McKinsey
& Company

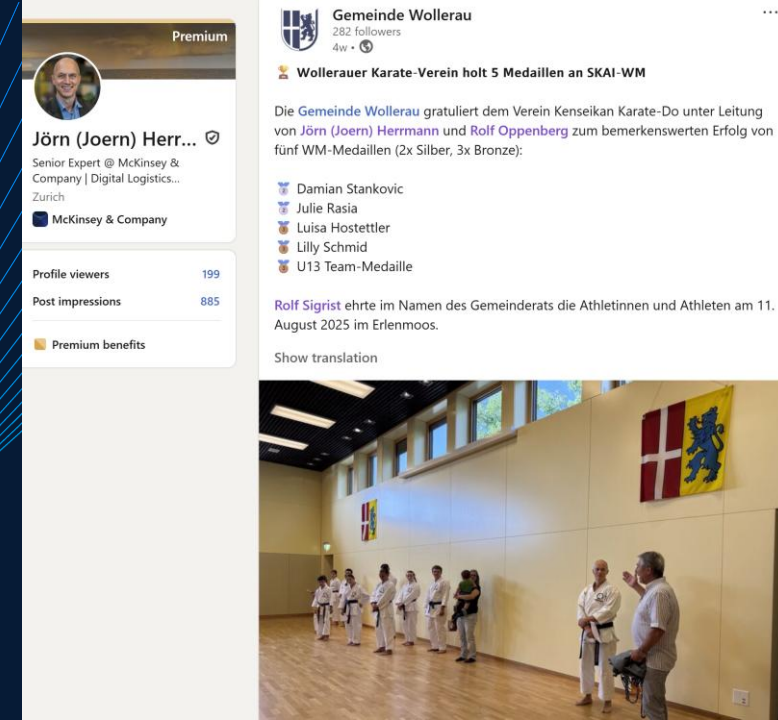# AgenticAI in Pharma Logistics

IATA Cargo Expert Conference

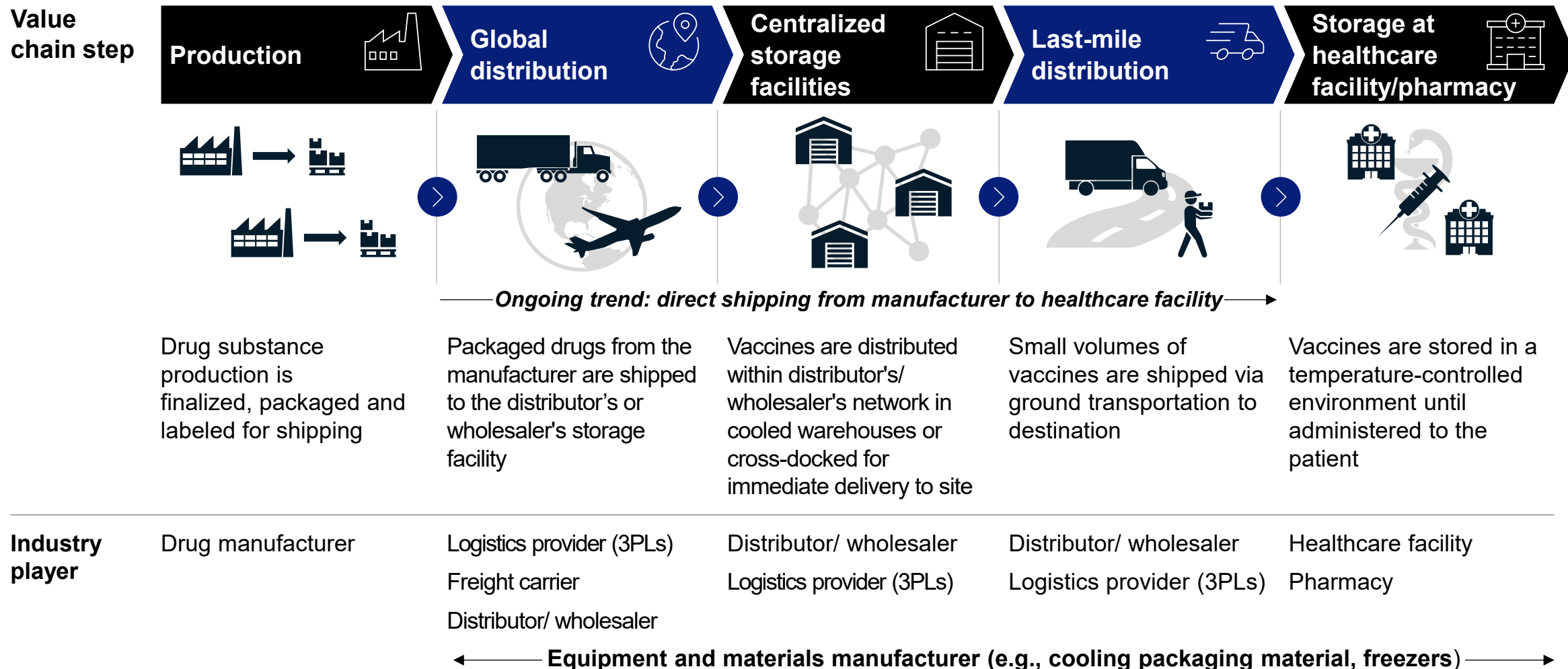Brussels, September 24th 2025

Jörn (Joern) Herr...

Senior Expert @ McKinsey & Company | Digital Logistics...

Zurich

McKinsey & Company

| Profile viewers | 199 |
| Post impressions | 885 |

Premium benefits

Gemeinde Wollerau
282 followers
4w • 🌐

🥋 Wollerauer Karate-Verein holt 5 Medaillen an SKAI-WM

Die Gemeinde Wollerau gratuliert dem Verein Kenseikan Karate-Do unter Leitung von Jörn (Joern) Herrmann und Rolf Oppenberg zum bemerkenswerten Erfolg von fünf WM-Medaillen (2x Silber, 3x Bronze):

🥈 Damian Stankovic
🥈 Julie Rasia
🥉 Luisa Hostettler
🥉 Lilly Schmid
🥉 U13 Team-Medaille

Rolf Sigrist ehrte im Namen des Gemeinderats die Athletinnen und Athleten am 11. August 2025 im Erlenmoos.

Show translation

Hello!

Jörn Herrmann, Zurich, Switzerland

Senior Expert at McKinsey & Company

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Pharma logistics spans over production, distribution, and final delivery to healthcare facilities and pharmacies

Value chain step	Production	Global distribution	Centralized storage facilities	Last-mile distribution	Storage at healthcare facility/pharmacy
	Drug substance production is finalized, packaged and labeled for shipping	Packaged drugs from the manufacturer are shipped to the distributor's or wholesaler's storage facility	Vaccines are distributed within distributor's/ wholesaler's network in cooled warehouses or cross-docked for immediate delivery to site	Small volumes of vaccines are shipped via ground transportation to destination	Vaccines are stored in a temperature-controlled environment until administered to the patient

Ongoing trend: direct shipping from manufacturer to healthcare facility

Industry player	Drug manufacturer	Logistics provider (3PLs) Freight carrier Distributor/ wholesaler	Distributor/ wholesaler Logistics provider (3PLs)	Distributor/ wholesaler Logistics provider (3PLs)	Healthcare facility Pharmacy

Equipment and materials manufacturer (e.g., cooling packaging material, freezers)

