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Digitalisation is one of the most effective ways to mitigate some of Latin America's physical logistics challenges

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Raphaël Chin-Fo-Sieeuw, Vice President Life Sciences and Healthcare Americas, DHL Group outlines the Americas as a core growth region, with strong momentum in Latin America. He details DHL's multi-billion-Euro investment in cold chain infrastructure, digitalisation, talent, and sustainability to support advanced therapies, evolving supply chains, and increasingly complex logistics demands across the region.

To begin, could you outline the scale and scope of DHL's life sciences and healthcare operations across the Americas, and highlight your current priorities?

The Americas is a core region for DHL's global life sciences and healthcare business. The US is naturally a major market, but Latin America is also one of our most important growth regions worldwide. We operate across all markets in Latin America and the Caribbean, delivering end-to-end services through DHL Express, DHL Global Forwarding, and DHL Supply Chain. Against that backdrop, my responsibility covers the entire Americas, including the US.

In terms of my own background, I am originally from the Netherlands and joined the Americas organisation around eight years ago. I have been based in the US since then, including the past four years in Miami, and I have led our life sciences and healthcare sector across the region for nearly four years.

Latin America appears to be experiencing rapid growth in pharmaceuticals, alongside the continued dominance of the US. How has the region evolved over the past four to five years, and how is DHL adapting to keep pace?

The market has certainly transformed quite substantially, particularly through and following the pandemic. If I consider DHL specifically, considerable change has occurred over the past 18 months or so.

When our corporate board announced our Strategy 2030, life sciences and healthcare was highlighted as a key strategic focus area for our group. Earlier this year, we announced an overall two billion Euro investment over the next five years for our group in this sector. All of this operates under our new DHL Logistics sector brand 'DHL Health Logistics' . This is not a division – not one of our DHL divisions – but genuinely a new sector brand encompassing all of our divisions, providing unified representation of our sector capabilities to the external market.

With this investment comes substantial allocation to our region. Of the two billion Euro, approximately 10 percent is allocated for Latin America, with 50 percent allocated for the overall Americas region. It is genuinely regarded as one of the larger growth areas for the group within this sector.

Could you explain how this investment translates into concrete initiatives in the Americas?

It has been an exceptionally busy year. The investment focuses specifically on constructing genuinely high-quality infrastructure throughout the region, with emphasis on advanced technology to support the complete pharmaceutical life sciences cycle – from raw materials and APIs through clinical trials, R&D, product launches, and commercial distribution. We are building capabilities to support the entire lifecycle.

Key initiatives we are currently pursuing include developing targeted cold chain transportation hubs across the region, with substantial focus on specialised warehouses in key growth markets – naturally the US, but also Brazil, Mexico, Colombia, and throughout the region. We are building capabilities spanning standard temperature ranges of 15 to 25 degrees, extending through ultra-low temperatures down to minus 80 degrees, which is required for some of the advanced therapies and biologics that we now observe driving substantial growth over the coming years. We want to ensure our infrastructure is prepared to provide that support.

Maintaining cold chain integrity across such a diverse region – from major urban centres to remote rural areas – is clearly challenging. How are you addressing this complexity?

That is certainly the reality. One of our key focus areas is strengthening infrastructure across our network, both through organic build-out and targeted mergers and acquisitions. It is not solely about building; where it makes more sense, we pursue a buy strategy. In March 2025, we acquired CRYOPDP, a specialist in courier services for clinical trials, biopharmaceuticals, and cell and gene therapies. This acquisition complemented our existing capabilities, particularly in strengthening our final-mile offerings across the region.

Is the current expansion primarily in response to existing demand, or are you investing in anticipation of future growth?

It represents both. Today, we are already one of the largest—if not the largest—providers supporting this sector in the region, with a substantial existing footprint. First, it further strengthens that footprint. Second, as I mentioned with regard to ultra-low temperature capabilities, the market itself is evolving. We are seeing a clear shift away from consumer healthcare and generics towards more specialised therapies, which brings with it a far broader and more complex set of requirements.

What we are building today is designed to genuinely support these evolving requirements by putting the right infrastructure in place. This is not always straightforward, as even the companies driving these innovations do not yet fully know how significantly their operations will scale. While growth expectations are substantial, the precise magnitude is often uncertain. Our task, therefore, is to invest ahead of demand while carefully balancing that investment against what will ultimately materialise.

How would you characterise your client base today – multinationals versus local or regional players – and how do you expect this mix to evolve?

It genuinely represents a mixture for us. Personally, I engage more with multinational companies, but our local teams maintain very strong relationships with numerous local players. We observe substantial investment on the manufacturing side from many of these local players across different areas. We observe the patent cliff approaching, so we see considerable investments by numerous local generic companies in that space, also within our region – Mexico, Brazil – serving those local markets. From that perspective, we are examining how to support them with different inbound manufacturing solutions and, ultimately, final-mile direct-to-patient solutions that we are providing in market.

Technology is often cited as a major enabler in life sciences logistics. How are AI, data analytics, and digital tools concretely transforming logistics operations in your region?

I strongly believe technology is reshaping the life sciences sector overall, and logistics in particular. We see widespread adoption of tools such as 24/7 monitoring, IoT sensors, real-time temperature mapping, and predictive analytics across the region. These technologies are receiving significant focus throughout the industry and are increasingly embedded in day-to-day operations.

Digitalisation is also one of the most effective ways to mitigate some of Latin America's physical logistics challenges. This is especially true for high-value clinical trials, biologics, and large-scale cold-chain products such as vaccines and insulin, where adoption of these tools is already accelerating meaningfully.

