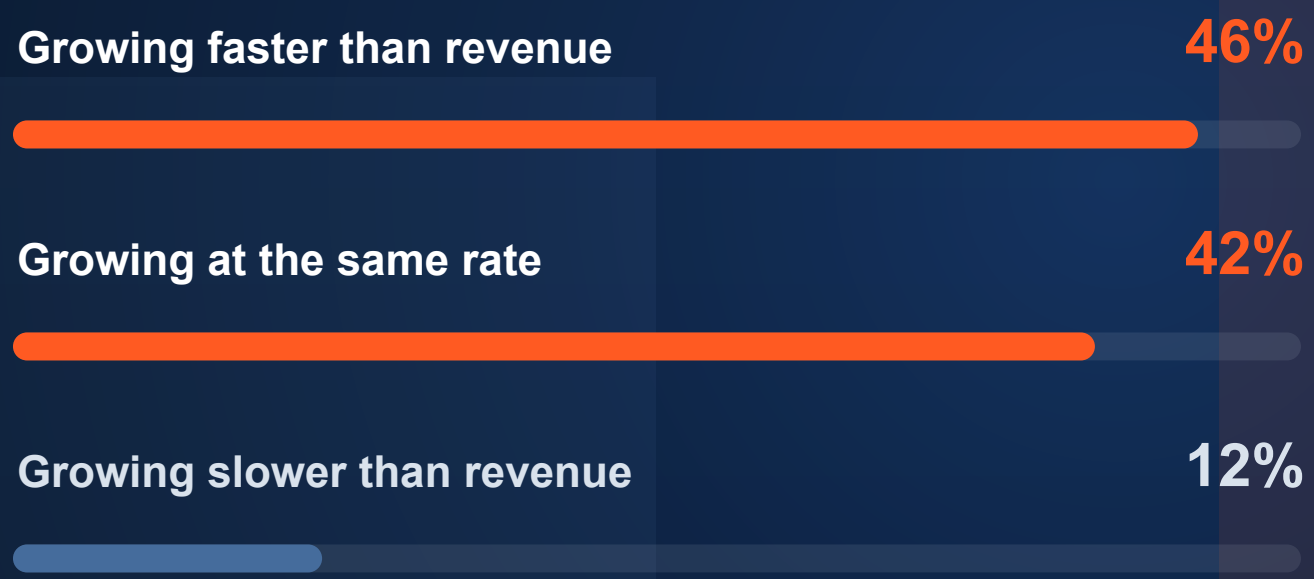
4 Predictions we made last year

WE SAID	WHAT HAPPENED	VERDICT
AI will go mainstream in supply chains	**89% are now at implementation or operational stage**	**Called it**
Around 90% will maintain or increase outsourcing by 2030	**Hybrid is already the default model at 57%**	**Called it early**
Cost is the number-one last-mile challenge	**Cost per delivery rose 10% for the second consecutive year**	**Understated it**
Consumers will pay more for faster delivery	**Consumer will pay more not just for speed, but for fast & reliable delivery**	**We got this wrong**

01 Cost of Delivery

THE ECONOMICS OF DELIVERY

Delivery costs growing at least as fast as revenue.



88%

of operators are not generating delivery operating leverage as they grow.

The cost of moving goods is under pressure

FUEL

+93%

Brent crude, January to October 2026

LABOUR

+3.6%

EU transport and storage labour costs, year on year

INSURANCE

Increase in Premium

Insurance on high-risk shipping routes

SOURCE: FAREYE EMEA REPORT, EXECUTIVE SUMMARY (MACROECONOMIC CONTEXT).

Double Digit delivery cost increase annually is the new normal

Y.O.Y RISE IN COST PER DELIVERY

2025 → 2026

10.3% → 10.5%

Two consecutive years at the same level is a sustained operating condition, not a spike to absorb and forget.

The Hidden Costs of Last Mile

10.8% TOTAL RISE IN COST PER DELIVERY



5.6%

GENERAL RATE INCREASE

Published DHL 2026 base rates

+5.2 pts

This is what you pay extra INCREASE BECAUSE OF

OPERATIONAL INEFFICIENCY

Top cost drivers for



THE CONTROL TEST

Can your team answer four questions without picking up a phone?

Where is it?

44% cite a lack of real-time visibility.

Why this carrier?

35% cite carrier performance as a technology gap.

What is it costing?

34% cite audit and reconciliation as a bottleneck.

What will it deliver?

