We have reached a new performance level and are delivering stronger than ever.
ON A NEW LEVEL

2022

DHL Supply Chain
May 2022

P&P Germany
May 2022

DHL Global Forwarding, Freight
June 2022

DHL Express
Management Update

+Site Visit in Florstadt

+Hub Visit in Cologne/Bonn Airport

TODAY
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

1. Order
2. 19:00 ICT Export through Hanoi Gateway
3. 23:00 ICT Sort in HK Hub
4. 02:00 CET Sort in Leipzig Hub
5. 07:00 CET Import in Rome Gateway
6. 09:00 CET Courier tour preparation in Rome Service Center
7. 10:30 CET Delivery at consignee in Rome
We have reached a **new performance level** and are delivering stronger than ever.
Safety Moment

- Notify EMS
- CPR
- AED
- Meet & Guide EMS
- First Aid
- Extreme Weather
- Evacuation Plan
- Hygiene
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
- GREAT SERVICE QUALITY
- LOYAL CUSTOMERS

Provider of Choice
- Profits
- First Choice
- Simplicity
- Wanna be a Billionaire

Investment of Choice
- PROFITABLE NETWORK
Strong performance as Employer of Choice

GPTW Video
2021 Revenue Market Share study confirmed DHL’s leading position in TDI

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

Global TDI Revenue Market Share [€42.3 bn]

2021 Revenue

Europe [€12.5bn]

Americas [€14.7bn]

Asia Pacific [€13.9bn]

MEA [€1.1bn]
Strong performance as Provider of Choice (2/2)

Touchpoint Results: Best of Breed by region (TDI)

(Best of Breed Provider*)

<table>
<thead>
<tr>
<th>Touchpoint</th>
<th>GLOBAL</th>
<th>EU</th>
<th>AP</th>
<th>AM</th>
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<td>Likelihood to Recommend</td>
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<td>.54 CS - General Enquiries</td>
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<td>DHL</td>
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<tr>
<td>.45 DS - Delivery Options</td>
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<td>Competitor</td>
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<td>Competitor</td>
</tr>
</tbody>
</table>

Relevance 2021

Empty fields when less than 25 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

- With our Insanely Customer Centric Culture & mindset we act upon the VoC
- Through our Net Promoter Approach we collect the Voice of the Customer (VoC)
- First Choice offers tools for everybody focusing on a continuous improvement mindset
- Competitor Research benchmarks our performance and customer satisfaction against our main competitors
- Customer Service lay the foundation of our customer centric culture

2022

ICCC+

➢ A customer-centric view along 9 customer journeys with harmonized Moments of Truth

➢ Systematic way to collect customer feedback through various channels: Calls, Emails, SMS, DHL Websites/ Apps and Social Media reviews

➢ Artificial Intelligence based text analytics and sentiment analysis
Strong performance as Investment of Choice

EBIT / margin / cash flow track record

<table>
<thead>
<tr>
<th>EBIT (in €m)</th>
<th>EBIT margin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 2019</td>
<td>453</td>
</tr>
<tr>
<td>Q1 2020</td>
<td>352</td>
</tr>
<tr>
<td>Q1 2021</td>
<td>651</td>
</tr>
<tr>
<td>Q1 2022</td>
<td>1,101</td>
</tr>
</tbody>
</table>

- **EBIT (in €m)**
  - Q1 2019: 453
  - Q1 2020: 352
  - Q1 2021: 651
  - Q1 2022: 1,101

- **EBIT margin**
  - Q1 2019: 11%
  - Q1 2020: 16%
  - Q1 2021: 18%
  - Q1 2022: 16%

- **Operating cash flow (in €bn)**
  - FY 2019: 3.3
  - FY 2020: 4.4
  - FY 2021: 5.9

- **ROCE (incl. Goodwill)**
  - FY 2019: 18%
  - FY 2020: >20%
  - FY 2021: >30%
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
What happens to DHL Express in a scenario of global downturn

**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** 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. Improving Lives.
Wheel of Purpose Video

CONNECTING PEOPLE. IMPROVING LIVES.
Connecting people and improving lives is what inspires us to get up and go every day.

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

**Engagement score**
- 68 in 2010
- 92 in 2021 (+24 points increase)

**EBIT**
- 497 in 2010
- 4,220 in 2021

Years: 2010 to 2021
Motivated people are at the center of our focus strategy, boosted by our Certified International Specialist programs.
Launched in 2010, the Certified International Specialists program is the centerpiece for employee engagement and development.

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

Program Overview

Certified International Manager (CIM)
CIM Supervisory Excellence Academy

Sales
Operations
Customer Service
Finance
IT
HR

Functional Curriculum

Welcome to Sales
Welcome to Service Center Operators
Welcome to Aviation
Welcome to Sales
Welcome to Hubs and Subbases
Welcome to Customer Service
Welcome to Finance
Welcome to IT
Welcome to HR
Welcome to My Function

Cross-Functional Curriculum

Welcome to My Country
CIS Foundation

- 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....

