

LSH Specialized Network

Meeting the needs of greater end to end
orchestration of patient centric supply chains

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Meeting the needs of greater end to end orchestration of patient centric supply chains



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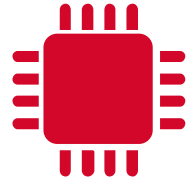


Pharma Trends & Outlook 2026



Market Momentum

- 5–8% CAGR, ~\$2.6T global spend by 2030
- Driven by oncology, immunology, obesity/diabetes, and novel modalities.
- Approaching 4 trillion defined daily doses



AI & Digital Transformation

- Executive are prioritizing AI for R&D, manufacturing, and operations
- Capabilities are still evolving but rapidly accelerating the pace of research & discovery



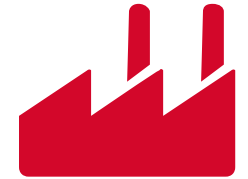
M&A Surge

- Patent cliffs accelerating activity
- Next-gen obesity platforms in high demand
- Targeted therapies fueling oncology acquisition surge



Geopolitics & Regulation

- Geopolitical risk fracturing pharma supply chains
- Policy volatility stalling cross-border deal flow
- Pricing pressures compressing global revenue outlook



Manufacturing & Onshoring

- Rising U.S. onshoring and diversification
- \$350B+ manufacturing investments
- Flexible capacity needed for complex modalities (ADCs, cell/gene)

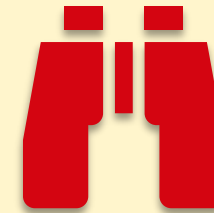
Market Pulse

As markets shift and evolve, we are committed to working with our customers to invest in the right capabilities ahead of need. Your feedback and input guides our strategy.

What do you think of when you hear “specialized pharma networks”?



What trends are you monitoring as you look toward the future?



**As our industry evolves, supply chains will need to adapt.
Together we can prepare for the future.**

HOW DHL IS PREPARING FOR FUTURE NEEDS

DHL CONTINUES TO MAKE INVESTMENTS TO BUILD
TOMORROW'S SUPPLY CHAINS



DHL's Emerging Strategy

Customer conversations have revealed several key themes that have formed our strategy:

Customer Needs



Increased Flexibility:

- Emerging channels: CMO, direct-to-patient
- Scale: piloting shared space solutions
- Free Trade Zone (FTZ) support



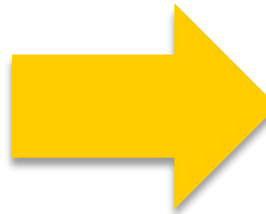
New services to support product evolution:

- Ultra low temperatures & cryogenic storage
- Sustainable temperature control packout solutions
- Niche delivery solutions



Strategic Partnerships (with customers):

