Deutsche Post DHL Group: Structure and Key Figures

DHL Consulting is part of Deutsche Post DHL, the world’s leading postal and logistics group with ~EUR 61.6bn revenues and >550k employees

<table>
<thead>
<tr>
<th>Division</th>
<th>Revenue (EUR)</th>
<th>EBIT (EUR)</th>
<th>Full-time Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post &amp; Parcel Germany</td>
<td>18.5bn</td>
<td>0.7bn</td>
<td>192k</td>
</tr>
<tr>
<td>Express</td>
<td>16.1bn</td>
<td>2.0bn</td>
<td>96k</td>
</tr>
<tr>
<td>Global Forwarding, Freight</td>
<td>15bn</td>
<td>0.4bn</td>
<td>43k</td>
</tr>
<tr>
<td>Supply Chain</td>
<td>13.4bn</td>
<td>0.5bn</td>
<td>156k</td>
</tr>
<tr>
<td>eCommerce Solutions</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Customer Solutions and Innovation

Global Business Services, Finance, Human Resources, Corporate Incubations

Vision

We are the management consultancy for Deutsche Post DHL Group and the Supply Chain consultancy for its customers

Note: Financial figures refer to FY2018 actual
Our positioning in the market and within DPDHL Group

DHL Consulting is an independent entity within the DPDHL Group and provides neutral, objective consulting recommendations.
Combining global presence and project experience with local expertise for a holistic approach to consulting

100+ Consultants

1200+ Management and logistics consulting projects across all major geographies

20 Years of consulting experience

4 Global offices with local expertise and language skills
We are the partner of choice for leading private and public sector companies across all major sectors

<table>
<thead>
<tr>
<th>Auto-Mobility</th>
<th>Consumer &amp; Retail</th>
<th>Energy &amp; Chemicals</th>
<th>Engineering &amp; Manufacturing</th>
<th>Life Sciences &amp; Healthcare</th>
<th>Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>APTIV</td>
<td>Alibaba</td>
<td>Baker Hughes</td>
<td>3M</td>
<td>Abbott</td>
<td>Dell</td>
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<tr>
<td>BMW</td>
<td>Avon</td>
<td>Clarient</td>
<td>Atlas Copco</td>
<td>Agilent</td>
<td>Fujitsu</td>
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<tr>
<td>Bosch</td>
<td>Chanel</td>
<td>DuPont</td>
<td>Bell Flight</td>
<td>BSN medical</td>
<td>HP</td>
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<tr>
<td>Goodyear</td>
<td>Colgate-Palmolive</td>
<td>Emery</td>
<td>Daikin</td>
<td>Eli Lilly</td>
<td>Huawei</td>
</tr>
<tr>
<td>Jaguar</td>
<td>Esprit</td>
<td>ExxonMobil</td>
<td>Danfoss</td>
<td>GSK</td>
<td>Konica Minolta</td>
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<tr>
<td>Land Rover</td>
<td>Fontella</td>
<td>Halliburton</td>
<td>Holcim</td>
<td>Johnson &amp; Johnson</td>
<td>Lenovo</td>
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<tr>
<td>Michelin</td>
<td>Haier</td>
<td>Phillips 66</td>
<td>Northvolt</td>
<td>Pfizer</td>
<td>Microsoft</td>
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<tr>
<td>Mitsubishi</td>
<td>Kraft</td>
<td>SABIC</td>
<td>Sandvik</td>
<td>TEVA</td>
<td>Nokia</td>
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<tr>
<td>Nissan</td>
<td>Minor Food</td>
<td>Schlumberger</td>
<td>Schneider Electric</td>
<td>Roche</td>
<td>Philips</td>
</tr>
<tr>
<td>Porsche</td>
<td>PepsiCo</td>
<td>Shell</td>
<td>Sime Darby</td>
<td></td>
<td>Samsung</td>
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<tr>
<td>Volvo</td>
<td>Proctor &amp; Gamble</td>
<td></td>
<td>ST Engineering</td>
<td></td>
<td>Siemens</td>
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<tr>
<td></td>
<td>Steinhoff</td>
<td></td>
<td>Vaillant</td>
<td></td>
<td>Tokyo Electron</td>
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<td></td>
<td>Unilever</td>
<td></td>
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<tr>
<td>Government and NPOs</td>
<td>Kingdom of Saudi Arabia</td>
<td>Hong Kong City Government</td>
<td>Dubai Pearl</td>
<td>Petroleum Development Oman</td>
<td></td>
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<tr>
<td></td>
<td>Wuhan Municipal Government</td>
<td>Chengdu Logistics Office</td>
<td></td>
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</tbody>
</table>