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
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™**

<table>
<thead>
<tr>
<th>Year</th>
<th>Rank</th>
<th>Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>6th</td>
<td>6</td>
</tr>
<tr>
<td>2015</td>
<td>12th</td>
<td>12</td>
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<tr>
<td>2016</td>
<td>17th</td>
<td>17</td>
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<tr>
<td>2017</td>
<td>8th</td>
<td>23</td>
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<td>2018</td>
<td>6th</td>
<td>30</td>
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<tr>
<td>2019</td>
<td>4th</td>
<td>41</td>
</tr>
<tr>
<td>2020</td>
<td>2nd</td>
<td>64</td>
</tr>
<tr>
<td>2021</td>
<td>1st</td>
<td>68</td>
</tr>
<tr>
<td>2022</td>
<td>TBC</td>
<td>86</td>
</tr>
</tbody>
</table>

The recognition as **World’s Best Workplace™ 2021** is a testament to the strength of the DHL Express culture.
Transforming the employee journey through digitalization drives engagement and efficiency.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attraction</td>
<td>Digital posting across multiple channels</td>
</tr>
<tr>
<td></td>
<td>Digital Interviews &amp; assessments</td>
</tr>
<tr>
<td></td>
<td>Taleo as one stop-shop for full digital recruitment suit</td>
</tr>
<tr>
<td>Onboarding</td>
<td>Digital onboarding utilized via Phenom/Taleo saving time and manual efforts</td>
</tr>
<tr>
<td>Development &amp; Retention</td>
<td>Changing the way our people interact, use HR services &amp; learn</td>
</tr>
<tr>
<td></td>
<td>Leverage AI and Machine Learning for Open Comments within annual survey</td>
</tr>
<tr>
<td>Offboarding</td>
<td>Exit Interviews – digital pilot in addition to in person</td>
</tr>
<tr>
<td></td>
<td>In-Depth Analysis of turnover rates</td>
</tr>
</tbody>
</table>
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)
Motivated people are at the center of our focus strategy, boosted by our CIS programs.

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

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

CIS

Great Place to Work

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

**SELL LIKE NEVER BEFORE**

**MICHIEL 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

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

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
High level results of our commercial strategy

Employee Engagement – EOS Score Sales Global

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

Unchanged strong focus on yield management based on well established toolset

Constantly tracked and revised through established mechanisms:
- Ship-to-Profile
- Tender review Board
- Red / Yellow Card
- Net Price Change
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

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

**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

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

**B2B development: 2019 – YTD June 2022**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>B2B Revenue per Day trend</th>
<th>B2B Weight per Day trend</th>
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</thead>
<tbody>
<tr>
<td>Q1'19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1'20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1'21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1'22</td>
<td>+39.6%</td>
<td>+34.4%</td>
</tr>
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</table>
B2C Growth Trends and Market Outlook: Continued above-GDP growth after current normalization phase

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

Revenue without Fuel Surcharge and Emergency Situation Surcharge. Revenue at constant exchange rate.
### Industry mix (H1 2022)

#### % of total Revenue
- **Retail**: 10% – 15%
- **Fashion**: 15% – 20%
- **Consumer Products**: 5% – 10%
- **Services**: 5% – 10%
- **Technology**: 10% – 15%
- **Automotive**: 5% – 10%
- **Life sciences & Healthcare**: 5% – 10%
- **Engineering & Manufacturing**: 10% – 15%
- **Other**: 15% – 20%

#### Heavy Weight Growth >70kg
- **Retail**: < 0% (-)
- **Fashion**: > +25%
- **Consumer Products**: > +10%
- **Services**: > +15%
- **Technology**: > +10%
- **Automotive**: > +5%
- **Life sciences & Healthcare**: > +15%
- **Engineering & Manufacturing**: > +20%
- **Other**: > +10%

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

#### B2B
- **Retail**: -3%
- **Fashion**: 12%
- **Consumer Products**: -16%
- **Services**: 11%
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.

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-to-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:

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?
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
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**

1. **E-COMMERCE AS VITAL PART OF YOUR BUSINESS MODEL**
2. **BUILD/OPTIMIZE YOUR PLATFORM MIGRATE CUSTOMERS**
3. **PROMOTIONAL & LOYALTY PROGRAMS DATA COLLECTION**

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

> 2,300 daily flights

**PURCHASE AIR**
- Over 300 Commercial Air carriers

**GROUND LINEHAUL**
- Over 450 ground operators

> 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)

[Diagram of the shipment process from Hanoi, Vietnam to Rome, Italy]

1. Order
2. 19:00 ICT Export through Hanoi Gateway
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5. 07:00 CET Import in Rome Gateway
6. 09:00 CET Courier tour preparation in Rome Service Center
7. 10:30 CET Delivery at consignee in Rome

Globally ~1.2m TDI Shipments/Day
Our Global Aviation Network – Snapshot of DHL Dedicated Network Flights

- **DEDICATED AIR**
  - > 2,300 daily flights
- **PURCHASED AIR**
  - > 4,500 daily road movements
- **GROUND LINEHAUL**