- Single source provider, end to end capabilities
- Global scale



DHL Strategic Investments



Expanded FTZ Support Infrastructure



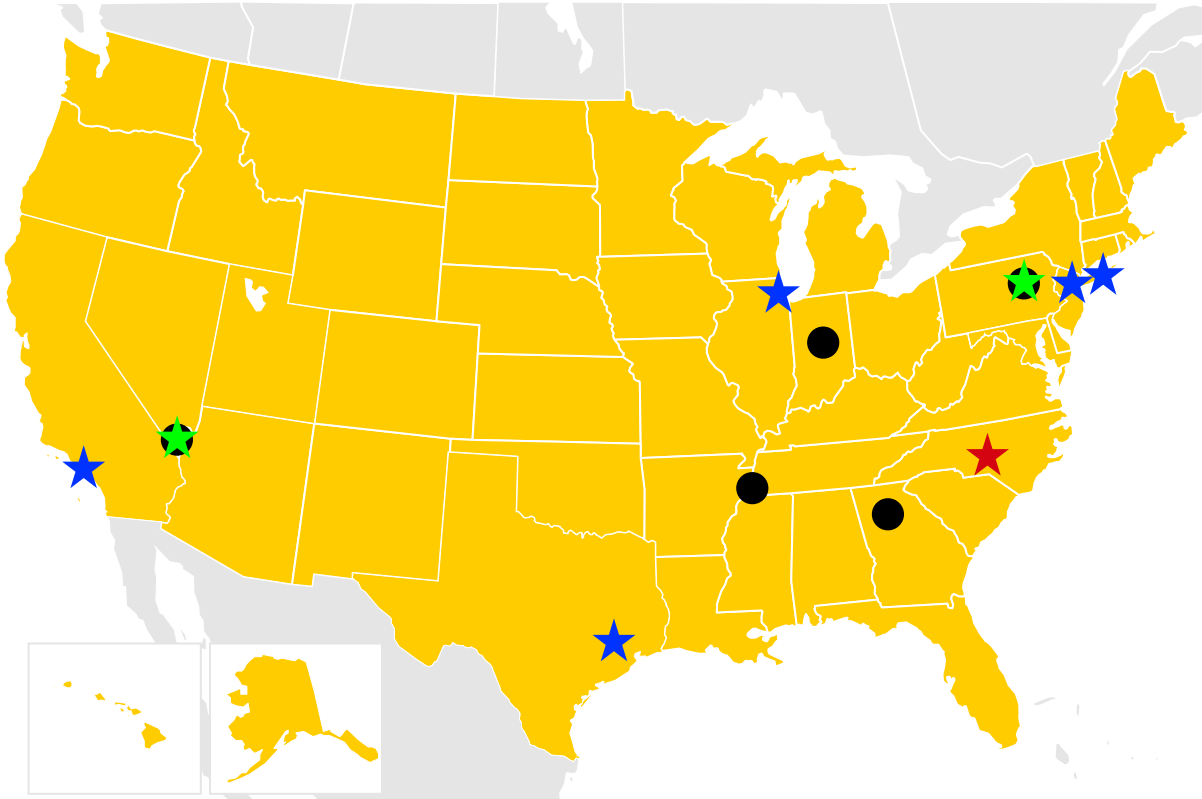
Specialty Pharma Lighthouses








Strategic Mergers & Acquisitions

Specialty Pharma Lighthouses

We are establishing several lighthouses with advanced offerings for key markets and solutions.



- DHL LSH Campus Hub
- ★ Specialty Pharma Lighthouse
- ★ Inbound to Manufacturing Lighthouse
- ★ White Glove Delivery Hub

-  **Range of temperature-controlled storage solutions** designed to support varied cold-chain requirements across high-value, temperature-sensitive products.
-  **Modular facility configuration** that enables space and capacity to flex efficiently as customer demand evolves, supporting both ramp-up and long-term scalability.
-  **Successful initial ramp-up**, achieving **50% occupancy**, demonstrating market demand and providing a clear trigger for **additional phased investment**.
-  **FTZ-enabled design**, intentionally built to unlock trade and duty optimization benefits, with operating models aligned to the needs of **multi-national customers**.
-  **Cutting edge cold-chain platform**, incorporating advanced monitoring and control capabilities, with further enhancements under evaluation in partnership with key technology providers.

Customer Centric Solutions- In Action

Shared Space – Cold Storage Facilities

Situation Overview: Specialty pharma customer approached DHL to support a critical initiative driven by new U.S. trade policies promoting domestic drug manufacturing, requiring FTZ-based storage of raw materials and a ULT freezer farm to maintain strict temperature controls while mitigating tariff risk.



Customer Challenge

- Risk of significant tariff penalties impacting an emerging raw material pipeline
- Urgent need for 1,980 sq. ft. of FTZ space to enable tariff-free storage
- Requirement to purchase, install, and validate 50 ULT freezers
- Handling of highly sensitive materials with strict temperature control requirements



DHL solution

- Leveraged DHL's Life Sciences, FTZ, and Regulatory expertise to design an end-to-end compliant solution
- Expanded facility FTZ footprint, and secured U.S. Customs approval
- Procured, installed, and validated all 50 ULT freezers
- Led Customs documentation (CBP 214s, 7512s) and facilitated on-site audits



Customer benefits

- **Tariff avoidance:** Enabled tariff-free storage aligned with U.S. trade policy objectives
- **Speed:** Project completed in under one month, well ahead of tariff deadlines
- **Operational flexibility:** Enhanced control over inventory, storage, and production planning
- **Compliance confidence:** Full alignment with customs, regulatory, safety, and quality requirements



GLP1– Inbound to Manufacturing, N. Carolina, USA

OVERVIEW

DHL has designed, built and manages a purpose-built facility to store raw materials that serve two production plants in North Carolina, USA. DHL's solution forms an integral part of a leading GLP1 manufacturing operation, providing expertise, reliability, continuous improvement and digital innovation. The operation currently has ~80 DHL FTEs.

