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From commodity  
business to premium  
services in ocean freight

**How premium services can drive investments for  
operational excellence in liner shipping**

# The rise of new products as part of the decommo-ditization of ocean freight

## Disruptions become daily business

The global ocean-freight industry is at a pivotal inflection point. After almost a decade defined by volatility, disrupted supply chains, and unprecedented rate surges, carriers now face a structurally different market environment characterized by **highly volatile freight rates, mounting financial pressure, and a rapid shift in expectations from Beneficial Cargo Owners (BCOs)**. In response, leading liner operators and adjacent logistics businesses are deploying two principal strategies: broad-based cost-reduction initiatives, including organizational streamlining and layoffs, and an **ambitious wave of product innovation** aimed at the decommo-ditization of ocean freight. This whitepaper focuses on the latter and its strategic implications for the industry. Historically, container liner carriers thrived on stable markups above operating costs, with occasional disruptions such as pandemics, geopolitical tensions, or blockages of critical waterways creating temporary and substantial margin uplift. **These shocks were once perceived as anomalies, but today, they represent a new baseline of operational uncertainty.**



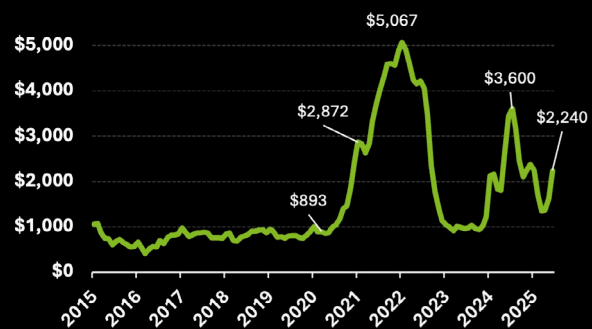
About **32%** of all **container journeys** in 2025 arrive **more than 10 days late** compared to their original ETA<sup>1</sup>

## Change in expectations from large shippers

Despite the “new normal,” extraordinary financial returns are likely to become increasingly rare as global capacity normalizes and competitive pressures intensify. At the same time, **BCOs are demanding a step-change in service reliability, transparency, and continued environmental performance**, expecting carriers not only to transport containers but to provide resilient, measurable, and sustainable value.

Some of the largest carriers striving to meet these expectations through operational excellence face a commercial dilemma: Enhanced reliability and premium service quality require significant investment, but simply raising base freight rates risks immediate loss of competitiveness, especially as quoting and tendering processes become tightly indexed and more transparent. As a result, the traditional model of embedding value within generalized rate structures is losing viability.

## SCFI comprehensive container freight rate index in USD per TEU



Freight rates peaked above USD 5,000 per TEU in 2022 & remain **volatile** and **above pre-crisis levels**<sup>2</sup>

## New ocean freight products in the making

The path forward lies in creating **differentiated, integrated premium services** that elevate customer experience independent from standard freight-rate mechanisms. These offerings aim to unlock higher yield, improve customer retention, and build resilience in an increasingly commoditized market. However, to succeed, carriers must define **clear value pools, develop coherent product architectures, and build the technological and operational capabilities** required to deliver premium performance at scale.

This whitepaper provides a structured perspective on these emerging product categories, outlines the strategic rationale behind premiumization, and offers a roadmap for carriers seeking to transform uncertainty into competitive advantage

1) Calculated based on: Vizion, 2025 Global Ocean Carrier Performance Report 2) UNCTAD, Review of maritime transport 2025

# Six types of premium services identified from the market



1

## Protecting the transport plan

Schedule reliability & loading guarantees

2

## Seeing beyond the horizon

Advanced visibility & exception management

3

## Safeguarding value on the vessel

Cargo protection & financial risk mitigation

4

## Navigating to sustainability

Decarbonization of ocean freight

5

## Guided by a dedicated crew

24/7 end-to-end customer service

6


## Building resilience for shipments


Loyalty programs for non-NAC business

# Selected add-on premium services which enhance customer experience


**1 | Protecting the transport plan**  
Schedule reliability & loading guarantees 


Carriers are investing in operational excellence to strengthen network performance and improve schedule reliability, while layering in premium services that guarantee transit times and loading certainty. Services for which BCOs pay an extra premium to reduce execution risk, e.g., guaranteed delivery times or loading.

Market adoption rate 


**2 | Seeing beyond the horizon**  
Advanced visibility & exception management 


Services for which BCOs pay for enhanced end-to-end shipment transparency, such as real-time tracking, (IoT-based) container visibility, temperature and humidity monitoring, alerts, analytics, API-based monitoring, and detection of emerging exceptions. This includes both dry cargo and reefer condition monitoring.

Market adoption rate 


**3 | Safeguarding value on the vessel**  
Cargo protection & financial risk mitigation 


Services for which BCOs pay to improve protection against the financial consequences of cargo loss, damage, theft, delay-related exposure, or limited standard carrier liability. This includes extended liability products and cargo value guarantees.

Market adoption rate 


**4 | Navigating to sustainability**  
Decarbonization of ocean freight 


Services for which BCOs pay to reduce the carbon footprint of their shipments, typically through lower carbon fuel programs and certified emissions reduction statements. The commercial logic is “pay extra for lower Scope 3 emissions and ESG documentation”.

