

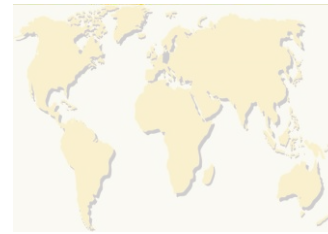
DHL EXPRESS

Missão 2050: Zero Emissões

Mata da Machada, Fevereiro 2018

Agenda

- 1 Grupo Deutsche Post DHL
- 2 DHL Express
- 3 Responsabilidade Social



Um Grupo com Dois Grandes Pilares

Deutsche Post DHL Group

Deutsche Post 

O serviço postal na Alemanha

Deutsche Post - o nosso negócio de correio altamente bem sucedido e uma referência mundial em tecnologia e eficiência. É a base que permitiu a nossa expansão internacional.



A empresa de logística para o mundo

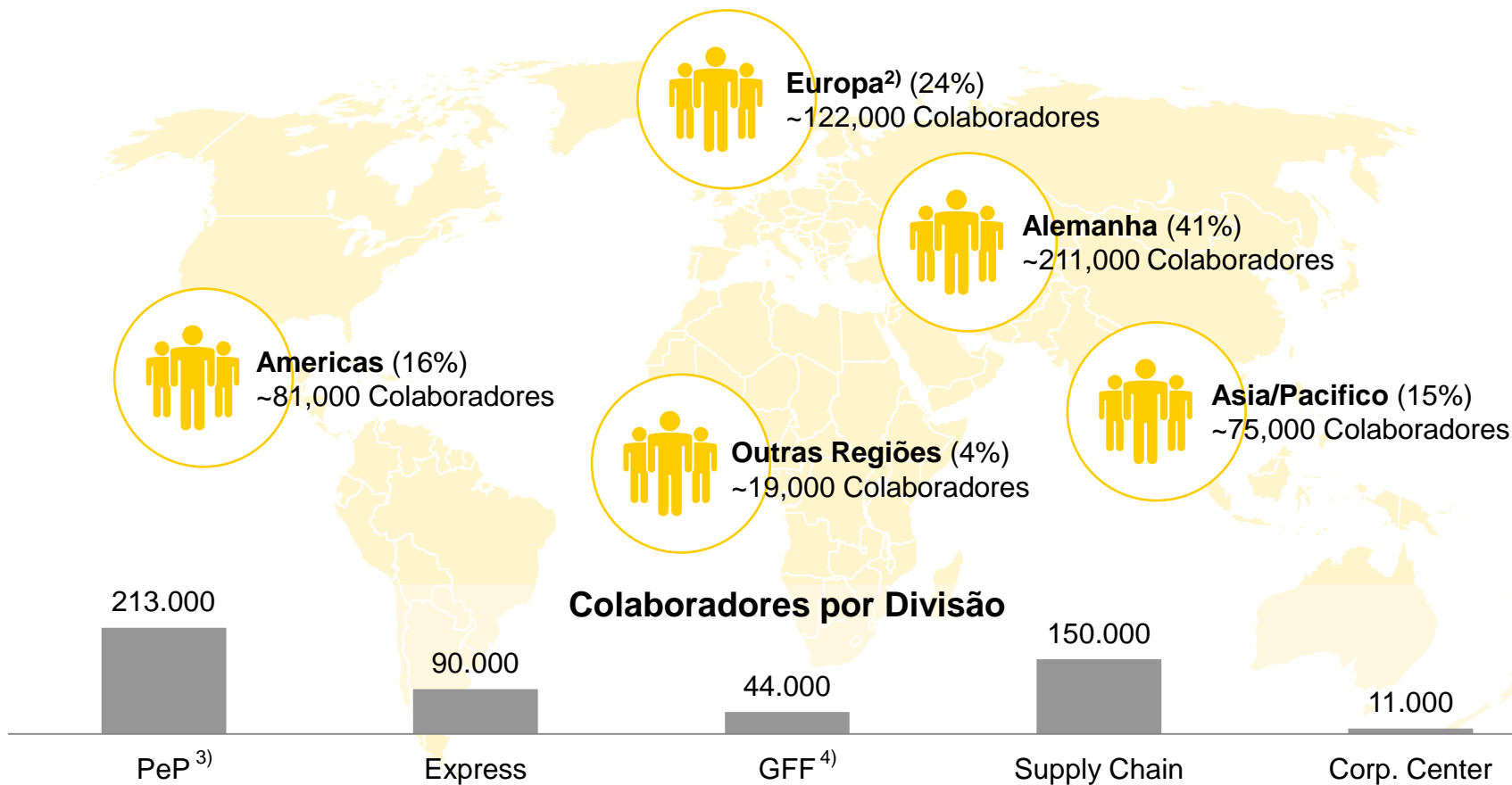
A **DHL** representa o nosso amplo portfólio de negócios de logística e a nossa abrangente presença internacional. Também representa as reconhecidas oportunidades de crescimento da indústria global de logística.

Grupo DP DHL– 3 linhas de resultados



Grupo Deutsche Post DHL

O Grupo DP DHL é um dos maiores empregadores mundiais¹⁾



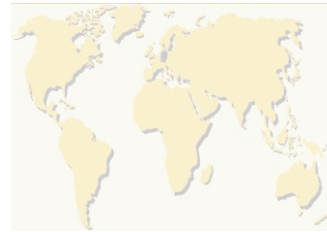
Source: Corporate Responsibility Report 2016; 1) Headcount as of 12/31/2016; 2) Excluding Germany; 3) Post - eCommerce - Parcel; 4) Global Forwarding Freight

Grupo DPDHL – estrutura organizacional



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- 2 DHL Express
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A DHL Express hoje: Uma perspetiva global



Excellence. Simply Delivered.

O que fazemos?

