

Deutsche Post DHL
Group

We have reached a **new performance level** and are delivering stronger than ever

ON A NEW LEVEL

JOHN PEARSON
CEO DHL EXPRESS

08 September 2022



ON A NEW LEVEL

2022 | ▼



DHL Supply Chain
May 2022



+Site Visit in Florstadt



P&P Germany
May 2022



**DHL Global Forwarding,
Freight**
June 2022

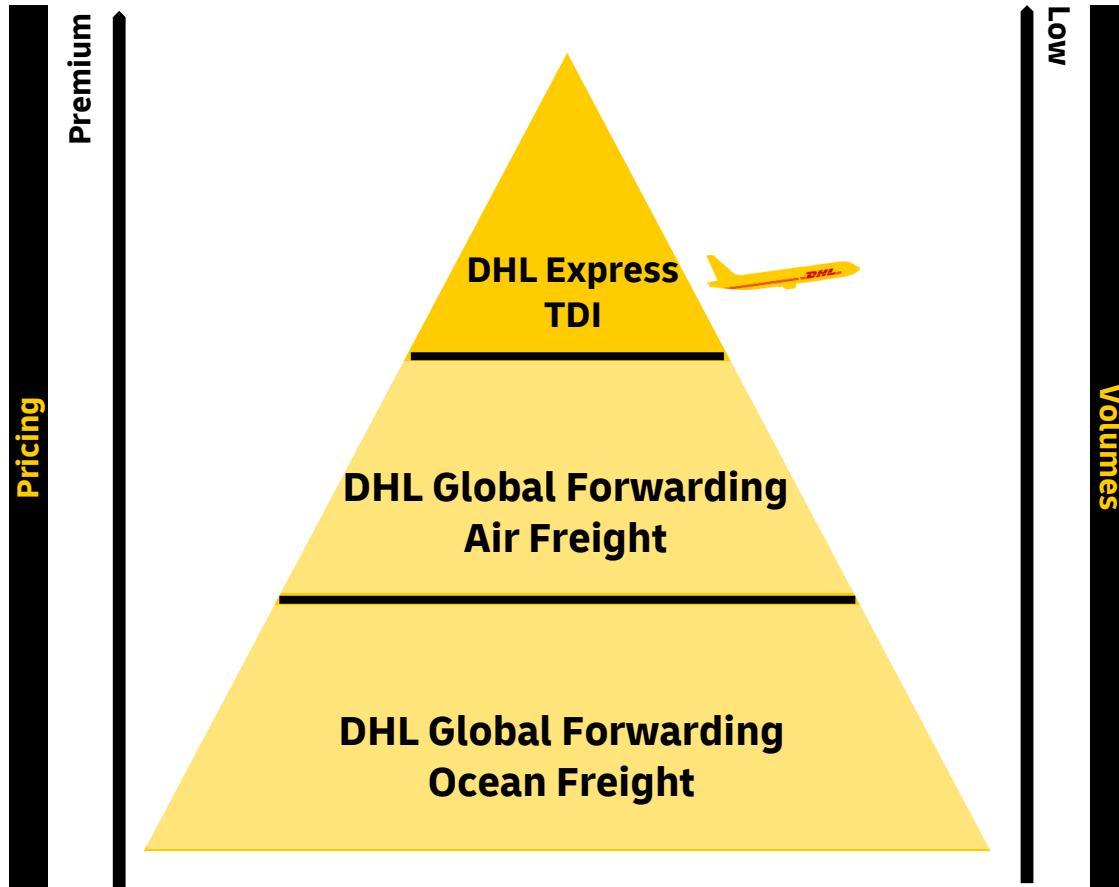


+Hub Visit in Cologne/Bonn Airport



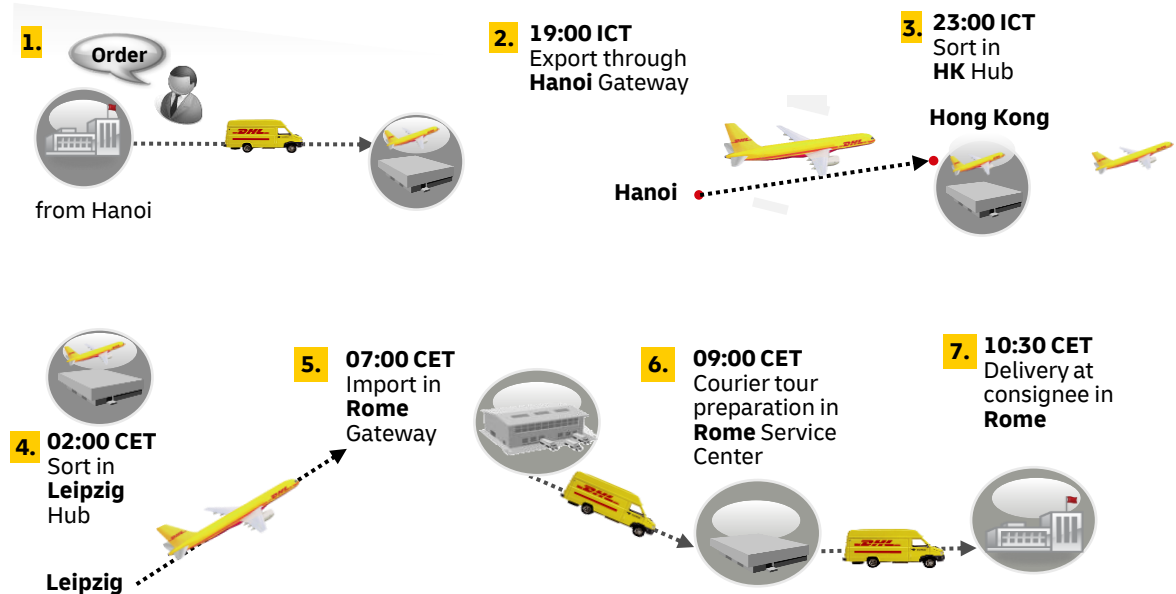
DHL Express
Management Update

DHL Express TDI: Premium niche of logistics industry



Time Definite International (TDI) The premium segment within the express industry
Time Definite = dedicated delivery at a scheduled time of day
International = cross-border shipment (intra- or between continents)

TDI shipment example: Hanoi, Vietnam to Rome, Italy



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Safety Moment



Notify EMS



CPR



AED



Meet & Guide EMS



First Aid



Extreme Weather



Evacuation Plan



Hygiene



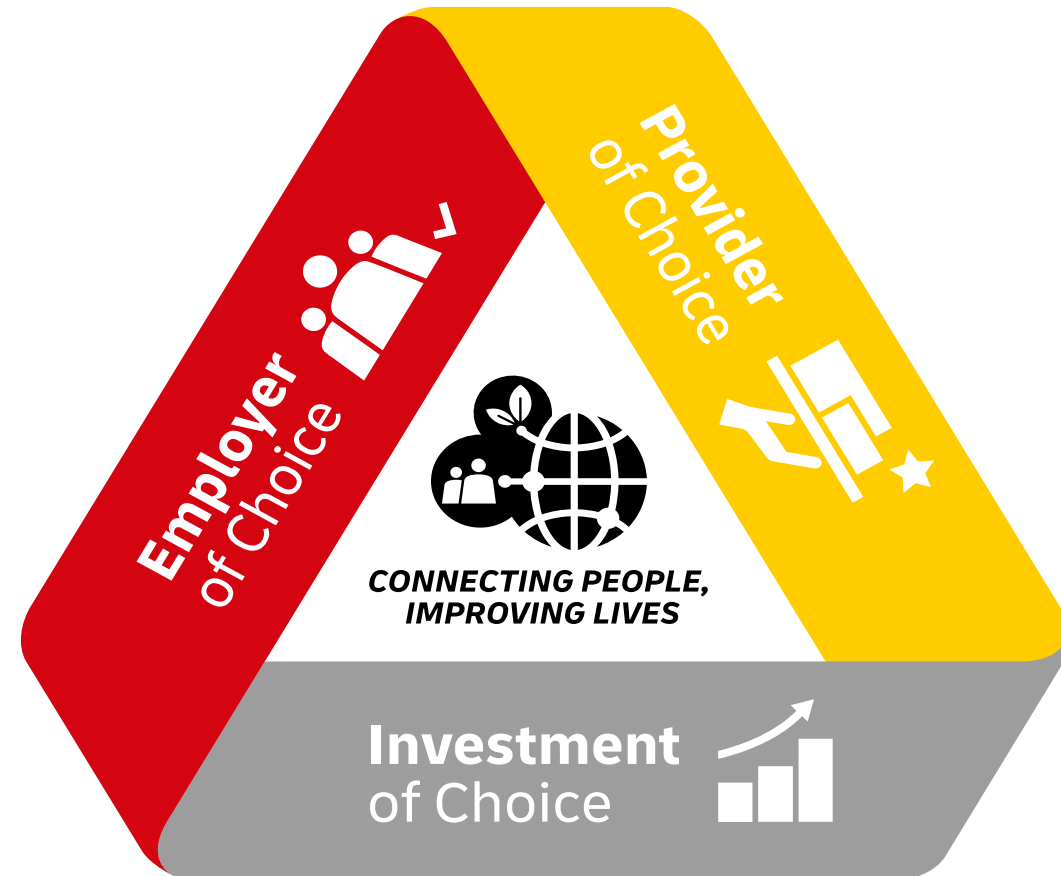


DHL Express:
Global market leader in Time Definite International (TDI) Express shipments

DHL Express investment summary

- **#1 World's Best Workplaces 2021**
- Premium logistics segment offers **above-GDP growth** driven by global trade (B2B) as well as international e-commerce (B2C+B2B)
- **Leading integrated global network** with long standing local presence in 220+ countries & territories
- Growth acceleration during COVID has led to **sustainably higher EBIT and margin levels**
- **Proven ability to flex network** to adapt to changing market circumstances

DHL Express:
Strong
performance
continued during
pandemic along all
dimensions



DHL Express:
Strong performance continued during pandemic along all dimensions

4 Pillars

Employer of Choice

MOTIVATED PEOPLE



Ain't no mountain high enough

Provider of Choice

GREAT SERVICE QUALITY



Love Sweet Love

LOYAL CUSTOMERS



Simplicity

Investment of Choice

PROFITABLE NETWORK



Target: FOCUS

GROSS PROFIT MANAGE INDEX

Wanna be a Billionaire

3 Letters

P = GQ

1 Passport

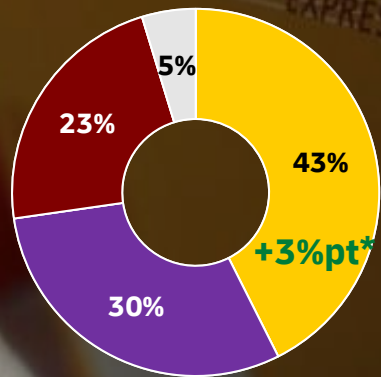


Strong performance as Employer of Choice

GPTW Video

**Great
Place
To
Work.®**

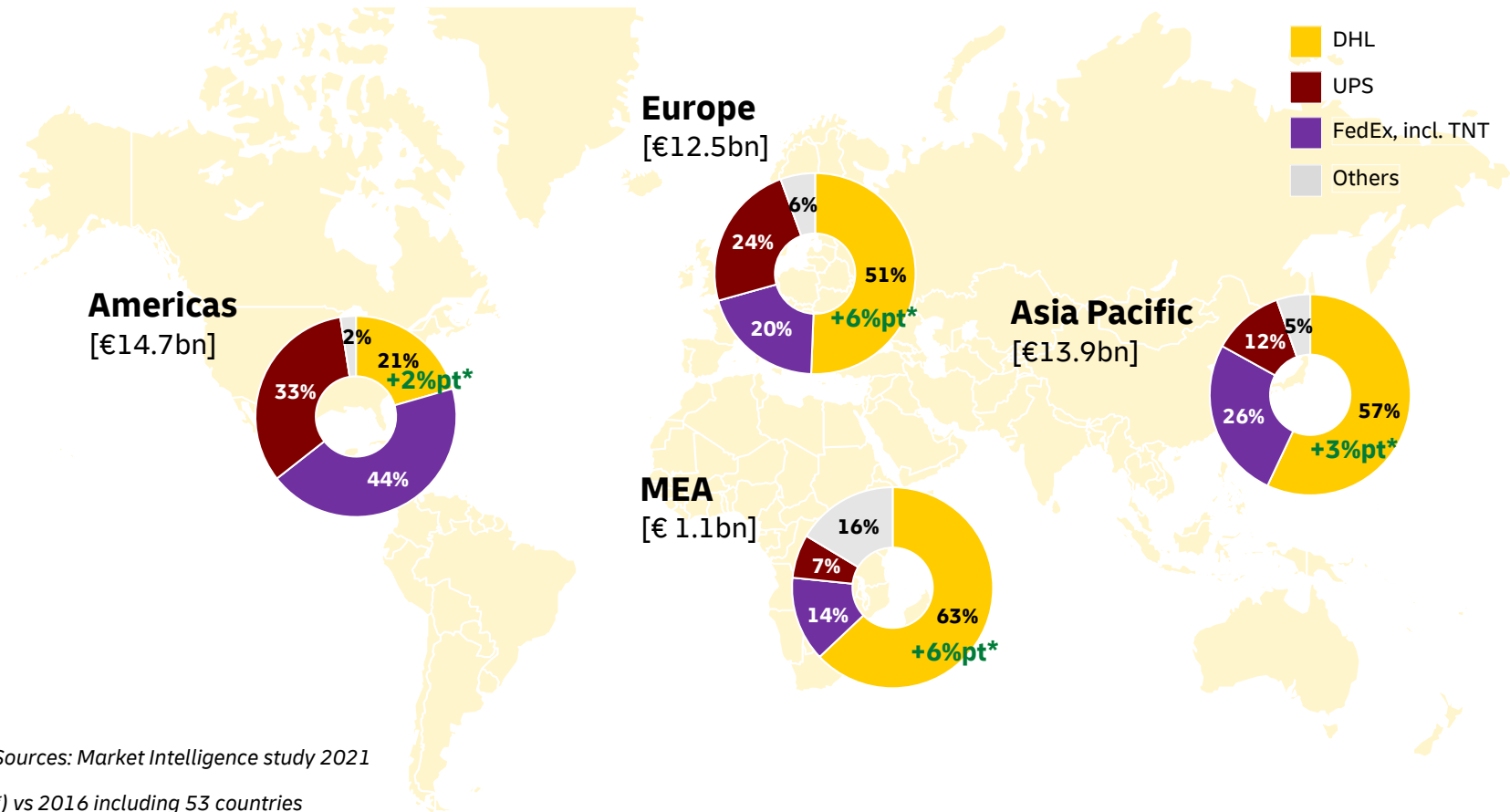
2021 Revenue Market Share study confirmed DHL's leading position in TDI



