



# GDP+ GROWTH driven by best industry portfolio



#1 Global TDI Express



#2 Air Freight



#1 Contract Logistics



#2 Ocean Freight



#1 Parcel Germany #2 World's Best Workplaces

> #1 Top Employer Europe

2023 confirms strong financial performance through the cycle

Strong cash flow and balance sheet

>€3bn

2023 FCF (excl. Net M&A)

BBB+

Fitch

**A2** 

Moody's

# **Attractive shareholder returns**

~4% €4bn

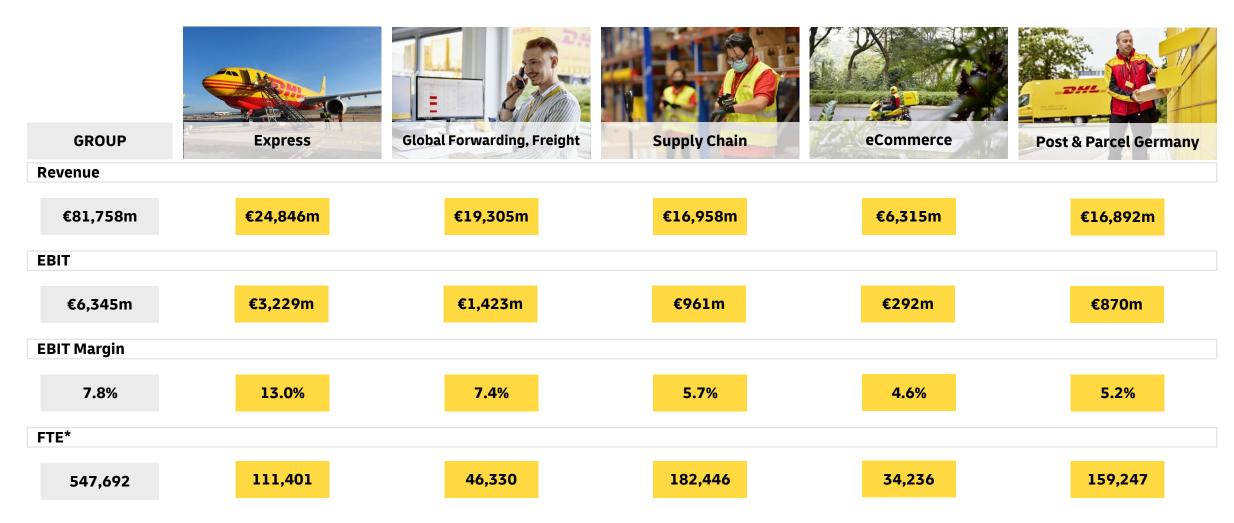
dividend yield\* 2022-25 share buy-back program

Strong commitment to €2.4bn executed

dividend continuity €1bn top-up to €4bn until end 2025 in March 2024

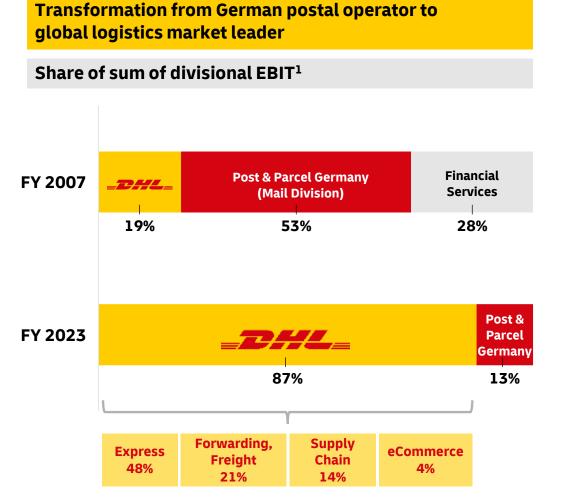
<sup>\*</sup>based on closing share price on March 5th 2024

# DHL Group at a glance (FY 2023)



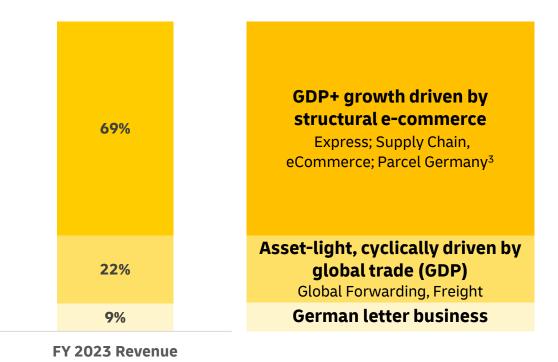
<sup>\*</sup>average for the year

# GDP+ growth profile supported by structural long-term trends



Globally diversified portfolio with GDP+ growth exposure

Share of sum of divisional revenue<sup>2</sup>



<sup>&</sup>lt;sup>1</sup>Both years excl. Corp Center (2007) / Group Functions (2023) / Consolidation. <sup>2</sup>Excl. P&P Others, Group Functions / Consolidation. <sup>3</sup>Incl. International

# **DHL GROUP (FY 2023)**

**Group revenue: €81,758m** 

**Employees: 594,396** 

# **AMERICAS**

External Revenue: €17,815m

**Employees: 126,394** 

# **EUROPE**

External Revenue: €45,354m

**Employees: 358,602** 

# MIDDLE EAST & AFRICA

External Revenue: €3,702m

Employees: 21,066

# **ASIA PACIFIC**

External Revenue: €14,887m

Employees: 88,334

# **DHL Group Board of Management**



Dr. Tobias Meyer
Chairman of the Board (CEO), Global Business Services
Member since April 2019 | CEO from May 2023
Appointed until March 2027



Melanie Kreis Finance Member since Oct. 2014 Appointed until May 2027



Dr. Thomas Ogilvie HR Member since Sep. 2017 Appointed until Aug. 2025

### **CORPORATE DIVISIONS**



John Pearson
Express
Member since Jan. 2019
Appointed until Dec. 2026



**Tim Scharwath Global Forwarding, Freight**Member since June 2017
Appointed until May 2025



Oscar de Bok Supply Chain Member since Oct. 2019 Appointed until Sep. 2027



Pablo Ciano eCommerce Member since Aug. 2022 Appointed until July 2025



Nikola Hagleitner
Post & Parcel Germany
Member since July 2022
Appointed until June 2025

# **DHL Group ESG Roadmap**

**Clean operations** for climate protection

Reduce emissions to

<29m

metric tons CO<sub>2</sub>e by 2030 (SBTi) No offsetting included

# **Net Zero**

**GHG Emissions by 2050** 

>30%

share of sustainable fuels by 2030

60%

e-vehicles used in pick-ups and deliveries by 2030

All new owned buildings to be **climate neutral** 

**Great company** to work for all

>80%

Group-wide Employee Engagement (aggregated & weighted result of 5 statements in Employee Opinion Survey)

Increase share of women in middle and upper management to

>30%

by 2025

Reduce LTIFR\* to

<3.1

by 2025
\*LTIFR: Lost Time Injury Frequency Rate

CONNECTING PEOPLE. IMPROVING LIVES.