**Regional Networks**

- **> 95** North & Latin America
- **> 120** Europe
- **> 20** Middle East & Africa
- **> 20** Asia Pacific

**Intercontinental Network**

- > 65 intercontinental
The fix: flex ratio of our dedicated network remains consistent over time

Unchanged network flexibility
for our dedicated air network

<table>
<thead>
<tr>
<th></th>
<th>Pre Pandemic</th>
<th>2021</th>
<th>Forecast Year End</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEASE terms: 30 days - &lt;1 year</td>
<td>47%</td>
<td>41%</td>
<td>43%</td>
</tr>
<tr>
<td>LEASE terms ≥ 1 year</td>
<td>23%</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>OWN</td>
<td>30%</td>
<td>35%</td>
<td>32%</td>
</tr>
</tbody>
</table>

> 215
> 280
> 320
Commercial air linehaul to complement our dedicated network

CAL weight by contract type (H1 2022)

- 73% Contractually secured capacity for 12 months
- 18% Tactical capacity purchases (ad-hoc buying)
- 9% Contractually secured capacity for 3 months

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

Network routing impacting our Cost per Kilo

For this tradelane

<table>
<thead>
<tr>
<th></th>
<th>PRE-PANDEMIC</th>
<th>CURRENT</th>
<th>POST-PANDEMIC</th>
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</thead>
<tbody>
<tr>
<td>Dedicated Air Capacity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial Air Capacity</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Cost per Kilo (CpK)</td>
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</tbody>
</table>

- **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.

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

TDI is DHL Express’ core product and basis for all demand data on shipment level.

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).
Supplemented by our Ground Linehaul to serve shorter distances

Ground linehaul

> 2,300 daily flights

> 4,500 daily road movements

> 4,500 Global Road Linehaul Movements per Day
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

- LEJ HUB
  - Parcel: 35k / h
  - Docs: 43k / h
- CVG HUB
  - Parcel: 90k / h
  - Docs: 40k / h
- HKG HUB
  - Parcel: 30k / h
  - Docs: 45k / h

... supported by our 19 regional hubs across the globe
We continue to **invest** consistently in improving our hub and gateway network.

**Key facility & Material Handling System upgrade planned investments**

in pipeline, going-live during and after 2021
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)

- **DPDHL Group**
  - 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

- **DHL Express**
  - 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)

- Air: 93.5%
- PuD: 3.5%
- Linehaul: 1.8%
- Real Estate: 0.9%
- Others: 0.3%

**Total Express CO₂ Emissions:** 17.12 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.
We modernize & grow DHL’s air network with the most fuel-efficient, economic & technically reliable freighters

## Aircraft Investment

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
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<tbody>
<tr>
<td><strong>Freighter</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>2022</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boeing 777-200</td>
<td></td>
<td></td>
<td></td>
<td>+4</td>
<td>+6</td>
<td>+4</td>
<td>+4</td>
<td>+2</td>
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<tr>
<td><strong>Passenger-to-Freighter</strong></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
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<tr>
<td>Boeing 767-300</td>
<td></td>
<td></td>
<td></td>
<td>+3</td>
<td></td>
<td>+7</td>
<td>+2</td>
<td>+8</td>
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<tr>
<td>Airbus 330-300</td>
<td>+2</td>
<td>+1</td>
<td>+2</td>
<td>+3</td>
<td>+2</td>
<td>+7</td>
<td>+1</td>
<td></td>
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<tr>
<td><strong>eCargo Aircraft</strong></td>
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<tr>
<td>Alice</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>+12</td>
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### Ordered

CAPITAL MARKETS UPDATE | DEUTSCHE POST DHL GROUP | DHL EXPRESS | 8 SEPTEMBER 2022
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

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

Planned Sustainable Aviation Fuel ramp-up at Express

<table>
<thead>
<tr>
<th>Year</th>
<th>SAF share in %</th>
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<tbody>
<tr>
<td>2022</td>
<td>1%</td>
</tr>
<tr>
<td>2023</td>
<td>3%</td>
</tr>
<tr>
<td>2024</td>
<td>5%</td>
</tr>
<tr>
<td>2025</td>
<td>8%</td>
</tr>
<tr>
<td>2026</td>
<td>10%</td>
</tr>
<tr>
<td>2027</td>
<td>15%</td>
</tr>
<tr>
<td>2028</td>
<td>20%</td>
</tr>
<tr>
<td>2029</td>
<td>25%</td>
</tr>
<tr>
<td>2030</td>
<td>30%</td>
</tr>
</tbody>
</table>
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.
A structured approach to achieve a clear target:
Carbon neutral design for all new buildings

FROM AUGUST 2021

Owned new build facilities

FROM JANUARY 2022

Leased new build (Build-to-Suit) facilities

FROM END Q2 2022

Retrofit existing owned and leased facilities

We focus on 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
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
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
PEOPLE ENABLEMENT

Our people at the core of our attention and value chain

SELL LIKE NEVER BEFORE

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

NETWORK OPTIMIZATION

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