

Best practices



Growing logistics operations
with limited land use.

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The logistics world in Western Europe is struggling with a shortage of land while simultaneously, the need for additional storage facilities is increasing. This need for more storage space can be traced back to various social developments.

The rise of e-commerce has given the logistics chain a completely different dynamic. The “last mile delivery” – the final part of the road a parcel travels – looks completely different today than it did a decade ago. The end point of the logistics chain is now much broader than “the shop”. Organisations want to guarantee the proximity of goods to new end-users, and therefore want to locate their warehouses closer to urban centres. This presents them with a challenge: the efficient organisation of warehouses due to the scarcity of land at these newly selected locations. In addition, drastic events such as the corona crisis, climate disasters, the blocked Ever Given container ship, and the war in Ukraine have led to companies wanting to fall back on extra stocks more often. We used to speak of a “just in time” delivery strategy, but we now speak of a “just in case” strategy. Carrying extra stock as a precaution is increasingly becoming a priority.

As a result of these developments, logistics are increasingly at the heart of every company, and optimal use of warehouse space must be considered. WDP will work with you on this challenge and help you identify opportunities in existing and

new warehouses so that the scarce space can be used as efficiently as possible.

Vertical storage offers an important solution. Mezzanines (adaptable to future needs) and multi-level warehouses make it possible to use the same ground surface area several times at different levels. Automation can also lead to far-reaching space savings; for example, robots need less space to carry out their activities.

The world is changing. The slogan used to be “no customer, no property”, but it has changed to “no property, no customer”. If you want customers, you must first have the space, preferably in the vicinity.

In this report we hear from various experts about how to grow in an environment of land scarcity – from organisations to René De Koster, Professor of Logistics and Operations Management at the Erasmus University.

“Enjoy the read. We hope you find it inspiring!”



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HOW TO IMPROVE YOUR USE OF EXISTING WAREHOUSES

Case Wehkamp

Case Brocacef

“Scalable, flexible, and step-by-step: this way, your warehouse always meets the needs of your organisation”

Jan de Niet

Head of Facility at the online stores Wehkamp and Kleertjes.com

Employed at Wehkamp since 1977



Scalable, flexible, and step-by-step are the three principles we use at Wehkamp for our warehouses. Scalable, because they must be able to facilitate Wehkamp's growth; flexible, so that a lot of capacity can be added during peak periods; and step-by-step, because you must keep up with the changes in the existing and the required equipment. Wehkamp always starts from these three cornerstones for the warehouses.

This was also the case with the construction of the first Logistics Service Centre Zwolle (LSCZ 1) in 2015, which is over 60,000 m² in size. Initially, all small goods that could be delivered by DHL were stored there. However, this capacity was soon insufficient and 33,000 m² was added. Thus, LSCZ 2 was born, allowing larger pieces to be stored in Zwolle. This expansion provided room for logistical growth, among other things, which entailed an increase in the capacity of the picking and return process.

Meanwhile, preparations have also started for LSCZ 3,



which will provide an additional 33,000 m² for items. A large proportion of the more than 300,000 articles in our range are stored in Zwolle.

The location of our warehouses, such as the one in Zwolle, depends on many different factors. We need to reflect on this because we notice that the world is changing enormously and that customers have become accustomed to good service. Because we have many different types of products and do not know what we will be selling tomorrow, we have to keep more and more goods in stock, so that smooth delivery can be guaranteed.

The choice of supplier, among other things, is important in this regard. By working with a supplier near you, the lead-time is much shorter. Having an overview of the rhythm of deliveries, shipments, and returns also contributes to a smooth service. We can guarantee on-time delivery by choosing the location of our warehouses strategically and making maximum use of our buildings through our order picking system and mezzanines.

Our building in Zwolle is an excellent facility for this. The height is a little over 12 m and we have built 26 layers up in it, using racks. The entire

warehouse has 21 aisles, housing 546 robots, with 28 people at the picking stations. Without that team and a personal approach, we couldn't make it work. After all, the human factor in our warehouse is the driving force behind the delivery of our packages. It's our team that determines productivity. In addition to the racks, we also have 60,000 m² of mezzanines. You can put three floors in a warehouse like ours: at 3.3 m, 6.6 m, and 9.9 m high.