Market adoption rate 


**5 | Guided by a dedicated crew**  
24/7 end-to-end customer service 

Services that shippers pay for to receive specialized, personalized support, a dedicated point of contact, priority access to transport capacity, proactive exception management, and concierge-style 24/7 customer service.

Market adoption rate 

**6 | Building resilience for shipments**  
Loyalty programs for non-NAC business 

Loyalty programs reward customers for sustained volume, long-term commitment, and strategic partnership through benefits such as priority access and commercial advantages. This allows shippers to receive preferential treatment if they prove to be loyal customers.

Market adoption rate 

# 1 | Protecting the transport plan

## Schedule reliability & loading guarantees



### Premium service at a glance

Schedule reliability and loading guarantees are premium services that eliminate the two most costly uncertainties in ocean freight 1) **whether the booked cargo will be loaded as scheduled**, and 2) **whether it will arrive on-time**. Rather than relying on best-effort commitments that leave shippers absorbing the cost of rolled bookings, late departures, and unpredictable arrivals, the service provides contractually committed on-time performance targets, dedicated capacity allocation appropriated from spot market demand, and priority loading sequences that protect departure windows. Increasingly, these guarantees extend beyond the vessel, connecting seamlessly with inland transport, customs, and last-mile delivery to provide a single, accountable commitment across the full door-to-door journey. For BCOs who need to plan backwards from a confirmed arrival, aligning production, warehousing, and customer commitments, this service provides the one thing the standard market does not: a schedule they can rely on and are increasingly willing to pay a premium to secure.

### Service mechanics

**Above-market schedule reliability:** Committed performance targets, a contractually defined threshold that the carrier is obligated to meet. Delivering on that commitment, however, requires a network design and level of operational excellence built to support it.

**Priority capacity and loading guarantees:** Dedicated capacity allocation to premium service subscribers, guarantying priority loading sequences to minimize port delays.

**Extended free time:** Extended free time, offered as part of premium service packages, provides an agreed, longer grace period built into the contract from the outset.



Only 27.5% of all shipments arriving on or before the exact date of first-ETA promise<sup>1</sup>

### Customer value & willingness to pay

**Reduced inventory & working capital costs:** Predictable arrivals allow BCOs to operate leaner inventory models, less buffer stock, lower warehouse costs, and working capital that is no longer tied up absorbing schedule uncertainty.

**Better supply chain planning:** A confirmed arrival date means production runs, warehouse labor, and trucking slots can all be aligned, eliminating the contingency buffers that add cost.

**Lower demurrage & detention exposure:** When arrival is known, transport can be pre-positioned and port appointments pre-booked. Free time gets used as intended, not consumed by uncertainty.

**Simpler operations:** Large BCOs deliberately spread volume across multiple carriers, but within each relationship, the demand for simplicity is growing fewer handoffs and less complexity at every step.

### How to monetize the service

**Tiered service levels:** A tiered structure based on factors such as container type, port, or free time duration allows carriers to serve a spectrum of shipper needs, without cannibalizing standard volume. Each tier should represent a meaningfully different value proposition, not simply a price point.

**Premium add-on:** Offering standalone add-ons at booking lowers the entry barrier and expands the addressable market. Another option is post-booking upgrades or even downgrades where shippers are paid to wait for the next vessel, helping balance supply and demand in a revenue-management approach.

**Indicative price range based on market information:** USD 150-1000/container depending on container type, season, and trade lane

### Operational & risk considerations

**Alliance dependency and execution control:** Since alliance networks can influence loading decisions, guarantees are credible only when carriers have sufficient control, partner alignment, and defined recovery options.

**High investments:** Delivering on the promise requires deliberate investment across various domains such as vessel and port operations, and technology.

**Risk of reputational damage:** Underperformance damages credibility beyond refunds.

1) Calculated based on: Vizion, 2025 Global Ocean Carrier Performance Report

# 2 | Seeing beyond the horizon

## Advanced visibility & exception management



### Premium service at a glance

Advanced visibility & exception management is a premium service closing the transparency gap in the fragmented logistics landscape, transforming the understanding of shipment progress. While Track & Trace (T&T) relies on events that occur days or weeks apart, newer services use AI to fill gaps and deliver continuous visibility. We see three complementary capabilities:

1. **T&T:** Traditional events (port arrivals, handovers) as anchors for reliable, verified data
2. **AI between events:** Analyze movement, shipment data, weather, etc. to understand status, predict delays, and identify emerging exceptions
3. **Continuous monitoring:** Real-time data to validate predictions and provide granular visibility during critical phases (inland transport) resulting in dynamic ETAs and more reliable planning signals

### Service mechanics

Deliver end-to-end visibility – from pickup to ocean transit and final delivery. AI-powered dynamic ETAs are updated throughout the journey, providing increasingly accurate estimates.

**IoT-enabled data foundation:** Built on containers that transmit GPS-based location globally. Inland uses cellular networks (e.g., LTE), while ocean leg containers connect via satellite or vessel networks. Data is aggregated from multiple sources and customer systems create a more unified data foundation.

**Intelligent API & web interface:** Available via two channels: A digital customer web interface, or API (e.g., to TMS). APIs are event-driven, pushing updates when new data becomes available, reducing polling and ensuring latest shipment status.

