

READY FOR MORE

WELCOME TO
LONDON THAMES GATEWAY

Site Visit DHL Supply Chain
Capital Markets Day
April 2025



Strategy 2030
**Accelerate
sustainable
growth**

DHL
Group



AGENDA



Innovation & Robotics

Leveraging our unique scale to realize the opportunity of supply Chain digitalization

Oscar de Bok
CEO DHL Supply Chain



DHL Supply Chain UK&I & MARS

Leveraging our global supply chain expertise to delight our customers

Saul Resnick
CEO DHL Supply Chain UK&I



London Thames Gateway

Leveraging our strategic locations, we enhance our service offerings to meet the needs of our key customers in the UK

Jon Northwood
General Manager London Thames Gateway



YOUR SAFETY ON SITE



There are no planned alarms / tests today



Smoking and vaping are strictly prohibited on-site, except in the designated areas



Personal Protective Equipment (High-visibility vests and safety shoes) must be worn in the yard & the warehouse



If you need first aid assistance, please ask your host



All visitors must remain on the designated safety routes and be always accompanied by their host



In the event of an evacuation, leave all belongings and follow your host to the designated assembly point

INNOVATION & ROBOTICS

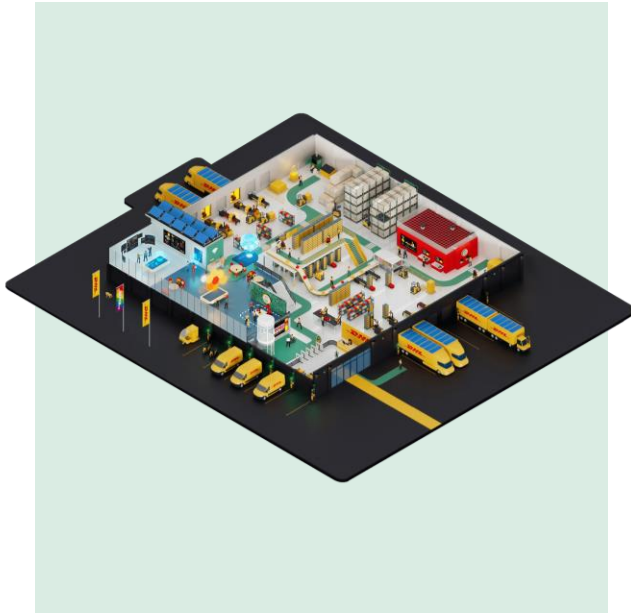
OSCAR DE BOK
CEO DHL SUPPLY CHAIN

Leveraging our unique scale to
realize the opportunity of supply
Chain digitalization



WE ARE WINNING AT THE INNOVATION GAME

Our size and breadth of operations empower us to test multiple robotics technologies, ensuring we remain at the forefront of innovation by actively engaging with robotics vendors and identifying emerging technologies



E2E Supply Chain expertise
fueled by **robotics innovation**



Driving Sustainable Growth
with **automation solutions**



Agile and flexible
operational capabilities



Data-driven insights
to optimize robotics
performance



Enhanced efficiency
through **process & data
standardization**



Scalable technologies
for Global Operational Reach



Strategic investment in
advanced robotics technologies



Collaborating with **industry
leaders for Innovation**

OUR APPROACH TO INNOVATION

We address market and industry challenges through our innovation strategy, using a funnel approach to identify, productize and launch the best robotics solutions

Industry Challenges



Ever-increasing customer expectations



Tightening labor markets



Accelerating technology pace

Our Solution

Our **Accelerated Digitalization** program brings key operational technologies to a wider number of operations through our focused funnel approach

Ideas →

100+ Partners engaged



Research and Proof of Concept

12 Focus technologies defined



Productization

1200+ Sites touched



Commercialization and Industrialization

Structured approach across all regions and functions to:

...have one view on what's **the next big thing** we want to scale

...make what works **available off the shelf**













... quickly scale across the broadest possible footprint in our business, while **retaining as much of the realized value** for us as possible