Pharma logistics expansion driven by growing demand

Higher complexity is leading to need for outsourced E2E services

Increasing demand for specialty pharma needs to be distributed

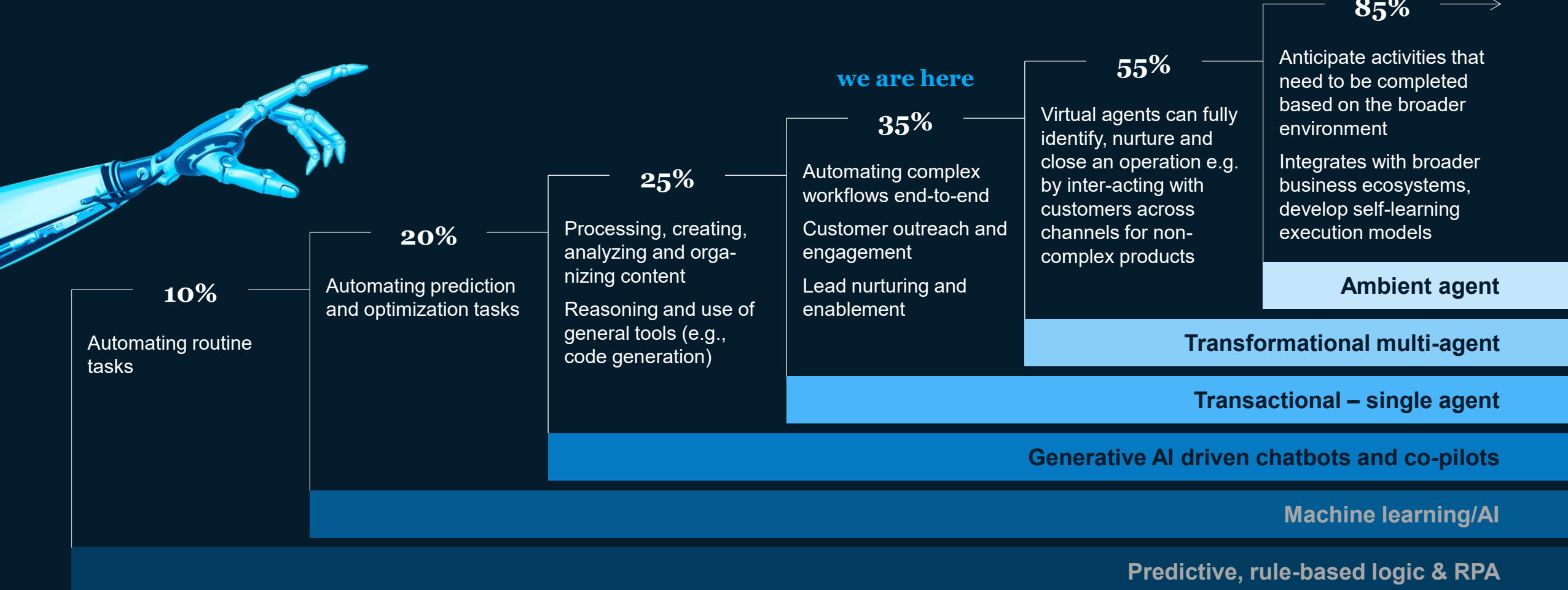Regionalization will lead to increased land freight demand

~5

~9

~6

EUR bn over next 5 years

EUR bn over next 5 years

EUR bn over next 5 years

AgenticAI boosts productivity in pharma logistics

Basic modelling

Leveraging basic modelling to drive business insights of key performance indicators

Predictive analytics

Applying data, advanced analytics, and statistical models to predict future trends or events

"AgenticAI"

Systems and models that without human interference understand goals and autonomously takes decisions and optimizes for the relevant goal

Data visibility

Establishing a digital foundation with using data for basics like visualization in dashboards

Advanced analytics

Leveraging machine learning to drive data insights from data relationships

GenAI

Applying large language models that learn abstract patterns to create text, images, videos, and data

2

1960's

4

2000's

1

1950's

3

1970's

5

6

2020's

2025+

Backwards looking, focused on analyzing available data

Forward looking, focused on predicting trends and events

Focused on generating and optimizing content and actions

AgenticAI for adaptive task-oriented automation

xx% Estimated automation potential in logistics

85%

Anticipate activities that need to be completed based on the broader environment

Integrates with broader business ecosystems, develop self-learning execution models

we are here

55%

Virtual agents can fully identify, nurture and close an operation e.g. by inter-acting with customers across channels for non-complex products

35%

Automating complex workflows end-to-end

Customer outreach and engagement

Lead nurturing and enablement

25%

Processing, creating, analyzing and orga-nizing content

Reasoning and use of general tools (e.g., code generation)

20%

Automating prediction and optimization tasks

10%

Automating routine tasks

Ambient agent

Transformational multi-agent

Transactional – single agent

Generative AI driven chatbots and co-pilots

Machine learning/AI

Predictive, rule-based logic & RPA

Agentic AI is causing a paradigm shift from "Giving Tools to practitioners" to "Building an Agentic Workforce"