**AI-powered exception management:** Continuously monitors progress & detects emerging exceptions (delays, dwell, missed handovers, congestion, equipment issues) - providing early warnings and guidance on recommended next actions.



Nine major carriers have collected about **USD 15.4 billion** in **Detention & Demurrage** charges from April 2020 to March 2025<sup>1</sup>

### Customer value & willingness to pay

#### Planning reliability & proactive operations

Support confident planning for warehousing, labor, truck dispatching, and delivery coordination. Reduce last-minute premium bookings and improve transshipment/inland planning efficiency.

#### Operational efficiency

Reduces manual follow-ups and processing workload, freeing supply chain teams to focus on priorities.

#### Supply chain resilience

Enables faster response to delays, missed handovers, and inland disruptions, protecting service levels and reducing avoidable downstream costs.

#### Typical willingness to pay drivers

- High service-critical, time-sensitive supply chains
- High-value cargo
- Reduction in dwell-related costs

### How to monetize the service

#### Subscription models

For API integration and larger volumes, customers can sign quarterly or annual subscription agreements with defined volume bands.

#### Booking add-ons

Can be offered as a value-added service, charged per container while booked at shipment level.

#### Future monetization paths

In the longer term, visibility can become a data monetization layer for adjacent services such as trade finance, parametric insurance, dynamic pricing, supplier financing, and market intelligence.

#### Indicative price range based on market information

~USD 10-30/container, with volume-based discounts.

### Operational & risk considerations

#### Customer expectations & contractual exposure

Critical to manage expectations and liability in services with third-party dependencies and complex data pipelines.

#### Input data availability and quality

Exception quality depends on reliable IoT, tracking, geofence, and ETA data across the pipeline.

#### Disintermediation risk

Pure-play visibility platforms can capture the customer interface unless carriers out-innovate, partner, or acquire.

<sup>1</sup> Federal Maritime Commission, Detention & Demurrage

# 3 | Safeguarding value on the vessel



## Cargo protection & financial risk mitigation

### Premium service at a glance

Cargo protection & financial risk mitigation is a value-added, extended cargo liability / cargo value guarantee that sits on top of the standard bill of lading liability and provides predefined compensation for physical loss or damage, and (depending on product terms) general average and salvage contributions, with a simplified, carrier-integrated claims experience. It is not an insurance product and does not replace or replicate insurance coverage. It is an additional option to the contract of carriage / booking.

### Service mechanics

#### Clearly defined covered events vs. exclusions

Physical loss/damage during carrier custody, based on a defined list of "damage events". Specific exceptions are listed that are not covered by the service.

#### Compensation logic

Compensation determined against commercial invoice value + freight, and additional expenses (e.g., storage, disposal) capped (e.g., up to USD 10,000) and always within the overall product limit.

#### Higher compensation limits via packages/tiers

Predefined per container limits depend on product design. Goods in one container treated as one unit and maximum compensation applies per container.

#### Transparent pricing & digital purchase journey

Protection fees and options can be reviewed and purchased digitally during quotation/booking or at various stages of the transport journey.

### Customer value & willingness to pay

#### Predictability and reduced financial exposure

Predefined compensation limits and extended liability provide a clearer expected outcome in case of an incident, creating financial predictability.

#### Administrative savings

Carrier-integrated processes reduce paperwork because shipment information is already available and fewer documents may be needed.

#### Fast compensation

Quick settlement once all necessary documents are received.

#### Typical willingness to pay drivers

- High-value goods / high incident sensitivity

- Customers optimizing internal claims handling effort
- Customers value faster cash recovery

### How to monetize the service

#### Tiered packaging

Predefined compensation caps per container (and potentially distinct structures for dry, reefer/temperature-controlled, and special equipment) with upfront, transparent pricing.

#### Monetization can be executed through

- Digitally attached at quote/booking (maximizes conversion through simplicity and transparency)
- Contract embedding for strategic accounts (standardized adoption, improved retention)

#### Indicative price range based on market information

- Fixed fee range: roughly USD 28–235/container depending on coverage tier
- Mid-tier benchmark: around USD 28–59/container for USD 15k–30k coverage



576 containers were lost at sea in 2024<sup>1</sup>. 244k insurance claims between 2017–2021, worth ~ €9.2 billion in value<sup>2</sup>

### Operational & risk considerations

#### P&L / balance-sheet exposure

Higher caps increase severity per incident, while multi-container events create aggregation exposure (managed per container maximum compensation).

#### Claims leakage & execution risk

Premium promise implies operational Service Level Agreement, i.e. risk of cost overruns and reputational impact if claims handling is slow or inconsistent

#### Legal interaction with contract of carriage

It is important to avoid an unintended expansion of basic liability, as this is not insurance, the compensation is valid up to the maximum limit. Potential applicability of EU Insurance Distribution Directive (IDD) in certain jurisdictions requires careful structuring and strict distribution controls.