Global TDI Revenue Market Share [€42.3 bn]

Strong performance as Provider of Choice (1/2) MI Study 2021

Global TDI Revenue Market Share



Sources: Market Intelligence study 2021

*) vs 2016 including 53 countries

Strong performance as Provider of Choice (2/2)

Touchpoint Results: Best of Breed by region (TDI)

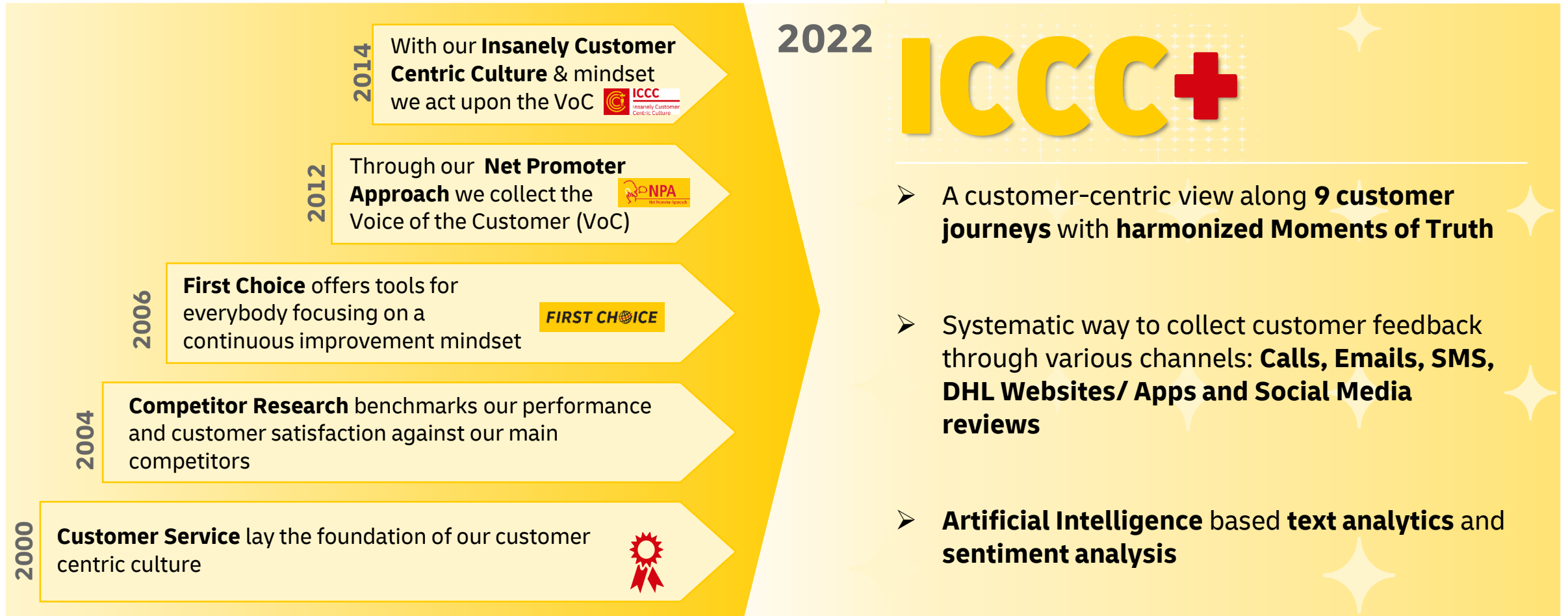
(Best of Breed Provider*)

	GLO-BAL	EU	AP	AM	CN	MENA	SSA
Overall Satisfaction	DHL	DHL	DHL	--	DHL	DHL	DHL
Likelihood to Recommend	DHL	DHL	DHL	DHL Competitor	DHL	DHL	DHL
.64 Delivery Service	DHL	DHL	DHL	DHL	DHL Competitor	DHL	DHL
.55 CS - Complaint Handling	DHL	DHL	DHL	Competitor	--	DHL	DHL
.54 CS - General Enquiries	DHL	DHL	DHL	DHL Competitor	DHL	DHL	DHL
.54 Customs Clearance	DHL	DHL	DHL	DHL Competitor	DHL	DHL	DHL
.53 Account Manager	DHL	DHL	DHL Competitor	DHL Competitor	DHL Competitor	DHL	DHL
.52 CS - Booking	DHL	DHL	DHL	DHL Competitor	DHL Competitor	DHL	DHL
.50 DS - Tracking	DHL	DHL	DHL	DHL Competitor	DHL	DHL	DHL
.47 Billing Inquiries	DHL	DHL	DHL	DHL Competitor	DHL	--	DHL
.46 Pick up Service	DHL	DHL	DHL	--	--	DHL	DHL
.45 Courier	DHL	DHL	DHL	DHL Competitor	DHL Competitor	DHL	DHL
.45 DS - Delivery Options	DHL	DHL	DHL	DHL Competitor	DHL Competitor	DHL	DHL
.45 Service Point	--	DHL Competitor	--	Competitor	--	DHL	DHL Competitor
.44 DS - Booking	DHL	DHL	DHL	--	DHL	DHL	DHL
.44 Invoices	DHL	DHL	DHL	DHL Competitor	DHL Competitor	--	DHL
.43 Prices and Conditions	Competitor	Competitor	Competitor	--	DHL Competitor	Competitor	Competitor

! Empty fields when less than 20 valid cases Best of Breed: Shows all providers with a gap smaller than 3 points to the best rated provider. No logo is shown, if all providers lie within a narrow 3 point range. If only one logo is shown, the respective provider is best of breed

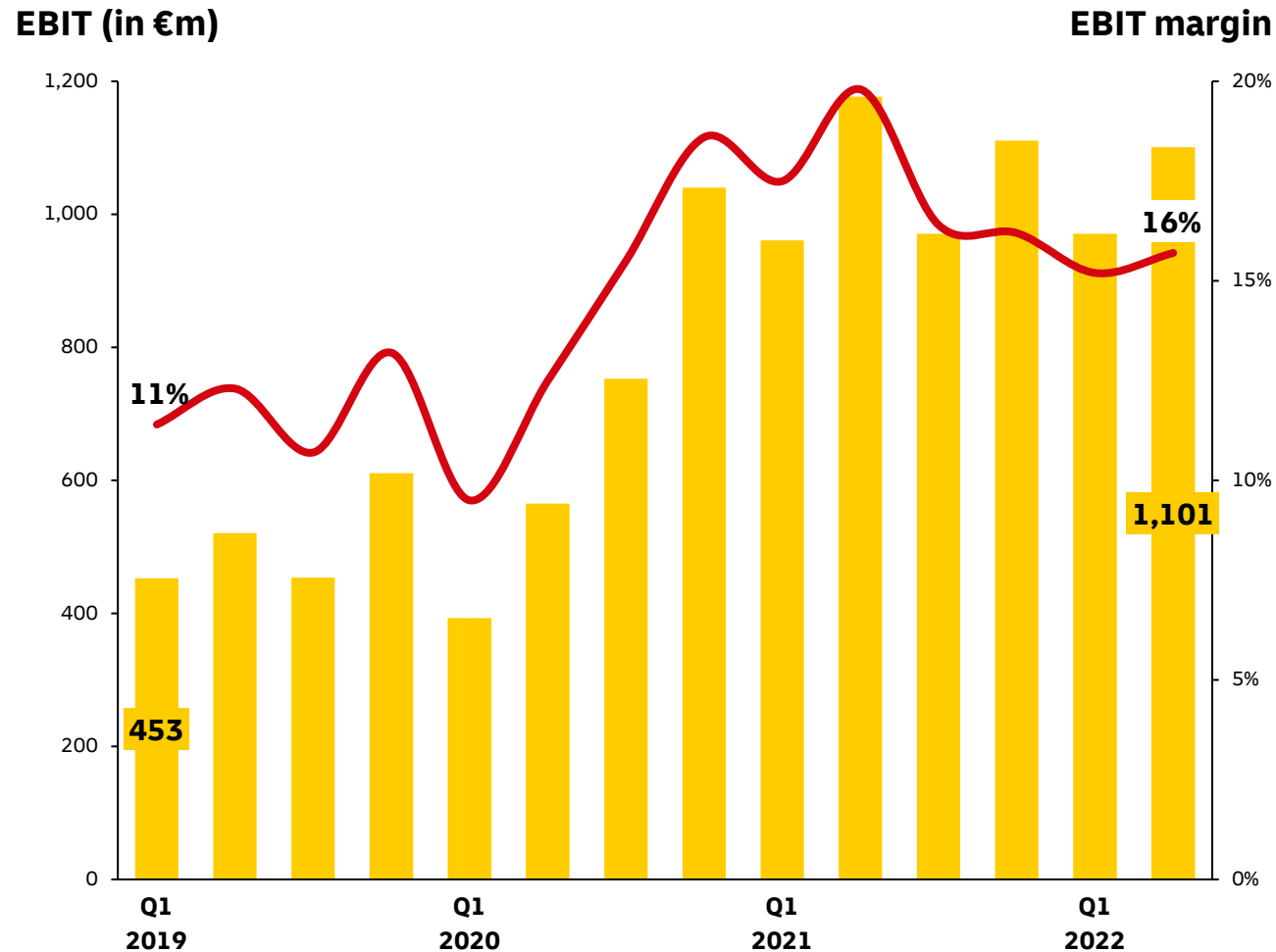
Provider of Choice

Moving to the next level of customer focus by digitalizing ICCC and NPA

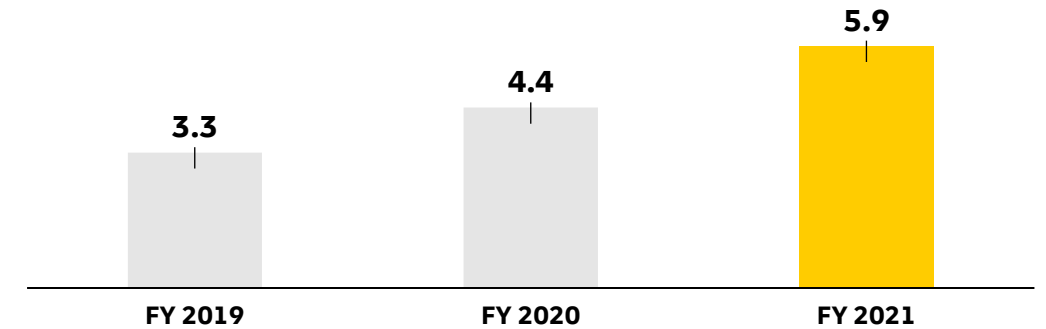


Strong performance as Investment of Choice

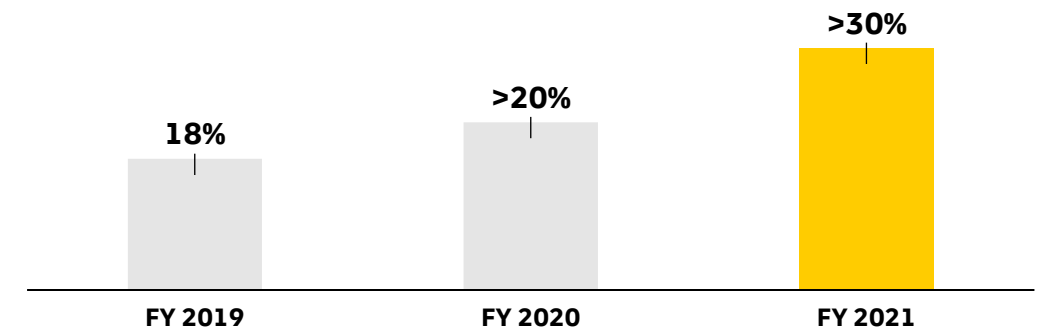
EBIT / margin / cash flow track record



Operating cash flow (in €bn)



ROCE
(incl. Goodwill)



DHL Express: Market Update

What has changed due to / during COVID-19 and related lock-downs?



- Acceleration of **structural B2C growth**
- **Solid V-shape recovery from B2B downturn** in first lockdown phase
- Significant **network adjustment** due to air freight market disruption

Market Outlook



- No fundamental change in Express business model, network focus or customer offering
- Expect **gradual return to pre-COVID trend growth rates** (volume: +4-5% p.a.), on higher absolute base, subject to current macro uncertainties

B2B Slightly above global GDP in line with pre-covid trend

B2C Continued above GDP growth as cross-border e-commerce continues to take share of retail spending

Embedded protection mechanisms



Diversified exposure

Regions, customer base,
B2B vs B2C mix



Cost & capex flexibility

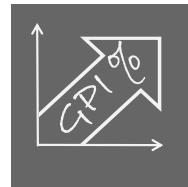
Possibility to delay capex projects
Limit indirect costs or
discretionary spending



Network flexibility

Virtual global airline and network
- combination of owned vs leased
planes, mix of short-, mid-, long-
term leases

Additional levers



General Price Increase



Fuel surcharge



Emergency Situation Surcharge

What happens to
DHL Express in a
scenario of global
downturn

What happens to **DHL Express** when air freight market normalizes?

VOLUME

- **Retain heavier profile shipments** (especially B2B) with **strong service quality proposition**
- **Continued growth of international cross border B2B & B2C**



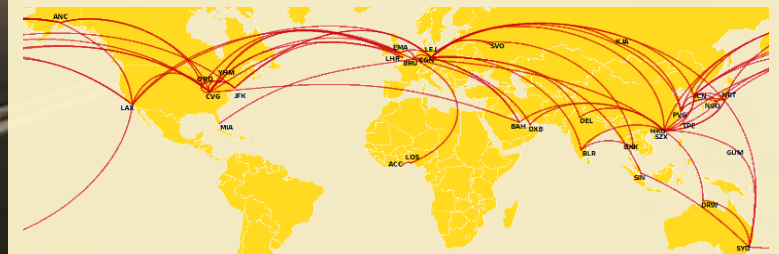
PRICING

- **Pricing mechanisms** (including surcharges) **to reflect market situation** and **cost fluctuations**
- Regular yearly **General Price Increase (GPI)** in line with stringent yield management approach



NETWORK

- **Covid-related ESS** to be reduced in line with return **to pre-pandemic CpK** driven by **increased CAL**
- Our **Aviation network mix (fix / flex)** enabling **optimization and adjustment** as pandemic ends and commercial air returns





Connecting people
and improving lives
is what inspires us
to get up and go
every day





Connecting people and improving lives is what inspires us to get up and go every day

WHEEL OF PURPOSE

WHAT WE DO EVERY DAY

We **CONNECT PEOPLE**, companies and countries by facilitating trade and moving express shipments through our network of people, planes, vehicles and facilities every day.