We use it for slow-moving products, and our packaging and return machines.

The collected orders go to

the mezzanine with the packaging machines. Most of it goes to the autopacking machine, which automatically packs the goods into a box. A smaller proportion is wrapped in plastic. We also arrange for items for the same customer to be packaged together to reduce transport costs. After all, two-thirds of the costs are transport costs and one-third is logistics costs.

At Wehkamp, we manage to process 180,000 articles on a normal working day. We can also work at night during busy periods and then we can add another 40,000. We are able to update our website twice

a day. This allows us to respond quickly to trends and developments in the market. ◆

Our warehouse in Eindhoven was built in 2014, and we extended it by 25,000 m² in 2020. But soon afterwards, our capacity was put under pressure once more. This is why we opted to create additional space by using steel entresols. Thanks to these entresols, part of the new building and part of the automation, we were able to extend our capacity by 15,000 m² extra pallet racking.

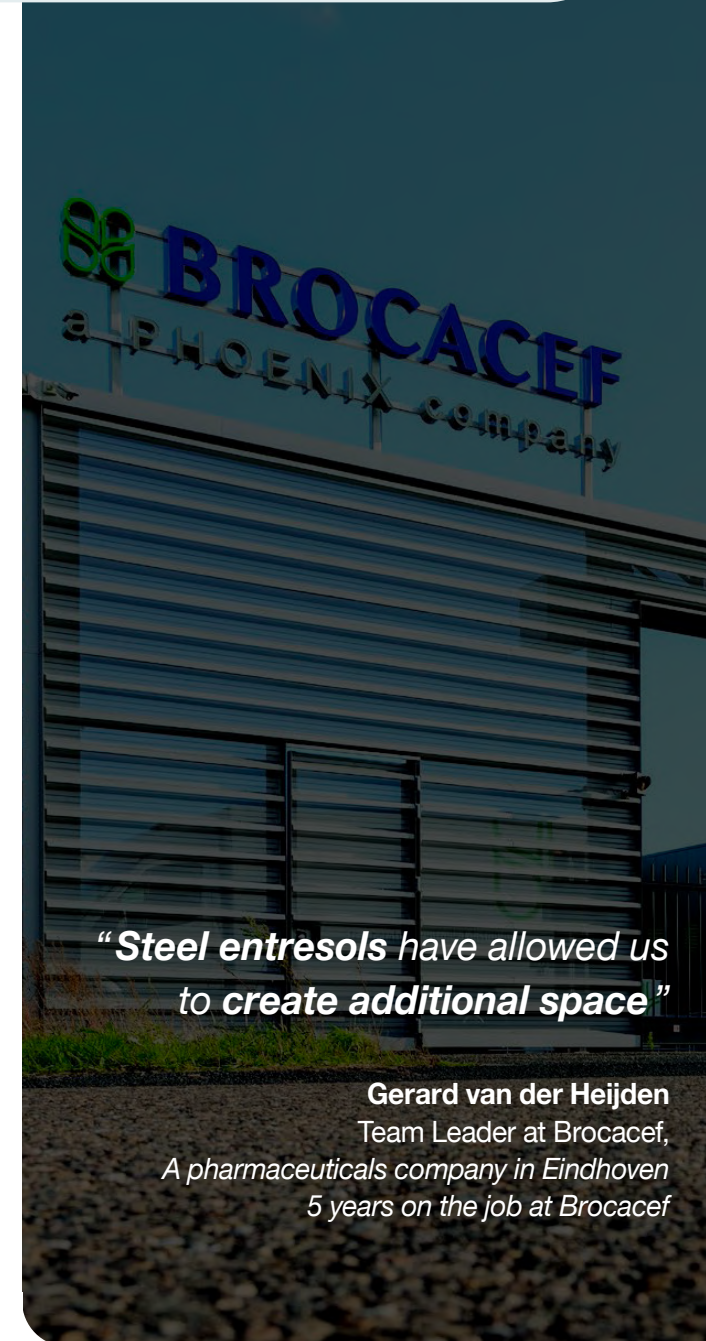
We opted for space optimisation in our existing warehouse because we're located near Eindhoven airport. This situation is extremely practical for our logistics, but it also means that there are many restrictions associated with building.