1) World Shipping Council, Containers Lost at Sea 2025 Report 2) Allianz, Global claims trends to watch in marine insurance, 2022

# 4 | Navigating to sustainability

## Decarbonization of ocean freight



### Premium service at a glance

Sustainable transport is a premium service that enables customers to achieve measurable, verifiable reductions of Greenhouse Gas (GHG) emissions associated with ocean freight. The service typically relies on low GHG fuels (e.g., certified 2nd-generation biofuels) and an allocation mechanism that transfers the resulting CO<sub>2</sub>e savings to specific customer shipments at scale. In the European context, it directly addresses accelerating regulatory and economic pressure from FuelEU Maritime and the EU ETS, which increasingly penalize conventional fuels.

### Service mechanics

#### Emissions boundary and metrics

Service performance is commonly quantified on a well-to-wake (WTW) basis, aligning with FuelEU Maritime's WTW GHG-intensity logic.

#### Insetting via book-and-claim or mass-balance

Sustainable transport is typically designed as carbon insetting: Low-GHG fuels are physically consumed within the operator's network, and the resulting emissions reductions are tracked and allocated to customer shipments through a book-and-claim / mass-balance approach.

#### Product modularity

Customers can usually select from defined reduction tiers up to 100% WTW reduction to match budgets and decarbonization targets, with options to purchase per shipment, via contracts, or via framework agreements.

#### Proof, documentation, & assurance

A core premium element is audit-ready documentation (e.g., certificates) and the governance that prevents double counting. Services are commonly supported by fuel sustainability certification (e.g., ISCC) and third-party assurance frameworks (e.g., ISAE-based engagements), strengthening credibility for reporting and sustainability claims.



> 50% of new-order ship tonnage is now represented by alternative fuel vessels

### Customer value & willingness to pay

#### Regulation-driven economics

In Europe, the value proposition is increasingly shaped by regulatory cost escalation. FuelEU and the EU ETS impose growing financial penalties on conventional fuels over time.

#### Scope 3 reporting & customer credibility

Customers benefit from verifiable CO<sub>2</sub>e reductions tied to their shipments, supported by formal statements and independent verification, improving auditability for carbon inventories.

#### Commercial differentiation

For customers under pressure from end-consumers and downstream value chain partners, sustainable transport enables immediate decarbonization action without waiting for a full fleet transition.

### How to monetize the service

#### Pricing principle

Customers are charged the incremental cost of low-GHG fuel versus conventional fuel, with CO<sub>2</sub>e savings transparently passed on through documented allocation and retirement.

#### Packaging & commercial options

Tiered reduction levels and contractual frameworks enable repeat purchases and budget-driven decisions.

#### Indexation and risk-adjusted offerings

Pricing can be fixed or floating to reflect fuel market volatility and enable risk-sharing; lane- or trade-specific models simplify purchasing.

#### Indicative price range based on market information

Dry container USD 5-300/TEU and reefer USD 10-550/TEU depending on lane and CO<sub>2</sub>e reduction level.

### Operational & risk considerations

Carrier must manage three practical risk areas:

1. **Fuel access and availability**, as demand for low-carbon fuels rises amid constrained (including additionality concerns around biofuels and NGO scrutiny of certifications).
2. **Price and carbon-cost volatility**, driven by fuel markets and FuelEU Maritime/EU ETS misalignment, requiring disciplined contracting and hedging/indexation.
3. **Assurance-grade traceability**, as book-and-claim models depend on robust allocation logic and audit-ready documentation.

# 5 | Guided by a dedicated crew

24/7 end-to-end customer service



## Premium service at a glance

24/7 end-to-end customer service refers to a premium, highly personalized support offering dedicated to strategic client, or for high-value cargo. It provides a single point of contact, priority access to capacity, proactive issue resolution, and tailored support on a 24/7 basis with a Service Level Agreement (SLA) on the time to answer.

The value lies in reducing operational uncertainty, solving exceptions proactively, and easing decision-making for customers. Currently, this is primarily handled by service centers, but we expect that in the future it will be managed by an Agentic AI system that is integrated with the provider's relevant IT systems.

## Service mechanics

### Dedicated service-oriented and trained staff

Named experts or team to ensure continuity in cargo monitoring, knowledge of the customer's stakes and proactive and quick resolution cycles through chosen communication channels.

### Enhanced transparency & proactivity

Near-real-time transparency through early warnings of disruptions and proactive suggestions for alternative solutions such as rerouting or transshipment - all at the frequency requested and by thresholds defined by the customer.

### Customized analytics and simple accessibility

Customized reporting, performance KPIs, and formats based on the clients' specific needs on demand. To provide these services, a very tight integration of commercial and operation systems is required to deliver consistently.



Customer service quality received just an average score of 2.98 out of 5, based on more than 400 shipper responses<sup>1</sup>

## Customer value & willingness to pay

### Transport risk mitigation

Reduce delay and supply chain disruption, limit costly operational impacts, and avoid using costly emergency alternatives (e.g. Air freight).

### Stabilized flow of materials

Better schedule reliability through faster issue resolution enables the customer to better plan its production cycles and optimize its inventory.

### Increased transparency

Streamlined communication, regular monitoring, better decision-making data through one interface reduces coordination effort and pressure.

### Typical willingness to pay drivers

Willingness to pay is highest for customers with time-sensitive cargo, high exception exposure, or internal coordination cost, such as production-critical cargo, or accounts facing penalties from delivery failure.