**Highly trusted** 

company

30%

ESG-related targets in bonus calculation for the Board of Management as of 2022

98%

share of valid compliance training certificates in middle and upper management (FY 2024 target)

**2690** out of achievable 820 points

Cyber security rating (FY 2024 target); equals top quartile in our reference group

# **DHL Group ESG measures**

# **Decarbonization measures**

Measures	2023 Results	2030 Targets	
Dealined Decayle orientian Effects	1,334 metric kilotons CO <sub>2</sub> e	Reduce GHG emissions to <29m metric tons CO <sub>2</sub> e	
Realized Decarbonization Effects	(2024 Target: 1.5m metric tons CO <sub>2</sub> e)		
Use sustainable fuels in air, ocean and road freight	Share of sustainable fuels amounts to 2.8 %	>30% share of sustainable fuels in air, ocean and road freight	
Increase electrification of the fleets in pick-up & delivery	~ 35,200 e-vehicles used in pick-ups and deliveries (37.6%)	60 % e-vehicles used in pick-ups and deliveries	
Climate-neutral building design		All our own new buildings are climate neutral	

# **Employee matters**

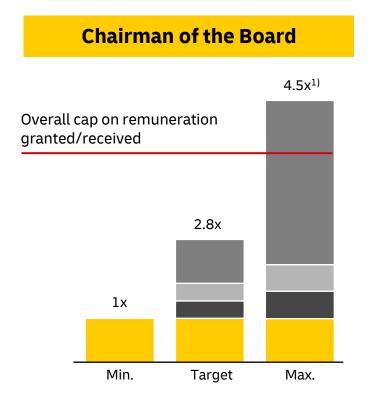
Measure	2023 Results	2024 Targets	2025 Targets
Employee Engagement	83%	>80%	Maintain employee engagement at a high level
Share of women in middle and upper-management	27.2%	28.8%	at least 30%
Lost Time Injury Frequency Rate per 200,000 working hours (incl. temporary workers as of 2023)	3.1	3.3	<3.1

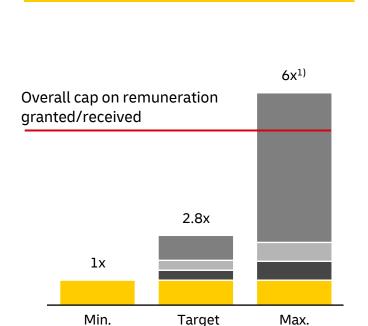
# **Corporate governance**

Measure	2023 Results	2024 Targets
Participation of executives in middle- and upper-level management in compliance training	98.6%	98% share of valid training certificates in middle and upper management
Cybersecurity rating	750 points out of achievable 820 points	≥ 690 points* of achievable 820 points

# **Board Remuneration**

# Total compensation (without fringe benefits and pension plan) Variable compensation Long-term component Medium-term component (deferral) Annual bonus Fix annual compensation Base salary





**Other Board members** 

### Total remuneration caps on the maximum annual payout:

- 2023: Remuneration granted in financial year capped to €8.15m for CEO, €5.15m for other Board members (incl. fringe benefits)
- Since 2022: Additional cap on remuneration received in a single financial year (payment cap) in the amount of €8.15m for CEO, €5.15m for other Board member

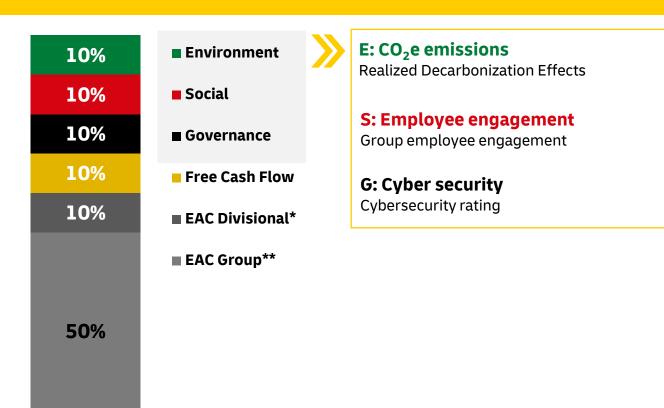
### **Details payment cap 2023:**

• Long-term incentive plan 2017/18/19 tranches (the payment dates depend on the date of exercise within the two-year exercise period), deferral from 2021 annual bonus, proportion of 2023 annual bonus for immediate payout, fringe benefits 2023, base salary 2023, pension expense 2023

<sup>1)</sup> From 2022, annual bonus including medium-term component can be decreased or increased by up to 20% (bonus/malus option) in extraordinary circumstances. Maximum remuneration in case of increase is 4.7 (CEO)/ 6.2 (other Board members)

# **ESG** targets integrated in management remuneration

# Criteria for Annual Variable Pay for Board of Management



### **Payment schedule**

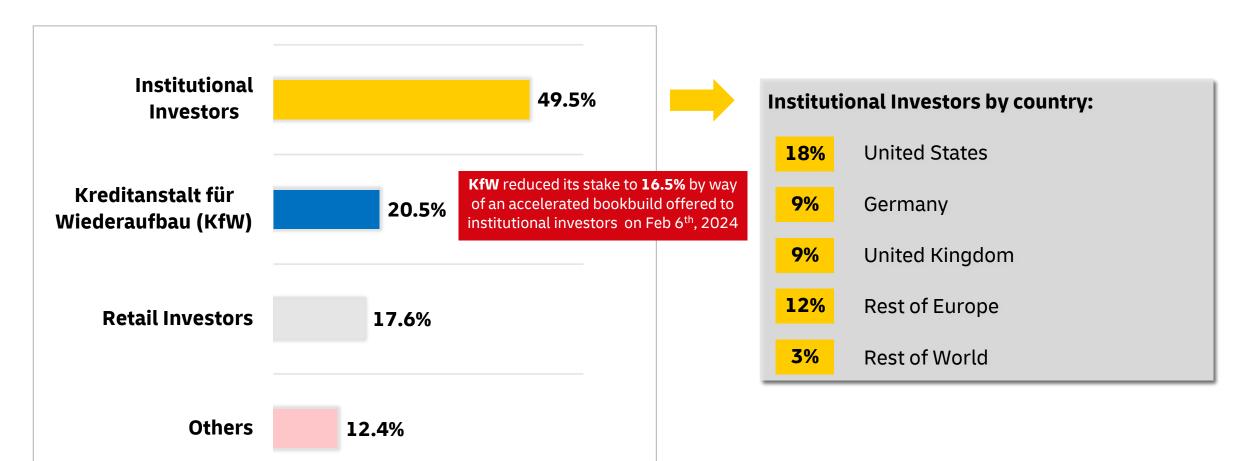
For medium-term component (deferral) and annual bonus

