

ECTA-Cefic-ECLIC Survey Analysis on Digitalization

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Background information and objectives

Objective

- Gaining insight into **priorities, barriers** and adoption of **digital collaboration** in chemical logistics.

Scope

- Answers from **12** major and minor LSP's and **9** shippers active in chemical logistics

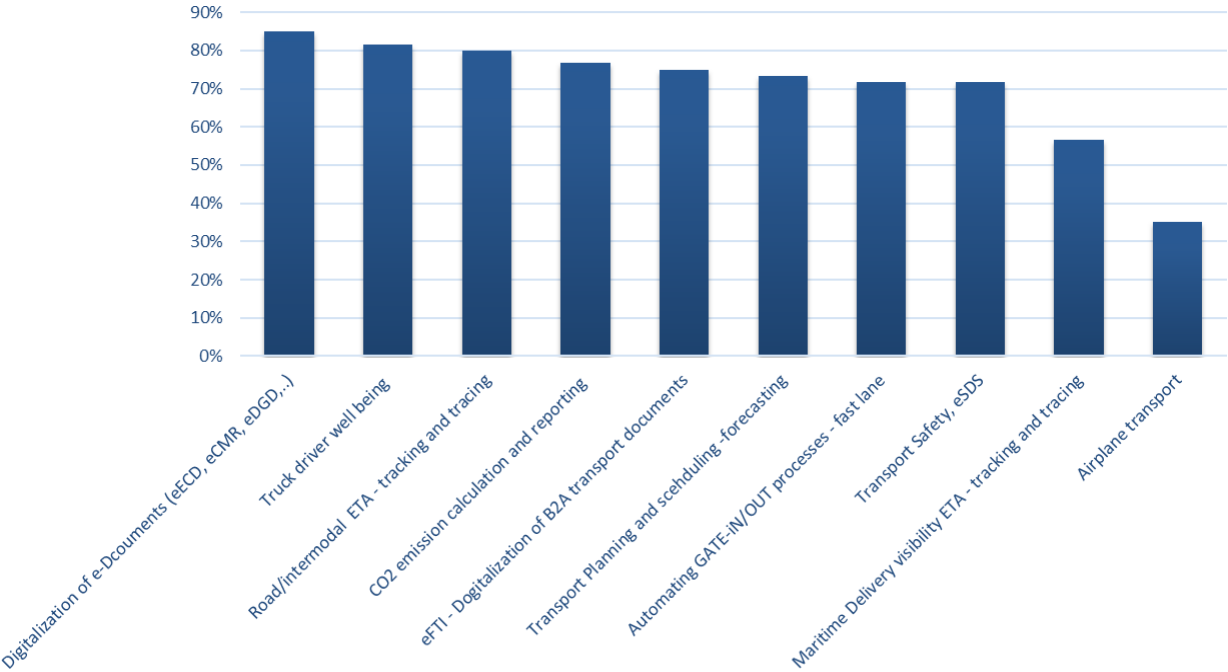
Definition of digital collaboration and controlled data sharing

- **Real-time exchange of standardised data sets** via IT channels to allow process automation and paperless working.
- **Controlled data sharing** means that clear data governance rules are agreed amongst the collaboration chain partners and IT providers who share their business sensitive data amongst themselves to serve a certain purpose.