18% flag dynamic allocation as a challenge.

Know your Cost to Serve

TRANSPORT + EXCEPTIONS + FAILED ATTEMPTS + CUSTOMER CONTACTS

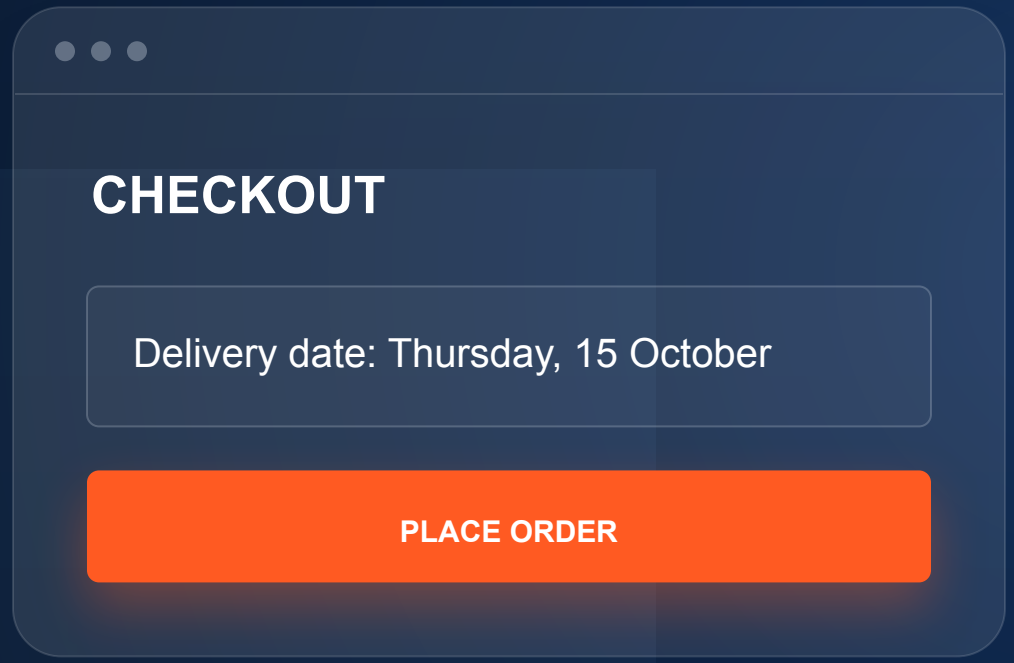
The winners know the full cost of each delivery

02

THE PROMISE GAP

Customer Experience

Delivery experience begins at checkout.





Delivery can make or break checkout.

48%

abandoned a cart
because of delivery time

43%

abandon over unexpected
or additional delivery costs

SOURCE: SENDCLOUD AND DHL ECOMMERCE 2026 SHOPPER RESEARCH, CITED IN THE FAREYE EMEA REPORT.

What customers want

2 in 3 want Reliability

~70% customers name Reliability: (predictable timing and guaranteed delivery) as the most important thing in delivery

SOURCE: FAREYE, EYE ON THE LAST MILE EMEA 2026 (OPERATOR SURVEY)

Businesses keep selling speed at Check-out

> 63% offer same-day or expedited delivery

SOURCE: FAREYE, EYE ON THE LAST MILE EMEA 2026 (OPERATOR SURVEY)

Sell the promise, not just the speed.