Recolhemos e entregamos documentos e encomendas, tão depressa quanto possível, em todo o mundo através de uma rede global programada. Promovemos o comércio global, permitindo aos nossos Clientes expandir o seu negócio de e para qualquer País no mundo.

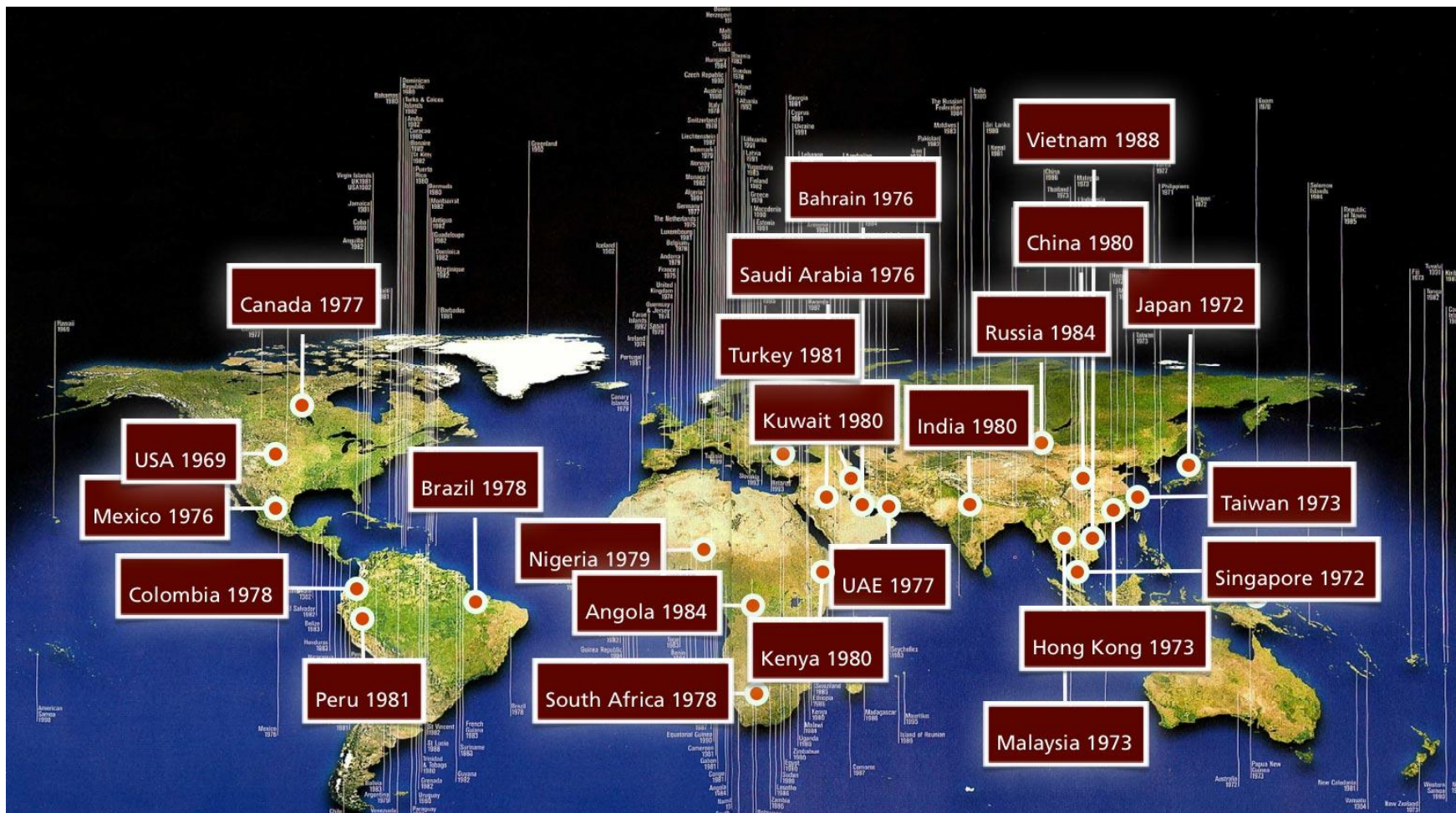
Serviços DHL Express:

Oferecemos os seguintes serviços em todos os Países do mundo:

- Transporte porta-a-porta rápido e eficaz, todas as vezes
- Focus em peças até 30kg e envios até 300kg
- Rastreabilidade total (track&trace) em toda a Rede