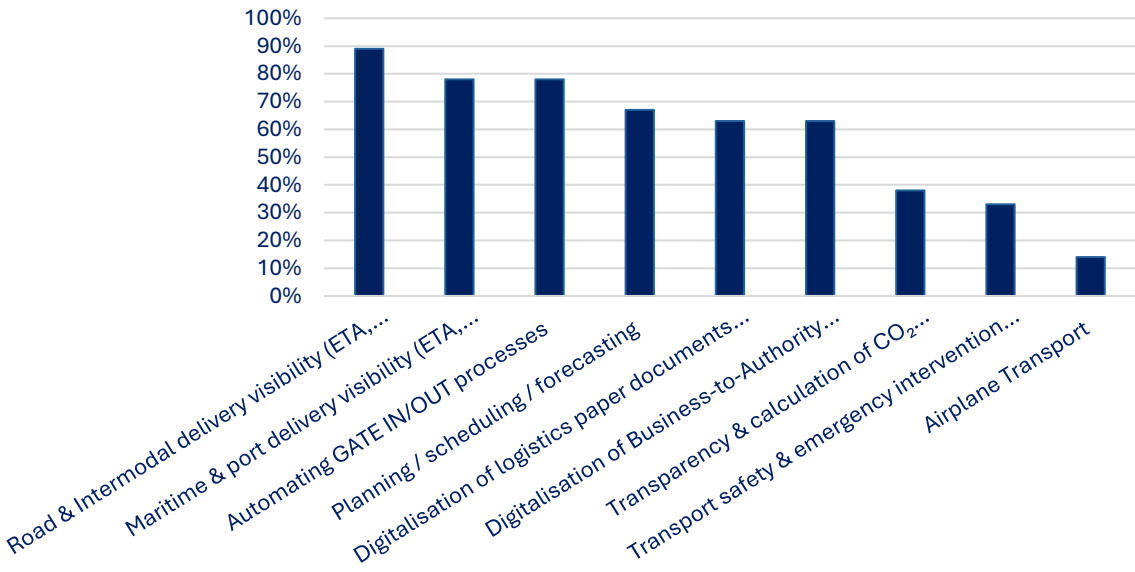
Analysis

Digital Collaboration priorities 2026 - 2028

LSP digital collaboration project priorities 2026-2028



Shippers digital collaboration project priorities 2026 - 2028

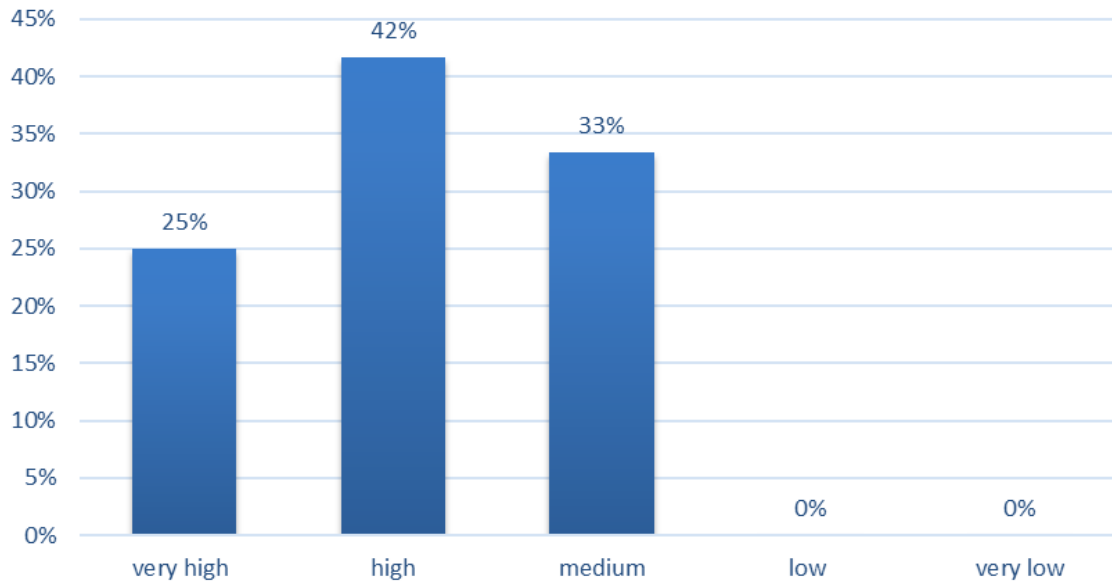


Analysis

Importance of Digital Collaboration for LSPs and Shippers