DHL Consulting | Introduction | DHL Global Auto-Mobility Conference | October 2020
Best-in-class management consulting expertise and end-to-end Supply Chain consulting services to unlock value

Internal Management Consulting for DPDHL Group
- Voice of Employee Interviews
- Job Architecture Mapping
- Employer Branding
- Global HR Roadmap
- Global Talent Network System
- Future of Work

Supply Chain Consulting for External Companies
- SC strategy development
- M&A and post-merger integration
- Sales & operations planning
- Channel segmentation and strategy
- Operating model design
- Change & program management
- Outsourcing & LSP assessment
- SC assessment
  - health check
  - Digitalization
  - Risk assessment
  - Sustainability
- Network design
  - I2M
  - Finished goods
  - After market & reverse logistics

Digitalization
- IT Audit Analysis
- Group Data Analytics
- Chatbot and Maturity Assessment Development
- Blockchain
- Information Management

Unlocking value through...

Finance
- Finance Transformation Roadmap
- Global tax functions
- Forecasting Accuracy Improvement
- Working Capital management
- Corporate Accounting Process
- Strategic Capital Allocation

Supply Chain Strategy

Operational Excellence
- Operational audits & benchmarking
- Warehouse design & optimization
- Transport optimization
- Process design
- Inventory optimization
- Demand forecasting
- Supply Chain training

Supported by data analytics
Our management consulting and Supply Chain expertise are backed by strong data analytics capabilities to deliver insightful and impactful results.

Value proposition:
- Insights generation across large data sets
- Reporting and visualization
- Automation and digital processing
- Machine learning and artificial intelligence for predictive scenario planning

Source: DHL Consulting
DHL Consulting tools and databases

A mix of DHL-developed and off-the-shelf tools/databases are used in all areas of Supply Chain optimization, benchmarking and market research

<table>
<thead>
<tr>
<th>Supply Chain analysis tools – best of fit</th>
<th>Knowledge resources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supply Chain Guru</strong></td>
<td>Logistics benchmarks &amp; best practices</td>
</tr>
<tr>
<td>• Baseline simulation</td>
<td><strong>CEPRESEARCH</strong></td>
</tr>
<tr>
<td>• Scenario modeling &amp; optimization</td>
<td><strong>Seabury</strong></td>
</tr>
<tr>
<td>• Supply Chain visualization</td>
<td><strong>Ti</strong></td>
</tr>
<tr>
<td>• Inventory optimization</td>
<td><strong>International Post Corporation</strong></td>
</tr>
<tr>
<td><strong>DHL Resilience 360: Risk Assessment Tool</strong></td>
<td>Company &amp; Market Intelligence</td>
</tr>
<tr>
<td>• Assesses operational, sociopolitical, natural disaster and hazard risk</td>
<td><strong>dun &amp; bradstreet</strong></td>
</tr>
<tr>
<td><strong>DHL Carbon Dashboard</strong></td>
<td>Expert financial &amp; KPI benchmarks</td>
</tr>
<tr>
<td>• Assessment and mapping of carbon emissions</td>
<td><strong>Gartner</strong></td>
</tr>
<tr>
<td><strong>Advanced Analytics</strong></td>
<td>Expert partners networks</td>
</tr>
<tr>
<td>• Bespoke in-house analytical tools to uncover unique insights tailored for specific industry/customer requirements</td>
<td>• Access to network of over 250,000 vetted experts for inputs, market insights and best practices</td>
</tr>
</tbody>
</table>

Source: DHL Consulting
Value proposition (1/2)

DHL Consulting offers a unique combination of extensive supply chain consulting experience and strong executional capabilities...