Delighted Customers



CUSTOMER CHALLENGE

- Hyper sales growth for customer resulting in production capacity challenges at existing plant.
- New Plant construction at opposite end of N. Carolina state.
- Large volume uplift expected over next 5 years
- Facility needs relevant LSHC permits & standards, plus temperature controlled warehousing & transportation.

DHL SOLUTION

- DHL Real Estate solution to design and build a purpose built facility that will support manufacturer's two production facilities today and for the next 12 years.
- 100% Climate Controlled (CRT) with 40,000 sqft 2-8C cooler (approx. 4,000 pp)
- Integrated plant shuttle transport between MC & production facilities – temp controlled
- Inbound Non- Temp Controlled Transport – managed using DHL transport brokerage

THE BENEFITS

- DHL's solution has resulted in 1 dedicated facility as opposed to 2 warehouses.
- Shared inbound transportation for the 2 production facilities into DHL warehouse.
- Customer can focus on hyper growth & production whilst DHL handle their supply chain.
- DHL RES built the facility & managed fit out. Process being used in other regions with customer.

Customer facts

| | |
|-----------|---------------------------|
| Geography | North America |
| Sector | Life Science & Healthcare |
| Services | I2M Warehouse & Transport |





CRYOPDP: White-Glove Courier Solution

Acquired in 2025, CRYOPDP - Specialty Pharma Logistics

- The missing piece of the DHL robust service puzzle
- Our Space: Clinical Trials and Advanced Therapies
- Temperature and Time Critical shipping requirements
- Temperature range from Cryogenic to Ambient control
- Compliant Packaging according to temperature requirements
- Complaint Shipper agnostic (MVE / Pelli / C-Safe / Envirotainer)
- Certified (IATA / GDP / C-TPAT / ISO)
- Lane Assessment / Risk Management
- Green light approval to mitigate any customs delays
- Customs / Brokerage support
- Packaging and Pack Out capabilities

DHL Health Logistics Vision

- **WMX Precision**- new offering that combines CRYO's expertise with the DHL Express air freight network
- DHL's scale, combined with CRYO's specialized expertise, delivers a trusted partner you can grow with—providing end-to-end solutions that simplify your supply chain.

Suite of Solutions



Direct-to-Patient
DtP



Control Tower



Customs &
Brokerage



Onboard Courier



Lab Move



White Gloves



Pick-Pack



Lane & Service
Assessment



Streamline
Clinical Trials



Consultancy

Timeline Case Study: Next Day Delivery

UC Davis Sacramento, CA – Hôpital Maisonneuve– Rosemont Montréal



Specialty Courier

Cryopreservation Site

Logistics

Clinical Site



UC Davis, Sacramento, CA

- Direct Drive SMF to SFO
- NFO to EWR
- Direct Drive YUL
- Next day delivery



Hôpital Maisonneuve–Rosemont
Montreal QC HIT 2M4 CA

Transport Analysis

- Delivery Time Leg 1
- Ready time
- Delivery time
- Temperature range
- Incoterms
- Value
- IOR (Importer Of Record)

Carrier Capabilities

- Direct / Transfer Flight
- Backup flights
- Aircraft size
- Operational hours (drop / pickup)
- Staff Training (DG trained)
- Clearance times / availability

Considerations

- Contact 1h/30 min before the pickup or delivery to ensure the person is available
- Pickup / Delivery nuances
- Notification about specific milestone

SDS Rx: LSH Final Mile Courier Solution

Acquired in 2025, SDS Rx provides final mile courier solutions for pharmaceuticals and medical supplies.