We strive to be a **Great Place to Work** For All by demonstrating our **leadership behaviors**, listening to our colleagues and acting on the feedback we get from the **Employee Opinion Survey (EOS)**.



HOW WE MAKE A DIFFERENCE

We **IMPROVE LIVES** not only by doing what we do every day but by ensuring that our leaders create an environment where our **PURPOSE** can flourish.

We **spend 1% of our net profit** each year to create lasting impact for the people and the communities we operate in.

Our **GO family** is designed to make the world a better place through building on our strengths and partnering with leading and international organizations.

We mobilize the strengths of our people by fostering **volunteering** activities. With **matching** time and money invested, we boost the contributions our colleagues make to society.

HOW YOU CAN GO AND GET INVOLVED:

VOLUNTEER
 GO and volunteer for a good cause - find out more about at: Volunteering-dpdhl.com

BE A ROLE MODEL
 GO and role model our leadership behaviors

ENGAGE IN THE PROGRAMS
 GO and engage in our partnerships & programs

AMPLIFY THE PROGRAMS
 GO and amplify, inspire, encourage, accelerate our GO Programs and volunteering activities

DHL Express Strategic priorities



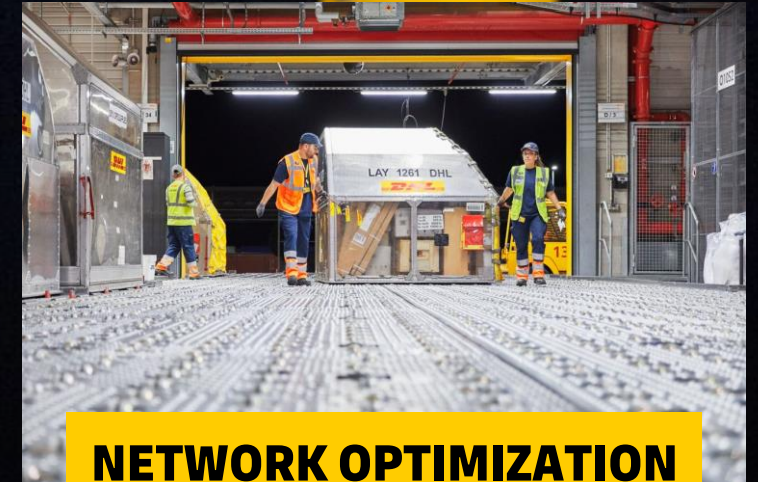
PEOPLE ENABLEMENT

Fadzlun Sapandi
Executive Vice President,
Global HR, DHL Express



SELL LIKE NEVER BEFORE

Michiel Greeven
Executive Vice President,
Global Sales, DHL Express



NETWORK OPTIMIZATION

Travis Cobb
Executive Vice President,
Global Network Operations &
Aviation, DHL Express

Deutsche Post DHL
Group

We have reached a **new performance level** and are delivering stronger than ever

PEOPLE ENABLEMENT

FADZLUN SAPANDI

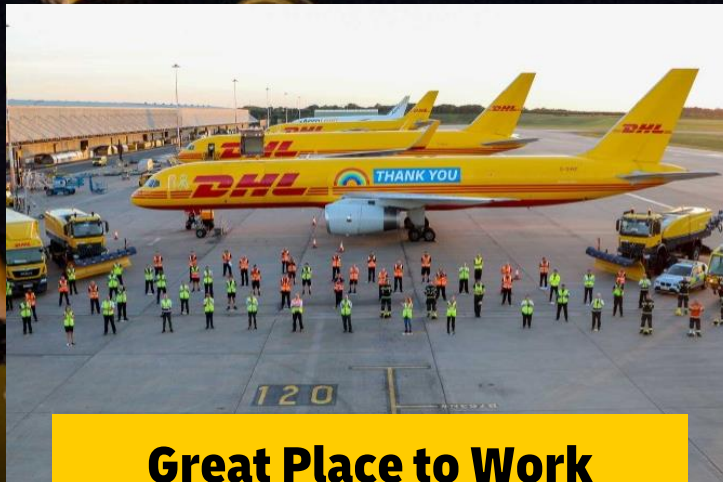
EVP GLOBAL HR, DHL EXPRESS

08 September 2022

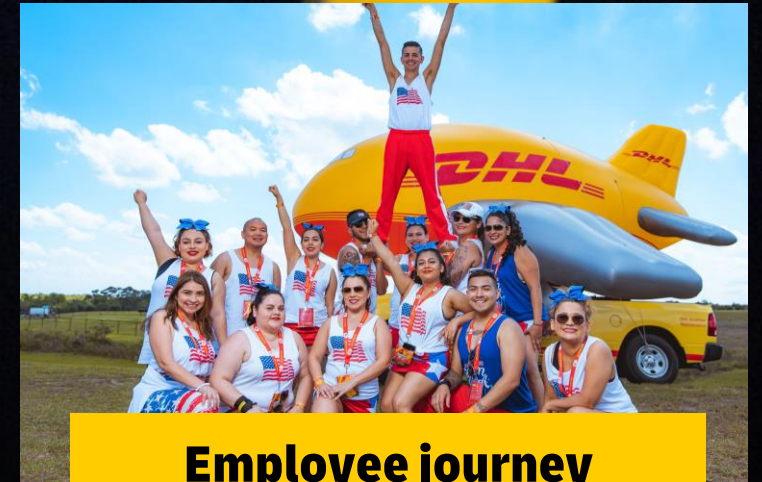
DHL Express People Enablement



CIS



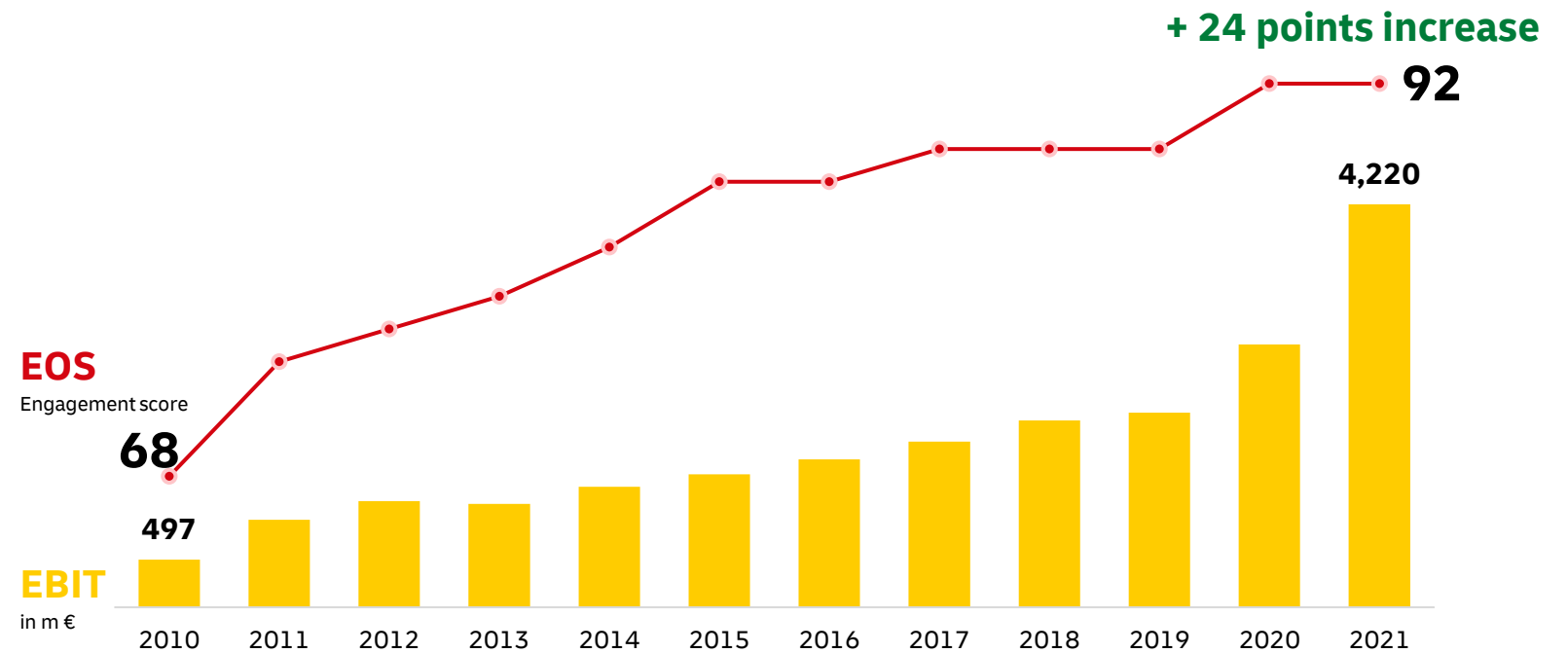
Great Place to Work



Employee journey

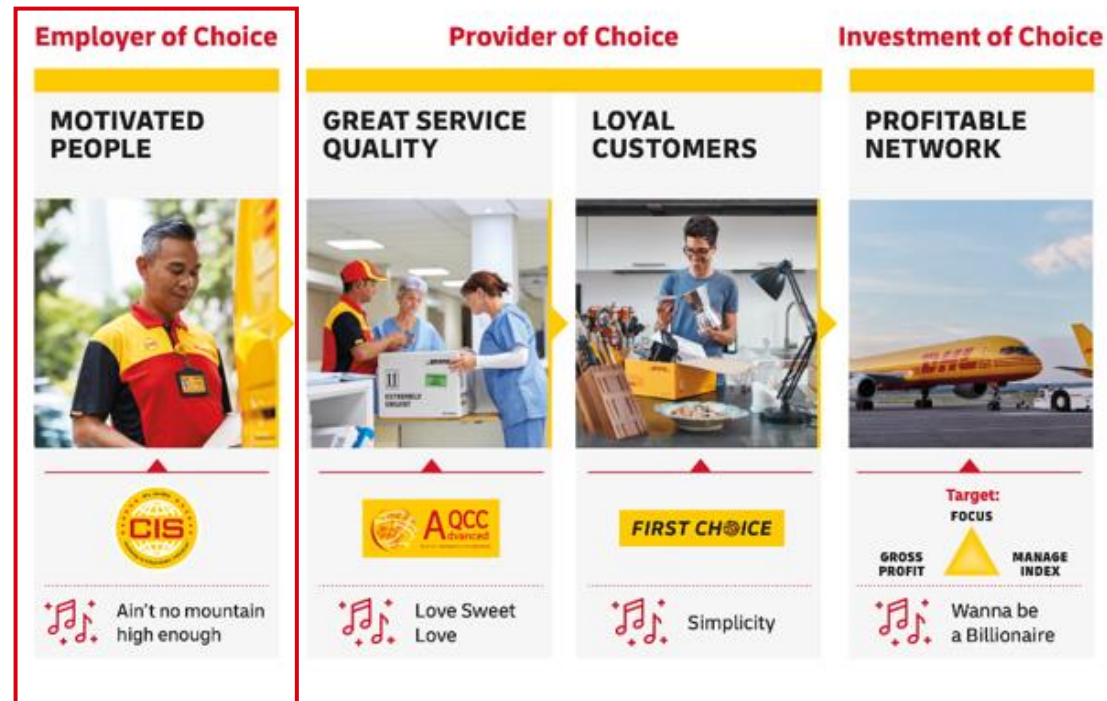
The impact of engaged employees on improved business performance becomes clear when looking at our annual Employee Opinion Survey (EOS) results

EOS & EBIT DHL EXPRESS 2010 – 2021



Motivated people are at the center of our focus strategy, boosted by our Certified International Specialist programs

4 Pillars



3 Letters



1 Passport



Launched in 2010,
the **Certified
International
Specialists** program
is the centerpiece
for employee
engagement and
development

Launched in 2010

Delivered by DHL Management and employees

Goal:

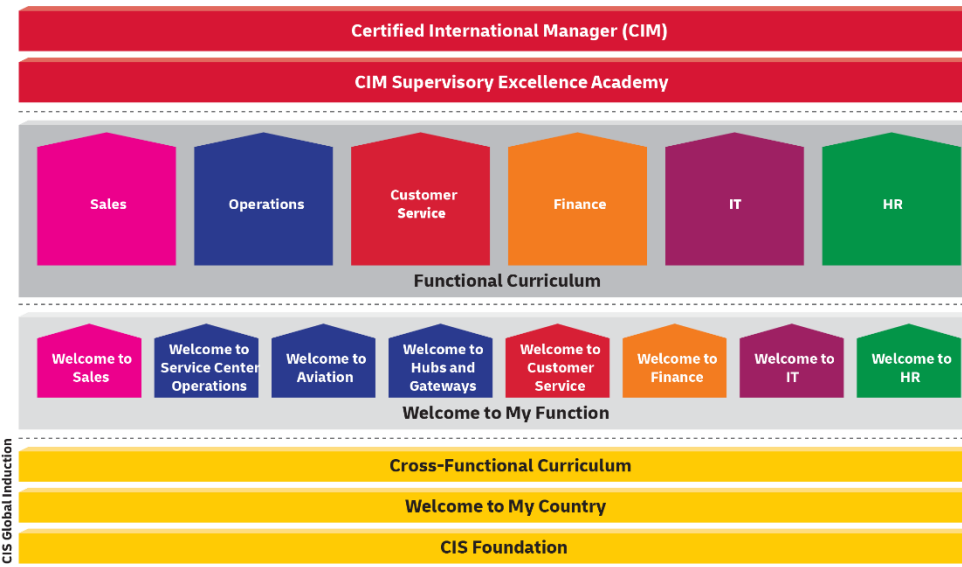
Understanding DHL Express culture, business objectives of FOCUS strategy and focus on international growth

Recorded in the '**Passport to Success**', capturing the employee's journey through CIS



100k employees attended
within **18 months**

Program Overview



- Program supports induction to knowledge, competencies, and skills upgrades
- Foundation module “Welcome to my Company” covers all functions
- Dedicated Supervisory Academy for our frontline leaders
- and many more....