- 50% paid after financial year if bonus criteria achieved
- 50% payout of achieved bonus deferred by additional 2 years\*

\*Medium-term component will only be paid out if EAC target is reached during the sustainability phase, i. e. at least the cost of capital was covered

<sup>\*</sup>Group EAC is weighted at 50% for Board of Management members responsible for the divisions and the EAC of the respective division for which they are responsible at 10%. For the other members of the Board of Management, Group EAC is weighted at 60%

# **DHL Group: Shareholders' structure**



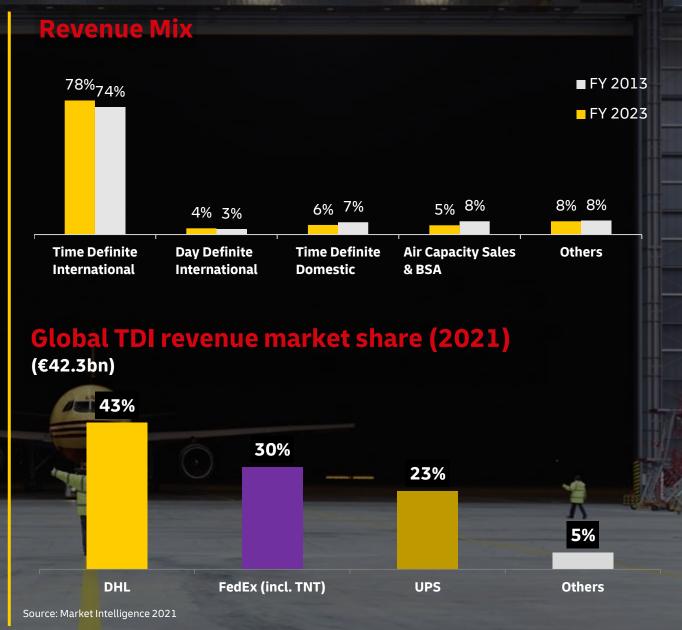
As of Dec 31st 2023

# **EXPRESS**

Global market leader in Time Definite International (TDI)

# **Investment Summary:**

- Voted among the top 3 World's Best Workplace for the 4th year running
- 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
- Proven ability to flex network to adapt to changing market circumstances

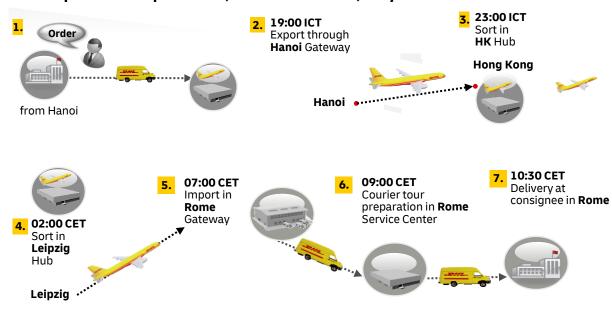


# Core Express TDI core product - capacity based upon average utilisation, adjusted on a daily basis ACS Air Capacity Sales, average total spare BSA Block Space capacity that is not Agreement slated to be utilised guaranteed air for BSA or TDI core cargo product volumes 2024 BUSINESS PROFILE | DHL GROUP | MARCH 2024

# **EXPRESS: CORE PRODUCTS**

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

### TDI shipment example: Hanoi, Vietnam to Rome, Italy



### **Time Definite Domestic (TDD)**

Domestic door-to-door delivery by a specific time, or by the end of the next possible business day

# Day Definite International (DDI) and Day Definite Domestic (DDD)

Door-to-door delivery within a certain number of business days for less urgent and heavier shipments

# **Express:**

# To serve our global network, we run more than just an airline

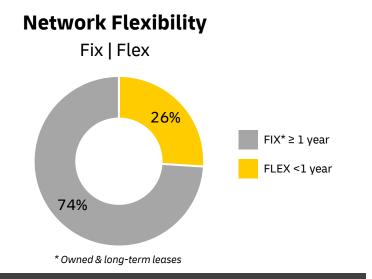
# **Dedicated Air (year-end 2023)**

>295 aircraft

>70 Intercontinental >

>225 Regional >>

17 partner airlines



# **Purchased Air**

>200 commercial air carriers

# **Global Network**

>2300 daily flights

>500 airports

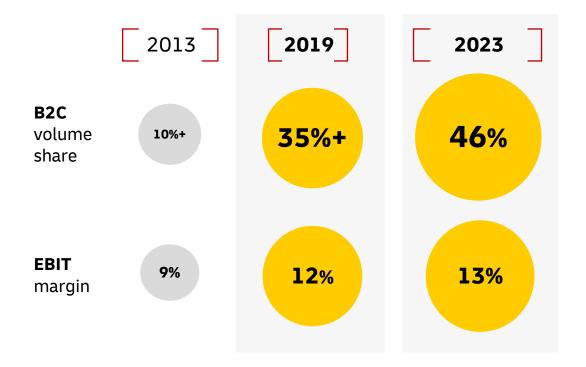
22 air hubs

3 global

19 regional

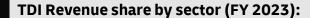
As of year-end 2023

# E-commerce is a profitable growth driver for Express



Network Characteristics	B2C Characteristics	Profitability Impact
Shipments per Day	Volume growth drives better utilization of existing network	1
Weight per Shipment	Lower weight per shipment	<b>→</b>
Revenue per Kilo	Higher RpK related to lower WpS	1
First mile	More pieces per stop at pickup	1
Hub sort	Better utilization of existing infrastructure, with high degree	1
Airlift	Better utilization of existing capacity, with lower WpS being advantageous	1
Last Mile	Optimize residential delivery via On Demand Delivery & Drop Off Locations and increased delivery density due to B2C Growth	<b>-&gt;</b>