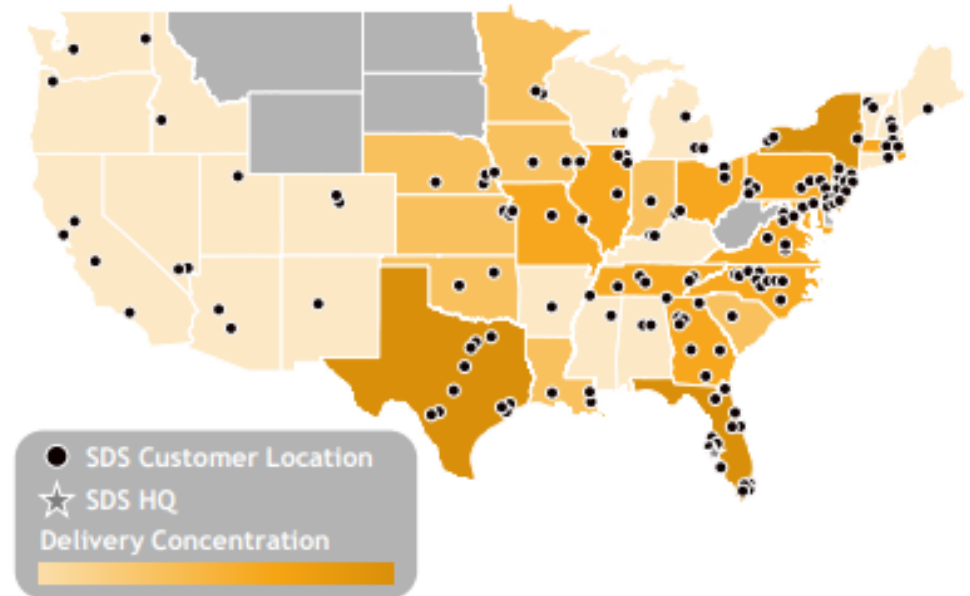
SDS Rx: final mile provider, pure-play LSH provider; intentionally designed & organized to optimize flexibility while providing a premium service to customers

- Extensive presence in radiopharma and long-term care markets
- Enabling the rationalization of delivery networks to include direct to patient home solutions
- Technology platforms designed to seamlessly integrate with pharmaceutical platforms to create end-to-end visibility and security to ensure safe delivery of pharmaceutical shipments

DHL Health Logistics Vision

- Fully integrated warehouse and courier solution combining the scale and reach of DHL Supply Chain with the flexibility and responsiveness of SDS Rx

National Courier Network



SDS Rx

National Courier Network

Situation Overview: leading radiopharmaceutical manufacturer was using multiple service providers to scale a national pharmacy network, resulting in inconsistent and poor service levels. SDS Rx designed a solution as the sole source delivery provider, enabling **consistent service across a national network**.



Customer Challenge

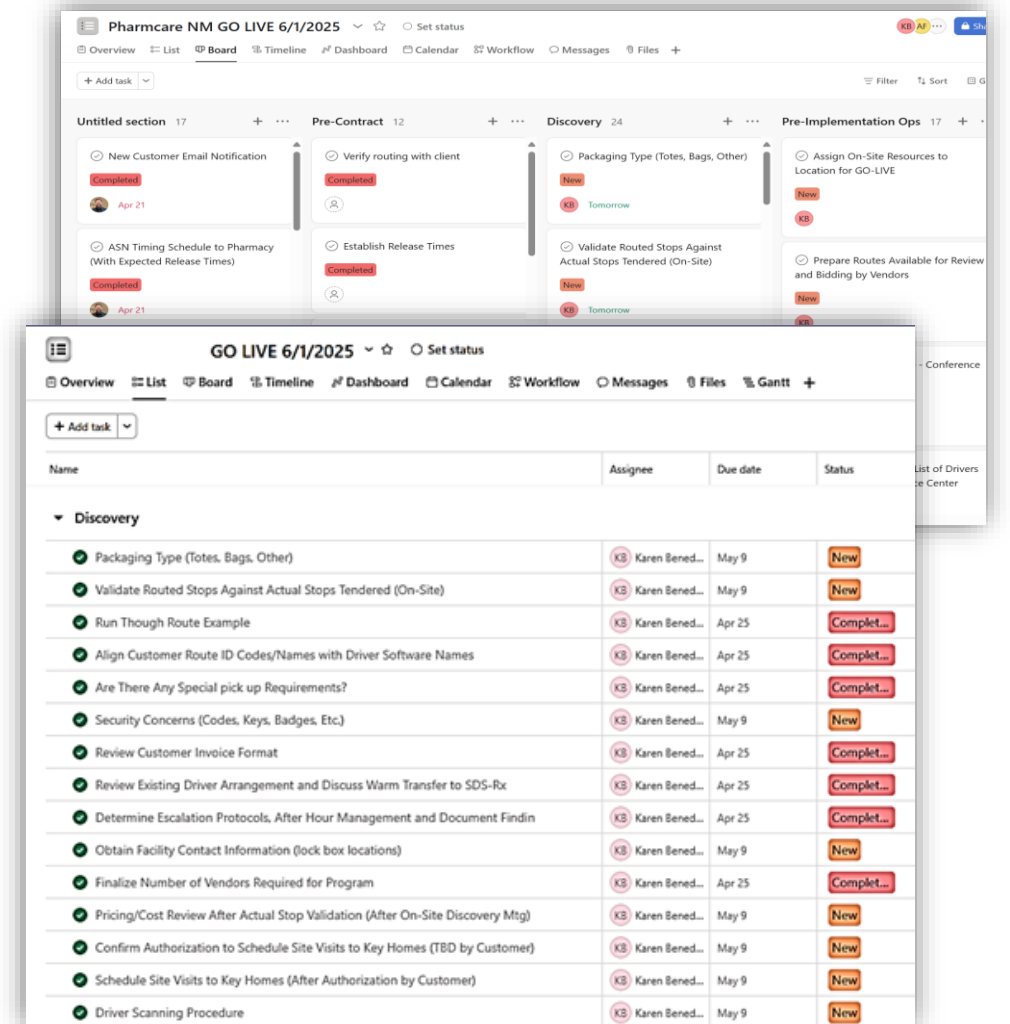
- Highly sensitive radiopharma deliveries required:
 - Narrow deliveries windows to protect product integrity
 - Temperature-controlled support & tracking
- Brand demanded **consistent service levels** and execution across national footprint
- Ability to expand rapidly in a growing market