Proficient practitioner

Practitioners perform the work "manually"

1x

Raw productivity potential

Practitioner using (GenAI) *Tools*

Practitioners use GenAI tools and incorporate outputs into their tasks

1.2x

Raw productivity potential
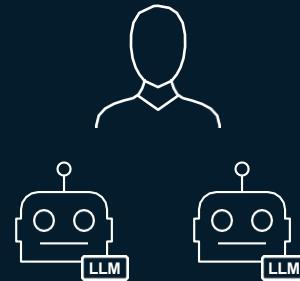
Practitioner using Agent *Assistants*

Practitioners or events invoke Agents which create outputs or perform a task e2e

2x

Raw productivity potential
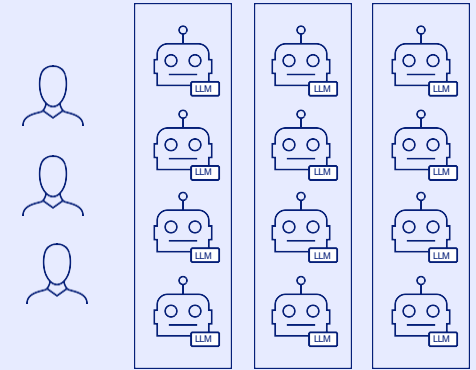
Practitioners supervising an Agentic Digital Factory

Practitioners build and supervise a virtual organization of agents. If needed, humans finalize outputs
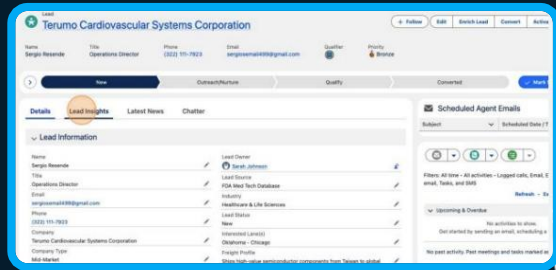
20x

Raw productivity potential

1 human supervising 15-20 agents

Example - the Onboarding Agent simplifies customer setup and boosts early engagement to scale adoption

Tailored onboarding journeys, automated welcome emails, milestone tracking

Outreach Progress
Email sent ✓
Opened ✓
Follow-up scheduled
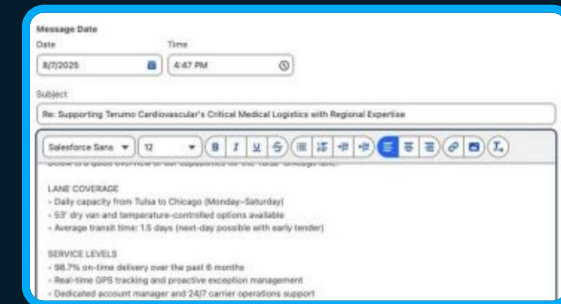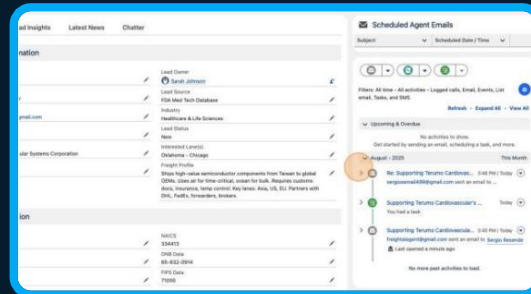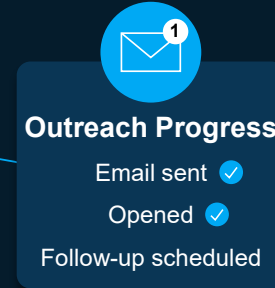
1. **AI flags newly closed accounts, prioritizing those ready for onboarding**

2. **Reviews an AI-built onboarding plan, tailored to the customer's goals, industry, and usage potential**

3. **AI sends personalized welcome emails and setup instructions, prompting first actions from the customer**

4. **Milestones are tracked automatically, with AI nudging customers to complete key steps on time**

5. **AI surfaces early engagement insights to step in proactively and accelerate adoption**