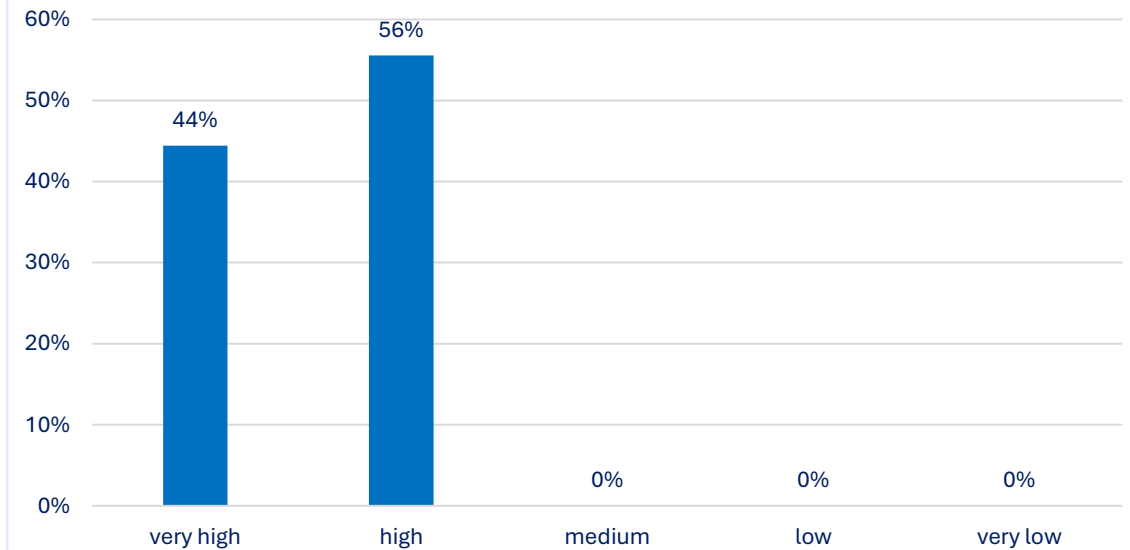
LSPs

**Importance of digital standards and interfaces
in digital collaboration**



Shippers

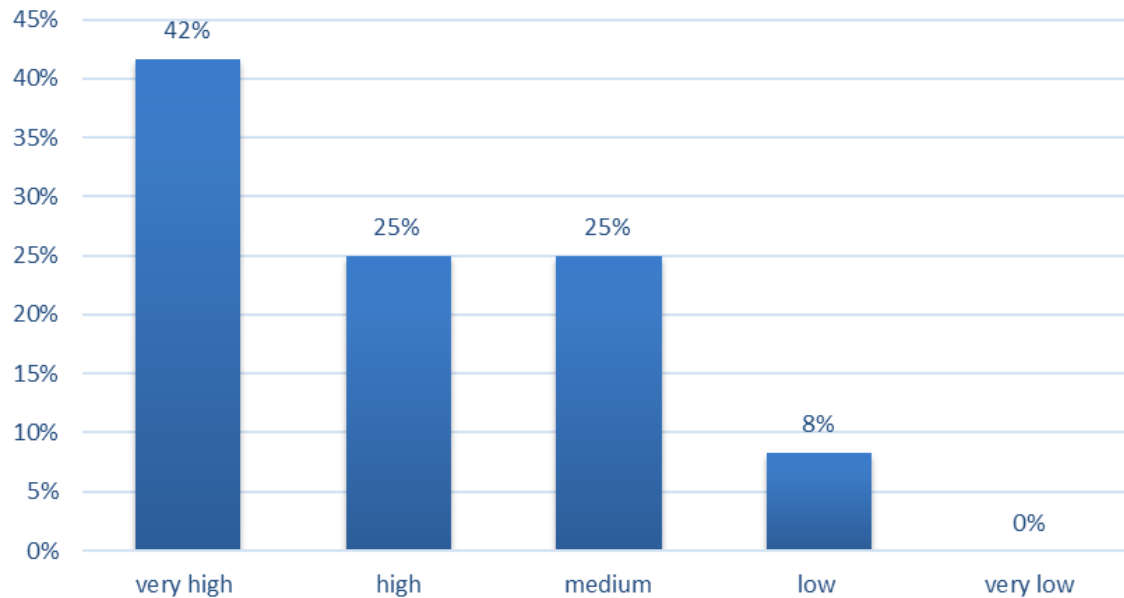
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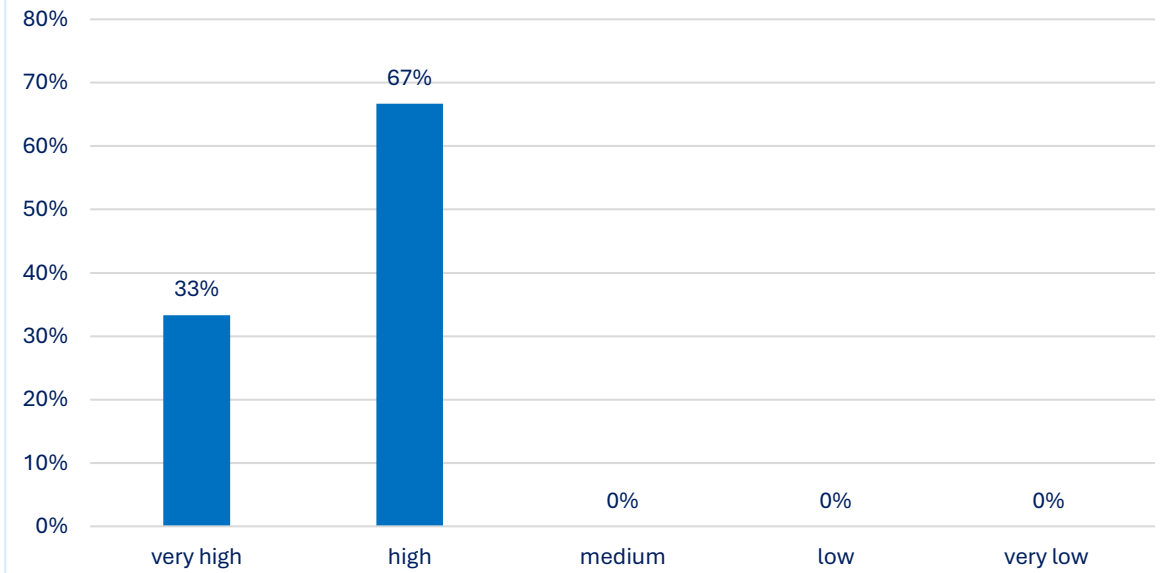
Analysis