OUR FOCUS TECHNOLOGIES







12 Accelerated Digitalization Focus technologies


Deep-dive


On site


Assisted Picking Robots 	(un)Loading Robots 	Intelligent Process Automation 	Packing Technologies 	Smart Operations 	Supporting Robots 
Goods-to-Person Robots 	AI & Data Analytics 	Sortation Technologies 	Indoor Robotic Transport 	Wearable Devices 	Asset Tracking & Monitoring 


6 Mechanized Automation Automation focus technologies

Automated Order Picking 	Automated Storage & Retrieval System 	Packing/Labeling automation 	Mechanized Sortation 	Mechanized (Un)Loading 	Powered conveyors 
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 **Employer of choice**
Employee attraction and retention, overall satisfaction

 **Provider of choice**
Customer satisfaction increase

 **Investment of choice**
Productivity and utilization increase, cost reduction

 **Green Logistics of choice**
Efficiency optimization, reducing waste and carbon footprint

TECHNOLOGY DEEP DIVE ALONG FUNNEL

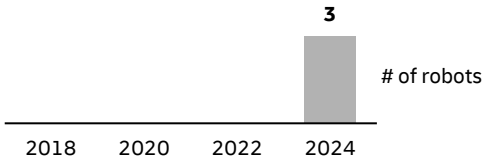
We successfully test and implement various technologies, ensuring customer fit and commercial viability as they progress through the innovation funnel from research to commercialization

Research and Proof of Concept



Assisted Picking Robots: **RobustAI**

- Automates order picking to save time & labor
- Works alongside humans to improve accuracy and productivity
- Piloting in 2 countries

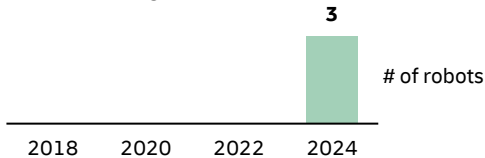


Productization



(Un)loading Technologies: **Boston Dynamics**

- Efficiently unloads packages, enhancing throughput
- Maneuvers in tight spaces with precision using AI-driven navigation
- Several projects with >12 more robots for 2025 totaling 3 countries

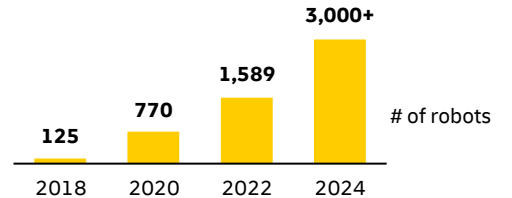


Commercialization and Industrialization



Assisted Picking Robots: **Locus**

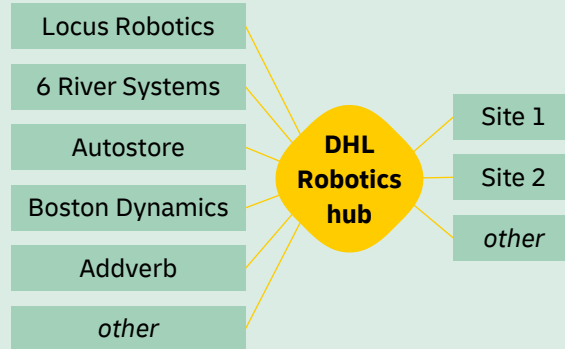
- Represents our most mature robotic solution
- Enhances operational reliability and reduces errors
- >10 countries



ORCHESTRATION & INTEGRATION

DSC is the best orchestrator of robotics in contract logistics, seamlessly integrating our operations and our robotics to ensure optimal efficiency, cost-effectiveness, and superior customer value

The Robotics hub connects all pieces of the puzzle, so that our operational scale, our strategic vendors and our robotics supplier are connected...



