Kale Logistics

Technology that Transforms

Why Logistics & Customs Control Towers are Becoming Essential for Modern EXIM Operations & Meeting Customs Compliance?

A futuristic perspective of EXIM trade orchestration

Whitepaper | January 2026

Table of Contents

Executive Summary

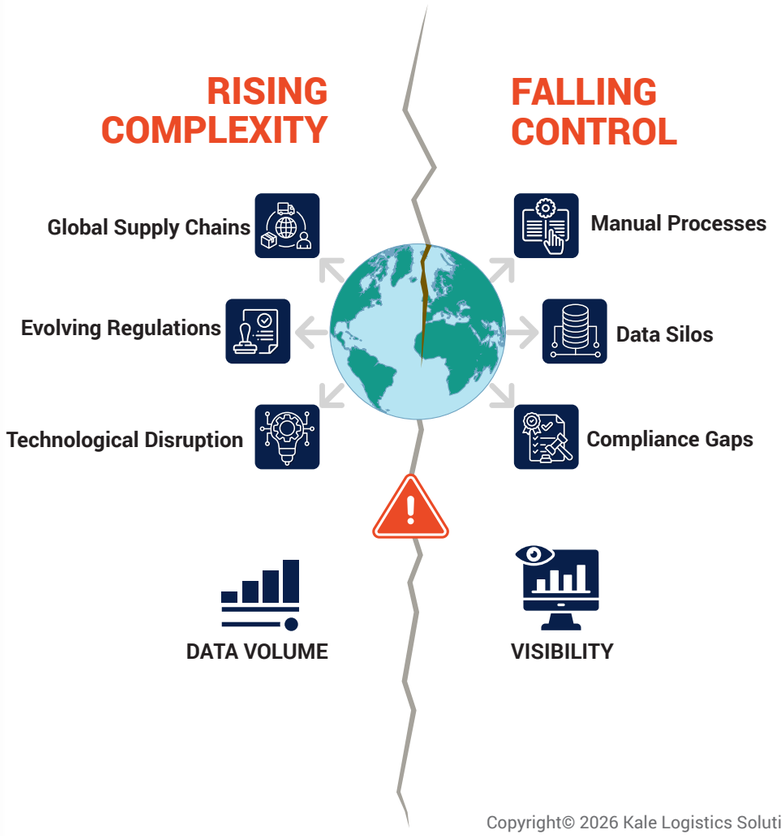
Global export–import (EXIM) supply chains are at an inflection point. Trade volumes are rising, regulatory scrutiny is intensifying, and disruption has become structural rather than episodic. Yet, most shippers and consignees continue to manage EXIM operations through fragmented systems, manual coordination, and reactive decision-making. This gap between trade complexity and operational control is now a strategic risk.

This whitepaper adopts an expert narrative to examine why traditional approaches to EXIM management are no longer sufficient and how Logistics & Customs Control Towers (LCCTs) are emerging as the most practical, scalable response. Drawing on research, confidential market studies, and global adoption trends, it demonstrates that Control Towers are moving rapidly from niche visibility tools to enterprise-wide orchestration platforms.

Adoption patterns across North America, Asia-Pacific, the Middle East, and emerging markets indicate growing maturity, particularly among enterprises handling high volumes, regulated cargo, or multi-country trade lanes.

Rather than positioning LCCT as standalone technology, this paper frames them as an operating model—one that aligns data, processes, and stakeholders to deliver predictability, compliance, and cost control across the EXIM lifecycle. The objective is to help shippers and consignees understand not just what Control Towers do, but why they are becoming essential for resilient global trade.

Why EXIM control is breaking?

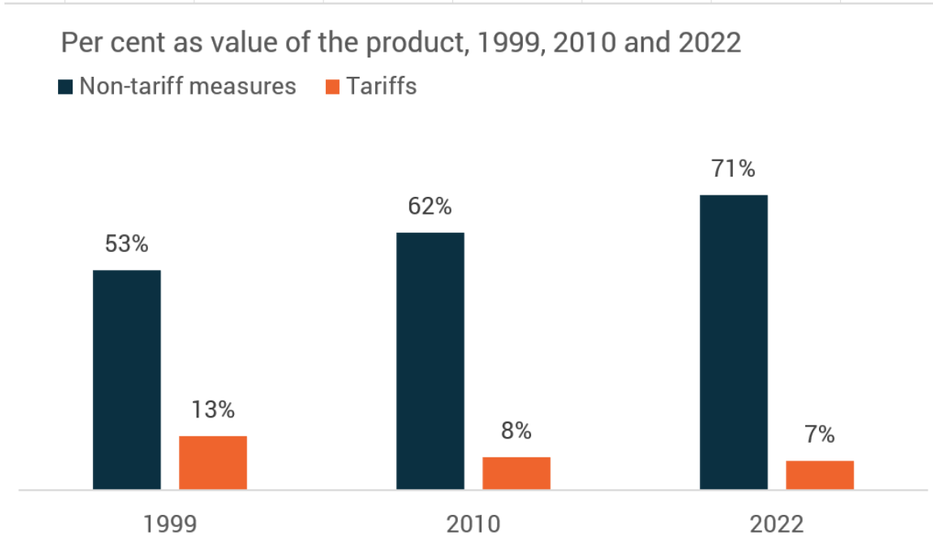


The Growing Complexity of EXIM Operations

EXIM logistics is no longer an execution problem—it is a coordination problem. International trade now spans multiple modes, regulatory regimes, and service providers, each operating on different systems and timelines. What was once manageable through bilateral coordination has evolved into a multi-party ecosystem that demands centralised oversight.