That said, many of the most significant hurdles are not technological but structural and regulatory. Even with fully digital hubs and advanced IoT capabilities, visibility can break down in the last mile—particularly in rural or remote areas where 4G or 5G connectivity is limited or unavailable. These gaps remain a real challenge.

Customs processes represent another major bottleneck. You can have the most advanced, AI-enabled shipment in transit, but visibility is lost the moment shipments encounter paper-based customs procedures, which still exist in parts of the region. These create what we often call digital black holes. A key focus for us today is closing those gaps—working closely with authorities to support digital customs processes and investing heavily in solutions that extend connectivity and visibility into the last mile.

In parallel, we are exploring emerging delivery models, including drone solutions, particularly in remote areas. While we are already testing and using drones in selected locations, this is not yet happening at scale. For now, the priority remains building robust, reliable, end-to-end solutions that work consistently across diverse geographies, rather than relying on any single technology as a silver bullet.

There has been growing discussion around shifting certain pharmaceutical shipments from air to ocean freight, largely for sustainability reasons. How advanced is this transition in Latin America, and where do its limits lie?

It is no secret that ports in Latin America can be challenging. Cold chain infrastructure also presents constraints, but we are clearly seeing a gradual shift from air to ocean, and with the right technology and data in place, this is very much achievable. A growing number of large pharmaceutical companies are already making that move. One of the main drivers is sustainability: logistics is a major contributor to Scope 3 emissions, and shifting from air to ocean can reduce carbon emissions by 80 to 90 percent. In a region like Latin America, where distances from manufacturing hubs in Europe and Asia are significant, those savings are truly meaningful.

Cost pressures are another factor. Healthcare systems in countries such as Brazil, Mexico, and Colombia operate under tight budgets, and there is strong pressure to reduce landed costs. That naturally supports the case for ocean solutions.

Of course, the challenges are well known. Ports such as Santos and Manzanillo experience congestion, labour disruptions, and equipment constraints. How far this shift can go really depends on the product. Ultra-short shelf-life medicines or personalised cell and gene therapies are unlikely to ever move by ocean. But for higher-volume biologics, vaccines, and more stable finished goods, ocean transport is increasingly viable—and we are already seeing that in practice.

This is not a simple, plug-and-play exercise. Pharmaceutical shipments require carefully selected routes and carriers, with each trade lane validated using historical performance data to demonstrate reliability. That proof point is critical for our customers. Despite the complexity, the shift from air to ocean is happening, and we see it accelerating. That is why we are placing significant strategic focus on building and scaling these capabilities.

Given the increasing complexity of products, regulations, and technologies, how have you approached building and developing the right talent across your teams?

In our industry and for our company, people represent one of our most important assets, if not the most important asset we possess. We place substantial focus on ensuring we have the next generation of logistics leaders in the region supporting our sector. As you mentioned, the sector is changing substantially. Those requirements are changing. One area where we invest substantial effort is maintaining a strong certification program, this includes a specific Life Sciences & Healthcare Certified program, which is conducted globally but also rolled out across the region. We are creating certified life sciences logistics leaders for DHL but also a substantial talent pool within the region. This is benefiting the entire local industry as well.

We currently have well over 11,000 certified life sciences specialists. We are also partnering with local institutions from an IT engineering perspective and others to bring those talents into our programmes.

Looking ahead, with increased emphasis on near-shoring and regional manufacturing in the Americas, how is DHL positioning itself to support these shifts over the next four years?

I return to some of my earlier points. The two-billion-Euro investment announced by the group, with the largest share directed to our region, demonstrates that we have recognised that trend of investing in manufacturing, both in the US and in Latin America. For us, again, there is substantial focus on building that infrastructure, maintaining a focused and selective M&A strategy in that area to address capability gaps we may have today.

That is precisely what we are focused on at present. We are investing heavily in these cold chain hubs and the broader end-to-end process, ensuring we can fully support our customers throughout the entire supply chain. Building these capabilities within our own network is a core element of our strategy.

Perhaps you have a final message for our global readers, many of whom are perhaps current or future clients and partners?

Life sciences and healthcare remain a strategic focus for us through 2030. We are committed to the sector through substantial investments and capability building, genuinely aspiring to be a cornerstone in the region, and I believe we are on the right trajectory to achieve that. Our five-year investment will focus on enhancing high-quality infrastructure and technology across all logistics touchpoints – from storage, order fulfillment, and distribution to global shipping and last-mile delivery – creating even more resilient, scalable, and responsive supply chains for customers.

Of course, we must also work within the realities of Latin America, which requires a pragmatic and phased approach. We have numerous targeted initiatives underway. One example is sustainable aviation fuel through our GoGreen Plus product. Using our global book-and-claim process, we can now offer this solution to clients in Latin America.

We also recognise challenges with national grids. To address this, we are building our own energy ecosystems. Our new life sciences campuses in Mexico and Brazil are designed to be fully carbon neutral, generating their own power through substantial solar installations. EV deployment is another example – it’s not just about acquiring trucks; the charging infrastructure is equally critical. In Mexico and Brazil, we are constructing our own charging stations and hubs, as public networks are insufficient. Today, we operate over 500 electric vehicles in the region, and that number continues to grow.

By combining global mechanisms, such as book-and-claim, with locally built solar and charging infrastructure, we enable our Latin American clients to overcome local limitations and compete on a global scale with green supply chains. This remains a major focus for us.

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