For example, we are not permitted to build higher up, making steel entresols in the building the ideal solution. The steel entresols ensure that we have an entire additional level, on which even forklift trucks can drive. We now have three steel entresol installations, and there's a strong chance that this will increase to four in future.

One of these installations is currently in the new building, while two are in the old one. The steel entresols are also modular and can therefore be removed if really necessary. Alongside steel entresols, we have also put a great deal of effort into machines. These machines, for example, can immediately put

the correct label on a box of medication. This was previously being carried out manually by a team of up to 100 people. Of course, there are always new places in the warehouse in which staff can play an important role. Machines are not replacing all the work being carried out, around 40% of the order picking is still being performed manually.

Throughout our entire warehouse, we are making efforts to be sustainable, for example by installing solar panels on the roof and recovering residual heat. 



“Steel entresols have allowed us to create additional space”

Gerard van der Heijden
Team Leader at Brocacef,
A pharmaceuticals company in Eindhoven
5 years on the job at Brocacef

SHORT DELIVERY TIMES OR AFFORDABLE WAREHOUSES?

Interview with **René de Koster**, Professor of Logistics and Operations Management, Erasmus University, Rotterdam



To discover how companies are rising to the challenge of logistical scarcity, we spoke to René de Koster, Professor of Logistics and Operations Management, Erasmus University, Rotterdam. Professor de Koster is the author of 8 books and over 230 research papers on a variety of logistic and operational topics, including warehousing, material handling, behavioural operations, sustainable logistics and many more. Our conversation included how companies around the globe are tackling land scarcity. We also discussed current solutions, such as vertical warehousing. Professor de Koster shared his thoughts on the most effective way to maximize available space, comparing the benefits of robotization, conveyor and shuttle systems. Finally, we touched on the role of warehousing in sustainability.

“Land scarcity makes companies choose between short delivery times and affordable warehouses”

René de Koster

Professor of Logistics and Operations Management Erasmus University, Rotterdam

Land scarcity is one of the biggest issues facing Western European Warehousing companies.

Is this a global problem? It is a global problem. Of course, there are regions where it is not an issue yet. But many distribution centres are close to concentrations of large populations. By definition, land there is always scarce. It started in regions like Hong Kong, where there is no space at all. Then it spread to Singapore, Japan and

Korea, Western Europe, and regions on the East Coast of the US. These are densely populated areas, with little room for large distribution centres. This forces up the price of land and the companies that want to be there have to find other solutions.

Why would a company choose to remain in a more expensive area?

A lot of companies compete on delivery time. This includes organizations that

need to have short delivery times, supermarket suppliers for example. With fresh products, you can't be 500 kilometres away. That leads to the question: Do you need to have fresh produce? Yes, if your competitors have it. You create a competitive disadvantage if you don't.

Outside of product freshness, what other factors do companies look at to give them a competitive edge?

They are still competing massively on short delivery times. Companies like Getir and Gorillas compete on 20-minute delivery times. Delivery time has become so important and that means being closer to your customers.

Getting close means more expensive properties, higher land prices and less availability.

For companies that aren't trying to hit a 20-minute delivery timescale, how

does land scarcity impact them?

The moment you are not in e-commerce retail, different factors come into play. If you don't need to compete on delivery time, then it's more a matter of scheduled deliveries, especially in the business-to-business environment.

It's more important to deliver precisely, in other words, that you keep appointments. If you can deliver next Monday at 9am, then you should deliver next Monday at 9am, and not Tuesday and preferably not at 8am on Monday either. Reliability and accuracy are much more important than speed.

This means you can be further from your customers, with site selection based on other things like supplier location, land availability, the benevolence of the municipalities, available subsidies, tax climate and logistical conditions.