...and we are able to be more efficient, safe costs and offer the best value

Efficient Integration
Swiftly connects all assets and resources via a plug-and-play style connectors

Cost-Effective
Re-uses components in every project, reducing integration complexity and costs

Flexible stability
Ensures highest resiliency of solution while allowing to change automation based on customer or operational profile changes

DHL SUPPLY CHAIN UK&I & MARS

SAUL RESNICK
CEO DHL SUPPLY CHAIN UK&I

Leveraging our global supply chain
expertise to delight our customers



GLOBAL PRESENCE BACKED BY LOCAL EXPERTISE

United Kingdom and Ireland represent 21% DHL Supply Chain revenue in 2024



75%
Employee
Engagement

65
Net Promoter
Score

€3.82bn
Revenue

77%
Carbon neutral
facilities

"Global supply chains are facing increasing challenges, making **resilience** a key focus. In an environment where **efficiency** and **reliability** are crucial, resilience reflects an organization's capacity for seamless operations despite external pressures. Larger, agile 3PLs will be essential in assuring the C-suite of supply chain stability. By investing in strategic projects like London Thames Gateway, we empower our customers to **confidently navigate a complex landscape.**"

Saul Resnick
CEO DHL Supply Chain, UK&I

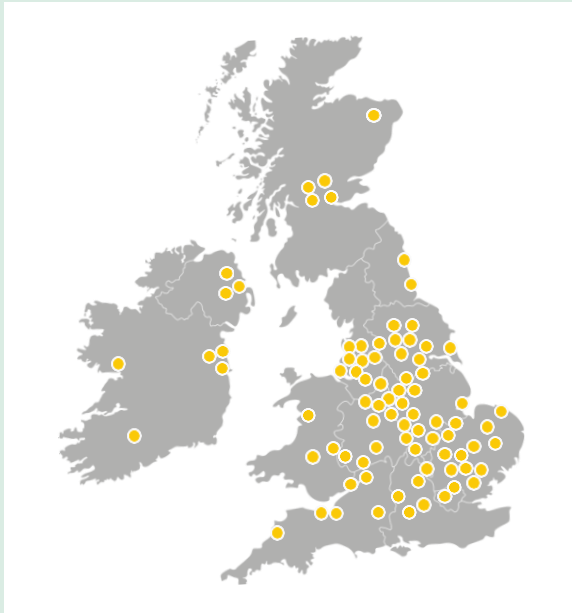
Winner of the CILT Logistics Service Provider 2023 and 2024



GLOBAL PRESENCE BACKED BY LOCAL EXPERTISE

DHL Supply chain is the #1 global logistics company in the world.

United Kingdom and Ireland are cornerstones of our success in the contract logistics space



Sites
~280
Warehouses and locations

Existing customers
~500

Vehicles operated
~5,100
In the region

~35K
Employees
providing supply chain expertise

Providing efficient scalability and flexibility
~5M
Square meters of storage space

MARS
as a Top 5 customer

THE VALUE WE DELIVER TO MARS

Partnering for Progress – DHL Supply Chain addresses key obstacles and builds the best fitting solutions to propel Mars forward

MARS' challenges



Sustainable solutions	Mars required sustainable solutions to achieve sustainable goals inc. reducing CO2 emissions
Profitability	Goals included reducing land footprint & operational costs while enhancing profitability
Growth	Plans for increased warehouse capacity in the south to fulfil growth aspirations
Transformation and need for co-pack centers	Seeking a transformation partner to manage the project and establish co-located co-pack centers

Our Value



Strategic Warehousing Network	<ul style="list-style-type: none"> Optimized warehouse locations for flow efficiency New warehouse designed for future capacity and seasonal peaks
Capacity to manage growth until 2030	Implemented ASRS ¹⁾ with double deep racking for high-density storage
Single provider strategy for maximal supply chain efficiency	Maintaining consistent volumes to guarantee extensive customer reach, using a single WMS for enhanced visibility and flexibility
Support in reaching sustainability goals	<ul style="list-style-type: none"> Cut CO2 emissions by over 12,000 tonnes annually, reducing the UK logistics carbon footprint by 16% Saved one million miles travelled annually