STANDARD

FREE DELIVERY

Default

SCHEDULED

PREDICTABLE SLOT

Choice

EXPRESS

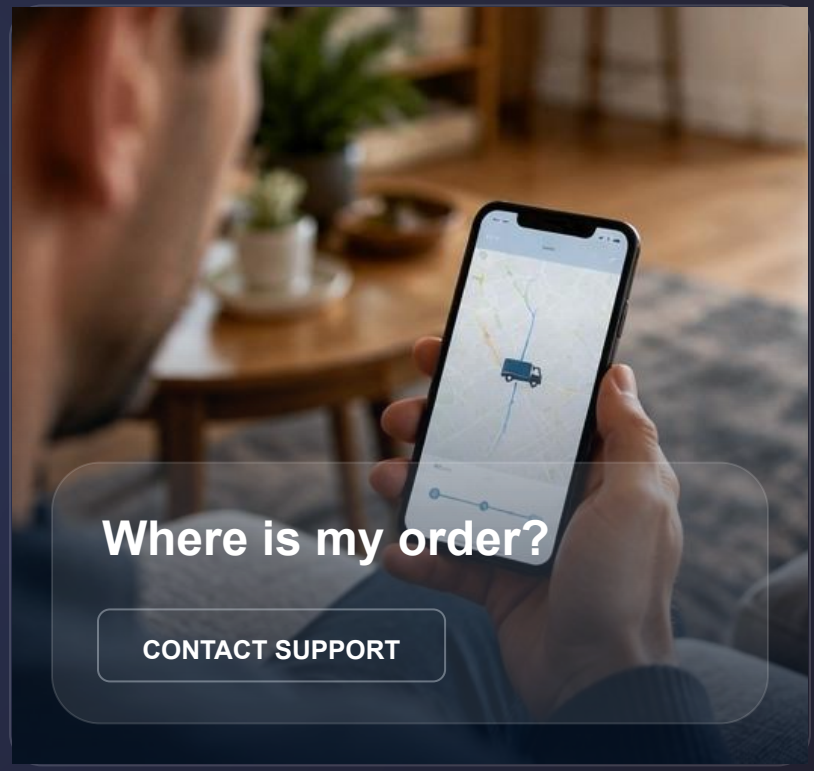
PAID UPGRADE

Speed

Where is My Order (WISMO) is going up.

1 in 5

customers contact firms about order status, operators report



SOURCE: FAREYE, EYE ON THE LAST MILE EMEA 2026 (OPERATOR SURVEY)

03

FROM ADOPTION TO AUTONOMY

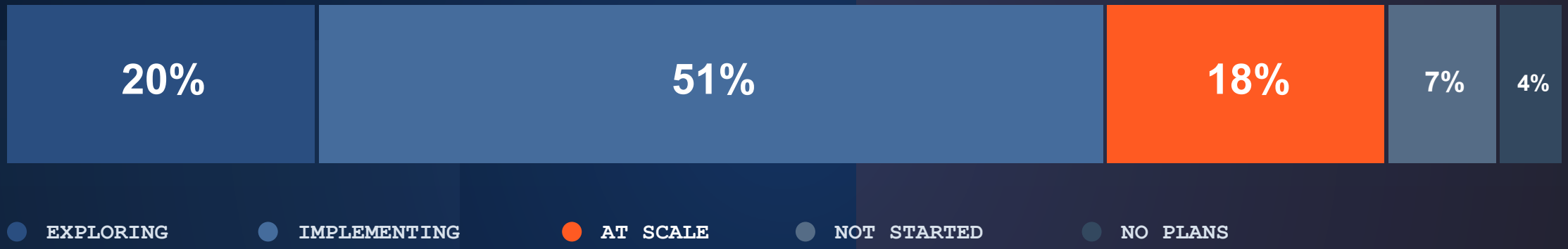
Artificial Intelligence

89%

ARE ALREADY ON THE AI JOURNEY

SOURCE: FAREYE EMEA SURVEY; 20% EXPLORING + 51% IMPLEMENTING + 18% AT SCALE.

2 out of 5 are already running AI at scale.



SOURCE: FAREYE, EYE ON THE LAST MILE EMEA 2026 (OPERATOR SURVEY)

Data enables quality AI output.

50%

of enterprises have formed multi-layer, standardised data quality for implementing AI at scale



SOURCE: FAREYE, EYE ON THE LAST MILE EMEA 2026 (OPERATOR SURVEY)

Capacity building with people

52%

have a team of experts, team-mates who leverage & enable AI adoption within the teams



SOURCE: FAREYE, EYE ON THE LAST MILE EMEA 2026 (OPERATOR SURVEY)

What AI at scale needs.

01

Trusted data

Common milestones, consistent exception definitions and reconciled cost data.

02

Human in the loop

Overrides generate the evidence required to widen autonomy safely.

03

Governance built in parallel

Explainability, thresholds, audit trails, override paths and ROI gates. Much of it is what the EU AI Act asks for.

2027

Now let us look at predictions for 2027.

PREDICTIONS FOR 2027

01 By 2030, parcel lockers will overtake doorstep deliveries in at least 10 European countries.

02 B2B becomes the first *scaled* market for autonomous commercial vehicles

03 40% of the last-mile decisions will be made without a human

04 Cost-to-serve & Delivery Experience move from a logistics KPI to a company KPI

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Lets together shape the future of last mile

Cost Optimization

Customer Delight

Sustainability

Last Mile
LEADERS

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Thank You

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