# **Express: Well-diversified vertical exposure**





# Unchanged strong focus on yield management based on well established toolset



# **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

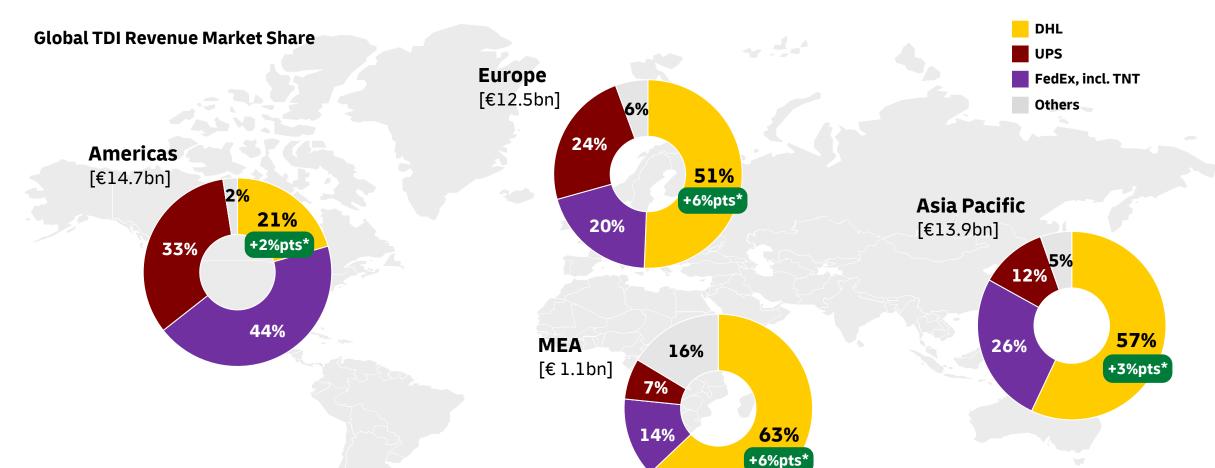
# **Potential other surcharges**

 Subject to specific shipment profile or services requested (e.g. Customs, delivery preferences etc.)

# Constantly tracked and revised through established mechanisms:

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

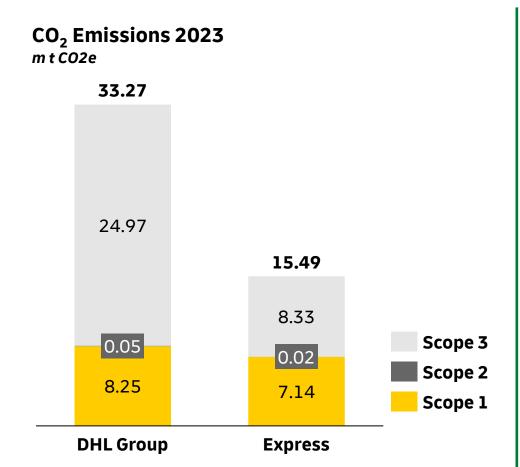
# **Express: Market share by geography (2021)**



Sources: Market Intelligence study 2021

\*) vs 2016 including 53 countries

# **Express**Path to climate neutral operations





**Sustainable Aviation Fuel (SAF)** supply at DHL Express also for our customers via **GoGreen Plus**.

In 2020 first **regular SAF supply** in Amsterdam and San Francisco Airport expanded to **eight airports around the globe.** 

72kt neat SAF uplifted in 2023



Express ordered up to 12 'Alice' fully-electric cargo planes from Eviation, which had its maiden flight in September 2022. The first delivery is planned for 2027.



Decarbonisation of ground operations via **electric vans, trucks & mopeds** as well as **e-bikes** and walking couriers and **electricity** from **renewable energy sources.** 

Designing and building **carbon neutral facilities & Hubs** by using innovative, clean technologies and renewable energy sources.

# GLOBAL FORWARDING, FREIGHT

International transportation of Air Freight, Ocean Freight and Road Freight including Customs Clearance and related value-added services like warehousing, cargo insurance, etc.

# **Investment Summary:**

- Asset-light business model: Global presence in>120 countries with ~47,000 highly qualified employees
- Investments into state-of-the-art IT systems are driving increased operational efficiency and enhanced customer experience
- On this basis, targeting high GP/EBIT conversion and EBIT margin levels
- Sustainable solutions available for all transportation modes



Air Freight

Ocean Freight

Road Freight (DHL Freight)

Others

29% 27%

13%

# **Market Position (2022)**

Air Freight

Ocean Freight

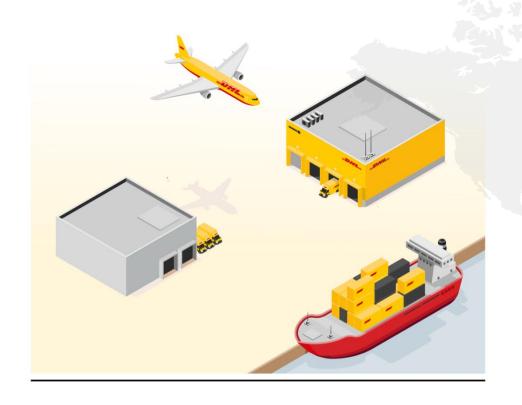
Road Freight (EU)

#2

#2

Leading position in a highly fragmented market

# Global Forwarding, Freight: Global presence



**EUROPE** ~40 Countries

AMERICAS ~25 Countries

MIDDLE EAST & AFRICA ~35 Countries

**ASIA PACIFIC** ~20 Countries







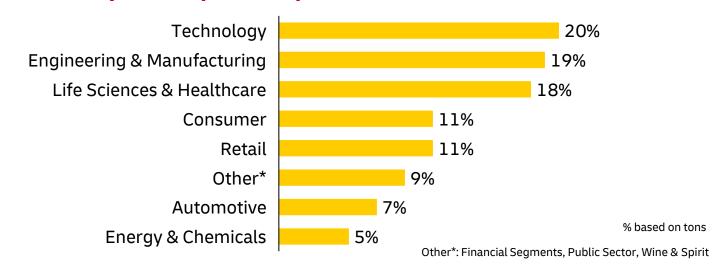


**~3.1m TEUs** transported

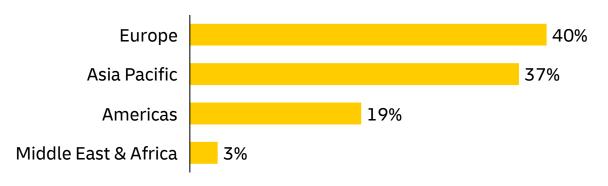


# GLOBAL **Market position 2022** (based on 000 tonnes, export only) 2.232 1.902 1.558 1.326 DSV DHL Kuehne + DB Nagel Schenker Source: Global Insight, annual reports / other publications, company estimates 2024 BUSINESS PROFILE | DHL GROUP | MARCH 2024