While global tariffs have fallen significantly since the establishment of the WTO in 1995, the frequency of Non-Tariff Measures (NTMs) has risen dramatically. One analysis comparing the decades before and after the 2007–09 Great Recession found that NTMs increased by over 200%.

Tariffs fall but non-tariff measure rise, creating new trade challenges



Feature	Old EXIM Model	New EXIM Model (Current Trend)
Primary Barrier	High Tariffs (Financial)	High NTMs (Regulatory/Technical)
Main Department	Logistics / Finance	Compliance / Legal / Quality
Market Access	Determined by Trade Agreements	Determined by Standards & Certifications
Cost Type	Variable (Tax per item)	Fixed (Testing & Certification fees)
Visibility	High (Tariff schedules are public)	Low (Regulations are fragmented)

The rise in NTMs amid low tariffs indicates a "policy substitution" where governments use regulations as alternative methods to achieve trade objectives, whether legitimate (like health and environmental protection) or protectionist. The increasing complexity and number of these measures create significant compliance costs for businesses, which can be particularly challenging for developing countries and small and medium enterprises, potentially hindering their market access and global competitiveness.

For manufacturers, this means the primary challenge of EXIM (Export-Import) operations has shifted from managing costs to managing complexity.

80%
of organisations' supply chains were disrupted in the prior year, with most experiencing between one and ten incidents.

Source: BCI's Supply Chain Resilience Report 2024

90%
of supply chain leaders faced resilience challenges, indicating that disruptions are a "new norm" rather than isolated events. Pre-pandemic McKinsey Global Institute research found that, on average, companies experienced a disruption of one to two months in duration every 3.7 years, but recent data suggests this frequency has increased significantly.

Source: A 2024 McKinsey survey

80%
of companies across various industries were not built for long-term resilience and were largely reactive to disruptions.

Source: A 2022 survey by BCG and APQC

To survive this "breaking" EXIM environment, manufacturers must move from a reactive to a proactive model:

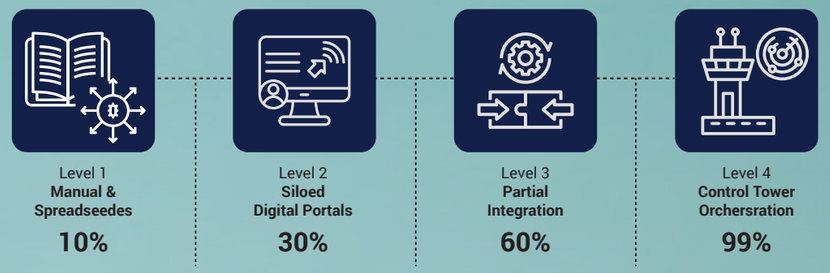
- **Digitalisation:** Using AI and automated trade management (GTM) software is no longer optional. Manually tracking 2.5 million global NTMs is impossible.
- **EarlyAAe Customs Compliance:** Manufacturers must involve EXIM and Customs Compliance teams at the R&D stage. Designing a product that meets the strictest global NTMs (e.g., EU standards) from the start is often cheaper than "retrofitting" it for different markets later.
- **Leveraging Data Resources:** Smart manufacturers are now using the OECD/WTO/UNCTAD tools to get early warnings of regulatory changes before they become law.

Current Key Challenges in EXIM Operations

Fragmented Visibility Across the Trade Lifecycle

One of the most persistent challenges in EXIM logistics is the lack of a single, trusted view of shipment status. Data resides across multiple platforms—enterprise systems, forwarder portals, carrier systems, customs interfaces, and spreadsheets. As a result, decision makers often rely on delayed or incomplete information, increasing the risk of missed milestones, demurrage, and service failures.

Visibility maturity curve



% of Visibility across Global Supply Chains

50% shippers still rely on email and spreadsheets for exception handling

63% of supply chain leaders cite limited real-time insights as a primary issue with spreadsheet-based management.

80% of actual on-the-ground processes are not reflected in current digital models, forcing teams to fall back on manual tools like email to handle “exceptions” (disruptions or changes that are not covered by the automated system).

In surveys of supply chain leaders conducted by DHL and its partners (Everstream/McKinsey), “Lack of End-to-End Visibility” is consistently ranked as the top internal challenge preventing effective EXIM (Export-Import) risk management.

Research indicates that while certain logistics functions have been automated, critical activities such as compliance checks, exception handling, and document reconciliation still involve significant manual effort. Manual processes increase cycle times, introduce human error, and make scaling operations difficult during demand surges.

This persistence of manual intervention reflects the uneven nature of digital transformation in EXIM logistics. Automation has largely focused on transactional execution—such as booking, tracking, and status reporting—while higher-risk and judgment-intensive activities continue to rely on human oversight. Compliance verification, document matching, and exception resolution often require teams to extract information from multiple systems, reconcile inconsistencies manually, and coordinate through email and spreadsheets. These tasks are not only time-consuming but also highly dependent on individual experience, making outcomes variable and difficult to standardise.