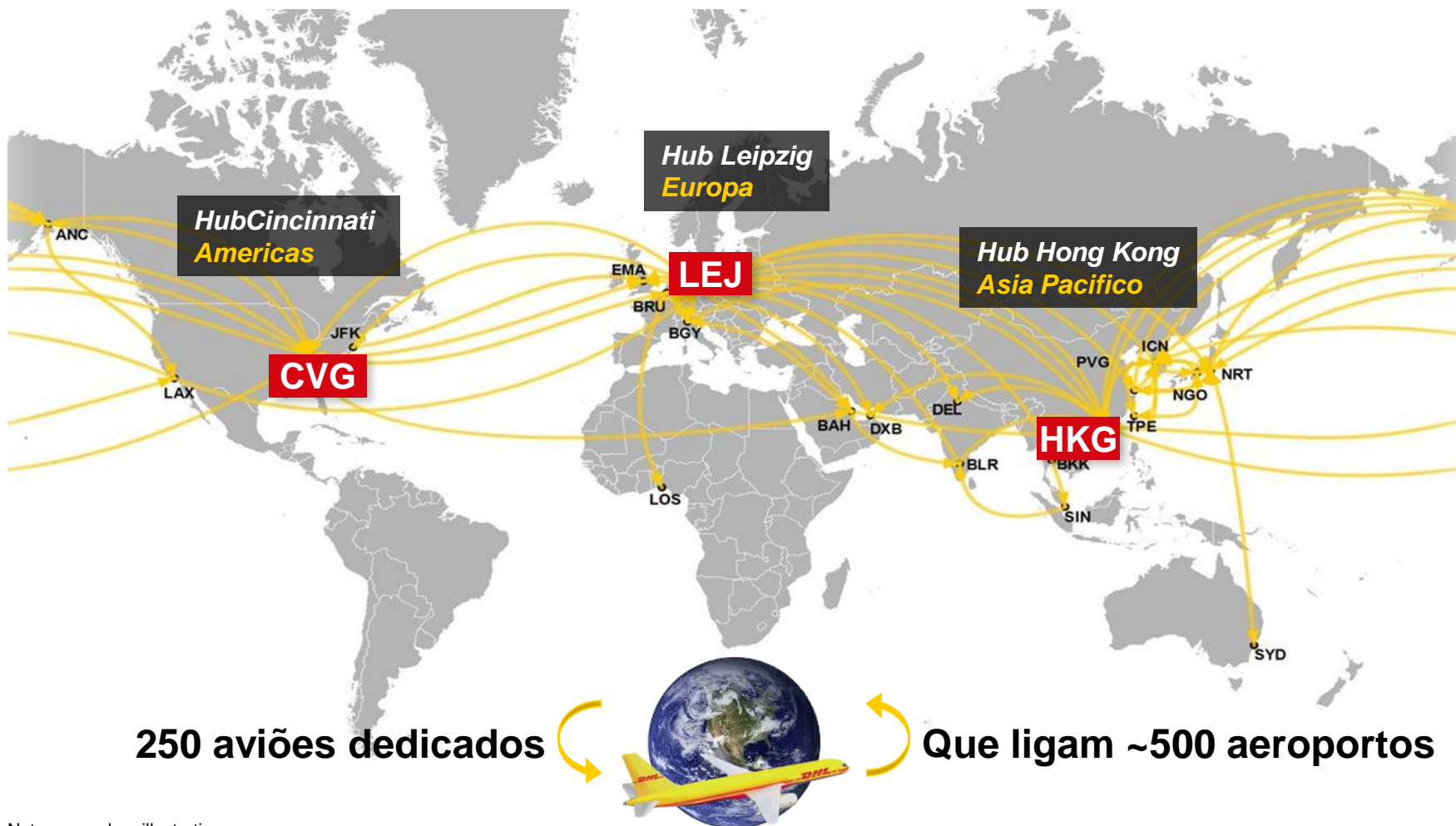


A Empresa Mais Internacional do Mundo



*Note that founding year and year of initial operation may be different

Rede Aérea Intercontinental Dedicada



Note: exemplary illustration

Agenda

- 1 Deutsche Post DHL Group
- 2 DHL Express
- 3 Responsabilidade Social**



Responsabilidade Social

GoGreen

Proteção ambiental



- Minimização do impacto ambiental das nossas atividades de negócio
- Otimização da rede e dos recursos, modernização da frota e dos edifícios, soluções ecológicas para os nossos clientes

GoHelp

Gestão de catástrofe



- Parceria estratégica com as Nações Unidas
- Preparação de apoio através do programa “Get Airports Ready for Disaster”
- Assistência no local prestada pelas nossas Equipas de Resposta a Catástrofes

GoTeach

Educação



- Parceiros internacionais: Aldeias de Crianças SOS e Teach For All
- Melhoria das oportunidades educacionais e de empregabilidade dos jovens
- Desenvolvimento do potencial das crianças e jovens independentemente da sua origem social

Colaboradores



- Atividades de voluntariado dos colaboradores através do Dia Global do Voluntário (GVD) e do fundo “Living Responsibility”
- Os colaboradores fazem doações e fornecem assistência financeira através do fundo interno de apoio: “We Help Each Other”

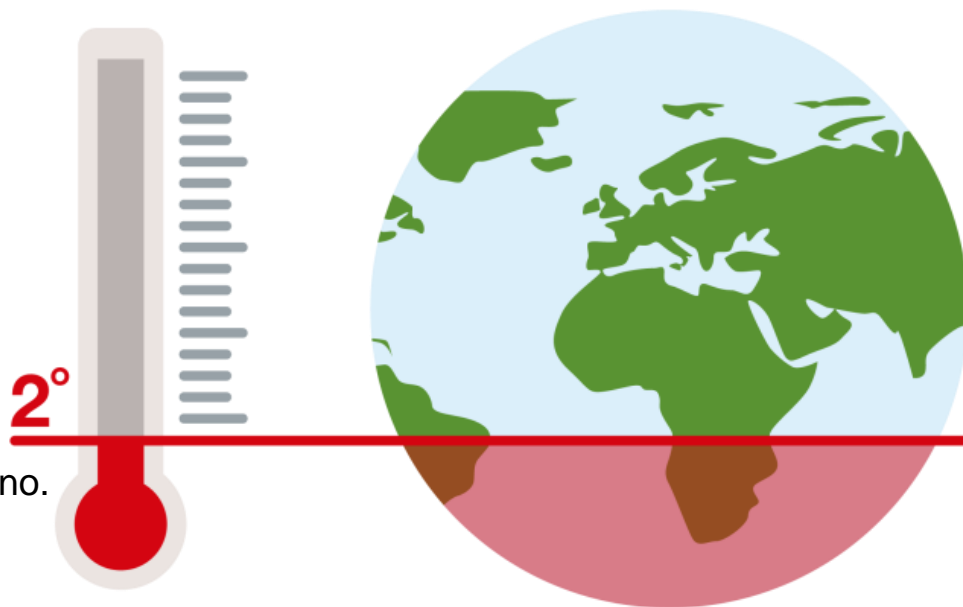
GoGreen

Missão 2050 ZERO: Emissões

Vamos reduzir as nossas emissões para ZERO até 2050.