Today, dedicated programs cater and foster the development of all employee groups

CIS in numbers

110,000

Certified International Specialists



**2500 Graduated
1,419 Planned for 2022**



EOS up over 20% points since the program began



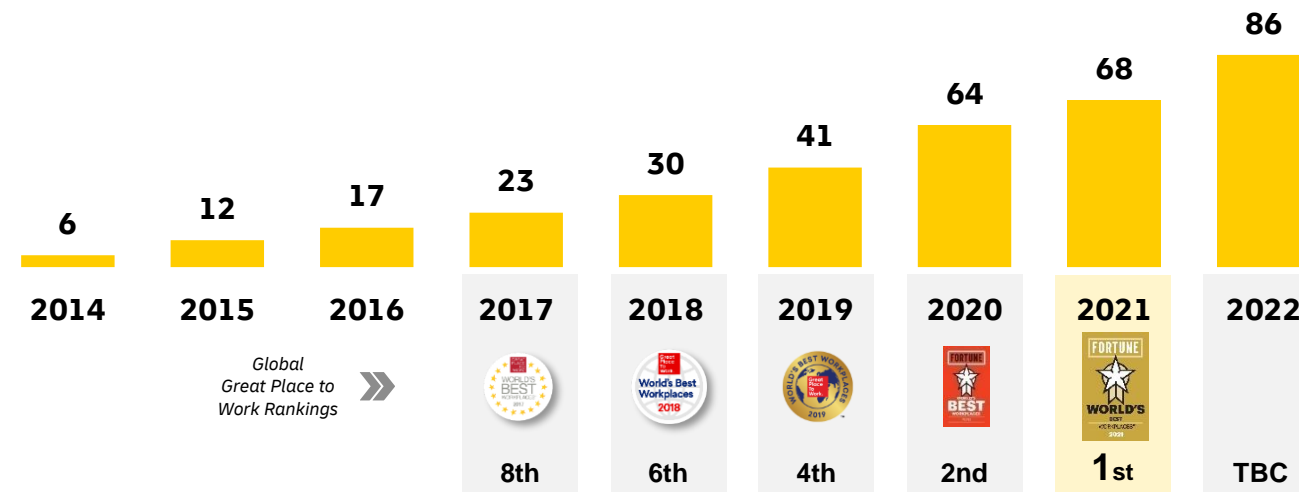
Over 280k feedback assessments through CIM

The recognition as **World's Best Workplace™ 2021** is a testament to the strength of the DHL Express culture



Great Place to Work identifies the **Best Workplaces** by analyzing companies' workplace programs and surveying over half a million employees across multiple countries about the key factors that create great workplaces for all.

Country participation & Ranking on World's Best Workplaces™



Transforming the employee journey through digitalization drives engagement and efficiency

Transforming the employee journey through digitalization



- Digital posting across multiple channels
- Digital Interviews & assessments
- Taleo as one stop-shop for full digital recruitment suit



- Digital onboarding utilized via Phenom/Taleo saving time and manual efforts



- Changing the way our people interact, use HR services & learn
- Leverage AI and Machine Learning for Open Comments within annual survey



- Exit Interviews – digital pilot in addition to in person
- In-Depth Analysis of turnover rates

Our people have always been and will always be at the core of our attention and value chain



In-Person Signature Events as of 2022
(Employee of the Year, Cups, Sales Champions Clubs)

DHL Express Culture driven in the hybrid world

Online Events
(TownHall(s), FESTIV-ALL, virtual EoYs)



DHL Express People Enablement



CIS

Motivated people are at the center of our focus strategy, boosted by our CIS programs



Great Place to Work

The recognition as World's Best Workplace is a testament to the strength of our culture



Employee journey

Data & analytics, enable us futureproof recruitment, a great employee experience and to be competitive in the external market

Deutsche Post DHL
Group

We have reached a **new performance level** and are delivering stronger than ever

SELL LIKE NEVER BEFORE

MICHEL GREEVEN

EVP GLOBAL SALES, DHL EXPRESS

08 September 2022

DHL Express

Sell like never before



GROWTH



YIELD



HEAVIER SHIPMENTS

The Big Yellow Sales Machine - Our three pillars

Focused Sales Approach

Focus on diverse growth opportunities

- B2B - Industry Approach
- B2C E-commerce (PUYP)
- B2B E-commerce
- Heavier Weight (Gatekeepers Program)

Responding to a dynamic world: COVID-19, Ukraine crisis, Fuel price changes

1. People Motivation

- People Development: Great Place to Work, wellbeing, recognition, Sell-Sell-Sell mindset



2. Efficiency & Discipline: Sales Tools and Processes & Pricing

- Revenue Quality: Net Price Change, Tender Review Boards, Red/Yellow Cards, Shipping to Profile
- Operating with advanced sales tools



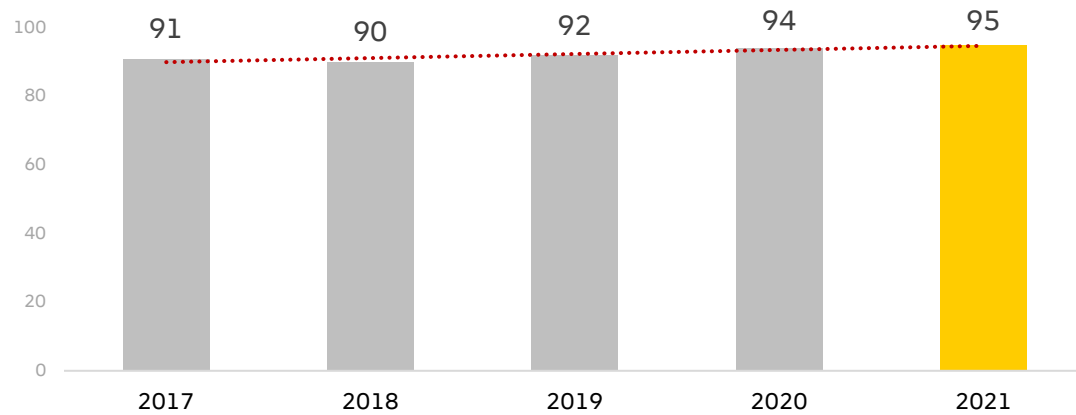
3. Skills

- Sell Like Never Before, Power Up Your Potential and targeted Power Sessions
- Proactive and constant Customer Communications

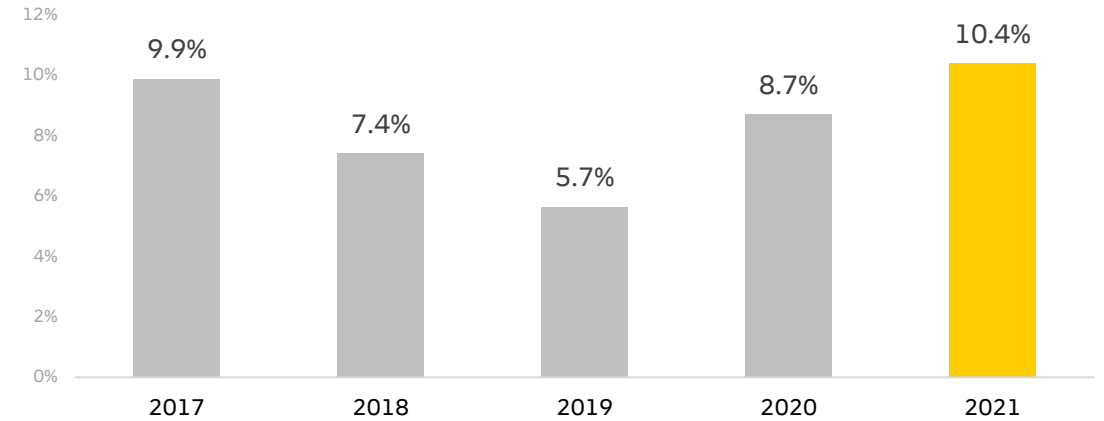


High level results of our commercial strategy

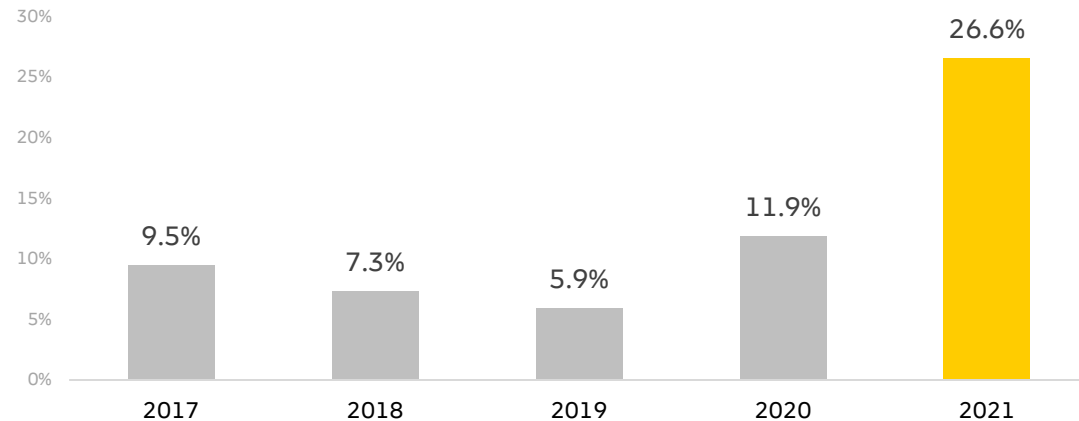
Employee Engagement – EOS Score Sales Global



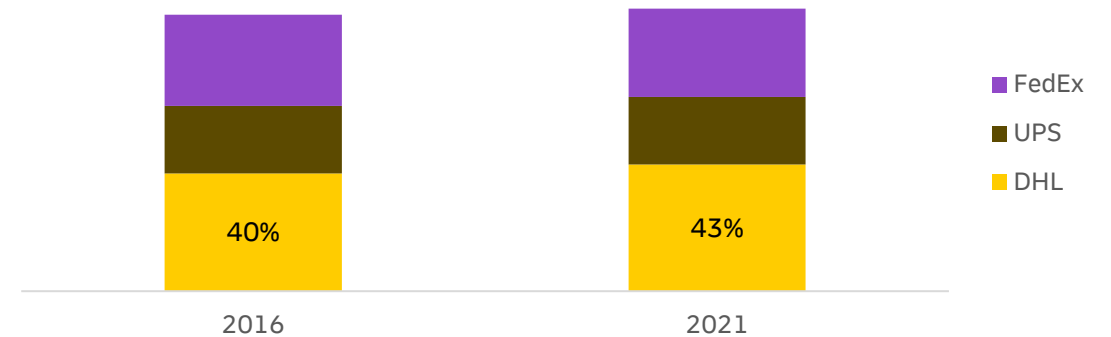
TDI Shipments per Day Growth – DHL Express 2017 - 2021



Global Revenue Growth – DHL Express 2017 - 2021



Revenue Market Share Growth - International Express



Express pricing components

Base shipment price

- According to customer shipment profile (volume, weight, trade lanes)
- Subject to annual **General Price Increase (GPI)**

Fuel surcharge

- Moves up and down with fuel price movements
- Transparently based on external fuel price indices

Potential other surcharges

- Subject to specific shipment profile or services requested (e.g. Customs, delivery preferences etc.)
- Currently including Emergency Situation Surcharge

Constantly tracked and revised through established mechanisms:

- Ship-to-Profile
- Tender review Board
- Red / Yellow Card
- Net Price Change

Unchanged strong focus on yield management based on well established toolset

Focused Sales Approach

Focus on diverse growth
opportunities

- B2B - Industry Approach
- E-commerce - B2B & B2C
- Heavier Weight
(Gatekeepers program)
- **Sustainability**
Offer green alternatives for all
of our core products via
GoGreen+ (SAF), supporting our
customers to reduce their
Scope 3 footprint

Looking Forward

1. People Motivation

- People Development: Great Place to Work, wellbeing, recognition, Sell-Sell-Sell mindset

2. Efficiency & Discipline: Sales Tools and Processes & Pricing

- Revenue Quality: Net Price Change, Tender Review Boards, Red/Yellow Cards, Shipping to Profile
- Operating with advanced sales tools

3. Skills

- Sell Like Never Before, Power Up Your Potential and targeted Power Sessions
- Proactive and constant Customer Communications

Building
to the Future

Sales
**Hiring
& Retention**

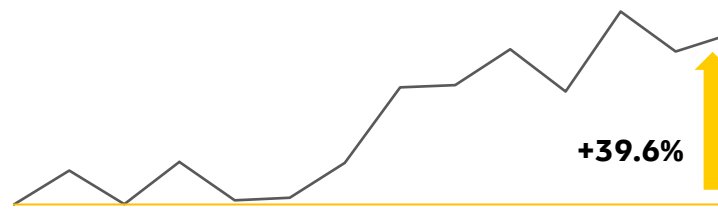
Sales
Roadmap
Digital Sales
New CRM

Embedding
**Selling from a
buyer's perspective
(SLNB)**

B2B Growth Trends and Market Outlook:
 Slightly above-GDP growth with additional potential from B2B E-commerce

B2B development: 2019 – YTD June 2022

B2B Revenue per Day trend



B2B Weight per Day trend



Revenue excl. Fuel Surcharge and Emergency Situation Surcharge. Revenue at constant exchange rate. Indexed to Q1 2019

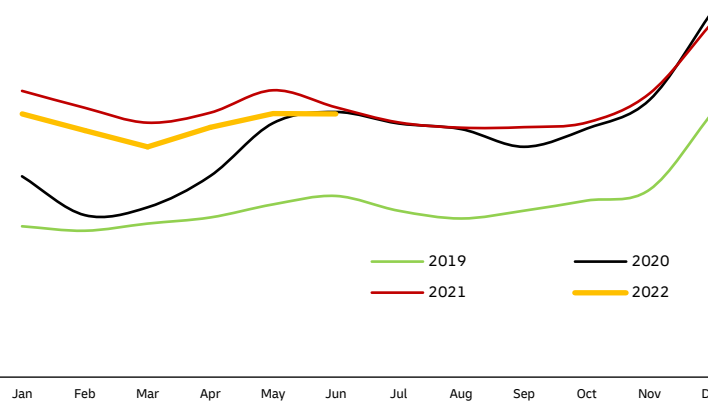
Comments and Outlook

- Ongoing B2B growth from a revenue and weight perspective - subject to current macro uncertainties
- **B2B Outlook:** Slightly above global GDP – and in line with pre-COVID trends
- B2B E-commerce remains the fuel for additional growth

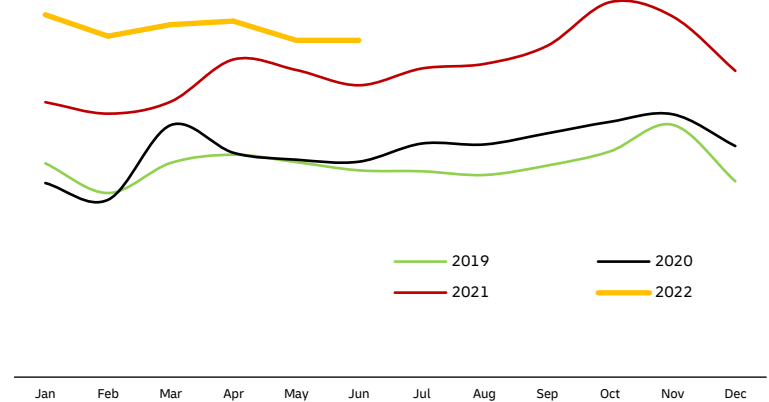
B2C Growth Trends and Market Outlook: Continued above-GDP growth after current normalization phase