The operational impact of manual processes becomes most visible during periods of volume volatility. Demand surges, seasonal peaks, or disruption events place disproportionate strain on teams that rely on manual workflows. As shipment volumes increase, the number of exceptions, documentation discrepancies, and compliance checks rises non-linearly, quickly overwhelming available capacity.

Human error further compounds this challenge. Studies consistently show that manual data handling increases the likelihood of inaccuracies in classification, valuation, and documentation. Even minor errors—such as mismatched reference numbers or outdated certificates—can trigger shipment holds, rework, and regulatory scrutiny. These errors rarely remain isolated; they propagate across downstream processes, affecting customs clearance, billing, and delivery timelines.

Heavy reliance on manual effort also limits visibility and control. Exception handling conducted through informal channels is difficult to track, measure, or analyse systematically. As a result, organisations lack insight into recurring failure patterns, true effort costs, and process bottlenecks. This obscures opportunities for improvement and reinforces a reactive operating model in which issues are resolved individually rather than prevented structurally.

Over time, this manual dependency creates a structural constraint on growth. Organisations may succeed at moderate volumes, but as trade complexity increases—through additional markets, partners, or regulatory regimes—the cumulative burden of manual coordination becomes unsustainable. This dynamic explains why many shippers and consignees experience diminishing returns from incremental automation and why scalable EXIM operations increasingly require a centralised orchestration layer rather than further point-solution deployment.

Region	Regulatory Volatility Level	Primary Drivers	Logistics Cost Impact
North America (US, Canada)	Moderate–High	Trade policy swings, environmental rules, port & trucking regulations	**Medium–High** — Customs rule changes, labor rules, and emissions standards raise trucking, port handling, and compliance costs
Europe (EU & UK)	Moderate	ESG, digital trade, cross-border harmonisation	**Medium** — Sustainability reporting, CBAM, and customs harmonisation increase documentation and border compliance costs
China	High	Industrial policy, data & security rules, trade controls	**High** — Sudden export controls, port compliance, and inspection intensity drive delays and inventory carrying costs
Asia-Pacific (ASEAN, India, etc.)	Moderate–High	Economic reform, digitisation, FDI policy	**High** — Frequent changes in tariffs, customs rules, and port processes raise clearance, demurrage, and brokerage fees
India	Moderate–High	GST, e-invoicing, customs digitisation, trade compliance	**High** — Rule changes cause documentation rework, cargo holds, and truck waiting costs at ports & airports
Latin America	High	Political change, tax reform, currency & trade controls	**Very High** — Customs delays, inconsistent enforcement, and port inefficiencies drive storage, demurrage, and detention costs
Middle East	Low–Moderate	Economic diversification, logistics hub development	**Low–Medium** — Generally stable, but new digital and trade regulations require system upgrades
Africa	High (varies by country)	Customs reform, political risk, weak enforcement	**Very High** — Border delays, informal payments, and regulatory ambiguity increase transit time and total landed cost

Regulatory and Compliance Complexity

Customs regulations, trade agreements, sanctions, and product specific controls vary widely across markets and change frequently. Shippers and consignees face penalties, shipment holds, and reputational damage when compliance processes are not tightly controlled. Traditional systems often lack real time regulatory intelligence or cross process validation.This complexity has increased sharply over the past decade as governments expand the scope and enforcement of non-tariff measures. Regulatory requirements now extend well beyond tariff classification and duty calculation to include security filings, origin verification, partner screening, environmental disclosures, and product-level certifications. Each additional requirement introduces new data dependencies and validation points across the EXIM lifecycle.

Compliance failures rarely stem from a lack of intent or expertise. Instead, they arise from fragmented execution. Documentation is prepared across multiple systems, regulatory checks are performed in isolation, and validation often occurs only at handoff points—such as customs filing or cargo release—rather than being embedded earlier in the process. This sequencing increases the likelihood that discrepancies surface only after shipments are in transit or have arrived at congested gateways, amplifying both cost and disruption.

Research indicates that customs penalties, shipment holds, and post-clearance audits consistently rank among the top operational risks for exporters and importers operating across multiple jurisdictions. Sanctions and denied-party screening further elevate exposure, as regulatory regimes evolve rapidly in response to geopolitical developments. In such environments, static compliance rules and periodic manual reviews are no longer sufficient to manage risk effectively.

Lack of Alignment with Customs Requirement

Traditional enterprise and logistics systems are not designed to address this level of regulatory dynamism. Compliance logic is often hard-coded, updated infrequently, and applied at discrete transaction points rather than continuously across processes.

Regulatory complexity has become a structural feature of global trade rather than an exception. Managing it requires a shift from reactive compliance checks to continuous, intelligence-driven control. Organizations that fail to make this shift face growing exposure—not only to direct financial penalties, but also to service disruptions, strained customer relationships, and long-term reputational risk.

Lack of alignment with customs requirements remains a critical challenge in global trade operations. When documentation, data formats, or regulatory interpretations differ across borders, it leads to delays, increased inspections, and higher compliance costs for traders.

Inconsistent application of customs rules often results in shipment holds, penalties, and operational inefficiencies, disrupting supply chain timelines. This misalignment is further amplified by varying digital maturity levels among customs authorities, where manual processes coexist with automated systems.