Importance of Digital Collaboration for LSPs and Shippers

Overall importance of digital collaboration and data sharing within your company



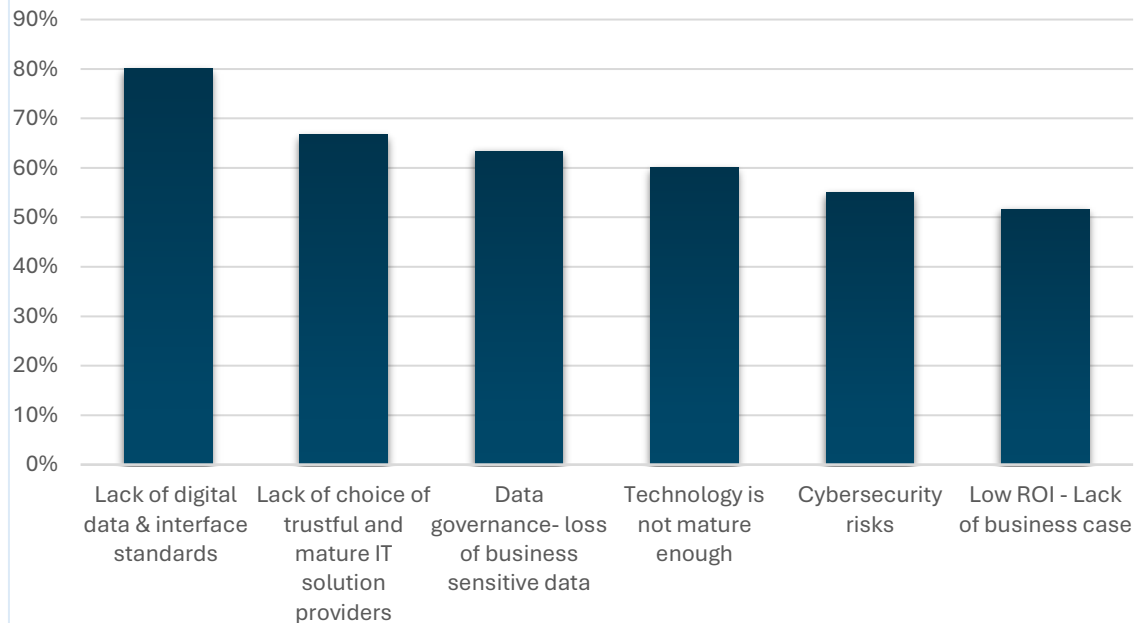
Overall Importance of digital collaboration and data sharing within your company