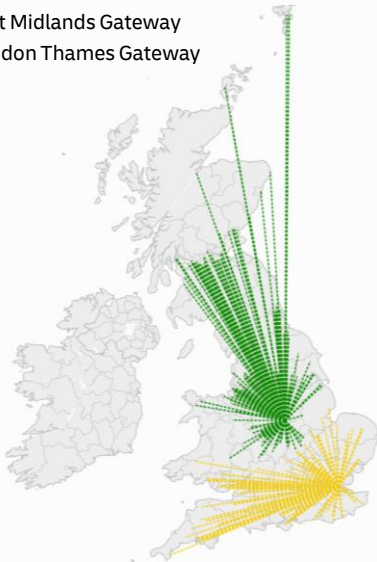
1) ASRS: Automated Storage and Retrieval System

STRATEGIC SET-UP FOR MARS IN UK

MARS

DHL Supply Chain's two strategically located distribution centers cover all of the UK, enhancing supply chain efficiency and supporting customer growth through our market-leading "Super Sheds."

- East Midlands Gateway
- London Thames Gateway



Future Growth opportunities

- ➔ Additional supply chain opportunity **due to acquisition of Kellanova** - home to iconic snacking brands including Pringles®, Cheez-It®, Pop-Tarts®, Rice Krispies Treats®, NutriGrain® brings
- ➔ Potential further outsourcing of **inhouse logistics**
- ➔ Further substantial growth potential in Transport via **DigiHaul**, enhancing transport efficiency with automated order allocation and data analytics

Mondelēz
International

is entering the London site soon and making this site a **multi-customer** warehouse and **increasing utilization**

LONDON THAMES GATEWAY

JON NORTHWOOD
GENERAL MANAGER
LONDON THAMES GATEWAY

Leveraging our strategic locations,
we enhance our service offerings to
meet the needs of our key customers
in the UK



BEST-IN-CLASS FACILITY

Our high-bay automated facility, which began operations in June 2023, operates 24/7, 365 days a year, providing multiple logistics services to meet the growing demands of our customers.

BREEAM®
OUTSTANDING

>85% SCORE
In the top 1%
of buildings



186 people on site
180K case picked/ week



22K pallet TP/week
135 loads per day



42,123 M² warehouse
86,602 M² plot size



Temp controlled
+15°C → +20°C



11 aisles, 14 levels
Double deep storage



35 Dock doors
8 level access doors



8 Full load
Despatch Lanes



WMS - Blue Yonder
WCS - DAI



Taint chamber
Returns chamber



3,700 M² Mezz floor
Co-packing facility



BREEAM is an internationally recognised certification, offering third-party assurance, efficient data management and reliable data validation as well as asset, portfolio and market level benchmarking

TECHNOLOGY FIT

The selection of technologies necessitates a thorough evaluation of each operation's criteria; ASRS emerged as the most suitable solution due to several fitting criteria that align with the operational needs.

Criteria	MARS profile	Assisted Picking Robots	Highly simplified	
			AGVs ¹⁾	ASRS ²⁾
Picking profile	Pallet	✗	✓	✓
Order volume	Large	✗	✗	✓
Inventory Turnover	Fast	✓	✗	✓
Contract Length	11 years	✓	✓	✓

Cost-Effectiveness

High automation reduces costs in high labor costs areas



Flexibility

ASRS can be used by multiple customers simultaneously



Efficiency and Speed

Automation enhances throughput and accuracy



Scalability and Risk Management

Advanced automation supports growth and mitigates risks



ROI

The long-term lease favors fixed automation investments, maximizing storage density and labor efficiency for a beneficial return on investment