# **Volume mix by sector (FY 2023)**



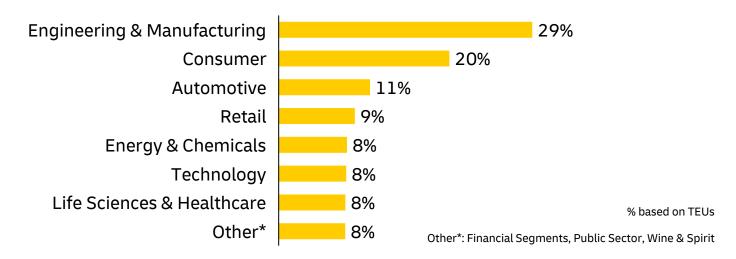
# Volume mix by region (FY 2023)



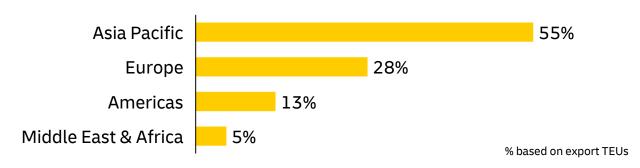
% based on export tons

# **GLOBAL FORWARDING** OCEAN FREIGHT **Market position 2022** (based on 000s of TEUs, export only) 4.386 3.294 2.665 1.909 Kuehne + DHL DSV DB Schenker Nagel Source: Global Insight, annual reports / other publications, company estimates 2024 BUSINESS PROFILE | DHL GROUP | MARCH 2024

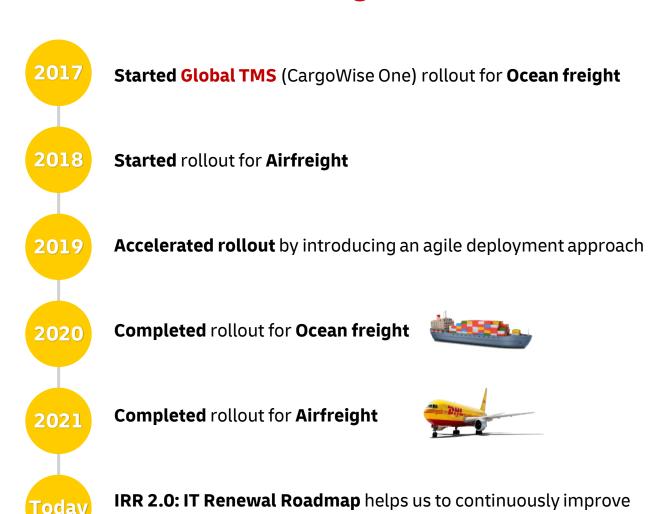
# **Volume mix by sector (FY 2023)**



# **Volume mix by region (FY 2023)**



# Enhanced customer experience and increased operational efficiency with new TMS and Digital Customer Interaction



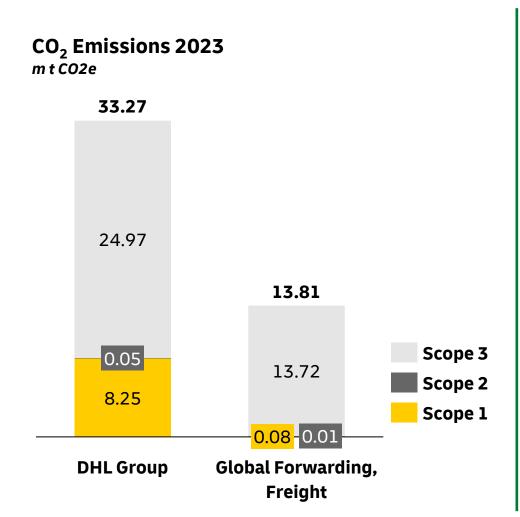
our IT landscape to drive operational efficiency



**myDHLi** provides customers with 360° visibility and full control over their shipments.

One-stop portal for Digital Forwarding with Quote, Book, Track, Documents, Analytics and Reports.

# Global Forwarding, Freight Path to climate neutral operations



# GoGreen Plus available for all core products, insetting through:



Sustainable Marine Fuels

For less-than-container load, launched in Jan. 2021 For full-container load, launched in Jun. 2021



**Sustainable Aviation Fuels** 

Launched in Feb. 2022



Sustainable Road Fuels

Successfully relaunched in Sweden in 2019, since 2022 available for all core road freight services in more markets and since 2023 with extended availability across

Europe

# **Green alternative: Rail Freight**



**DHL Railnet** 

Offered for rail & intermodal shipping across Europe

# **Collaborate with like-minded industry partners**

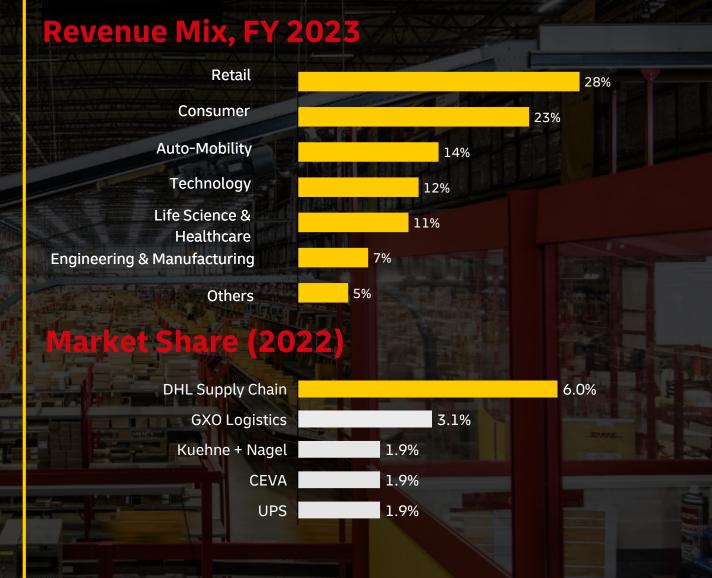
- Strong industry partnerships
- Annual carrier certification

# SUPPLY CHAIN

Manage supply chains to reduce complexity for our customers. Our profitable core includes warehousing, transportation as well as key solutions like e-Commerce (incl. returns management), Lead Logistics Partner (LLP), Service Logistics, Packaging and Real Estate Solutions

# **Investment Summary:**

- World market leader in Contract Logistics with industry-leading EBIT margin at >5%
- Leading Omni-channel and e-commerce (incl. returns solutions) offering
- Scalable and flexible digital solutions embedded in our standard ways of working
- Strong focus on Employer of Choice attracting and retaining employees in times of critical labor shortages
- ESG roadmap and metrics fully integrated into strategic and operating framework