“Shuttle systems are popular in e-commerce: they can go up to 14 metres and have built-in elevators, this removes the need for fixed floors.”

But there is an ever-growing group of companies for whom this is less relevant. Customer delivery times have become so critical, that they will sacrifice other advantages for customer proximity.

As more and more companies need to be closer to their clients, how can businesses increase the effectiveness of their distribution centres? There has been a lot of discussion about vertical warehousing. How do you see that trend evolving?

I do see it continuing. The only question is: How high is

high? The real high-rise warehouses of 40 metres high, which were only used exclusively for distribution centres with cranes, are not something that most companies want.

But there is a large group of companies looking for something between those real high-rise warehouses of 30-40 metres and the 10 metre warehouses.

I think for that group, warehouses with multiple floors, either mezzanines or fixed floors, are becoming more important. Along with good vertical transport and/or

goods systems that can go a little higher than the conventional pallet or shelf racks.

Think about shuttle systems, which are suitable up to 14 metres and can work alongside elevators as well as robot carts. These are very popular systems, especially in e-commerce. With those solutions, you can go a bit higher than conventional low-rise warehouses. But there are a lot of automated solutions that don't make good use of that height. I see less of a future for that.

What kind of automated solutions are companies

already using or thinking about implementing?

Some large online retailers use robots extensively. These drive around their warehouses, moving racks of about 2 - 2.5 metres. So a 4-metre ceiling is sufficient. Just imagine, thousands of movable racks with thousands of robots moving them, and all that activity happening on one floor. This needs a huge area; easily 100.000 square metres of floor space or more.

Some warehouses will have multiple floors, but they are also used for packaging or other things. But this is still an expensive solution. It would be better to go for a shuttle system, which utilizes height and has built-in elevators. That removes the need for fixed floors; they are at least not needed for the whole building.

What trends do you see continuing in terms of better space management?

The shuttle systems have been a real breakthrough. You see them in a number of sectors, and especially in recent e-commerce implementations, for example, Bol. com and Zalando. Picnic in the Netherlands has also implemented a shuttle system. So it's already starting in the food sector as well.

I'm seeing more and more shuttle systems that are actually semihigh-rise, so not really high-rise but about 14 metres. They work extremely well as you can fit a lot into a relatively small space. You have a lot of storage capacity combined with a very high throughput capacity.

Are there any other benefits to the shuttle systems?

They are also reasonably modular, namely, you can

expand them or you can put aisles next to them. Provided, of course, that you incorporate that into the building in advance, because the building has to be big enough. But they are fairly flexible when it comes to expansion. With the shuttle systems these days, you have all kinds of variants.

What about the role of robotics in the future of warehousing? Surely they are not going away?

In the very latest robotic systems, like the one from Exotec, you have a robot that doesn't only operate the

racks, but can climb too! That means you don't need elevators, plus outside the rack you don't need conveyors. The robot will just drive up to the picking station. Without conveyors, you have much more flexibility.

So I foresee the expansion of shuttle systems due to the variety available. There is the classic one with elevators. Then, we have the Autostore system where the robot also includes an elevator. Finally, you have the systems with climbing robots.





*“Collaborative robots, called **cobots**, gradually robotize conventional processes without requiring a new warehouse.”*

What about existing low-rise warehouses? How can they increase their efficiency?

It's possible to robotize a conventional warehouse by gradually introducing collaborative robots, or cobots. Imagine a traditional warehouse where people pick from a rack and place the item in a trolley.

With cobots, you replace the trolley with a robot that goes to the picker. The picker is constantly picking, only they don't work with one trolley. They work with one or more robots that automatically remove carts when they are full. That's the second kind of system I see. One that doesn't require a different building at all. You just grad-

ually robotize a conventional process. This is, of course, a great advantage for companies with smaller pockets than those that want to implement a shuttle system, because a shuttle system, even a small one, is extremely expensive.

The human element is an important one in the whole robotization story, where you can see that robots and humans have to start working together. How do you see the need for new skills in this sector?