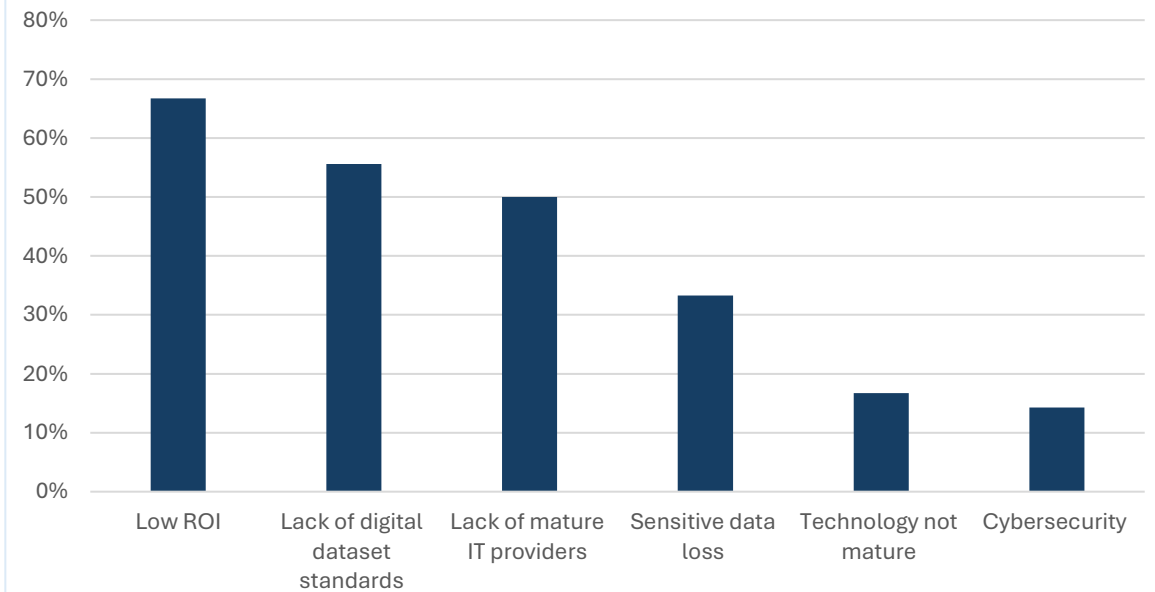
Analysis

Major digital collaboration and data sharing barriers

LSP major digital collaboration and data sharing barriers



Shippers' major digital collaboration and data sharing barriers

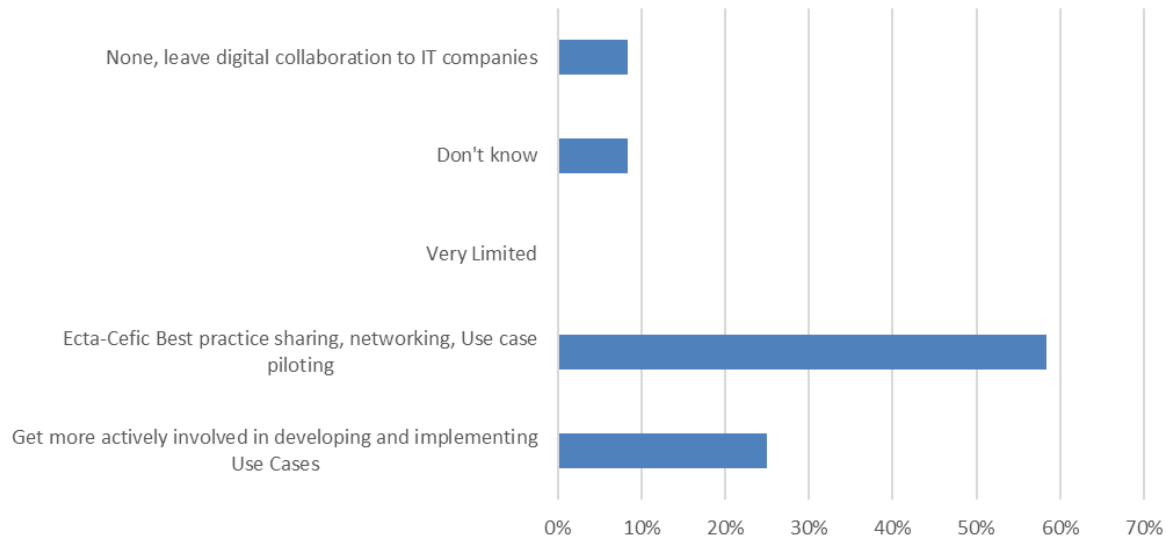


Analysis

Role of industry associations

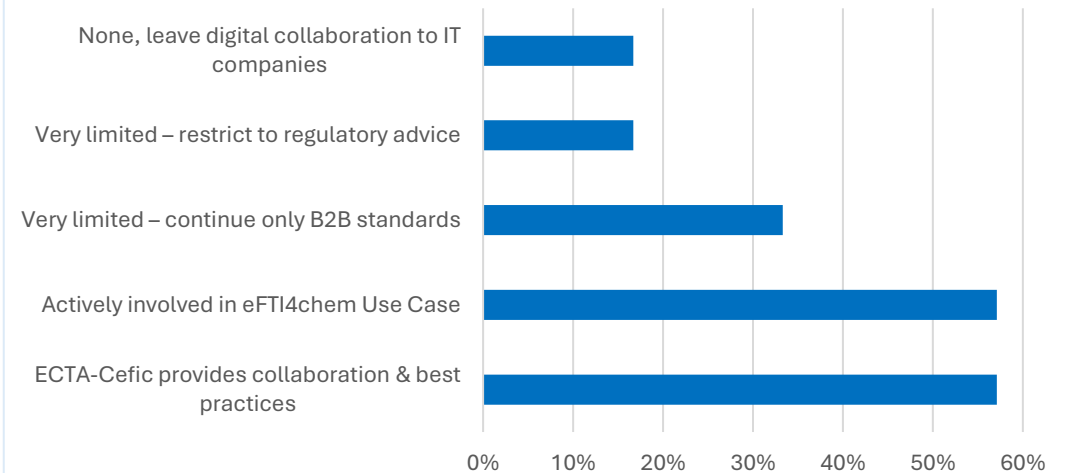
LSPs

Which role, if any, should industry associations play in digital collaboration?!



Shippers

Which role, if any, should industry associations play in digital collaboration?



Interesting common Insights for LSPs and Shippers

- Digital collaboration is widely recognized as a strategic priority to increase industry competitiveness and save costs however finding common project journeys are not simple.
- Lack of standardisation, trustful and mature IT solutions, cybersecurity risks and low ROI are hindering the adoption of digital collaboration solutions.
- The lack of data standards lead to more fragmented, complex IT landscapes and system interfaces something IT providers are not inclined to solve as many stakeholders have rather an individual and siloed project approach.



Interesting insights for LSPs

- The majority of the LSP's see direct benefits of data standards and interfaces however a few LSP's question the value of these standards as they are forced to deviate from these industry standards by their customers/shippers.
- LSPs who are "API-ready" are weighing the digital collaboration barriers lower.
- Addressing standardization and security challenges significantly increases willingness to adopt to real-time API connections and cloud technologies.



Interesting Insights for Producers

- Chemical producers find accurate ETA delivery visibility as a non-negotiable enabler for safe, efficient and compliant transport and logistics.