## How to monetize the service

### Contract-based customer service

This type of service is typically monetized through commercial global contracts or per container charging, agreed via sales teams and embedded into broader customer arrangements.

### Subscription-based service model

A dedicated-service fee could cover a defined shipment volume, service scope, or response model for a specific customer and provide access to tailored support for the customer's container flows.

## Operational & risk considerations

### Governance and prioritization discipline

The carrier must be able to prioritize between premium and standard cargo across involved 3rd parties such as terminal operators or feeder networks without creating unmanaged escalation loops or service promise disruptions that erode margin.

### Execution capability across disrupted networks

The service only creates value if the carrier can translate premium support into real operational responsiveness. That requires deep knowledge of trade lanes, asset control, routing options, and operational bottlenecks across the logistics chain.

<sup>1</sup>) Drewry, Satisfaction survey in container transport: availability of cargo space now number one customer requirement, 2020

# 6 | Building resilience for shipments



## Loyalty programs for non-NAC business

### Premium service at a glance

Despite investments in digital services, most relationships between carriers and customers remain transactional. Loyalty programs are powerful accelerators of digital sales for an industry historically driven by relationship-based, offline channels. They complement rather than replace traditional customer segmentation (e.g. strategic accounts), which continues to guide commercial steering alongside behavior-based rewards. They offer a way to:

- Secure and grow share of wallet, by encouraging customers to consolidate volumes
- Stabilize relationships, by increasing perceived switching costs
- Activate new revenue pools, through cross-selling of higher-margin or sustainable transport
- Create a data asset, enabling more precise segmentation and decision-making
- Despite the many possibilities, ocean carriers have not yet widely adopted this service.

### Service mechanics

#### Digital enrollment

The program is accessed via carrier's digital customer platform and linked to online booking channels.

#### Booking-based earning logic

Customers earn rewards on qualified, paid bookings, linking loyalty directly to real shipment activity.

#### Redemption mechanism

Rewards can be redeemed on future bookings, creating a clear incentive for repeat business within the same carrier ecosystem.

#### Tiered status model

Higher booking frequency and volume unlock higher status levels and more exclusive benefits.

#### Operational & portfolio-linked benefits

Benefits can include priority treatment and access to additional related premium services.



~80% of customers report greater operational value from the loyalty program<sup>1</sup>

### Customer value & willingness to pay

#### Financial benefits

Direct costs savings through discounts incite the customer to choose to invest in its relationship with a maritime carrier.

#### Operational reliability

Reaching certain tiers in the loyalty program grants access to free benefits that enhance the customer experience. The program becomes materially more attractive when rewards are tied to real operational benefits instead of points alone.

#### Recognition

The status granted to the shipper through the tiering structure reinforces its relationship with the carrier.

### How to monetize the service

#### Monetization through behavior change

Monetization is mostly indirect as the goal is to encourage consumers to invest in a relationship with a provider, consolidating the transport of their cargo. A loyalty program should improve economics by increasing retention, booking frequency, share of wallet, and digital-channel adoption.

#### Shift from discounts to structured value

A well-designed program should not become a pure rebate engine. Instead, it should combine a controlled reward layer with operational privileges and tier-based differentiation, increasing perceived value while protecting yield.

### Operational & risk considerations

#### Internal value attribution logic

Defining traceable exchange rates between tier-related global rewards and local file profitability ambitions to secure program buy-in of P&L owners.

#### Risk of margin leakage

The program may become a costly rewards scheme without changing customer behavior, leading to yield dilution instead of real loyalty.

#### Risk of weak operational delivery

If a program promises preferential treatment but internal processes do not allow for differentiated handling, customer trust will quickly erode.

#### Legal limitations

Some countries may be excluded for legal reasons. Rewards cannot be transferred between legal entities, even within the same company.