Rising Cost Pressures and Margin Erosion

Logistics costs continue to rise due to fuel volatility, congestion at gateways, and inefficiencies in coordination. Many organisations lack transparency into the true cost to serve per shipment or per lane, making it difficult to optimise routing, mode selection, or service provider performance.

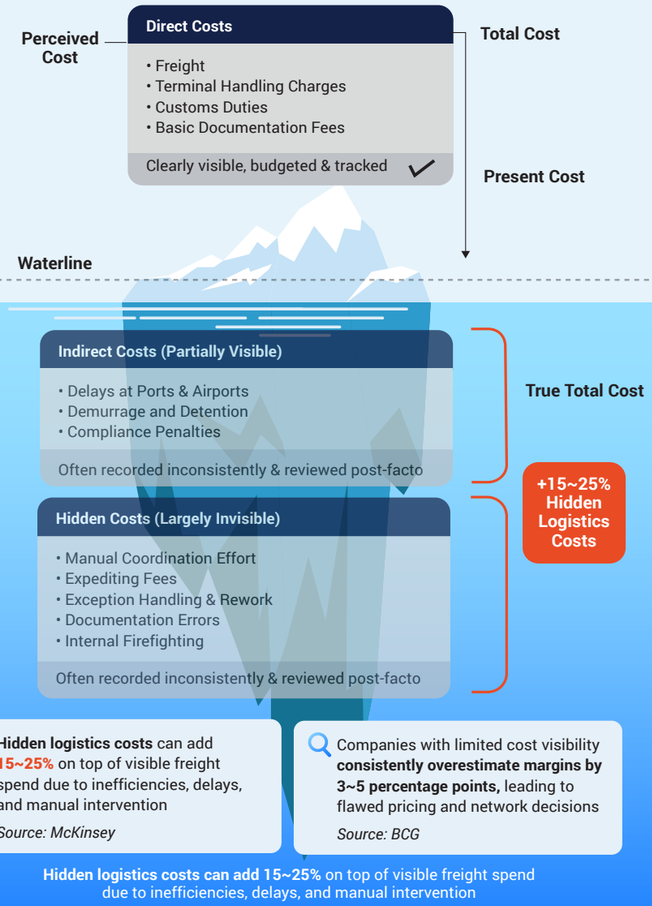
Most EXIM organisations manage logistics costs based on what is easiest to measure—freight rates and direct charges. However, the true cost to serve extends far beyond these visible elements. Delays, demurrage, compliance risks, and manual coordination quietly accumulate across shipments, routes, and partners, creating a substantial blind spot.

Limited Ability to Manage Disruptions

From port congestion and labour shortages to weather events and geopolitical shocks, disruptions have become the norm rather than the exception. Without predictive insights and scenario modelling, shippers and consignees remain reactive, often responding only after service failures occur.

Traditional EXIM operations remain largely reactive in nature. Disruptions are typically detected only after a milestone is missed, triggering escalation across emails, calls, and manual follow-ups. By the time corrective action is taken, delays, penalties, and service failures have often already materialised. This “detect–escalate–react” cycle not only increases operational cost but also limits an organisation’s ability to contain downstream impact across trade lanes and stakeholders.

Perceived vs. Actual cost to serve



Logistics & Customs Control Towers fundamentally alter this response model by enabling proactive and predictive intervention. By continuously analysing historical patterns alongside real-time shipment, compliance, and capacity data, Control Towers can anticipate risks before they escalate. Scenario simulation allows teams to evaluate alternative responses—such as rerouting, prioritisation, or documentation correction—before execution.

This “predict–simulate–intervene” approach shifts EXIM management from firefighting to controlled decision-making. Research reinforces this advantage: McKinsey Global Institute finds that organisations with predictive capabilities recover from disruptions 30–40% faster, while IBM reports that predictive supply chains reduce service failures by approximately 20%. These outcomes underscore why proactive control is becoming a defining capability in resilient global trade operations.

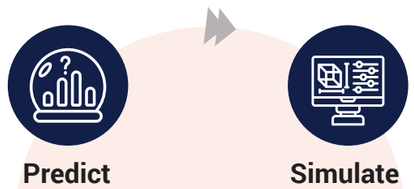
Despite the strong demand fundamentals driving air cargo growth, the industry continues to face several structural, operational, and regulatory challenges that threaten to limit its full potential. As global trade intensifies and supply chains become more complex, the pressure on air cargo infrastructure and systems is increasing. Yet many parts of the ecosystem are still operating with legacy processes and outdated frameworks, creating friction at precisely the moment when agility and speed are most essential.

Reactive vs. Proactive Response in EXIM Operations

Traditional Model

Issues addressed
after impact occurs

Lositiscs & Customs Control Tower Model



Risks managed before disruption

+30-40%
faster recovery from disruptions

20%
reductions in service failures

Predictive Lositiscs & Customs control replaces reactive firefighting in modern EXIM operations

Source: McKinsc

Logistics & Customs Control Towers can anticipate risks before they escalate.