B2C development: 2019 – YTD June 2022

B2C Shipments per Day trend



B2C Revenue per Shipment Monthly trend



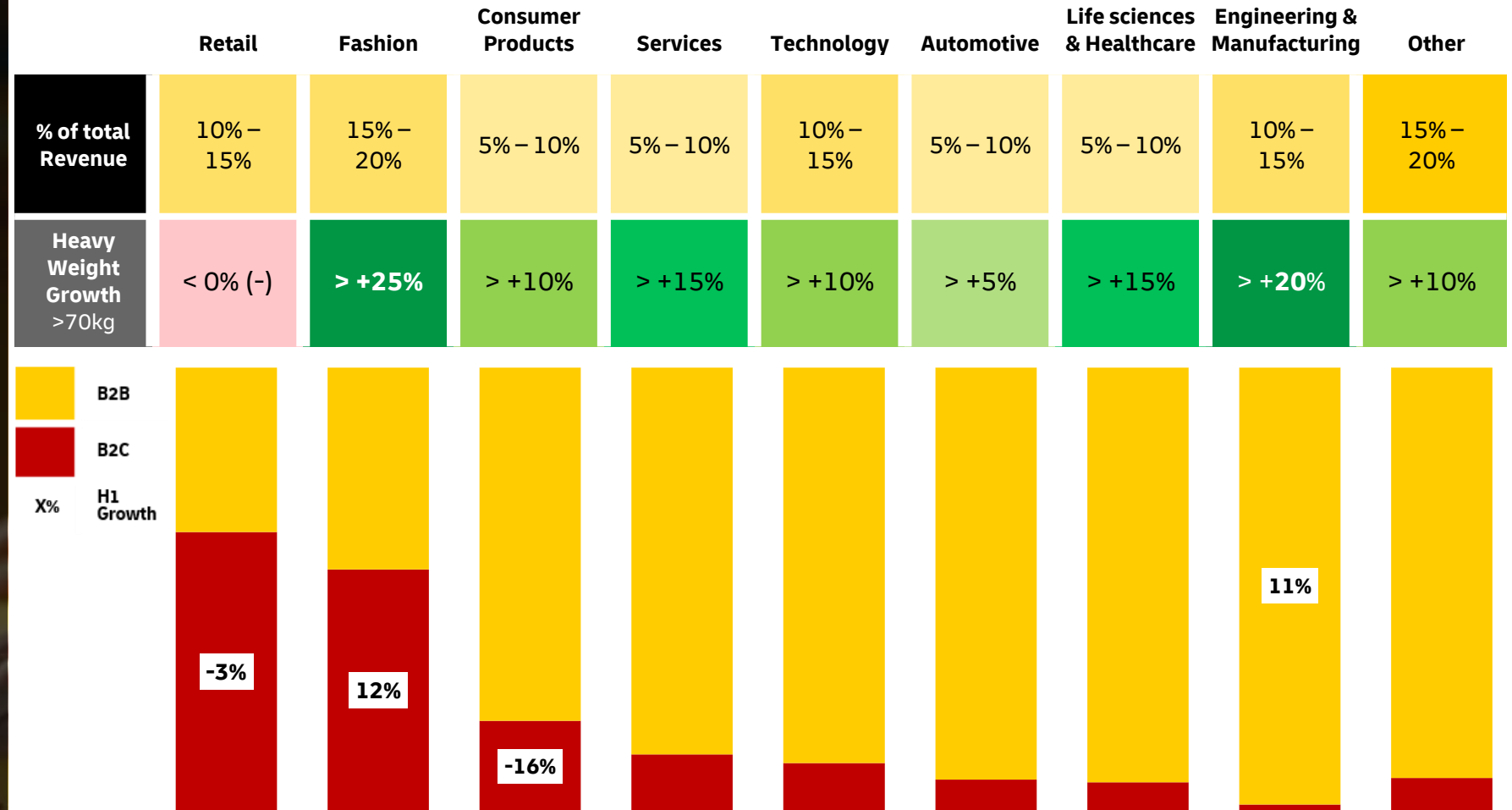
Revenue without Fuel Surcharge and Emergency Situation Surcharge. Revenue at constant exchange rate.

Comments and Outlook

- Accelerated absolute B2C shipment growth in the last 2 – 3 years (+20 - 30% vs. 2019)
- **B2C Outlook:** Normalization in B2C is happening, but continued growth above GDP as cross-border E-commerce continues to take share of retail spending
- The impact of our yield measures (Red & Yellow Cards) well visible in B2C

Industry mix (H1 2022)

Healthy industry mix:
Driving well-balanced exposure to B2B and B2C growth across different weight categories

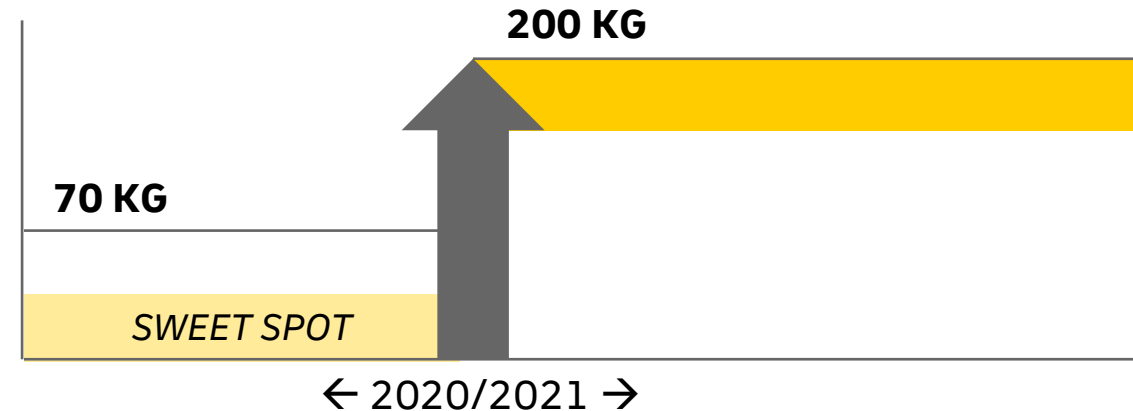


Focus on Heavier Weight volume

Increased demand for Express shipping of heavier shipments is not only a one-off effect fueled by the pandemic.

The bar has moved up
and we are only scratching the surface

Gatekeepers Program



While the Gatekeepers program started with a focus on retention, today we keep gaining new heavier volume, and we are only scratching the surface.

There is a growing awareness that Express door-2-door shipping is a good fit for time critical heavier shipments:

- Specific industries and customers indicate they will keep all heavier volume with us
- Fast and reliable transit times and available capacity
- Stable pricing (only adjusted 1x per year)
- High Service Quality, tracking and customer service

B2C E-commerce:
Profitable growth
segment
representing 45+%
of TDI volumes

Power Up Your Potential

A network wide approach to sell Profitable Premium E-commerce:

- Picking the right product which suits the express network
- Besides high-end fashion and luxury customers, DHL Express also supports the middle section:

FARFETCH

Malaville


VARSITY
HEADWEAR

LVMH

Db | douchebags™

Under

Global e


PHILOCOFFEA
ROASTERY AND LABORATORY

SBitDo®

You know these ...

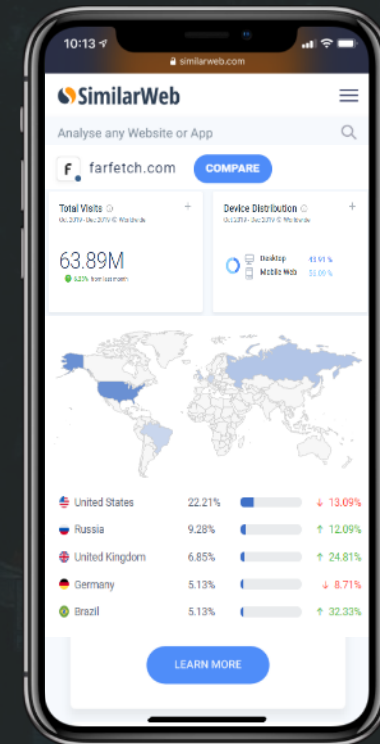
But do you also know these ?

Facilitating growth for our customers via our Website Health Check and smart use of market intelligence data

WEBSITE HEALTH CHECK

- ✓ Do you sell **internationally**?
- ✓ Do you state your **shipping options** on your home page and mentioned that you **sell internationally**?
- ✓ Do you offer an **express delivery** option?
- ✓ Are your **shipping charges** appropriate?
- ✓ Do you offer a **Duties & Taxes Paid** option?
- ✓ Do you offer an easy **returns** solution?
- ✓ Is your Website available in multiple **languages**?
- ✓ Do you apply **currency** conversion?
- ✓ Do you offer localized **payment options**?
- ✓ Are **delivery notifications** mentioned on your website?

SimilarWeb

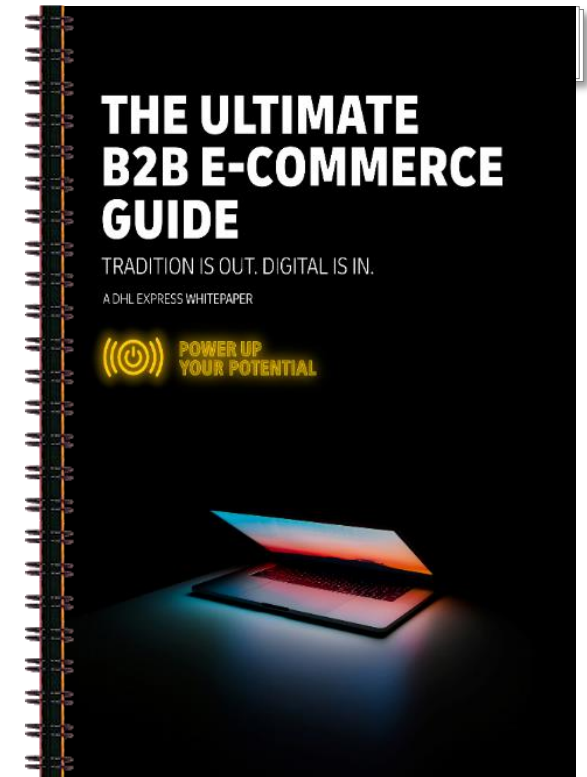


The Ultimate B2B E-Commerce Guide

Tradition is out. Digital is in.

The pace of the B2B sector's e-commerce transformation should not be underestimated:

- Digitally-native buyers, combined with the ongoing effects of the pandemic, are pushing through rapid change in B2B supply chains
- B2B customers want flexible, convenient, and digitally-focused services more aligned with their B2C experiences
- Even B2B players established within their sectors will need to invest to optimize their e-commerce channels



**B2B E-commerce:
Supporting B2B
customers to adapt
their sales approach
to e-commerce**

Consulting our customers with our B2B E-commerce Health Check

A B2B E-commerce flywheel and Health Check that will help B2B Companies identify which elements of their E-commerce portal need further optimization and how the journey looks like:

B2B E-commerce Flywheel

B2B E-commerce Website Health Check



- ✓ Do you have an **Easily Accessible B2B Webstore**?
- ✓ Do you **Sell Internationally** and state clearly on your Home Page that you offer **Worldwide Shipping**?
- ✓ Is your website available in **Multiple Languages**?

- ✓ Do you have **Detailed Product Descriptions** and Catalogs?
- ✓ Do you offer **Online Interactive Support** and **Product Customization** with easy interaction options?
- ✓ Do you offer **Self-help Portals** such as **how-to videos**?
- ✓ Do you have a simple and **Powerful Search Engine** on your website?
- ✓ Do you offer **Multiple Payment options** like credit card payments, extended payment and localized payment?

In Summary: Our Big Yellow Sales Machine

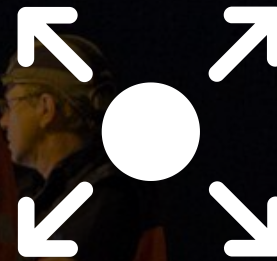
We have our **3 main pillars** in our Big Yellow Sales Machine (People Motivation, Efficiency & Discipline and Skills) and we remain focused on:



GROWTH

Focused on growth and opportunities

B2C & B2B E-commerce adding to growth



YIELD

Ongoing focus on Revenue Quality

“At the right price”



HEAVIER SHIPMENTS

Heavier shipments as a TDI opportunity

Not a one-off effect fueled by the pandemic

Deutsche Post DHL
Group

We have reached a **new performance level** and are delivering stronger than ever