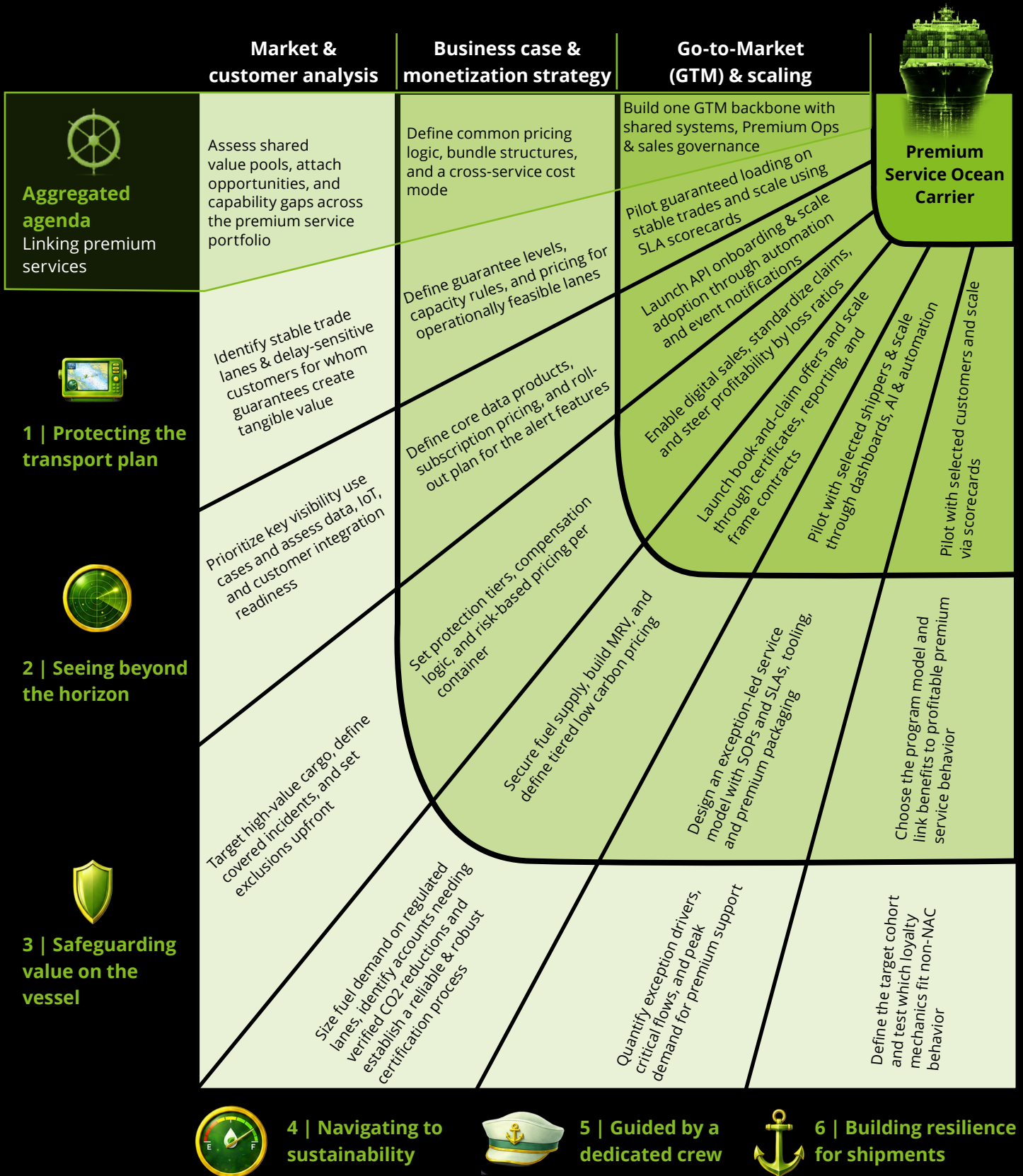
1) Deloitte, Reshaping loyalty programs in an era of value seeking, 2026

# Considering individual challenges for each product of the premium portfolio

## Empiric challenges and key success factors

	Challenges	Key success factors
 <p><b>1   Protecting the transport plan</b></p>	<p>Guarantees are sold in a network with <b>structurally volatile performance</b>, in which first-ETA deviations, severe delays, and lane-specific congestion can quickly <b>undermine premium promises</b>.</p>	<p>Development of a <b>tailored network design</b> in collaboration with reliable partners. Clear SLA tolerances, volume caps on risky trades, and predefined backup-routing playbooks, so that <b>guarantees are only offered</b> when they are <b>operationally defensible</b>.</p>
 <p><b>2   Seeing beyond the horizon</b></p>	<p>IoT scaling is held back by security concerns, cost, <b>lacking infrastructure</b> and limited smart container penetration. The potential behind the data and the subsequent possible <b>monetization strategies</b> are not always immediately apparent.</p>	<p><b>Device coverage</b> is broad enough to generate <b>reliable data</b>, data is embedded into customer and carrier workflows through <b>APIs</b> and predictive logic, and the operating set-up is robust enough to ensure interoperability, KPI-driven performance, and trust.</p>
 <p><b>3   Safeguarding value on the vessel</b></p>	<p>Balancing customer-friendly compensation and handling fast claims with <b>tight exposure control</b>, as broader protection can quickly create loss leakage, fraud risk, and <b>operational complexity</b>.</p>	<p><b>Strict eligibility and exclusions</b>, simple tiered protection modules, digital attach in booking, and a <b>standardized claims workflow</b> that keeps the product easy to buy but controlled in execution.</p>
 <p><b>4   Navigating to sustainability</b></p>	<p>Uncertainty regarding the <b>supply of low-GHG fuels and costs</b>, potential low willingness to pay of customers, increased technical and <b>operational complexity</b> due to fuel mix, credibility risk due to lack of traceability and security.</p>	<p><b>Secured fuel supply</b>, a robust Measurement, Reporting &amp; Verification (MRV) and certification set-up, clear product tiers, and transparent pricing linked to <b>compliant emissions reductions</b>, so the service becomes scalable and trusted.</p>
 <p><b>5   Guided by a dedicated crew</b></p>	<p>Service becomes expensive and inconsistent if it is not <b>tightly linked to exception handling</b>, clear ownership, and operational escalation capabilities. In volatile networks, service teams can otherwise become reactive bottlenecks instead of value creators.</p>	<p>Exception-led service model, defined SLAs, dedicated tooling and dashboards, and playbooks that <b>connect customer service directly to operational intervention</b>, making the service faster, more structured, and genuinely differentiated.</p>
 <p><b>6   Building resilience for shipments</b></p>	<p>Avoid developing a <b>discount-only model</b> that <b>erodes margins</b> without changing customer behavior, especially in non-NAC business, in which loyalty is often weak and booking patterns are fragmented.</p>	<p>An advanced CRM system, common KPIs, unified pricing rules, and a bundle strategy, so that the <b>services reinforce each other commercially and operationally</b> instead of competing for attention internally.</p>

# Aligning distinct service mechanisms into an aggregated product roadmap



# From client administration to strategic sales of complex product portfolios

## Common pitfalls and mitigation measures

### Create value pools

Premium selling fails when carriers can't see where value is created and where it leaks. Trace margins across rates and surcharges to assess potential. Use lane- and customer-level performance and disruption risk to quantify the cost of volatility and link it to, upsell triggers on file / shipment / customer / trade lane level.