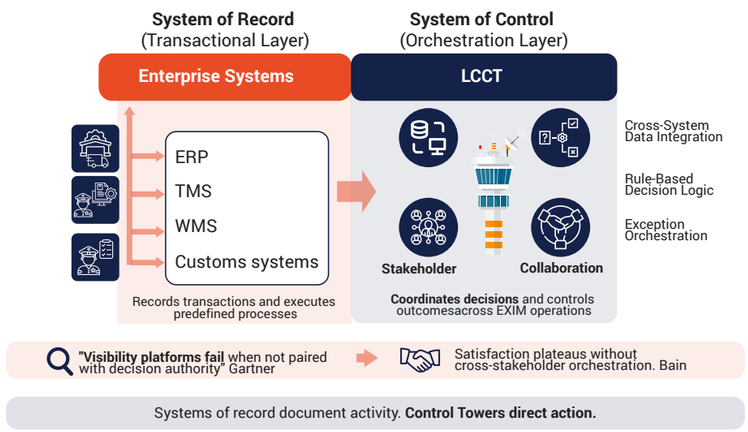
Why Existing Systems Fall Short?

Market assessments consistently show high penetration of enterprise systems across regions, particularly among large exporters and importers. However, charts outlining current-state adoption reveal a parallel reality: manual processes continue to coexist with digital systems across critical EXIM workflows. Compliance tracking, document reconciliation, and exception handling remain heavily dependent on human intervention.

This gap persists because most existing systems were designed as systems of record, not systems of control. Enterprise Resource Planning (ERP), Transportation Management Systems (TMS), and Warehouse Management Systems (WMS) excel at capturing transactions, executing predefined processes, and maintaining audit trails within functional boundaries. They record what has happened, but they are not architected to continuously coordinate what should happen next across multiple stakeholders.

Visibility platforms were introduced to address this gap, yet many fall short because visibility alone does not confer control. Dashboards may surface delays or compliance risks, but without embedded decision authority and orchestration capability, teams are left to respond through the same manual channels as before. Gartner captures this limitation succinctly: “Visibility platforms fail when not paired with decision authority.” In practice, organisations see problems sooner—but still resolve them too late.

System of record vs System of control



Logistics & Customs Control Towers address this architectural shortfall by functioning as a system of control. Rather than replacing ERP, TMS, or WMS, they sit above them—integrating data across systems and partners, applying business and compliance rules, and enabling coordinated intervention. This shift from transactional optimisation to orchestration explains why Control Towers succeed where traditional systems reach their limits.

Ultimately, the limitation is not technology adoption, but operating model design. Organisations that continue to rely solely on systems of record struggle to scale EXIM operations without proportional increases in cost, risk, and manual effort.

Market observations indicate that organisations have invested heavily in enterprise platforms and specialised logistics tools over the past decade. However, these investments have largely optimised individual functions rather than the end-to-end trade flow. The result is a landscape where data exists in abundance, but actionable insight is scarce. This structural mismatch sets the context for why Logistics & Customs Control Towers are gaining traction globally.

Introducing Logistics & Customs Control Towers

A Logistics & Customs Control is a centralised, intelligent platform that provides end to end visibility, coordination, and decision support across EXIM operations. It acts as a nerve center for global trade, integrating data from multiple sources and transforming it into actionable insights.

Core Capabilities of a Logistics & Customs Control Tower

- **End to End Visibility:** Logistics & Customs Control Towers aggregate data across shipments, documents, milestones, and stakeholders to provide a single source of truth. This visibility spans origin, transit, and destination, enabling shippers and consignees to anticipate delays and intervene early.
- **Exception Driven Management:** Rather than overwhelming users with data, Control Towers highlight deviations from plan—missed cut offs, documentation gaps, customs holds, or cost overruns. This allows teams to focus attention where it matters most.
- **Customs Compliance and Risk Intelligence:** By embedding compliance rules and regulatory checkpoints into workflows, Logistics & Customs Control Towers reduce the risk of non compliance. Alerts and validations ensure that issues are addressed before shipments are impacted.
- **Performance and Cost Analytics:** Control Towers enable granular analysis of service provider performance, transit reliability, and cost drivers. Over time, this data supports strategic decisions around network design, partner selection, and contract management.
- **Collaboration Across Stakeholders:** A key differentiator of Logistics & Customs Control Towers is their ability to connect internal teams with external partners on a shared platform. This reduces email based coordination and accelerates issue resolution.

Capability	Operational Impact	Business Outcome
End-to-end visibility	Early delay detection	Higher predictability
Exception management	Faster response	Lower disruption cost
Customs Compliance intelligence	Fewer holds	Reduced penalties
Performance analytics	Better partner control	Margin protection

How Logistics & Customs Control Towers Address EXIM Pain Points?

Global supply chains are operating in an environment defined by rising regulatory scrutiny, increasing shipment volatility, and expanding multi-stakeholder coordination requirements. As a result, logistics leaders are re-evaluating traditional execution models that rely heavily on disconnected systems and manual intervention.

Global adoption charts from research indicate that Logistics & Customs Control Towers are most mature in North America, where a significant share of large enterprises have already implemented centralised visibility or orchestration layers for international logistics.

Asia-Pacific markets show rapidly accelerating adoption, driven by export-led economies and growing regulatory digitisation.

In the Middle East, adoption is emerging, often anchored around trade hubs and free zones, while developing markets are moving from pilot initiatives toward broader rollouts.