What I see is that in companies where robots are used, people are very happy working with those robots. Partly, this is because those who don't like working robots have left. Right now, the market is so good that they can work anywhere.

But companies that are using robots have told me that people are very satisfied working alongside them.

What do you see as the big challenge for warehousing in the coming decades?

We've tested this ourselves, with an experiment in our own warehouse that we set up with people from a training course for warehouse workers: so with people who are actually going to work in those warehouses, or in logistics. We've found that in general, people are very happy with working with robots. They regard it as their robot, and it obeys them, which they find exciting.

Finding staff remains the biggest challenge. You have to ask why there are so many companies looking to robotize? It's not because it's incredibly profitable right now. For most companies, it is not profitable to invest in robots. The same is true if you put a shuttle system in place. Those systems are so expensive; you have to sell a lot of orders if you are to recoup your outlay. But the reason they do it is the lack of employees who are available 24/7. More work is taking

place during evenings, at night and over the weekends. Finding enough good people, who are motivated and with sufficient skills is the number one problem.

What do you see as the main trends for the same timeframe?

Robotization is going to continue, and it's going to continue growing really, really fast too. The challenge here will be how to pick the right tools from the range on offer, then how to deploy, plan and control these systems, and finally, how to analyse them for operational and economic performance.

The trend towards building high will continue. I think we're going to see more multi-storey warehouses. The trend in Korea and Hong Kong for high-storey warehouses hasn't quite reached here yet, but there will be a kind of in-between, where we are going to see a bit more height.

When it comes to location and land scarcity. I don't know how this short delivery time is going to stick. But while short lead times deliver competitive advantage, companies will be happy to offset increased costs to be as close to their customers

as possible.

Finally, we've not touched on the hottest topic for every industry right now - Sustainability. What impact will that have on growth in the industry?

I think circular warehouses are still a long way off. In the short term, many warehouses are going for sustainability certificates and to reduce long-run costs. However, the higher levels of automation that we're seeing require a higher energy consumption. Finding out how to jointly optimize

highly automated warehouse performance and energy use would be a very interesting study.

Not to mention, finding out to what extent more sustainable warehouses would also deliver better operational and cost per unit performance.

Either way, by investing in sustainability, warehouses have an excellent opportunity to lower their energy bills. 

“The robotization is going to continue, not because it is profitable, but because there is a lack of employees who are available 24/7.”

“Circular warehouses are still some way off, but sustainable certificates and reducing long-run costs are already on the agenda of many companies.”



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6 TIPS TO IMPROVE THE USE OF YOUR WAREHOUSE

**TIP
1**

Create narrower aisles so you can add more racks

**TIP
4**

Build multi-storage

**TIP
2**

Use mezzanines, or build additional mezzanines in the building

**TIP
5**

Automate storage, reducing forklift space and freeing up space for additional storage

**TIP
3**

Build in height so you can store stock higher

**TIP
6**

Place technical installations underground or on the roof instead of in the building

NEW BUILD WAREHOUSES & OPTIMAL SPACE USAGE

Case Barry Callebaut

Case De Jong Verpakking

In 2021, we were able to inaugurate our new Lokeren warehouse. We had outgrown our previous 25,000 pallet space site in Aalst. Additionally, we had been forced into using a number of overflow warehouses. We wanted to make our business as efficient as possible. That's why we needed to do something about the logistics. So we started looking for a different location in 2016.

“In our high-bay warehouse, we have 16 storage levels, good for 80,000 pallet spaces.”

Willy Raemdonck

Site Manager Global Distribution Centre

39 years on the job at chocolate manufacturer Barry Callebaut

When designing the new warehouse, we applied a long-term vision of 12 years. With annual growth rates of 4 to 7 per cent, this meant that we had to expand our storage capacity to five times our old pallet spaces. So for the new warehouse, we were talking about a capacity of 120,000 pallet spaces. In the end, the high-bay warehouse became 41m high, 300m wide (high-bay plus conventional), covering 60,000 m². That is a total surface area of 12 football fields.