### Coherent product architecture

A scattered set of Value-Added Services (VAS) creates confusion, low attach rates, and inconsistent delivery. Build a small number of modular "product families" with clear tiers, prerequisites, governance, and service level definitions, so customers can buy outcomes (e.g. reliability) rather than isolated features.

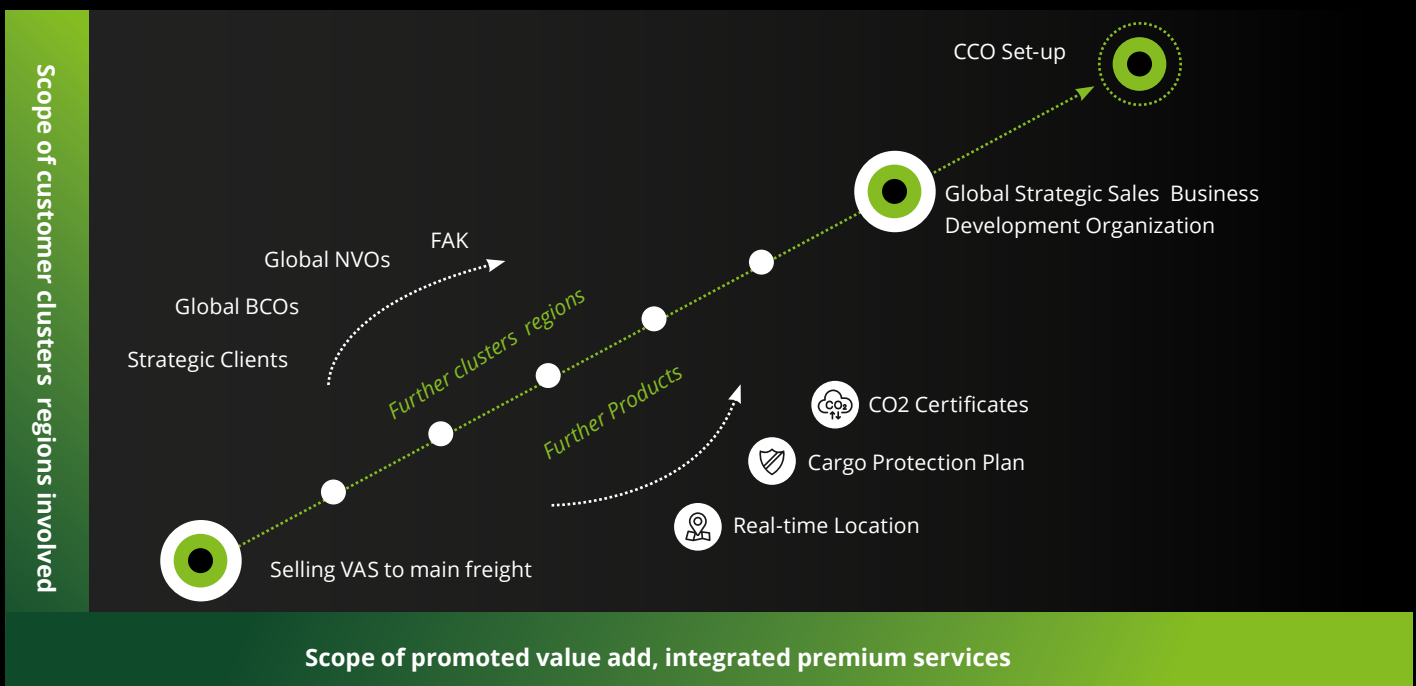
### Building advanced capabilities

A portfolio of premium services break when execution relies on manual workarounds and siloed data. Carriers need integrated data feeds, KPI dashboards (e.g., on severe delays), and predictive analytics to triage exceptions, plus secure scalable architectures and staff training to operate the services consistently.

### Form a strategic sales organization

In volatile markets, large BCOs manage carriers as a portfolio and reallocate volumes predefined triggers. Premium monetization therefore requires a sales model that co-designs trade lane strategies, commits to measurable SLAs, and ties premium products to the customer's business, not just to short-term campaign execution.

## Transformation from selling VAS to main freight to a global strategic sales business development organization



# Bringing together global transport market expertise in our Center of Excellence

## Global COE for transportation logistics

Deloitte's Global Center of Excellence transportation logistics practice brings together over 1,000 dedicated specialists operating across every major transport and logistics hub worldwide. Our track record includes complex, end-to-end strategic transformations for some of the world's largest carriers, port operators, and freight forwarders, spanning network redesign, digital transformation, cost optimization, and decarbonization.