# Our strategic solutions are accelerating growth



- Strategic Focus: Over 50% of our revenue comes from strategic products, reflecting our continuous emphasis on our key offerings
- Targeted Portfolio: Our portfolio mix is aligned with market demands and customer preferences
- Future Preparedness: We are well equipped for the future through proactive innovation and adaptation

# Our strategic solutions are targeted to our customer's needs across all industry verticals and accelerate our top and bottom-line growth

# e-Commerce incl. returns



State of the Art omni-channel and e-fulfillment unrivalled solutions incl. returns management

# Service Logistics



Delivery within 2-4 hours in an worldwide network for global aftermarket services of critical parts e.g. for medical devices

# Lead Logistics **Provider**



Management and optimization of the entire or significant parts of customers' supply chains

# **Packaging**



Tailored design and execution of packaging services

# **Real Estate Solutions**



Design, development and management of logistics real estate in strategic locations

# **Transport**



Domestic

distribution

the largest

domestic

transport

transport

collection of

capabilities in

the industry as

well as x-border

building upon

Providing bestin-class dedicated or shared warehousing operations

Warehousing

**Technology** 

Life Science &

Healthcare

Retail

Auto-

Mobility

Consumer

**Engineering &** Manufacturing We are uniquely positioned to cater for structural growth of e-commerce and omni-channel fulfillment demand across all customer segments globally

Customer Segment

Customer Examples

portfolio Solution

# **SMALL**

Fast growing customers



BALR.



# **MEDIUM**

Sized multi-country customers, internationalizing further



carbartt



JOCKEY

# LARGE

**Established multi-national** customers





ĽORÉAL



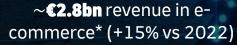
**Omni-channel solutions** 

**DHL Fulfillment Networks** 

**Dedicated Fulfillment** 

**Returns-management** 







+220 operations across all regions



Strong customer sign up on Fulfillment networks



16% of DSC's revenue from ecommerce\*



+60 returns operations centers globally

\*includes e-commerce transport revenue

# DSC's digitalization agenda is processing fast while the unique ecosystem of integrated solutions, robotics and analytics maximize value

# **Focus technologies** identified along entire logistics process

**Accelerated Digitalization** 

Assisted **Picking Robots** 







**Packing Technologies** 



Smart Operations



Supporting Robots



Goods-to-Person Robots

AI & Data **Analytics** 



Sortation Technologies



Indoor Robotic Transport



Wearable Devices



Asset Tracking & Monitoring



Mechanized

**Automated** Order Picking



Automated Storage & Retrieval System Packing/ Labeling automation



Mechanized Sortation

Mechanized (Un)Loading

Powered conveyors



**Vendor orchestration** 

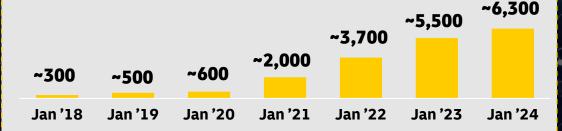
Logistics assets and expertise Robotics vendors for solutions and

analytics



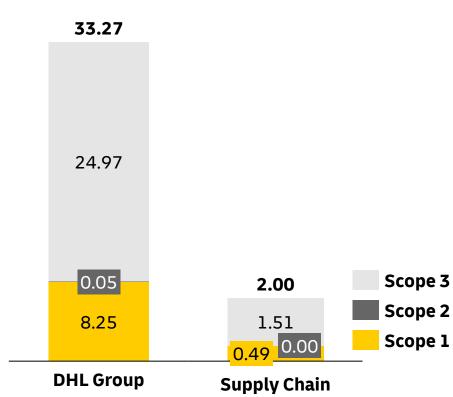
Strategic software vendors for integration and analytics of sites with Accelerated Digitalization technology deployed

# of digitalization projects live



# Supply Chain Path to climate neutral operations and transportation

CO<sub>2</sub> Emissions 2023 *mt CO2e* 



Supply Chain is leveraging ESG offerings to create a clear value add for customers by driving decarbonization of their supply chains.

Our key offerings and commitments drive CO<sub>2</sub>e reduction of our main service areas:

# **Transport**



Investments in sustainable fuels and technologies to reduce transport emissions and gain efficiencies

### **Examples:**

 DSC Green Transport Policy mandates best green alternative per market (e.g. electric, hydrotreated vegetable oils, biogas) based on availability, infrastructure & cost – 2,000 of our vehicles to be replaced with green alternative by 2026

# Warehousing



Investments into renewable electricity and energy to achieve carbon neutral warehousing

### **Examples:**

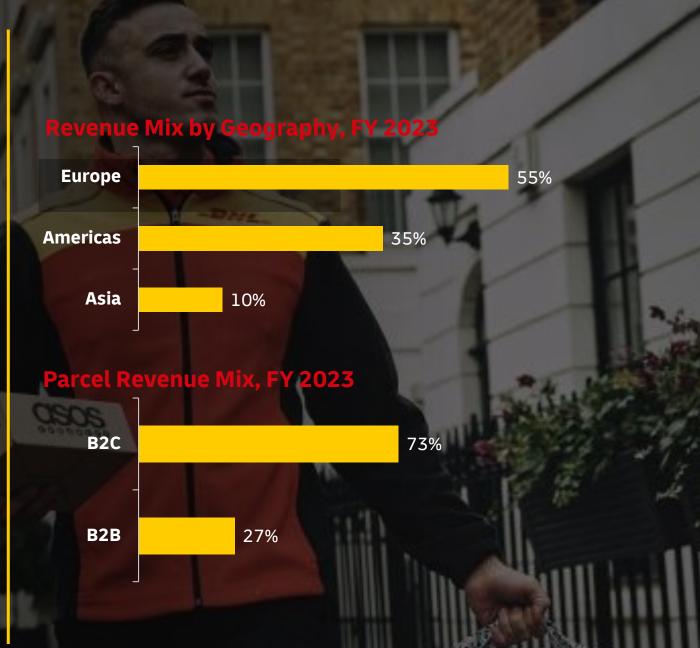
Focus on renewable electricity
 (e.g. self-generated through solar
 panels) and renewable energy
 (e.g. electric heating or biogas) for all
 our warehouses

# **ECOMMERCE**

Domestic parcel delivery in selected countries in Europe, in the United States, in specific markets in Asia, in particular in India, and deferred cross-border services primarily to, from and within Europe, as well as to and from the United States.