With such a massive capacity expansion, the first question is how to set up the warehouse for maximum efficiency. The answer is simple: the only way is up. In our global distribution centre in Lokeren, we have 80,000 pallet spaces in a fully-automated high-bay warehouse. That's a tower of 16 levels of shelves, also called storage levels. A lot of our

distribution activities with full pallets are done way up, from shipping to receiving.

In addition, we have another 40,000 pallet spaces in a conventional warehouse. Anything that deviates from full pallet activity remains in the conventional warehouse. Of course, the two are fully interconnected. A conveyor system brings a full pallet to the high bay. When it is needed, it returns to the conventional warehouse again via the roller conveyors. Our motto is: minimum intervention, maximum output.

Thanks to space optimisation, we are happy, at the moment, to have a single central global distribution centre to store finished products, raw materials and packaging. More than



2,570 Belgian chocolate products find their way to some 140 different countries through our 48 loading and unloading docks.

To us, the building actually feels like much more than just a warehouse. You notice this immediately when you enter: the mezzanines are painted white, and there is a lot of natural light. The warehouse is also the first in the Benelux with Breaam Outstanding certification for its sustainable character. Some examples are the solar panels, heat pumps and a BEO field, as well as recovery of the braking energy from the robotic cranes. 



The Westland is the largest greenhouse horticultural area in Europe. If you drive around there, you will see tomatoes, peppers, cucumbers, and many other products growing everywhere, as well as flowers. The flowers are sold around the world via the Aalsmeer and Naaldwijk auctions and the vegetables now often go to the end customers via packers, businesses, and associations. The potatoes, vegetables, and fruit products used to be sold via the Westerlee auction house where De Jong Verpakking is now located in the former auction halls.

*“To be able to **link up factories**, they really have to be **next to each other**.”*

Dick Schep

Chief Operating Officer at De Jong Verpakking in the Netherlands
Employed at De Jong Verpakking since 2000



You can even find the old cold stores and the auction house in a number of buildings, but De Jong Verpakking is primarily focused on packaging. They make 2.5 million packages there every day. However, the need to expand the factory came as the demand for corrugated trays and boxes continues to rise.

In order to grow further, we needed to add a second

location, right next to our first factory in Westerlee. After all, a second site that is only one kilometre away is the same to us as one that's 100 kilometres away because the control of our logistic processes then changes. However, there is hardly any free space available at the business park where we are located.

This scarcity also leads to high land prices. That's why we opted to build up. This is particularly interesting when land costs are high. That's how we ended up with a building 19 metres high, with two full floors and two mezzanine floors, where the mezzanines do not cover the entire surface of the building.

The ground floor will be used for production and will soon contain large machines to make and process corrugated cardboard. The upper floor will be used primarily as a storage location, with trucks also being loaded on the first

floor. They drive up a ramp to the parking deck with loading docks.

WDP bought the part of the auction halls where we are located, and we are now jointly developing this as an extension for De Jong Verpakking. This underutilised site, also known as a 'brown field site', has since been completely redeveloped, but putting together the plans for a 19-metre high building was no easy task, as the permitted building height is normally 12 metres.

We had to take a lot of laws and regulations into account, which made it quite a challenge to obtain the permit for our 19-metre high building. Thanks to this permit, we have managed to double our already-existing floor space, but with a smaller footprint because we can work on multiple floor levels. Also because of our latest expansion, our production capacity

will also continue to grow and will double in time. The extension will be equipped with various automation systems, allowing us to work even more efficiently. In our new building, for example, the storage and transport of the paper rolls and subsequently of the corrugated cardboard sheets will be fully automated. As a result, De Jong Verpakking will really be able to go all out in the coming years.. ♦



6

TWO PIONEERS IN ROBOTISATION AND AUTOMATION WITHIN WAREHOUSES

The story of **stow Group** and **Logflow**

Belgian company stow Group's primary activity is developing and producing logistical solutions for storing pallets, small goods, long articles and mezzanines. With the ever-growing importance of robotisation and automation, stow Group established a separate branch, stow Robotics, in 2021. What began as a start-up has since grown into a company of over 100 employees, which has gone on to take over international start-ups.

