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DHL Global Forwarding (Greater China)





We live in a
volatile world.

- Uncertainty
- Complexity
- Diversity
- Transparency
- Myths & Fake News

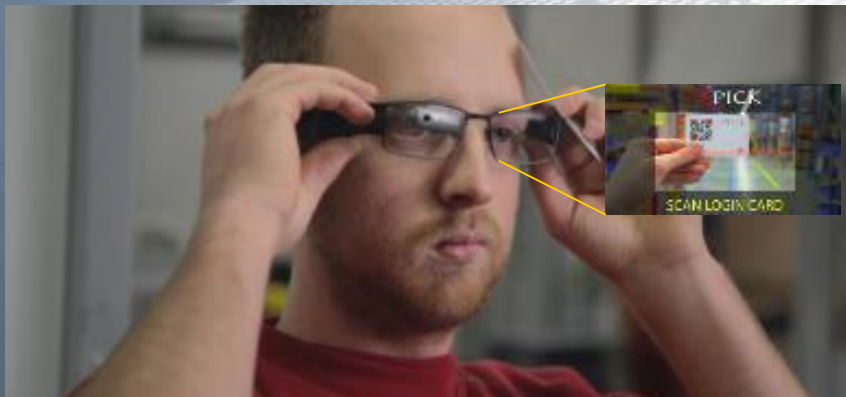
A close-up image of a robotic hand with beige segments and blue joints, positioned over a laptop keyboard. The hand is in a typing position, with fingers slightly curved. The background is a blurred blue and green pattern.

MYTH

Digitalization is
a threat

Digitalization will create productivity gains

REALITY



Augmented reality



Self-driving trucks

China 2.0

Imitating to Innovating

REALITY



- Low cost labor & heavy capital investment are growth drivers no more
- Large, dynamic consumer market
- World's manufacturing base
- Chinese giants and Government are investing heavily

Low cost & rapid customer centric innovation

Made in China 2025

REALITY

9 Strategic Priorities

Improve innovation capability of manufacturing industry

Integrated digitalization and industrialization

Strengthen basic capabilities of industries

Enhance quality branding

Facilitate "Green Manufacturing"

Achieve breakthroughs in 10 sectors

Refine manufacturing industry structure


Propel service-oriented manufacturing and
manufacturing-oriented service industries

Facilitate the globalization of manufacturing industry

10 Key Sectors


New
generation
of IT industry


Advanced
CNC
machines/
robotics



Aerospace/
aviation
equipment



Ocean
engineering
& hightech
ships



Advanced
rail sys.
equipment


Fuel efficient/
new-energy
car


Electricity
equipment


Agricultural
equipment

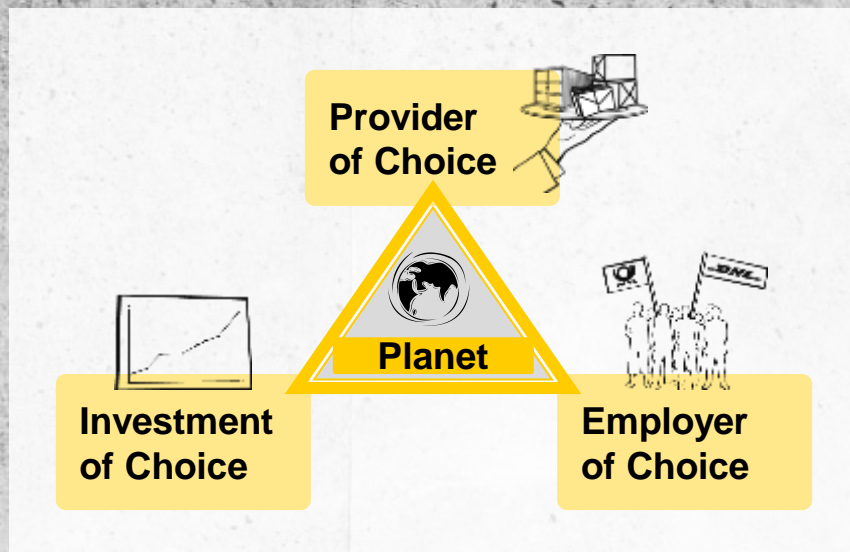

New
materials


Pharma &
adv. med.
devices



How does DPDHL Group lead in this context?

- Long term compass
- Engaged employees
- Insanely customer-centric



Long-term compass

- **Purpose:** We connect people, improving lives.
- **Mission:** Excellence. Simply delivered.
- **Values:** Respect & Results



STRATEGY 2020

Focus.Connect.Grow.

Focus.

1. Logistics as our core
2. Committed to the needs of our stakeholders & our planet
3. A family of divisions

Industry-leading margins

Connect.

1. One global team
2. Certified specialists for everything we do
3. Connected approach wherever appropriate

Quality leadership and service excellence

Grow.

1. Leader in eCommerce logistics
2. Accelerate footprint shift towards emerging markets
3. New market opportunities for organic expansion

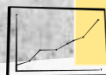
New growth opportunities

Good results along all dimensions

- All key customer touch points continuously improved
- Multitude of awards (customer service, best-in-class partner, innovation)



Provider of Choice



Investment of Choice

Revenue (€ m)

46,201 57,334

2009 2016

EBIT (€ m)

231 3.49

2009 2016



Employer of Choice



Top ratings in key
CR rankings and ratings



Dow Jones
Sustainability Indexes



FTSE4Good



MSCI

Employee Opinion Survey (% approval)

Active Leadership

58

2009

74

2016

Strategy

55

2009

72

2016



Our aspiration:
The most global logistics provider

Continuous expansion of global presence

Example: EXPRESS

- Network expansion on a large scale (investments totaling hundreds of millions)
- Renewal of air cargo fleet

- Last-mile/ e-commerce options
 - e.g. Evening/ weekend courier
 - e.g. On-Demand Delivery
 - e.g. Advanced Duty Collection

Customer centric solutions

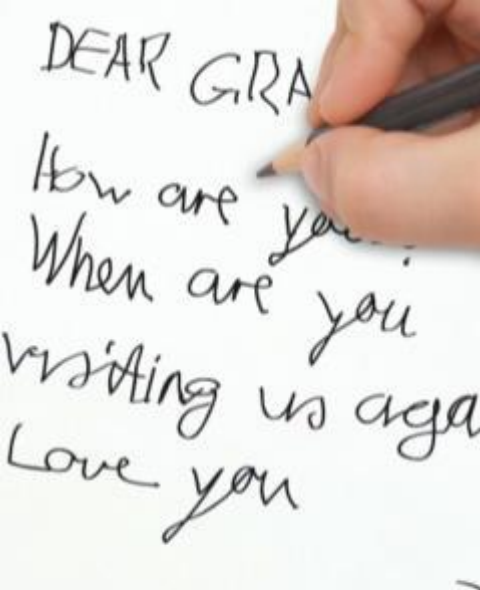
AP Multi-Modal Solution

- Network coverage from Singapore/ Japan to Europe
- Road, Rail, Ocean
- Cold chain, track & trace



Our aspiration:
**1st zero emissions
logistics provider**





Our purpose: We connect people and improve their lives.

We deliver
joy

We help
save lives

We deliver
prosperity

We deliver
trust