While regional maturity levels vary, a consistent pattern emerges across markets: early adoption is typically led by organisations managing high shipment volumes, complex regulatory environments, or time-critical cargo such as perishables, pharmaceuticals, and high-value goods. In these contexts, even minor disruptions can translate into significant financial, compliance, or reputational risk, making centralised control a business necessity rather than a technology upgrade.

This adoption pattern reinforces a key insight: Control Towers are typically introduced where trade complexity, regulatory exposure, or shipment criticality reaches a tipping point. Once implemented, organisations report a measurable shift from reactive issue management to proactive control. Fragmented visibility is replaced by a unified operational view, manual interventions are reduced through rule-based workflows, and compliance risks are addressed earlier in the shipment lifecycle.

Beyond operational improvements, organisations with mature Control Tower implementations also report stronger governance and accountability across stakeholders. Decision rights become clearer, escalation paths are standardised, and performance management shifts from retrospective reporting to forward-looking risk mitigation. Over time, this enables logistics functions to move from cost containment toward value creation, supporting faster market access, improved service reliability, and scalable growth.

A study by Kale Logistics Solutions

A global study conducted by Kale Logistics Solutions surveyed 313 enterprises and SMEs across multiple regions to understand the cost structure of EXIM logistics operations and the willingness of organisations to invest in a centralised logistics control and orchestration solution. The study focused on identifying cost pressures, value drivers, and investment appetite linked to operational efficiency and compliance.

63% of respondents indicated that EXIM logistics and customs-related activities account for a meaningful share of annual revenue, with costs most commonly clustering in mid to high single-digit and low double-digit percentages. A notable 24 per cent concentration was observed around two dominant cost bands, reflecting that logistics spend is not marginal but strategically material for most organisations. This confirms that EXIM operations are viewed as a controllable cost centre with strong optimisation potential.

44% respondents says the nature of goods handled emerged as a stronger determinant of logistics cost than shipment volume alone. 21 per cent of organisations dealing with regulated, high-value, sensitive, or time-critical cargo consistently reported higher logistics and compliance expenditure. This highlights the complexity premium embedded in EXIM operations and explains why similarly sized companies experience vastly different logistics cost profiles.

52% acknowledged limited end-to-end visibility into cost drivers. While 39 per cent said that direct transport costs are tracked, indirect and intangible costs—such as delays, compliance risk, demurrage, and manual effort—are often underestimated. This gap reinforces the need for centralised oversight and integrated cost intelligence across EXIM workflows.

62% expressed clear willingness to invest in a comprehensive solution that demonstrably reduces operational friction and improves predictability. Willingness to pay showed a tiered pattern, with most organisations preferring moderate, predictable annual investments, while a smaller segment with higher complexity demonstrated readiness for significantly higher investment levels.

21% respondents indicated openness to both annual lump-sum pricing and usage-based per-shipment models. Organisations with stable, high-volume trade flows showed a preference for predictable annual fees, while those with variable shipment volumes favoured per-shipment pricing that scales with activity. This reflects a mature understanding of value-based pricing tied to operational impact rather than software ownership.

25% respondents consistently linked investment justification to measurable reductions in delays, improved compliance outcomes, lower exception-handling effort, and better cost predictability. The expectation is not only cost reduction but greater control over EXIM operations, particularly in complex and disruption-prone trade environments.

Adoption Considerations and Success Factors

The successful adoption of a Logistics & Customs Control Tower is as much an organisational transformation as it is a technology initiative. While digital platforms provide the foundation, long-term value is realised only when governance, processes, and people evolve in tandem. Organisations that approach Control Towers as a standalone IT deployment often struggle to move beyond basic visibility, whereas those that treat them as a new operating model unlock sustained performance improvements.

A critical first step is establishing clear governance and ownership. A Logistics Control Tower cuts across traditional functional boundaries, spanning logistics, customs, finance, procurement, and customer service. Without a clearly defined governance structure, decision rights can become ambiguous, slowing response times and diluting accountability.

Stakeholder alignment is equally important. EXIM operations depend on a wide ecosystem of internal teams and external partners, including logistics service providers, customs intermediaries, and transport operators. Early engagement with these stakeholders helps define data-sharing protocols, escalation mechanisms, and performance expectations. Alignment at the outset reduces resistance during rollout and reinforces the Control Tower's role as a collaborative platform rather than a monitoring tool.

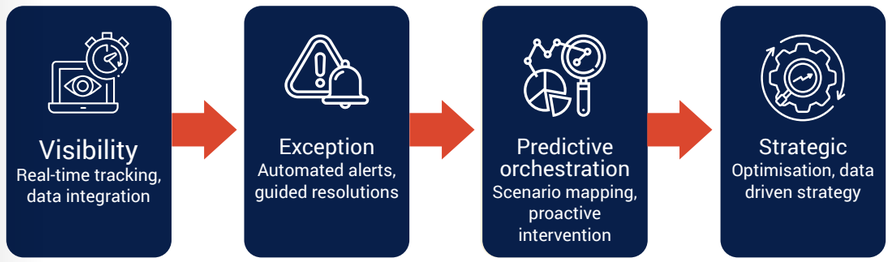
A phased adoption approach significantly increases the likelihood of success. Attempting to cover all shipments, trade lanes, and processes from day one can overwhelm teams and dilute focus. Instead, organisations should begin with clearly defined, high-impact use cases—such as high-value cargo, time-critical shipments, regulated goods, or congestion-prone gateways. These use cases typically deliver quick, visible benefits, helping build confidence and internal advocacy.