Para lá chegarmos, definimos 4 metas intercalares para 2025:

- 1) Melhoria da nossa **eficiência carbónica** em 50% face a 2007
- 2) 70% das recolhas e entregas ao Cliente serão **isentas em carbono**
- 3) Mais de 50% dos nossos Clientes terão no seu portefólio **soluções GoGreen**
- 4) 80% dos nossos terão formação como **especialistas internacionais GoGreen** e em conjunto com os nossos parceiros iremos plantar **1 Milhão de árvores** por ano.



MISSION 2050: ZERO EMISSIONS

If we don't want to overwhelm the planet, we have to be stewards of sustainability. The decisions we make today will determine how we live tomorrow. For us, the world's leading mail and logistics company, the decision is clear.

PROTECTING OUR PLANET

We are doing our part to limit global warming to less than two degrees Celsius – our aim is to reduce our logistics-related emissions to zero by 2050.



We have big plans: To get us there, we've set four milestones to be reached by 2025.



We have two strategic approaches for reaching a sustainable future:

Burn Less
consume less energy



Fleet renewal



Optimized aerodynamics



Smart and efficient buildings



Telematics systems



Engine modifications and hybrid drive systems

Burn Clean
use alternative fuels



Alternative fuels



Green electricity



Natural resources (daylight and rain water harvesting)



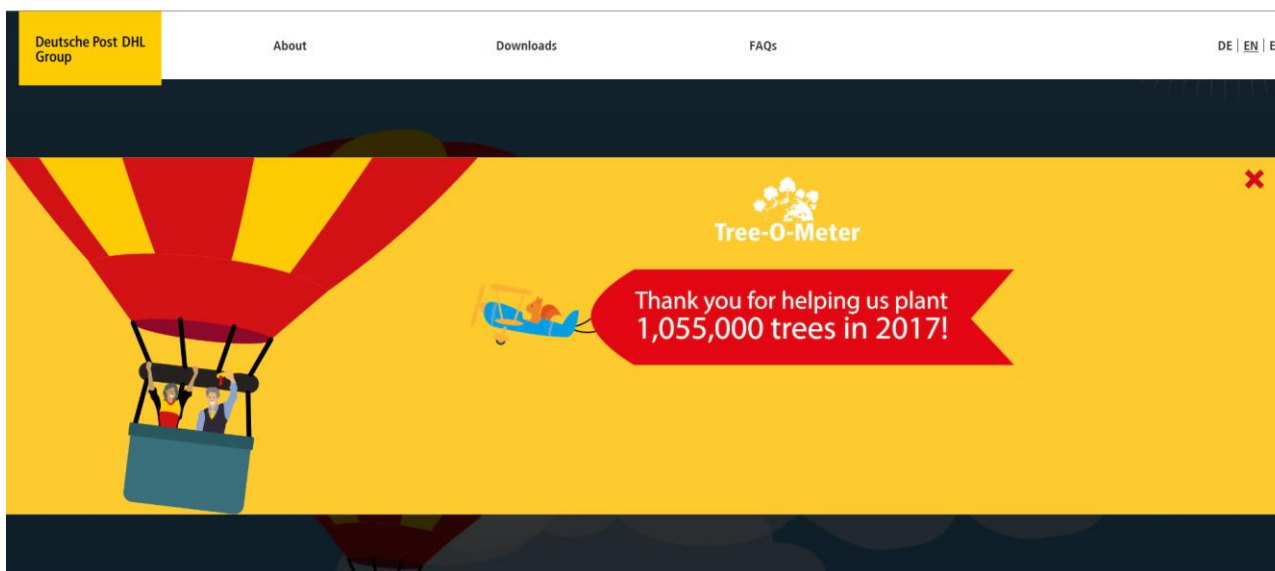
Deutsche Post DHL Group

GOGREEN

PLANTAÇÃO DE 1 MILHÃO ÁRVORES / ANO

CrITÉRIOS para contribuir para o objetivo global de 1 milhão de árvores por ano:

1. Tem de ser uma árvore
2. A árvore tem de ser plantada em parceria com uma entidade oficialmente reconhecida
3. A plantação das árvores tem de ser confirmada através de documento escrito emitido pela entidade parceira



Objetivo Parcial

PLANTAÇÃO DE 1 MILHÃO ÁRVORES / ANO - Grande Lisboa

Plantação na Reserva Natural da Mata da Machada, Barreiro em parceria com o projeto LIFE Biodiscoveries

- 11 de Novembro de 2017
- 2.000 árvores (Pinheiros manso, medronheiros e salgueiros)



OBRIGADA

BACK UP




Shared Value

We offer green products and services to generate shared value – for our and our customers' business as well as for the environment

▼ GoGreen Solutions category

Carbon Report




▼ What it is about


Easy-to-understand and accurate reports of customer and product related greenhouse gas emissions in the supply chain.



▼ What customers get

Clear view on where to improve

Green Optimization




Solutions for minimizing and/or avoiding logistics-related emissions, waste and other environmental impacts by capturing efficiency gains along the entire logistics supply chain.



Concrete improvement measures for a more environmentally-friendly supply chain

Climate Neutral




Verified calculation and offsetting of greenhouse gas emissions for our transport and logistics services through climate protection projects.



Climate neutral supply chain and official certificate stating annual CO₂e offset

Corporate Citizenship

Our Corporate Citizenship activities are based upon strategic corporate programs and supported by the volunteering efforts of our employees worldwide locally

▼ GoHelp



DRT



DHL Disaster Response teams: Professional logistics support at airports to ensure speedy, efficient supply chain after natural disasters



GARD



Get Airports Ready for Disaster: Workshops to train airport employees and representatives of disaster management authorities

▼ GoTeach



SOS Childrens V.