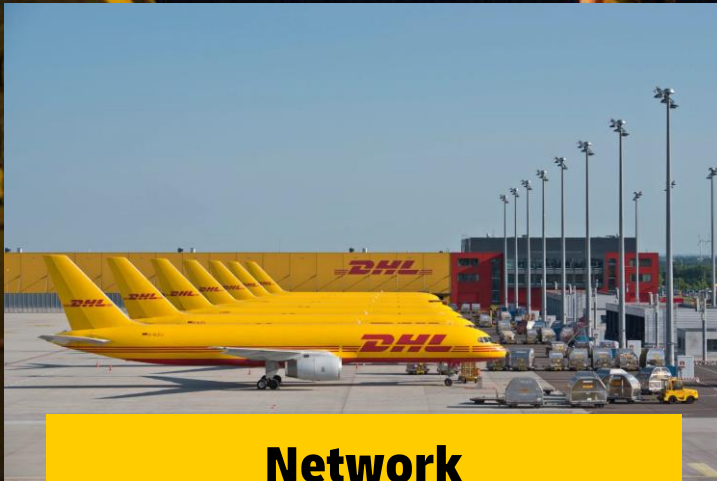
NETWORK OPTIMIZATION

TRAVIS COBB

EVP GLOBAL NETWORK OPERATIONS & AVIATION, DHL EXPRESS

08 September 2022

DHL Express Network Optimization



Network



Flex



Decarbonization



To Serve its Global
Network,
DHL Express Runs
More Than Just an
Airline

Over 500 airports served world-wide

DEDICATED AIR

- **18** own and partner airlines
- More than **320** dedicated aircraft

PURCHASE AIR

- Over **300** Commercial Air carriers

GROUND LINEHAUL

- Over **450** ground operators

> **2,300**
daily flights

> **4,500**
daily road movements

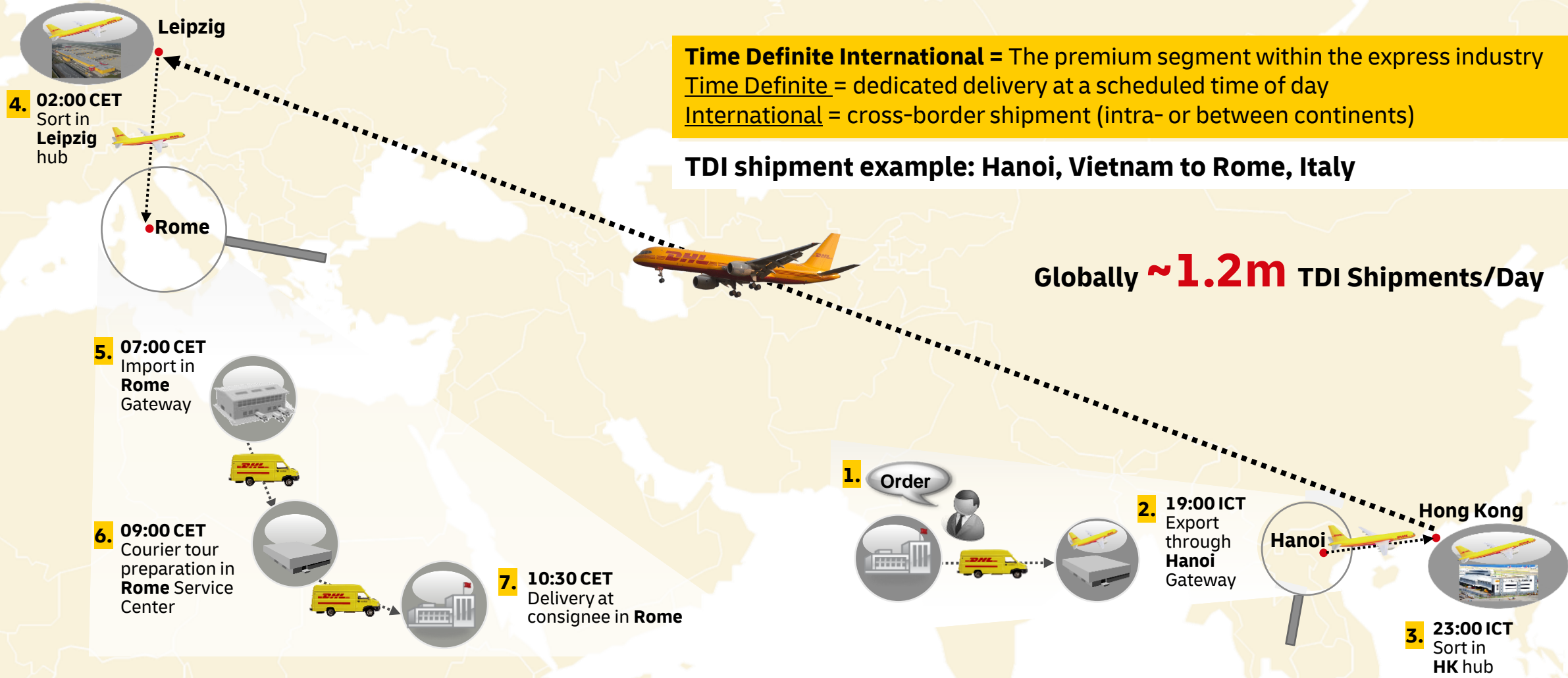
1 VIRTUAL GLOBAL AIRLINE and Network

Time Definite International: Our core DHL Express Product

Time Definite International = The premium segment within the express industry
Time Definite = dedicated delivery at a scheduled time of day
International = cross-border shipment (intra- or between continents)

TDI shipment example: Hanoi, Vietnam to Rome, Italy

Globally **~1.2m** TDI Shipments/Day



DEDICATED AIR

> 2,300 daily flights

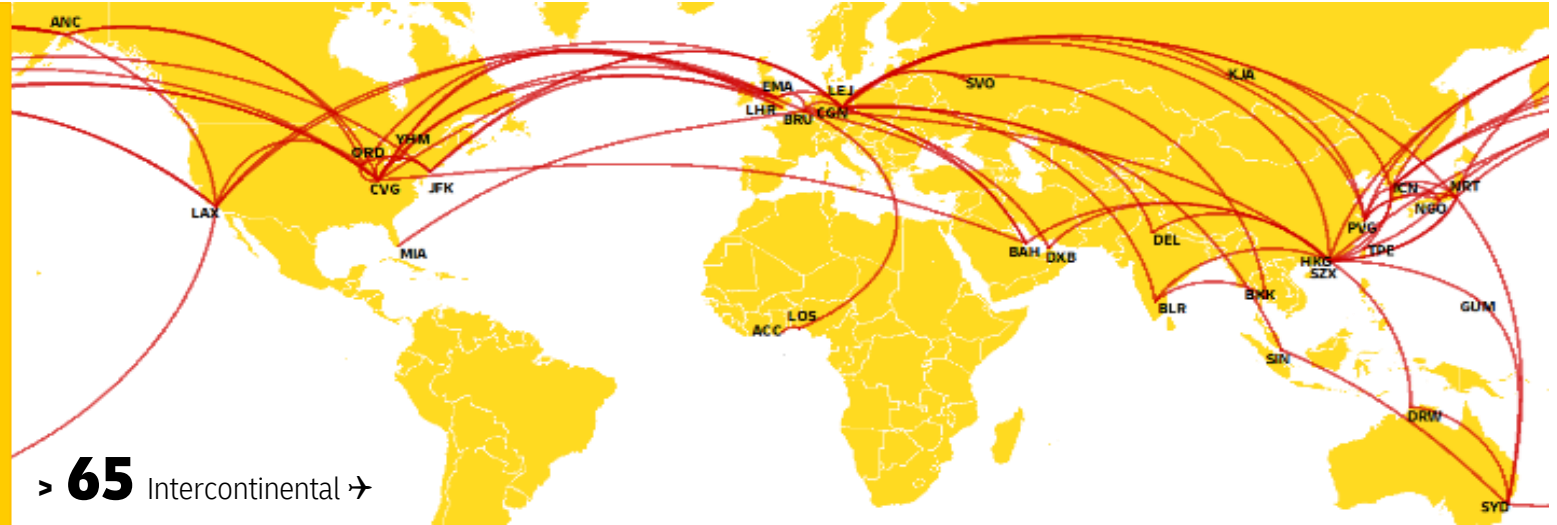
PURCHASED AIR

GROUND LINEHAUL

> 4,500 daily road movements

Our Global Aviation Network – Snapshot of DHL Dedicated Network Flights

Intercon Network



Regional Networks

> **95**

North & Latin America →



> **120**

Europe →



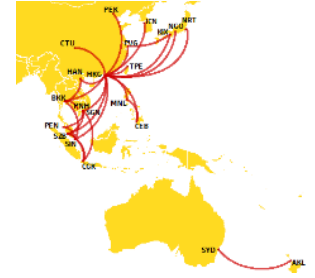
> **20**

Middle East & Africa →



> **20**

Asia Pacific →



DEDICATED AIR

> 2,300 daily flights

PURCHASED AIR

GROUND LINEHAUL

> 4,500 daily road movements

The **fix : flex ratio** of our **dedicated network** remains consistent over time

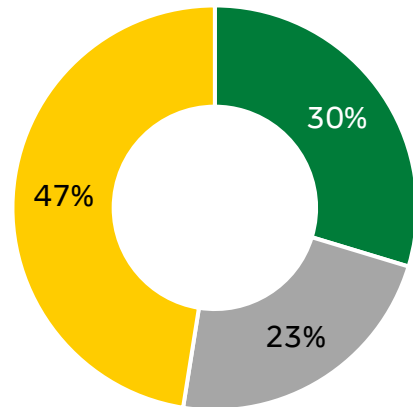
Unchanged network flexibility

for our dedicated air network

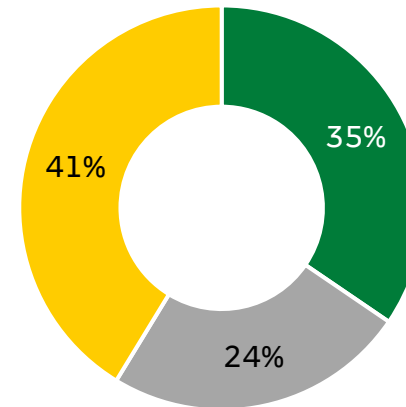
Pre Pandemic

2021

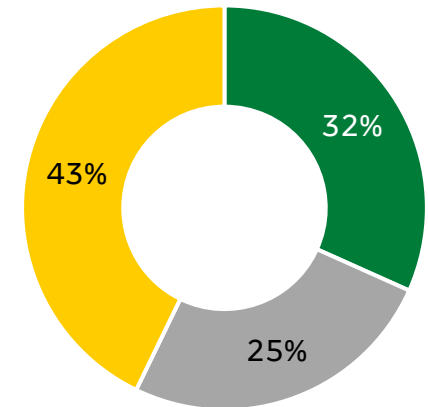
Forecast Year End



> 215



> 280



> 320

- LEASE terms: 30 days - <1 year
- LEASE terms ≥ 1 year
- OWN

DEDICATED AIR

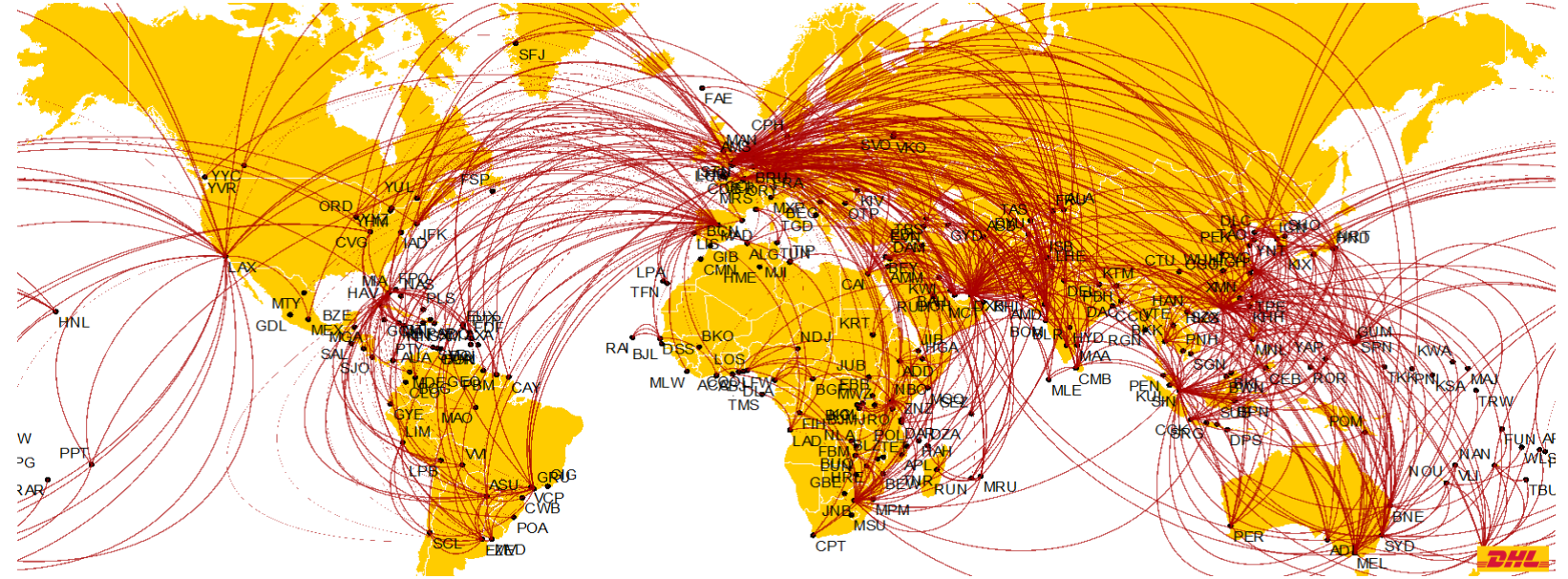
> 2,300 daily flights

PURCHASED AIR

GROUND LINEHAUL

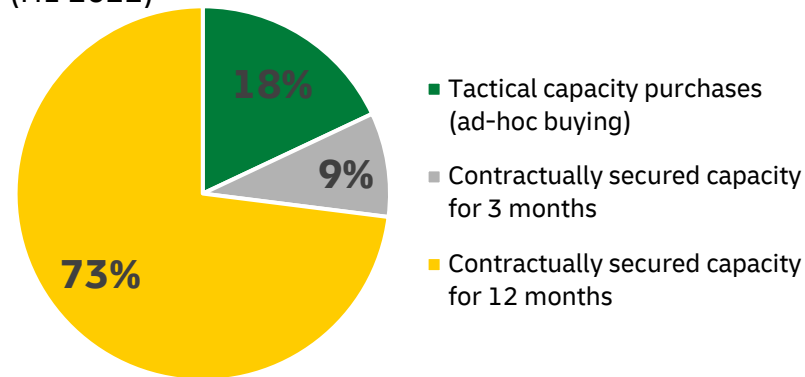
> 4,500 daily road movements

Commercial air reach



Commercial air linehaul to complement our dedicated network

CAL weight by contract type (H1 2022)



Tactical global and regional approaches are deployed to leverage **best service & value with flexible commercial contract terms and access to capacity**