For stow Group, automation and robotisation therefore forms the key to efficiently equipped, environmentally friendly warehouses. Thanks to automation, they are able to build warehouses that are 45 to 46 metres in height and take up less land and thereby reduce costs. Automation also offers an answer to the current logistical challenges, such as the unprecedented flow of online trade.

stow Robotics has noticed that there is an increasing demand for automation, which has been on-going for 2 to 3 years. SMEs are now considering automation, while this had previously not been the case. People are thinking about automation from quantities as low as 2000 pallets upwards.

What can a warehouse do in terms of automation/robotisation as a function of space optimisation? Some tips and tricks from Jos De Vuyst, CEO at stow Group:

1. Invest in crewless shuttles that drive around between the racks and bring the pallets to the outside of the rack. Crewed forklifts require far more space and do not reach any higher than 15 metres. Automation allows you to go up to 45 metres. In this way, you are able to reduce the ground area.
2. Go a step further in automation by investing in AMRs (Autonomous Mobile Robots) that take the pallet from the end of the rack to elsewhere.
3. Consider the future of your warehouse. You will

always require a rack, and that's unlikely to change. On the other hand, humans will be found less and less frequently in the warehouse and we will evolve towards dark warehouses, without any people walking around. Instead, the technical spaces will become hubs where engineers keep everything on track. Technology will therefore certainly create new jobs instead of rendering a few jobs obsolete. 



Jos De Vuyst
CEO at stow Group

Logflow is a logistics consultancy company that develops a future vision for their customers based on a logistics study. The focus is primarily on designing and automating warehouse environments. To this end, Logflow developed its own standardised operating methodology. Initially, the logistics business processes are studied in order to start optimising them in an efficient, flexible and space-conscious way. Based on the so-called “Logflow principles” and following a thorough data analysis, a concept is developed that is a combination of logistics operating principles, the right IT/software automation and hardware automation.

“The increase in automation projects is largely down to the many changes happening in succession, including the rise of e-commerce, labour market shortages and rising land scarcity.”

Sylvie Sepot
Commercial Director at Logflow

Nowadays, at Logflow we also find that not only large companies, but also more and more SMEs are opting for a comprehensive form of automation. Sylvie Sepot, Commercial Director at Logflow, is also noticing a persistent and accelerating (r) evolution when it comes to automation.

This gave rise to the following trends, according to Simon Popelier, Logistics Consultant at Logflow:

1. The disruptive changes in the sector have meant that there is a distinct trend towards flexible automation. The most recent generation of warehouses show an increased level of automation combined with higher flexibility, agility and scalability. Both the storage capacity and reactivity of a warehouse should be relatively easy to adjust based on the changing market.
2. The advent of artificial intelligence will also create another disruptive change. Industry 4.0 changes the way in which we deal with cobots, AGVs (Automated Guided Vehicles) and AMRs.

3. In addition, the link between production and logistics is likewise becoming more important. The warehouse becomes an extension of production. The same technologies used in production can be adapted to the warehouses. This will certainly have an important impact on how warehouses operate in future.

4. In contrast to what was previously thought, we see that humans remain indispensable, even in an automated environment. Automation through robots and cobots is mainly used to simplify workers' lives. What is necessary here, however, is to attract people with the right technological expertise and adequately retrain current staff. A warehouse supervisor used to be somebody who walked round a warehouse and had a good rapport with employees. Now they have to be somebody who can also work with high-tech systems and interpret master data. In the future, many simple jobs will be taken on by robots.

We will always require employees, however, in order to make the right decisions.

5. Finally, companies are also increasingly considering their carbon footprint. By building tall warehouses, savings are made when it comes to ground area. Robot-controlled automation, in turn, ensures the most efficient use of energy. 

Have you been inspired, or would you like more information about the optimal use of space in warehouses?

We would be happy to take a look at what is possible for your organisation.

Contact us!

www.wdp.eu