DHL solution

- Nationalized offering via a single-provider
- Rapid screening of over 20,000 applicants to onboard select elite independent contractors
- Tech stacked designed to integrate with pharmacy systems enabling: real-time tracking, chain of custody documentation, and routing updates

Customer benefits

- **Service Consistency:** standard processes across ~40 pharmacies nationwide;
- **Quality Solution:** rigorous recruitment standards ensured safe on-time delivery (>97%)& seamless customer experience
- **Scalability:** flexible network that can grow with customer
- **Business Confidence:** consistent performance strengthened business relationships



| Name | Assignee | Due date | Status |
|--|-------------------|----------|-----------|
| Discovery | | | |
| • Packaging Type (Totes, Bags, Other) | KB Karen Bened... | May 9 | New |
| • Validate Routed Stops Against Actual Stops Tendered (On-Site) | KB Karen Bened... | May 9 | New |
| • Run Through Route Example | KB Karen Bened... | Apr 25 | Comple... |
| • Align Customer Route ID Codes/Names with Driver Software Names | KB Karen Bened... | Apr 25 | Comple... |
| • Are There Any Special pick up Requirements? | KB Karen Bened... | Apr 25 | Comple... |
| • Security Concerns (Codes, Keys, Badges, Etc.) | KB Karen Bened... | May 9 | New |
| • Review Customer Invoice Format | KB Karen Bened... | Apr 25 | Comple... |
| • Review Existing Driver Arrangement and Discuss Warm Transfer to SDS-Rx | KB Karen Bened... | Apr 25 | Comple... |
| • Determine Escalation Protocols, After Hour Management and Document Findin | KB Karen Bened... | Apr 25 | Comple... |
| • Obtain Facility Contact Information (lock box locations) | KB Karen Bened... | May 9 | New |
| • Finalize Number of Vendors Required for Program | KB Karen Bened... | Apr 25 | Comple... |
| • Pricing/Cost Review After Actual Stop Validation (After On-Site Discovery Mtg) | KB Karen Bened... | May 9 | New |
| • Confirm Authorization to Schedule Site Visits to Key Homes (TBD by Customer) | KB Karen Bened... | May 9 | New |
| • Schedule Site Visits to Key Homes (After Authorization by Customer) | KB Karen Bened... | May 9 | New |
| • Driver Scanning Procedure | KB Karen Bened... | May 9 | New |

DHL is Investing for a Global Future

As treatments evolve, logistics needs are changing. DHL is aggressively expanding our global footprint and investing in the capabilities to meet those needs.

DHL Delivers Global Scale:

- Across Europe, Asia, and the Americas, DHL is rapidly expanding our specialty networks to connect key markets and manufacturing hubs.
- Prioritizing growth areas in the Middle East and Africa
- Leveraging Group synergies to create end-to-end solutions via air freight, warehousing, and final mile.