DEDICATED AIR

> 2,300 daily flights

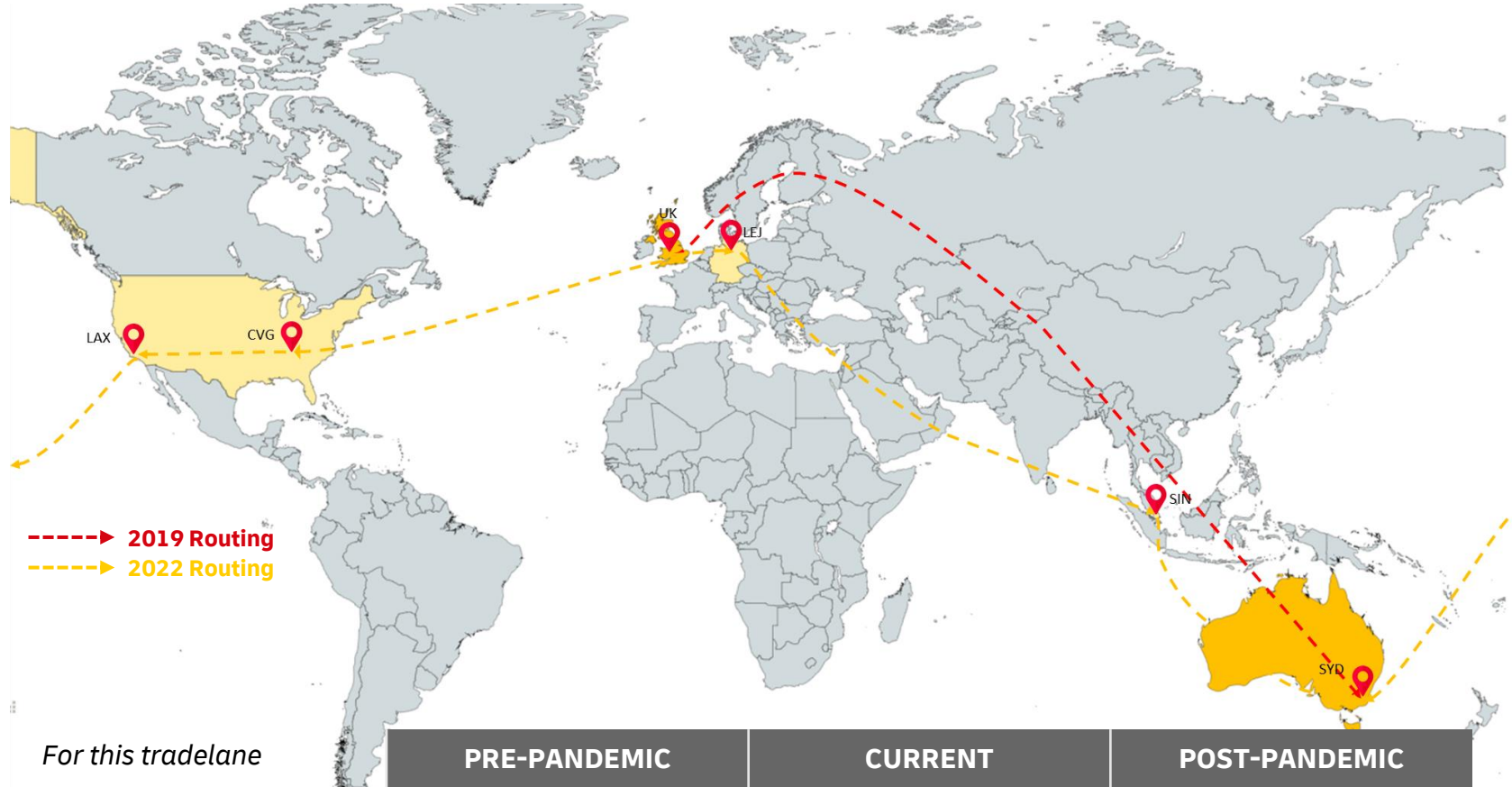
PURCHASED AIR

GROUND LINEHAUL

> 4,500 daily road movements

Navigating the pandemic

Network routing impacting our Cost per Kilo



For this tradeline

	PRE-PANDEMIC	CURRENT	POST-PANDEMIC
Dedicated Air Capacity	↓	→	↓
Commercial Air Capacity	↑	↓	↑
Cost per Kilo (CpK)	↓	↑	↓

Day to day management of our virtual airline

DEDICATED AIR

> 2,300 daily flights

PURCHASED AIR

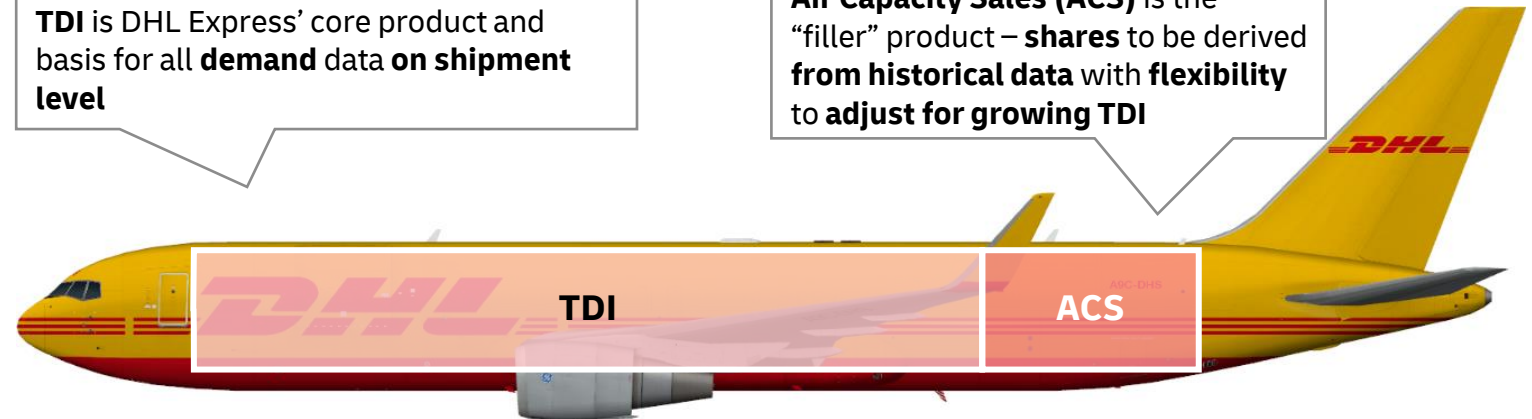
GROUND LINEHAUL

> 4,500 daily road movements

TDI is DHL Express' core product; our own 'ACS' product is being used as a 'filler' product to optimize our network

TDI is DHL Express' core product and basis for all **demand data on shipment level**

Air Capacity Sales (ACS) is the "filler" product – **shares** to be derived from **historical data** with **flexibility** to **adjust for growing TDI**



Weight Load Factor (WLF) used as **given input** within **target range** with **option to increase** on **low utilized lanes**

High TDI utilization on network supported by Air Capacity Sales (ACS) at market air freight yields; 2021 ACS revenue: 7% (6% in 2019)

DEDICATED AIR

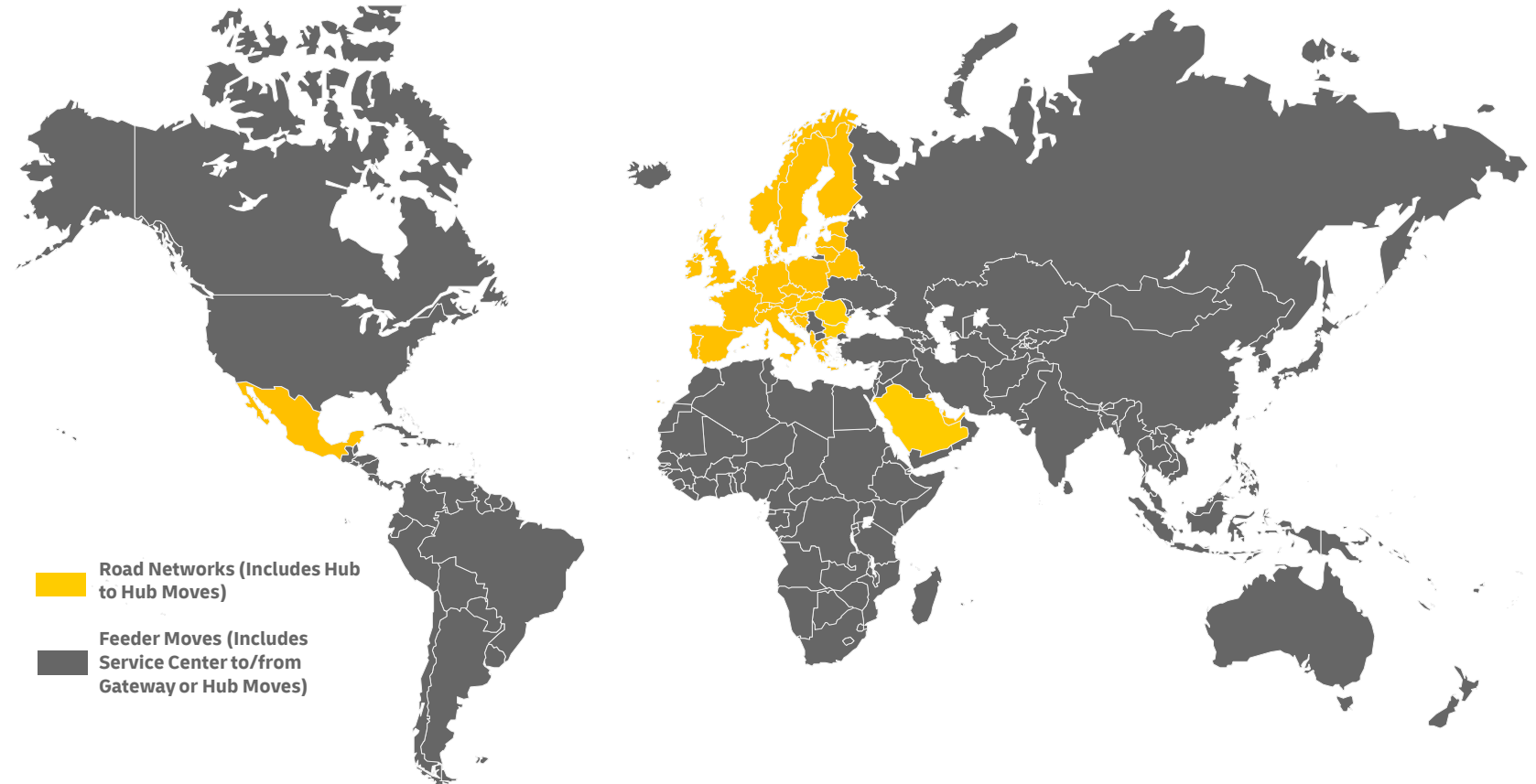
> 2,300 daily flights

PURCHASED AIR

GROUND LINEHAUL

> 4,500 daily road movements

Ground linehaul



> **4,500** Global Road Linehaul Movements per Day

Supplemented by our **Ground Linehaul** to serve shorter distances



DEDICATED AIR

> 2,300
daily flights

PURCHASED AIR

GROUND LINEHAUL

> 4,500 daily
road movements



Our **Virtual Global
Airline and
Network**

1 VIRTUAL GLOBAL AIRLINE & NETWORK providing..

- Unparalleled **geographic coverage**
- **Optimal cost-service** proposition
- Excellent **network utilization**
- **Maximum operational flexibility**
- **Compliance** with industry regulation

At the core of our operation: 3 global hubs

Sort Capacity



Parcel: 35k / h
Docs: 43k / h



Parcel: 90k / h
Docs: 40k / h



Parcel: 30k / h
Docs: 45k / h

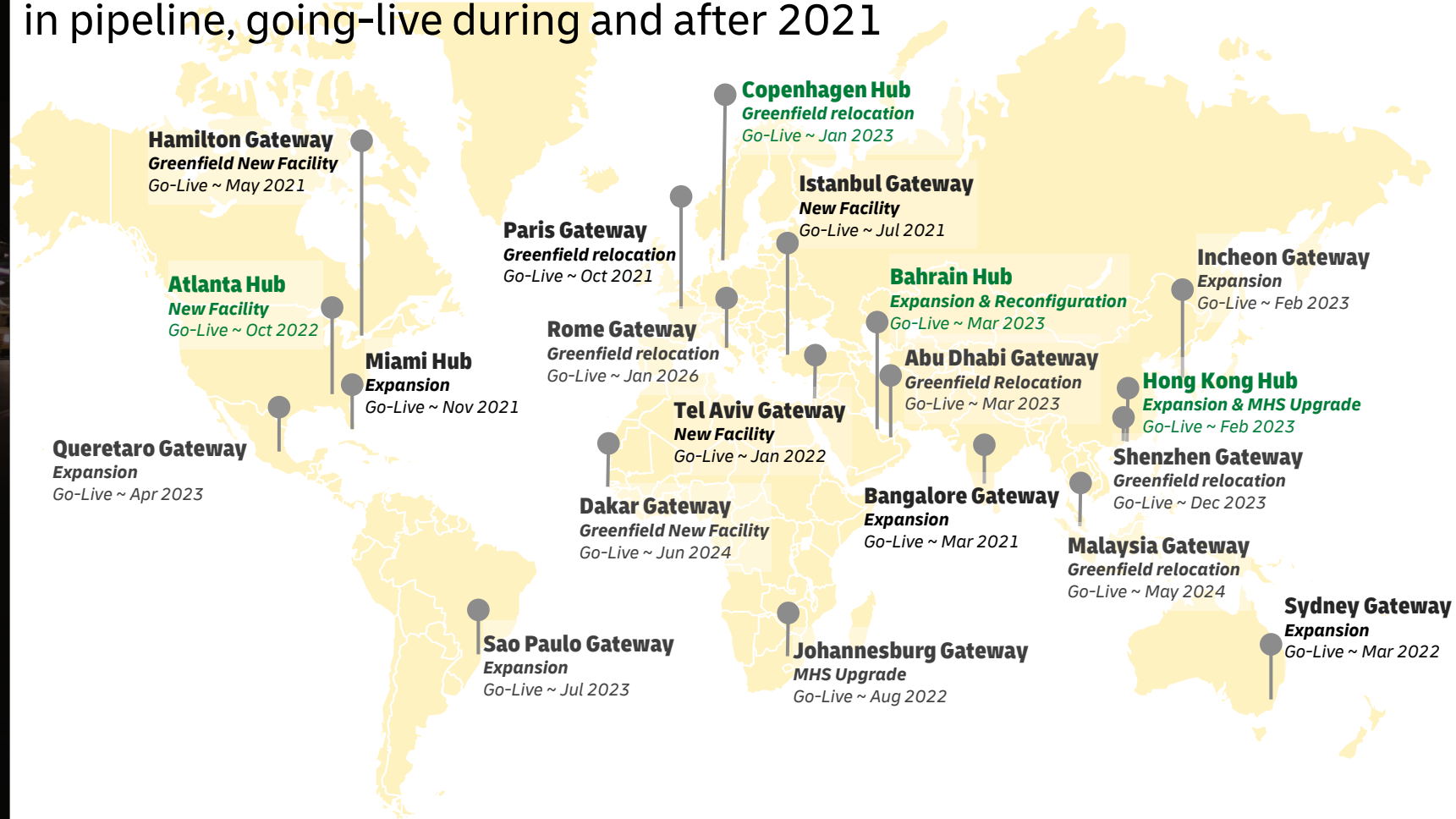
... supported by our 19 regional hubs across the globe



Key facility & Material Handling System upgrade planned investments

in pipeline, going-live during and after 2021

We continue to **invest** consistently in improving our hub and gateway network

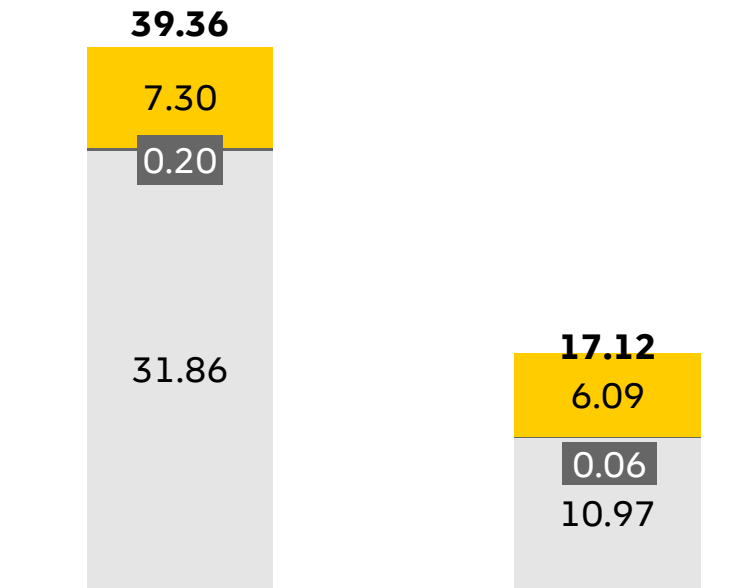


Where do we stand with our footprint today?