# **Investment Summary:**

- Strong organic growth driven by domestic and crossborder e-commerce in all selected markets we operate in
- Sustainably increased EBIT, well above the level from before the pandemic in 2019, thanks to economies of scale, yield management and service performance
- Expansion of our domestic footprint by acquiring 100% of MNG Kargo in Turkey
- Investments in network capacity & automation, sustainable last-mile capabilities and technology



# Our profitable core: Focus on domestic and international parcel delivery

## **Core business**

## **Domestic**

- In selected countries outside of Germany
- This includes Europe, US and selected markets in Asia Pacific, incl. India

# Deferred Crossborder

- Commercial capabilities primarilyto/from and intra-Europe
- Parcel Connect in Europe a strong and growing platform as basis for future growth



### **Parcel Connect**

Parcel Connect is our **optimizable delivery and returns solution** developed especially for e-commerce in Europe, catering to both B2B and B2C.

- Customers benefit from a single DHL point of contact for seamless access to 28 European countries.
- Brands establish trust and loyalty with customers thanks to fast, flexible, hassle-free delivery and returns.



# eCommerce: Key stats at a glance



1.6 billion

parcels delivered each year



Offices



~28,500

Vehicles



2,900

**Facilities** 



>51,000

Employees



>110,000

**Access Points** 



**Dedicated Aircraft** 

Data as of Dec 31st, 2023

# eCommerce: Regions and service portfolio

We focus on **domestic parcel delivery** in selected countries in Europe, in the United States, in specific markets in Asia, in particular in India, and deferred cross-border services primarily to, from and within Europe, as well as to and from the United States.

### **Americas**

- B2C domestic delivery (U.S.)
- Outbound cross-border (U.S.)
- Direct shipping (Canada to U.S.)

# Europe

- Selected B2C and B2B domestic delivery in 9 countries: UK, NL, BE, SE, PL, CZ, ES, PT, TR
- Pan-European cross-border offering

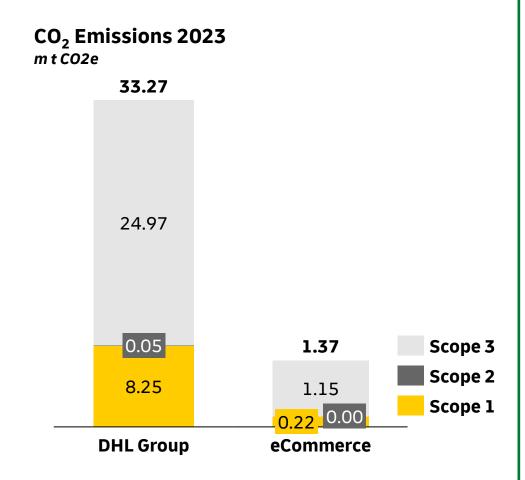
# India (Blue Dart)

 Premier domestic courier and integrated express package distribution

# **Asia/Pacific**

- B2C domestic delivery in key markets of Thailand and Malaysia
- Cross-border shipping from Australia

# eCommerce Path to climate neutral operations



<sup>\*</sup> Own vehicles only and excluding 3rd party owned vehicles

# Increasing investments into Clean Operations:

- Purchase of sustainable fuels wherever accessible, especially HVO for last mile and line haul
- Sustained increase in number of EVs in last mile, continuous replacement of traditional vehicles wherever possible
- All new facilities are approved and being built with carbon neutral design
- >90% of electricity is green electricity



> 2,000 EVs in use\* Largest **electric delivery fleet** in Netherlands



BlueDart moved from 100% grey electricity to 100% green electricity



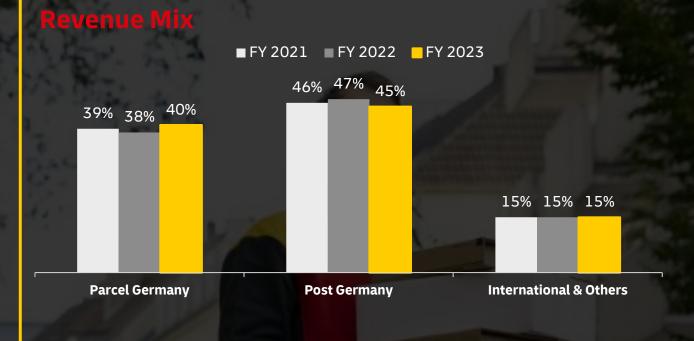
Poland increased share of green electricity to 100%

# POST & PARCEL GERMANY

Transporting, sorting and delivering of documents and goodscarrying shipments in Germany and export.

## **Investment Summary:**

- German parcel and mail service provider with leading market position
- Financial performance outlook: stable long-term EBIT with consistent FCF contribution
- Recognized Top Employer driving superior network and delivery quality
- First mover in green delivery: significantly lower CO<sub>2</sub>e /parcel vs all delivery competitors in Germany
- Digitalization and automation: Highest productivity in the industry through scale, automation und digitalization



# **Market Position (2023)**

**~63%** Market share **Mail Communication** (business customers)

>40% Market share Parcel

# **German Post and Parcel Network**



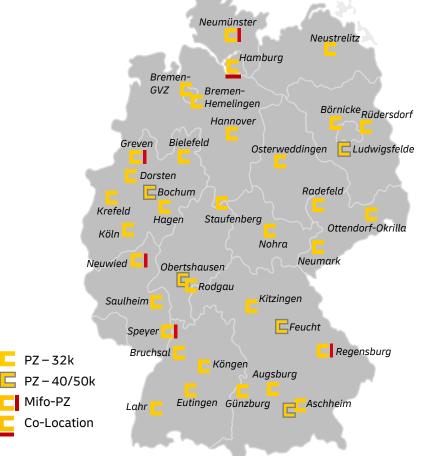


# **Delivery**



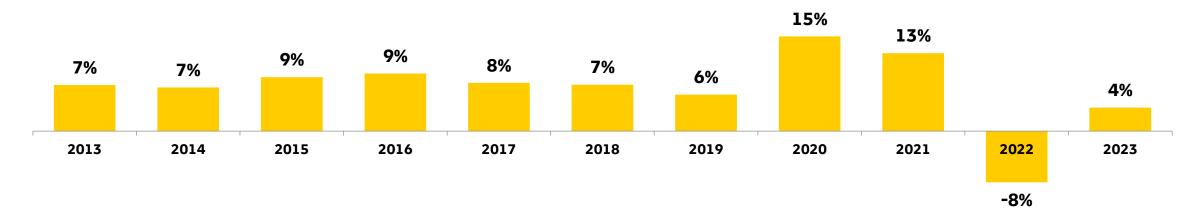
**~64.5%** – and growing – of Parcel deliveries done through joint delivery with mail