Equally important is data readiness and integration discipline. Control Towers depend on consistent, reliable data from multiple sources. Organisations must invest upfront in defining data standards, validation rules, and integration priorities. While perfection is not required at the start, a minimum level of data quality is essential to establish trust.

Change management often determines whether a Control Tower becomes a strategic asset or an underutilised dashboard. Operational teams must trust the data and understand how insights improve their daily work. This requires structured training, clear communication of benefits, and leadership sponsorship.

Finally, organisations should define clear success metrics aligned to business outcomes rather than system usage alone. Metrics such as reduction in delays, faster exception resolution, improved compliance rates, and better cost predictability provide tangible evidence of value.

Logistics & Customs Control Tower adoption journey from visibility to intelligence



Logistics & Customs Control Towers as Strategic Assets

As global trade continues to evolve, Logistics & Customs Control Towers are rapidly transitioning from operational support tools into strategic enterprise assets. What began as a mechanism to improve shipment visibility is now emerging as a central intelligence layer for EXIM operations. This shift is being driven by increasing supply chain volatility, tighter regulatory oversight, and rising expectations for speed, reliability, and transparency across international trade networks.

Advances in predictive analytics are significantly expanding the value of Control Towers. By analysing historical patterns alongside real-time data, Control Towers can identify early warning signals of disruption—such as congestion, compliance risks, or carrier performance deviations—well before they escalate into operational failures.

Artificial intelligence further strengthens this evolution by enabling smarter decision support. Rather than simply flagging exceptions, next-generation Control Towers can recommend optimal responses, such as alternative routing, mode shifts, or priority reallocation based on risk, cost, and service impact.

Most importantly, customs related operations are smoothened and made even more efficient on a long run thereby making it a seamless platform to adhere with customs protocols in documentation and other processes.

Gartner

By 2027, 80% of supply chain organizations will use AI-driven control towers for autonomous decision making

McKinsey

Leaders report 10–15% cost savings and 5–10% revenue uplift with AI-powered supply chains

In an environment where resilience and agility increasingly define competitiveness, Control Towers provide a clear strategic advantage. Ultimately, Logistics & Customs Control Towers will play a defining role in enabling sustainable, insight-driven growth in global trade.

Data Sources

This whitepaper draws on a combination of primary research, secondary research, and established industry benchmarks to ensure analytical rigor and credibility.

Primary Research

- **Kale Logistics Solutions – Global EXIM Market Study (2024)**
  Survey of **313 enterprises and SMEs** across multiple regions, assessing EXIM cost structures, visibility gaps, operational challenges, and willingness to invest in centralised logistics control and orchestration solutions.

Secondary Research and Industry Benchmarks

- **World Trade Organisation (WTO)** - Global trade volumes, tariff and non-tariff measure (NTM) trends, and international trade forecasts.
- **OECD, World Bank, IMF, UNCTAD** - Trade policy indicators, customs digitisation initiatives, and regulatory data supporting global EXIM trends.
- **McKinsey & Company / McKinsey Global Institute** - Research on supply chain disruptions, resilience, predictive capabilities, and cost visibility.
- **Gartner** - Insights on visibility platforms, decision authority, and limitations of systems lacking orchestration.
- **Boston Consulting Group (BCG)** - Findings on supply chain resilience, margin erosion, and organisational readiness.
- **Bain & Company** - Research on technology investment satisfaction and the role of cross-stakeholder orchestration.
- **IBM Supply Chain Research** - Benchmarks on predictive supply chains and service failure reduction.
- **Business Continuity Institute (BCI)** - Supply Chain Resilience Report (2024) on disruption frequency and impact.
- **DHL / Everstream Analytics** - Studies highlighting end-to-end visibility as a top EXIM risk management challenge.

All quantitative ranges and performance impacts referenced in this paper are presented conservatively to reflect aggregated market observations rather than isolated case studies.

Glossary

EXIM (Export–Import): All activities related to the movement of goods across international borders, including transportation, customs clearance, compliance, and documentation.

Logistics Control Tower (LCT): A centralised platform and operating model that provides end-to-end visibility, coordination, and decision support across logistics and EXIM operations.

System of Record: Transactional systems (such as ERP, TMS, WMS) designed to capture, store, and audit operational data and events.

System of Control: An orchestration layer that integrates data across systems and stakeholders to enable proactive decision-making and outcome management.

Non-Tariff Measures (NTMs): Regulatory requirements other than tariffs—such as standards, certifications, quotas, and inspections—that affect international trade.

Cost to Serve: The total cost incurred to move goods from origin to destination, including direct, indirect, and hidden costs.

Direct Costs: Visible and typically budgeted costs such as freight, terminal handling, duties, and basic documentation fees.

Indirect Costs: Costs arising from delays, demurrage, detention, compliance penalties, and shipment holds.

Hidden Costs: Often untracked costs including manual coordination effort, expediting, exception handling, rework, and internal firefighting.