DPDHL Group and Express CO₂ Emission by mode & scope

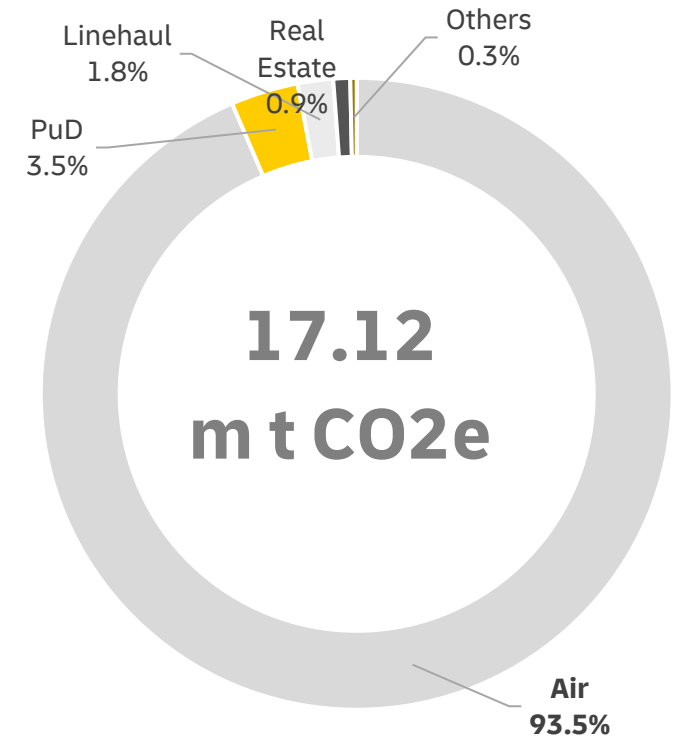


Group & Express CO₂ Emissions 2021 by scope (in mt CO₂e)



- Scope 1: Direct CO₂ emissions from fossil fuels which we use
- Scope 2: Indirect CO₂ emissions from purchased energy
- Scope 3: Other indirect CO₂ emissions from our business partners

Express CO₂ Emissions 2021 by mode (in mt CO₂e)



Decarbonization at Express

SUSTAINABLE AVIATION



GREEN LAST-MILE



CARBON NEUTRAL FACILITIES



Our approach to Sustainable Aviation builds on three pillars with the ultimate goal to burn less for every ton flown

New Aircraft Technology



FLEET

Aircraft
Advancements
Fleet Renewal

Sustainable Aviation Fuel



FUEL

Making
Investment

Operational Efficiency



FLIGHT OPS

Fuel
Optimization
Program

We modernize & grow DHL's air network with the most fuel-efficient, economic & technically reliable freighters

Aircraft Investment

	2018	2019	2020	2021	2022	2023	2024	2025
Freighter								
Boeing 777-200		+4	+6	+4	+4	+4	+4	+2
Passenger-to-Freighter								
Boeing 767-300		+3		+7	+2	+8		
Airbus 330-300	+2	+1	+2	+3	+2	+7	+1	
eCargo Aircraft								
Alice								+12

 Ordered



Boeing 777-200



Boeing 767-300



Airbus 330-300



Alice

DHL Express
shapes future for
sustainable
aviation with the
order of first-ever
all-electric cargo
planes from
Eviation



Max Payload **1,200** kg | **2,600** lbs



Max Range **815** km | **440** NM



Max Cruise Speed **407** km/h | **220** kts

SAF contracts in place with yearly supply ...

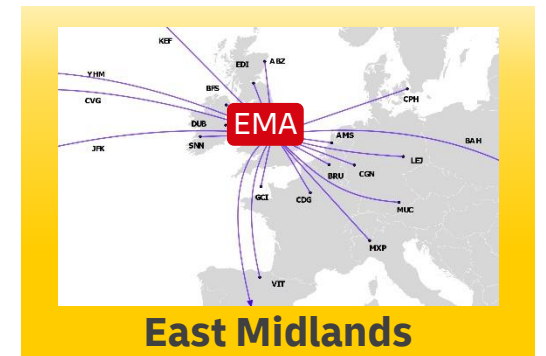
To achieve the agreed science based target, Express will ramp up its **Sustainable Aviation Fuel (SAF)** supply



Supplier: Shell
Producer: NESTE

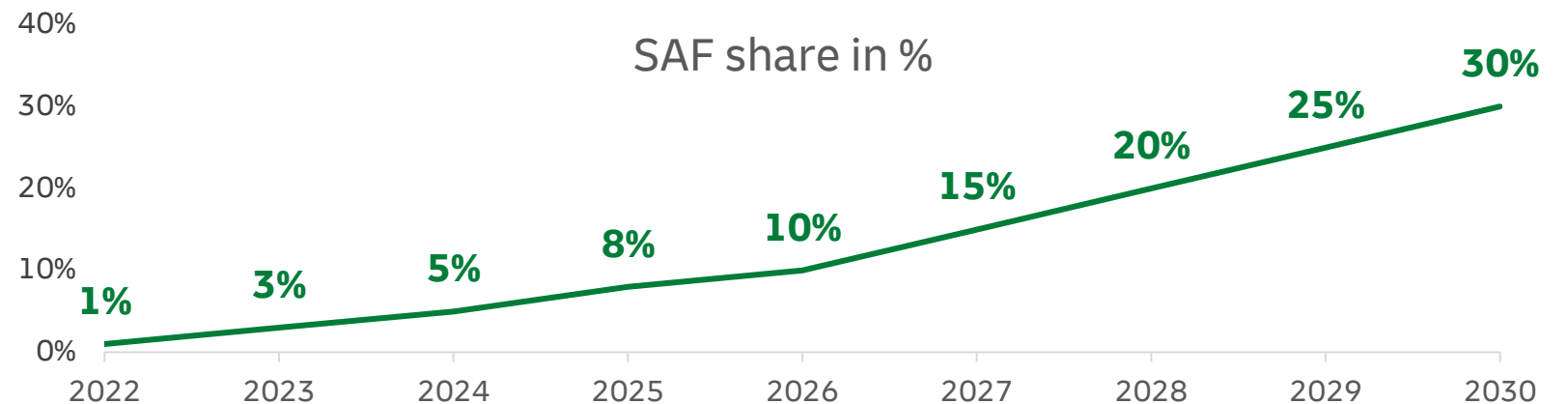


Supplier: NESTE
Producer: NESTE



Supplier: AIR BP
Producer: AIR BP

Planned Sustainable Aviation Fuel ramp-up at Express





Aviation Fuel Optimization Program (FOP) deploys sustainable processes & policies to improve aviation fuel efficiency and reduce emissions

On our mission to burn less fuel for every shipment flown we engage our pilots and run 7 modules...



... leading to sizable results in line with our sustainability roadmap

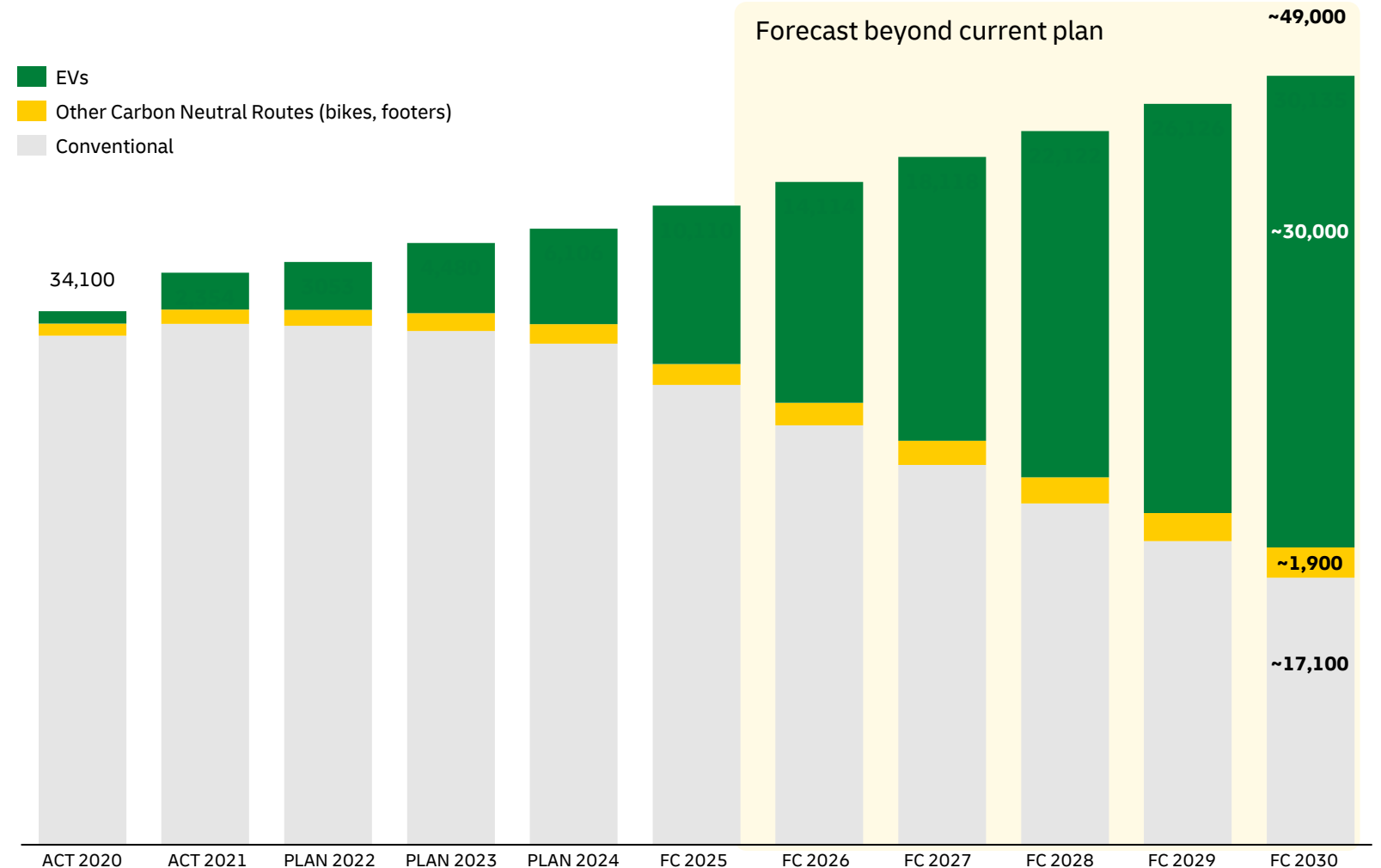
Savings projections for 2022

- \$45 Million
- 166 Million Kg CO₂
- 14 Million USG



60% **electric PuD** by 2030 means operating ~30,000 EV's globally

DHL Express PuD fleet





We focus on **carbon-neutral design** for all new buildings

A structured approach to achieve a clear target:

Carbon neutral design for all new buildings

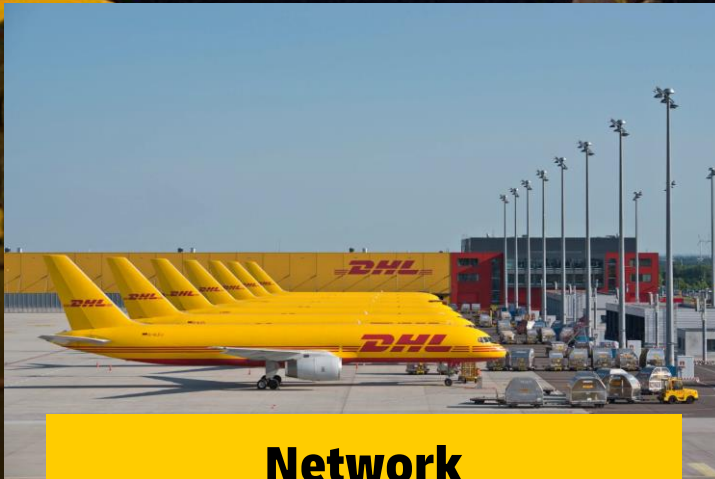


3 Steps to Carbon Neutral Building Design

- 1 Install green technology : 20 mandatory & 15 optional technologies
- 2 Procure renewable electricity and heating fuels.
- 3 Offset any remaining emissions, up to a maximum of 25%.



DHL Express Network Optimization



Network

Our global footprint allows us to best serve our customers needs



Flex

Our air and ground network offers maximum operational flexibility



Decarbonization

We heavily invest into a sustainable future

Deutsche Post DHL
Group

We have reached a **new performance level** and are delivering stronger than ever

ON A NEW LEVEL

JOHN PEARSON
CEO DHL EXPRESS

08 September 2022



DHL EXPRESS

FINANCIAL OUTLOOK

Market (2022 – 25)

Market growth assumptions

- TDI volume growth: 4-5% p.a., after B2C normalization in 2022 – subject to macro uncertainties

Expected growth vs. market

 **AT LEAST IN LINE**

Supported by continued strong yield discipline

Capex Outlook

- Expect Capex at €1.5-2.0bn p.a. for 2022-2024 based on market conditions
- Investment in expansion, sustainability and digitalization along whole value chain (air & ground fleet, hubs/gateways/depots)

EBIT Outlook

- Continued growth of absolute EBIT, after B2C normalization in 2022 - subject to macro uncertainties
- Maintain higher margin levels, potential for additional margin expansion more incremental

P



PEOPLE ENABLEMENT

Our people at the core of our attention and value chain

G



SELL LIKE NEVER BEFORE

Remain focused on growth and heavier shipments – always at the right price

Q



NETWORK OPTIMIZATION

Our global network offers us maximum operational flexibility with strong focus into a sustainable future

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