Employees support young people mastering the transition to the world of work by sharing experience and expertise



Teach For All

Financial support and volunteering efforts to support teaching participants and students in underserved schools

▼ Instruments



Global Volunteer Day

Mobilize our employees worldwide to address local social and environmental needs with a partner organization



Living Responsibility Fund

Promote and acknowledge extraordinary volunteering efforts, employees can apply for financial support

Corporate Responsibility at DPDHL Group in numbers (2016) (examples)

GARD¹⁾ workshops
at 38 airports
since 2009

1) Get Airports Ready
for Disaster



More than
365,000
volunteer
hours
in GVD
activities



since 2007
30 % CO₂
efficiency
improvement



2 billion
climate-
neutral
shipments



3,300 volunteers reached
15,000 beneficiaries in our
GoTeach partnerships
with
SOS Children's Villages
and Teach For All



39 DRT¹⁾
deployments
since 2004

1) Disaster Response Team



DPDHL Group is committed to
17 Global Goals
for **Sustainable**
Development



> 230,000 employees
are trained to become
"Certified"
specialists



6,200 vehicles
with **alternative**
drive systems



Refugee Initiative:
15,000 employees
engaged in
~ 1,000 refugee aid efforts
in Germany.
~ 300 refugees
employed,
realization of
~ 460
internships



~ 60% electricity from
Renewable energy
sources



Shared Value partnership
with **Gavi, the**
vaccine alliance



The management team – more than a century of DHL experience



Charlie Dobbie

EVP Network Ops,
IT & Aviation
DHL since 1986

Regine Buettner

EVP Human Resources
DHL since 2007

Joe Joseph

CFO DHL Express
DHL since 1998

Dong Ming Wu

CEO China
DHL since 1997

Ken Allen

CEO DHL Express
DHL since 1985

Ken Lee

CEO APEC
DHL since 1997

John Pearson

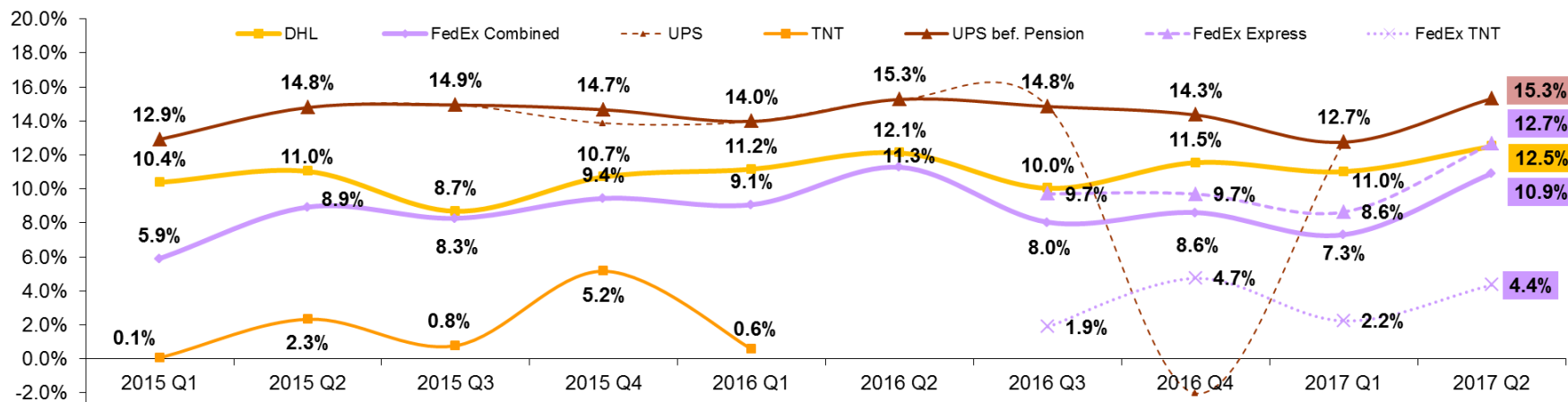
CEO Europe
Head of Marketing & Sales
DHL since 1986

Mike Parra

CEO Americas
DHL since 1997

EBIT margin excl. one-offs

	EBIT margin excl. One-offs	
	Full Year	
	2015	2016
DHL	10.2%	11.2% (+1.0%pts)
FedEx	8.1%	9.1% (+1.0%pts)
FedEx Express	8.1%	9.9%
FedEx TNT	n/a	3.3% (only H2)
UPS bef. Pension adj.	14.3%	14.6% (+0.3%pts)



Note: no TNT reporting as of Q2 2016; TNT was taken over by FedEx

Global facts (1/2)



CEO	Ken Allen
Head Office:	Bonn, Germany
Revenue: ¹⁾	Approx. 13.7 bn EUR
Shipments: ¹⁾	Approx. 347 million (TDI: approx. 211 million)
Network:	More than 220 countries and territories served // approx. 500 airports served globally
Global Hubs:	Cincinnati, Hong Kong, Leipzig
Main Regional Hubs:	Amsterdam, Bergamo, Brussels, Copenhagen, East Midlands (UK), Frankfurt, London, Madrid, Marseilles, Paris, Vitoria (Spain) // Bangkok, Shanghai, Singapore // Bahrain, Dubai, Lagos // Miami, Panama
Facilities: ²⁾	Approx. 1,500
Service Points:	More than 50,000
Dedicated Aircraft: ³⁾	More than 250
Main Global Dedicated Airlines:	Aerologic, DHL Air, Kalitta Air, Polar Air Cargo Worldwide, Southern Air
Flights: ⁴⁾	Approx. 2,470 daily flights
Vehicles: ⁵⁾	Approx. 31,300

1) Full year 2016; 2017 reporting structure

2) Owned and leased, count as at December 2016

3) 5 aircraft in Blue Dart are still supported by Express Aviation but not included; count as at December 2016