# **38 Parcel sorting centers (PZ)**



# Parcel Germany: Structural trend accelerated during pandemic, followed by normalization in 2022

# Parcel Germany, volume growth, yoy



>40%
Parcel Market Share

**1.7bn**Parcel Germany Volumes (2023)

>135k
Parcel Business customers

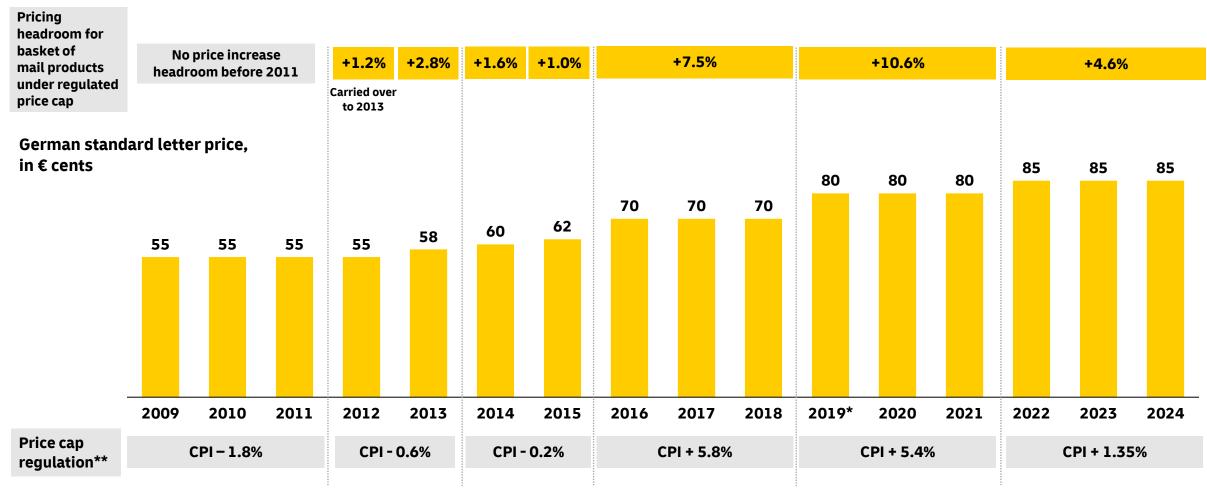
>13,000
Parcel Lockers
(Packstation)

# **P&P Germany: Products and Pricing**

P&P revenue FY23: ~ €16.9bn			Pricing
Mail Communication	Ex-ante products - privαte customers (€0.6bn) - business customers (€1.4bn)		4.6% increase starting Jan 1st 2022 for 3 years (incl. international)
~ €5.1bn	Partial services - business customers (€2.0bn)		Increase discount for 2 <sup>nd</sup> service level by 3 pp & incentive for more E+1/2
	Other (€1.1bn)*		Partial annual price adjustments
Dialogue Marketing ~ €1.8bn	Addressed and unaddressed advertisement mailings, campaigns (both digital & physical)		Introduction of season/peak surcharge & increase in pick-up surcharge abroad & weight-differentiated increase in base prices
International ~ €2.5bn	In- and outbound Germany shipments		Partial annual price adjustments
Others/Consolidation ~ €0.9bn	Press, pension services, retail		Price curve harmonization and increase of minimum price
Parcel Germany ~ €6.8bn	Business customers	Top accounts (~0.5k customers) Middle accounts (~20k customers) Small accounts (~115k customers)	Pricing varies by contracts. General price measures combined with adjustment of toll surcharge
	Private customers		Last increase July 1 <sup>st</sup> 2023 for higher weight levels and selected services

 $<sup>^{\</sup>star}$  e.g. small items eCommerce, Philately, "Postzustellungsauftrag"

# Standard letter stamp price development is based on regulated price cap

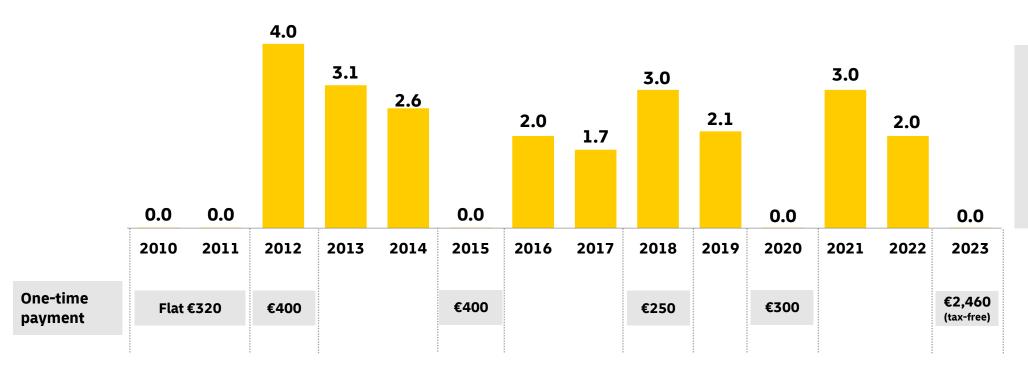


<sup>\*</sup>implemented from July 1st 2019 onwards, taken into account in headroom calculation

<sup>\*\*</sup>CPI: Consumer price index

# **P&P Germany: Wage agreements in Germany**

Wage increases for P&P Germany employees\*, yoy in %

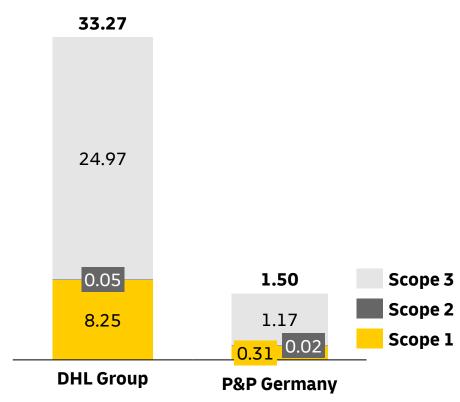


Union agreement until end 2024: In 2024 further €540 tax-free one-time payment per FTE spread monthly until March; average 11.5% wage increase in April 2024

<sup>\*</sup>applies to ~140,000 Deutsche Post AG tariff employees

# P&P Germany Path to climate neutral operations









>50% of P&P delivery districts are green with zero carbon emissions

Currently ~28,100 electric vehicles and ~19,000 e-bikes and e-trikes in daily operations

~290 biogas-powered trucks and testing the use of electric trucks in a pilot area of Berlin

Currently >13,000 Pack- and Poststations available in Germany; to be expanded in the next few years

**Sustainable regional solutions** e.g. Berlin use of a solar-powered DHL parcel ship between Spandau and Westhafen for the transport of parcel shipments

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