DHL Consulting is an international strategy and management consultancy within Deutsche Post DHL group

>1000 projects covering various sectors and geographies

~100 global dedicated pool of consultants with logistics and strategy consulting expertise

4 local offices across Americas, EMEA and APAC providing exposure to trends and best practices around the world

... allows us to identify problem areas, propose sustainable solutions with the rigor and analytical capacity of the top management consultancies

DHL is the largest global provider of end-to-end logistics solutions...

Present in 220 countries and territories

... with over 285,000 employees

... and a fleet of 80,000 vehicles

... with strong footprint in service logistics:

Serving 220+ customers

... at a network of 1,000+ stocking locations

... across 140 countries

... allows us to test feasibility and operational fit of consulting recommendations and perform solution implementation and optimization

Source: DHL Consulting
Value proposition (2/2)

... that will ensure our ability to meet customer’s requirements through operationally feasible recommendations

Customer requires the following for a successful project...

<table>
<thead>
<tr>
<th>Consulting Approach</th>
<th>...that is <strong>systematic and structured</strong>, leveraging tools and methods ...that are proven through <strong>past project success</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unbiased/Objective Advice</td>
<td>...purely focused on maximizing value for customer</td>
</tr>
<tr>
<td>Operational Experience</td>
<td>...in <strong>the requested field</strong> and understanding of the clients industry and geographical position</td>
</tr>
<tr>
<td>Country Expertise</td>
<td>... to understand the unique <strong>requirements and constraints</strong> of operating in the client’s market</td>
</tr>
</tbody>
</table>

...which matches capabilities offered by DHL Consulting

- **Management consultants** who can connect business and supply chain priorities/requirements
- **Proven project history in the required field** with multiple success cases globally
- DHL Consulting is an independent entity and would provide **objective and neutral advice** to customer
- DHL Consulting signs **individual consultancy contracts** with customers external to DPDHL
- Recommendations are validated through **local experts** with in-depth experience of the requested field, industry and country
- Access to **global best practices and trends** relevant to customer
- Demonstrated **track record** in conducting complex **consultancy studies for global players in the client’s market**

Source: DHL Consulting
Our past engagements prove that the supply chain is not just a cost center but a strategic asset at the core of your organization

- **Increased product availability**
  Predictive analytics to prevent stock-outs and improve forecast accuracy by 28% for a European Telecom major

- **Cost efficiency**
  Global network optimization for a Middle East Chemical resulting in annual savings of USD 27mn

- **Working capital optimization**
  Inventory optimization for a Food and Nutrition player helped reduce working capital requirements by 14% without any infrastructure changes

- **Business transformation**
  Logistics strategy and vision definition for a global furniture retailer to improve cross brand collaboration and drive group-wide performance

- **Digitalization**
  Warehouse digitalization for an Energy player to transform their existing MRO facility into a flagship for global innovation

- **Best-in-class service**
  Logistics process improvement for a Defense equipment manufacturer increasing on-time availability of parts by 29%

- **Improved visibility & resilience**
  Identified 43 risks over 30 categories for a global Pharma manufacturer to significantly reduce long term risk exposure

- **Sustainable future proofing**
  European network redesign for a Fashion retailer increased proximity to stores & reduced air shipments leading to 43% reduction in carbon emissions
About DHL Consulting

DHL Consulting offers strategic logistics consulting, combining management consulting skills and logistics expertise to turn your supply chain into a strategic asset.

- **20** years of consulting experience
- **1,200+** consulting engagements completed
- **4** global offices

DHL Consulting leverages DHL’s global expertise, including experts across various regions, industries and logistics capabilities.

Contact us for more information

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DHL Consulting  
[Link to dhl-consulting.com]

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