4) Average; domestic and international

5) Owned, leased and subcontracted trucks and vans

Global facts (2/2)

Employees:⁶⁾

Approx. 90,000

Customers:⁷⁾

Approx. 2.6 million

Global QCCs:⁸⁾

Cincinnati (US), East Midlands (UK), Leipzig (Germany) and Singapore (Singapore)

Global IT Centers:

IT centers in Cyberjaya (Malaysia) and Prague (Czech Republic), supporting the entire global network

TAPA Certifications:⁹⁾

289

6) Headcount (as at 30th June 2017)

7) Active customers in sales portfolio

8) QCC: Quality Control Center; key functions: Real Time Shipment Management and Crisis Control Center

9) TAPA: Transported Asset Protection Association (status: end of June 2017)

Americas facts



CEO:	Mike Parra
Head Office:	Plantation, Florida
Revenue: ¹⁾	Approx. 2.7 bn EUR
Countries/ Territories:	More than 55 countries and territories served
Main Hubs:	Cincinnati (Global Hub), Miami, Panama
Facilities: ²⁾	Approx. 250
Service Points:	approx. 7,000
Dedicated Aircraft: ³⁾	Approx. 80
Main Regional Dedicated Airlines:	Atlas Air, ABX Air Inc., ATI (Air Transport International), DHL Aero Expreso, DHL De Guatemala, Southern Air, Vensecar Internacional
Flights: ⁴⁾	Approx. 530 daily flights
Vehicles: ⁵⁾	Approx. 7,500
Employees: ⁶⁾	Approx. 20,000
Customers: ⁷⁾	Approx. 400,000
QCC: ⁸⁾	Cincinnati (US)
TAPA Certifications: ⁹⁾	31

1) Full year 2016

2) Owned and leased; count as at December 2016

3) Count as at December 2016

4) Average; domestic and international

5) Owned, leased and subcontracted trucks and vans

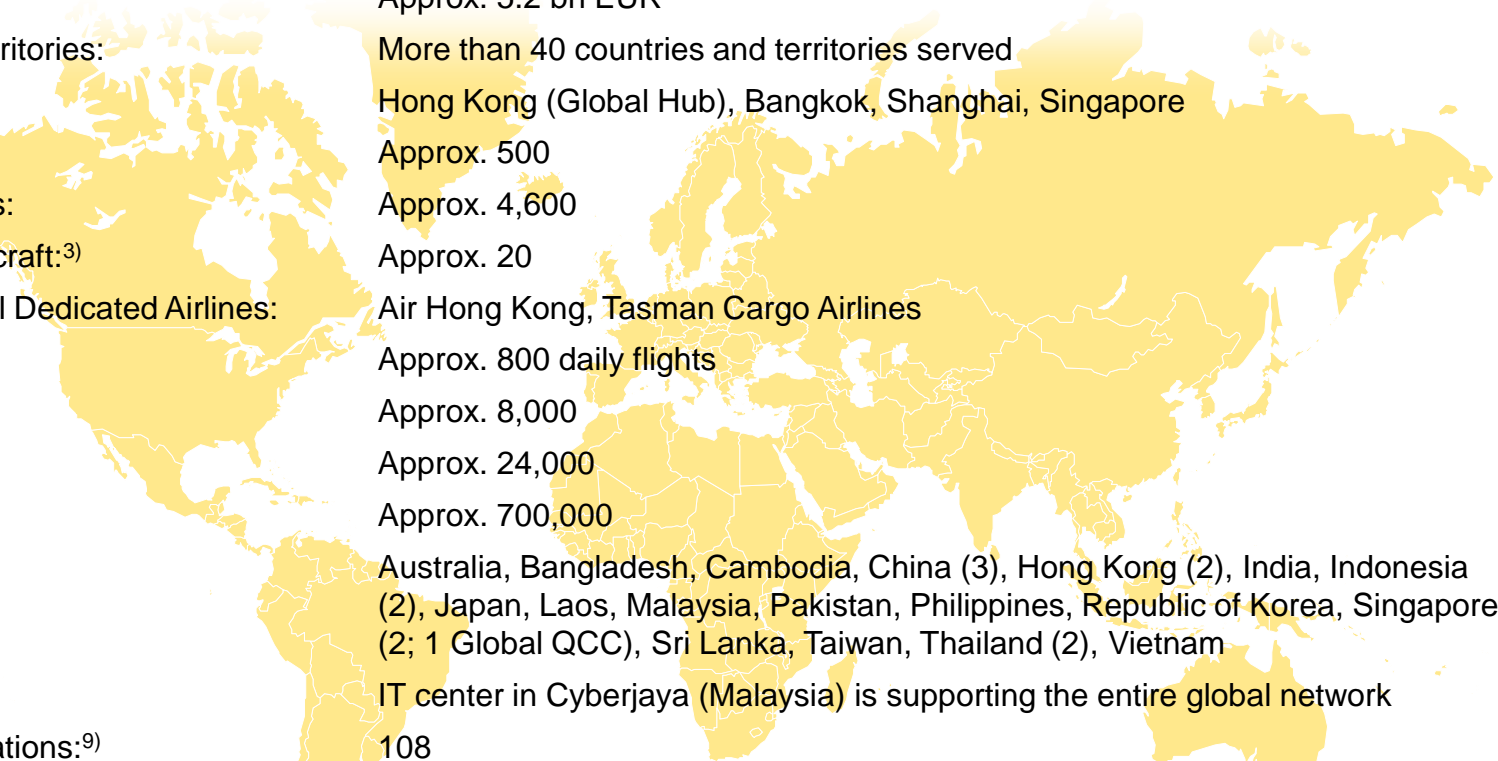
6) Headcount (as at 30th June 2017)