Exception Management: The process of identifying, prioritising, and resolving deviations from planned logistics and compliance workflows.

End-to-End Visibility: The ability to track and monitor shipments, documents, and milestones across origin, transit, and destination.

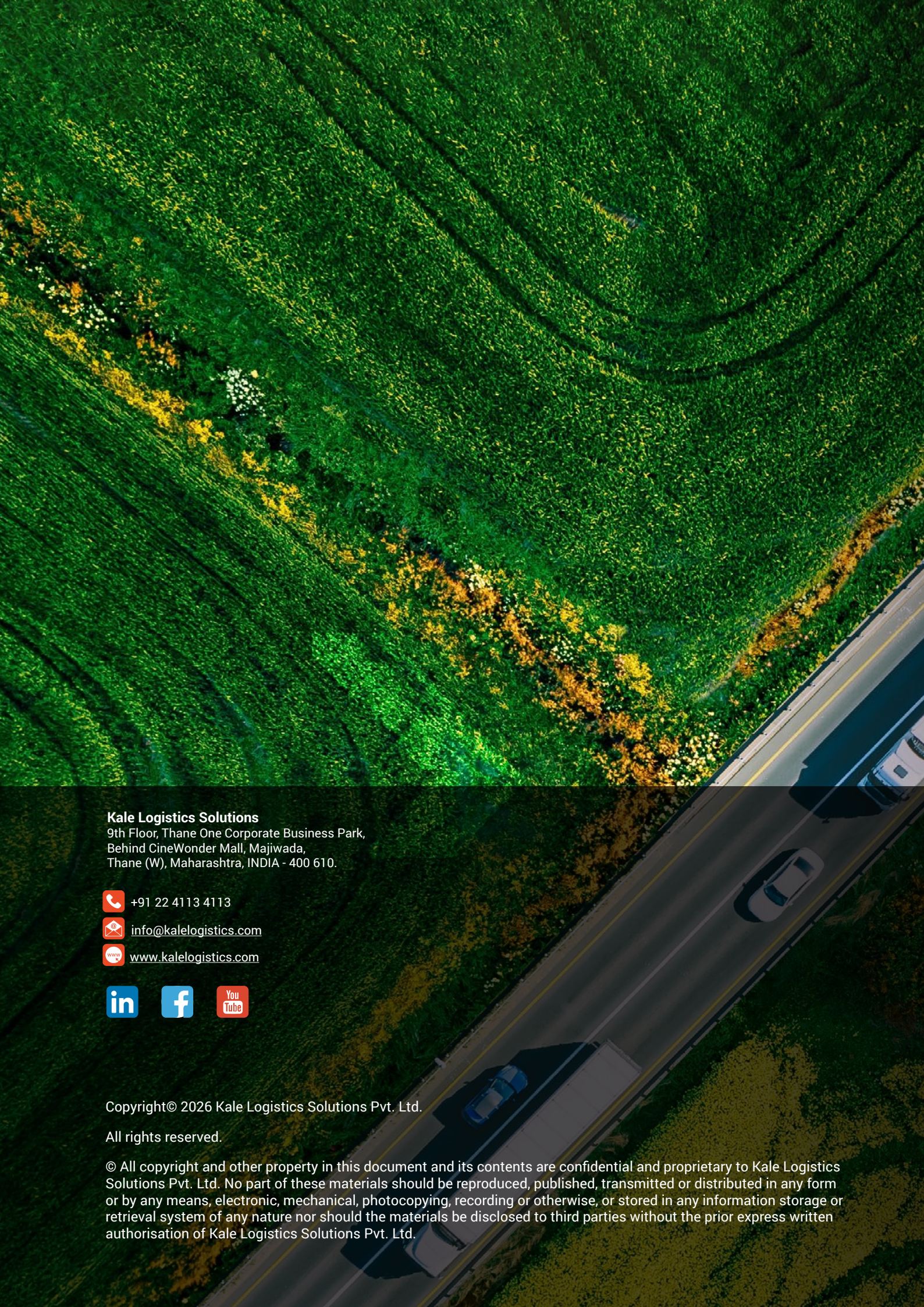
Orchestration: The coordinated management of processes, decisions, and stakeholders across the EXIM lifecycle.

Predictive Analytics: The use of historical and real-time data to anticipate disruptions, delays, or compliance risks before they occur.

Compliance Risk: The potential for penalties, shipment holds, or reputational damage resulting from regulatory non-compliance.

Abbreviations

AI	Artificial Intelligence
APAC	Asia-Pacific
BCG	Boston Consulting Group
BCI	Business Continuity Institute
CCS	Cargo Community System
CXO	Chief Experience / Executive Officer (context-specific)
DHL	Deutsche Post DHL Group
ERP	Enterprise Resource Planning
EXIM	Export–Import
GDP	Gross Domestic Product
IDC	International Data Corporation
IMF	International Monetary Fund
KPI	Key Performance Indicator
LCT	Logistics Control Tower
ML	Machine Learning
NA	North America
NTM	Non-Tariff Measure
OECD	Organisation for Economic Co-operation and Development
SME	Small and Medium-sized Enterprise
TMS	Transportation Management System
UNCTAD	United Nations Conference on Trade and Development
WMS	Warehouse Management System
WTO	World Trade Organisation



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