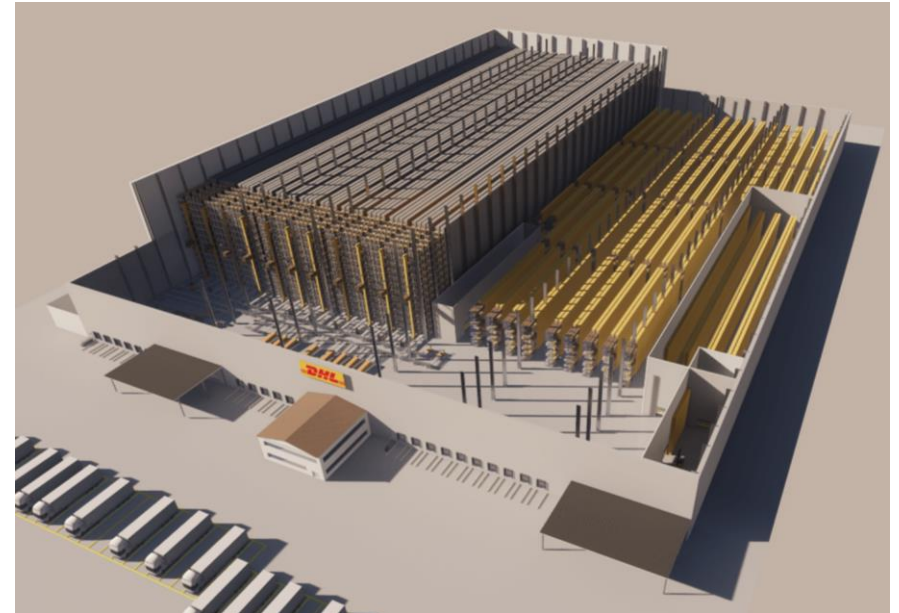
1) AGVs: Automated Guided Vehicles 2) ASRS: Automated Storage and Retrieval System

ASRS SOLUTION

The ASRS automates the storage and retrieval of pallets and can be used by multiple customers ensuring operational flexibility

Automation solution profile

Inbound	<ul style="list-style-type: none">• Autonomous vehicle offload capability• 4 input spurs for loading the ASRS
Storage / Retrieval	<ul style="list-style-type: none">• 11 Cranes with a capacity of 8400 pallets per aisle• 93k pallet storage• 487 m of pallet conveyor• Productivity: 213/228 pallets per hour throughput (in/out)• 2 diverts for redundancy
Dispatch	<ul style="list-style-type: none">• 16 outbound dispatch lanes• Level access interaction between human and stock



INBOUND - OUTBOUND AREA

Infeed area



Inbound area includes:

- One automated vehicle offloading (AVO) system for automated inbound product from MARS manufacturing sites, designed exclusively for MARS.
- Three manual ground-level infeed points for ride-on PPTs and reach trucks, with one additional future infeed point available.
- One reject point for all pallets rejected by the system or sent to the rework station.
- One rework station for pallets failing profile or weight checks, with unresolved issues directed to the outfeed point for resolution.

Outfeed area



Dispatch outfeed lanes:

- The design includes 16 gravity-fed lanes, each holding 13 pallets.
- Outfeed lanes allow pallet pickup with ride-on PPTs and reach trucks.
- Total dispatch capacity is 8 full trailer loads (208 pallets), servicing 1 hour of deliveries.
- Dispatch lanes are paired for easier access and are designed for UK standard pallets only; no allowance for double-stacked loads

TOUR PREPARATION



Personal Protective Equipment (PPE)

PPE is required for all warehouse tours.
This includes:

- High-visibility vests (provided if needed).
- Safety shoes



Safety Briefing

A safety briefing will be conducted before entering the warehouse. Please listen carefully and adhere to all instructions. Always remain with your tour guide.

Familiarize yourself with site safety rules, including:

- Staying on designated safety routes.
- Observing the one-way traffic system in the yard.
- Reporting any incidents to your host, no matter how minor.

THANK YOU



Strategy 2030
**Accelerate
sustainable
growth**

DHL
Group