7) Active customers in sales portfolio

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Asia Pacific facts



Revenue: ¹⁾	Approx. 5.2 bn EUR
Countries/ Territories:	More than 40 countries and territories served
Main Hubs:	Hong Kong (Global Hub), Bangkok, Shanghai, Singapore
Facilities: ²⁾	Approx. 500
Service Points:	Approx. 4,600
Dedicated Aircraft: ³⁾	Approx. 20
Main Regional Dedicated Airlines:	Air Hong Kong, Tasman Cargo Airlines
Flights: ⁴⁾	Approx. 800 daily flights
Vehicles: ⁵⁾	Approx. 8,000
Employees: ⁶⁾	Approx. 24,000
Customers: ⁷⁾	Approx. 700,000
QCCs: ⁸⁾	Australia, Bangladesh, Cambodia, China (3), Hong Kong (2), India, Indonesia (2), Japan, Laos, Malaysia, Pakistan, Philippines, Republic of Korea, Singapore (2; 1 Global QCC), Sri Lanka, Taiwan, Thailand (2), Vietnam
IT Center:	IT center in Cyberjaya (Malaysia) is supporting the entire global network
TAPA Certifications: ⁹⁾	108

1) Full year 2016

2) Owned and leased; count as at December 2016

3) 5 aircraft in Blue Dart are still supported by Express Aviation but not included; count as at December 2016

4) Average; domestic and international

5) Owned, leased and subcontracted trucks and vans

6) Headcount (as at 30th June 2017)

7) Active customers in sales portfolio

8) QCC: Quality Control Center; key functions: Real Time Shipment Management and Crisis Control Center

9) TAPA: Transported Asset Protection Association (status: end of June 2017)

Europe facts



CEO:	John Pearson
Head Office:	Bonn, Germany
Revenue: ¹⁾	Approx. 6.0 bn EUR
Countries/ Territories:	More than 60 countries and territories served
Main Hubs:	Leipzig (Global Hub), Amsterdam, Bergamo, Brussels, Copenhagen, East Midlands (UK), Frankfurt, London, Madrid, Marseilles, Paris, Vitoria (Spain)
Facilities: ²⁾	Approx. 550
Service Points:	Approx. 35,700
Dedicated Aircraft: ³⁾	Approx. 90
Main Regional Dedicated Airlines:	DHL Air, European Air Transport
Flights: ⁴⁾	Approx. 720 daily flights
Vehicles: ⁵⁾	Approx. 13,300
Employees: ⁶⁾	Approx. 33,000
Customers: ⁷⁾	Approx. 1.4 million
QCCs: ⁸⁾	East Midlands (UK; Global QCC), Leipzig (Germany, Global QCC), Spain
IT Center:	IT center in Prague (Czech Republic) is supporting the entire global network
TAPA Certifications: ⁹⁾	99

1) Full year 2016; 2017 reporting structure

2) Owned and leased; count as at December 2016

3) Count as at December 2016

4) Average; domestic and international

5) Owned, leased and subcontracted trucks and vans

6) Headcount (as at 30th June 2017)

7) Active customers in sales portfolio

8) QCC: Quality Control Center; key functions: Real Time Shipment Management and Crisis Control Center

9) TAPA: Transported Asset Protection Association (status: end of June 2017)

Middle East Africa facts



Revenue: ¹⁾	Approx. 1.1 bn EUR
Countries/ Territories:	More than 65 countries and territories served
Main Hubs:	Bahrain, Dubai, Lagos
Facilities: ²⁾	Approx. 250
Service Points:	Approx. 2,800
Dedicated Aircraft: ³⁾	Approx. 20
Main Regional Dedicated Airlines:	DHL Aviation, DHL Aviation EEMEA, SNAS Aviation
Flights: ⁴⁾	Approx. 430 daily flights
Vehicles: ⁵⁾	Approx. 2,500
Employees: ⁶⁾	Approx. 9,000
Customers: ⁷⁾	Approx. 150,000
QCCs: ⁸⁾	Bahrain, South Africa
TAPA Certifications: ⁹⁾	51

1) Full year 2016; 2017 reporting structure

2) Owned and leased; count as at December 2016

3) Count as at December 2016

4) Average; domestic and international

5) Owned, leased and subcontracted trucks and vans

6) Headcount (as at 30th June 2017)