In an industry defined by tight margins, geopolitical complexity, and rapid technological change, Deloitte brings the global reach and sector depth to move from insight to impact reliably.

Driving end-to-end efficiency through modern IT architectures, ERP and mainframe modernization, AI use cases, and process standardization, automation, and process mining across the value chain

**Digital and operational transformation**

Supporting the full MA lifecycle as well as establishing future-ready finance, tax, and control models, including due diligence, post-merger integration, global tax compliance, and accounting optimization

**Financial governance and transaction support**

**Customer, commercial, and supply chain excellence**

Enhancing customer experience and commercial performance through CRM and digital engagement, while optimizing supply chain networks, warehouses, ports, and operations using data and automation

**Sustainability, compliance, and organization**

Ensuring regulatory, ESG, and sustainability compliance alongside organizational and workforce transformation, covering ESG reporting, governance, HR systems, and change enablement

## Your contacts



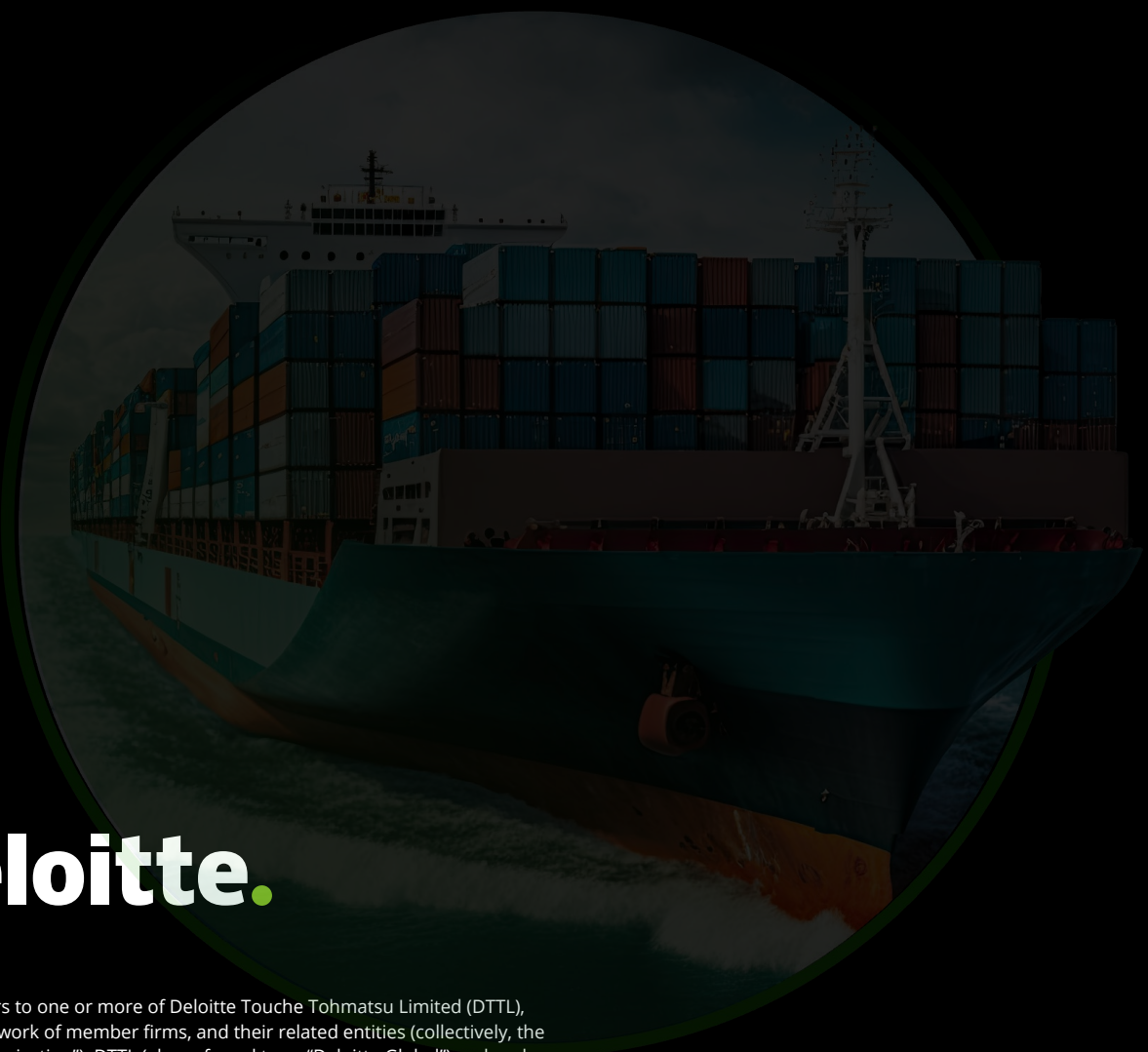
**Tobias Koppe**  
**Partner**  
Frankfurt, DE  
tkoppe@deloitte.de



**Caroline Lébrard**  
**Partner**  
Marseille, FR  
clebrard@deloitte.fr



**Signe Maly Pedersen**  
**Partner**  
Copenhagen, DK  
sipedersen@deloitte.dk



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