- Within shippers, there is a strong digital focus on automation, planning, scheduling, and forecasting (=financial ROI & working capital cost drivers) and less on e-documents.
- Safety and regulatory data digitalization are viewed as essential, however not consistent across all chemical shippers/producers.



Recommendations towards implementations

- Industry association workgroups need to continue their collective efforts to encourage all stakeholders (including IT providers) to use and implement industry data standards.
- Transport visibility along the multimodal supply chains can only be achieved through standardized ETA data sharing protocols which are operating independent of any platform or tool.
- Recommendation is to work out a generic, standardized best practice industry protocol so that drivers across Europe no longer need to carry individual access cards, QR codes, paper documents and which are eFTI and GDPR compliant...

Recommendations towards implementations

- Further develop collectively an industry standard best practice protocol so that transport companies have the ability to pre-register in advance and provide all required information upfront, such as equipment info, e-documents, ADR licences, driver identification....
- The industry needs to move the discussion from global platforms to interoperable, open source API interconnections build on standardized and structured datasets
- Focus on Business-to-Business (B2B) connectivity to start with and consider the Business-to-Authorities (B2A) regulations and connectivity as an extra trigger for adoption.
- In the coming years, the eFTI regulation might be a fundamental legal enabler to drive digital collaboration in logistics forward.