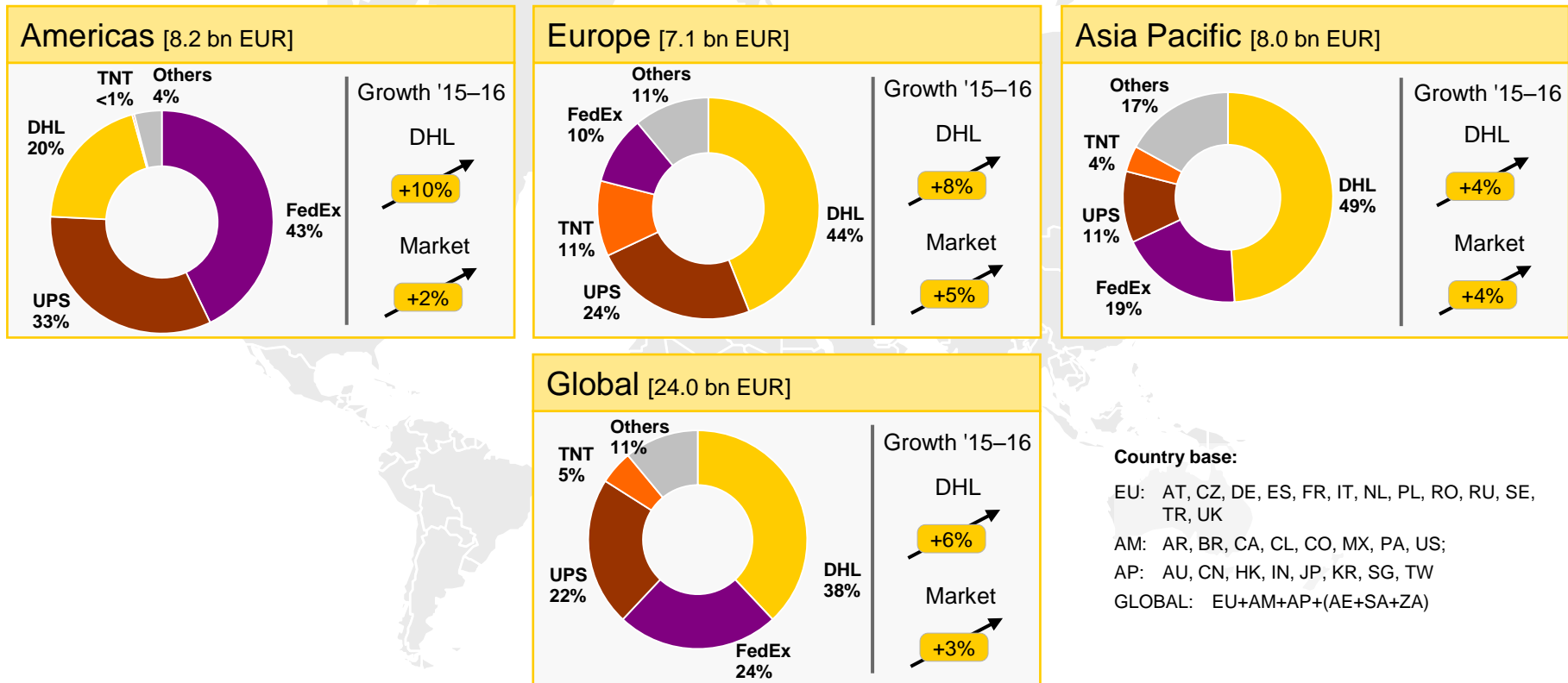
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Market position in TDI in 2016 – value share (in EUR)

Continued TDI leadership across all regions outside the Americas



Source: Market Intelligence 2017, annual reports and desk research

CIS – Certified International Specialist

CIS enables staff empowerment through knowledge and development. Using the core DHL Express attributes of Speed, Right 1st Time, Can Do and Passion CIS engages every member of DHL Express and provides them with the specialized knowledge they need to do their job competently and confidently. Customers and colleagues worldwide benefit from the inspiration, know-how and passion that sets DHL Express apart from the competition.

CIS provides a lifelong learning and engagement journey from Foundation through to Leadership.



CIS Foundation ensures every member of the DHL team demonstrates the same consistent behavior, whatever their country or region.



Functional CIS training provides employees with the skills and knowledge they require in their individual operating environment



The **Cross Functional** curricula provides all employees with knowledge of customer and business topics that drive a customer-centric network.



CIM* and the **Supervisory Academy** is creating a team of DHL Express Managers and Supervisors who are inspired and capable of delivering 21st Century Leadership and driving the highest levels of performance and results across the business



* Certified International Manager

Quality Control Centers (QCC)

Real Time Shipment Management

DHL Quality Control Centers monitor DHL's global network in real time from shipment pickup to final delivery.

Crisis Command Center

The Major Quality Control Centers double as a Global Crisis Command Center to activate and manage any crisis situation.



Cincinnati, AM



East Midlands, UK



Leipzig, EU



Singapore, APEM

Roles of a QCC

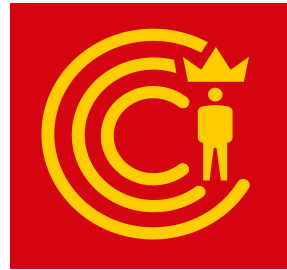
Service Recovery

Identify a breakdown in the shipment process chain at the earliest possible time to activate agreed contingency plans to maintain quoted service levels

Pro-Active Notification

In the event of an unavoidable service incident, allow visibility to pre-defined customers of the delay and impact for pro-active customer notification

Insanely Customer Centric Culture



ICCC

Insanely Customer Centric Culture



Taking
Ownership and
Fixing Issues



Reducing
Service
Failures and
Complaints



Increasing
Customer
Satisfaction



Driving
Customer
Loyalty and
Retention



Improving Our
Customer
Experience
across all touch
points

Why shipping Express?

1 Cost Savings



- Faster movement – Lower inventory levels
- Economies of scale passed on to customers

2 Time Savings



- Reduced transit time – Supported just-in-time inventory management models
- Especially in emerging markets with weaker infrastructure

3 Infrastructure



- Access to small and untested markets
- Ability to cope with short-term demand

4 Outsourcing of Non-Core Activity



- Extended knowledge of markets & regulations
- Electronic solutions for processing documentation, reporting, shipment tracking



8 Global Reach



- Door-to-door service – Direct access to international customers (particularly SMEs)
- Sourcing opportunities from global markets – Access to new materials and suppliers

7 Service



- Quicker delivery – Better customer service
- Tailored delivery options and full visibility for own customer

6 Efficiency



- Quick replacements – Reduced production shutdowns
- Reduced order-to-delivery cycle – Increased customization of products & services

5 Security



- Visibility on items in transit – Low failure/loss rate
- Short transit time – Lower risk of theft

Constant development/ improvement of our last mile options to address consumers expectations

Evening and weekend courier routes

additional routes in the evening or weekend to meet consignees when they are at home



Service points/ lockers

expanding our coverage off access points to provide alternative delivery options



ADC (Advanced Duty Collection)

online tool to allow consumers to pay duties and taxes online



ODD (On Demand Delivery)

notifying receivers of their shipment progress via e-mail and/or SMS and providing standard delivery options to choose from

