



Corporate Presentation 2017



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SEUR, the best partner



We are SEUR 1

Reference company

- | Pioneer company in the industry since 1942
- | The structure with largest network in Spain and Portugal
- | Multi-expert mindset
- | International operational capacity provides a worldwide service through the GeoPost network



Market share
above 22%

Committed to our customers

- | Pro-activity in delivery solutions
- | Adaptation to every customer's need
- | Proximity and cooperation
- | Quality, reliability and customer's full satisfaction



Highest client satisfaction
ratio in the market:
above 90%

We are SEUR: facts and figures



Number of parcels we
deliver every single day

350,000

Total revenue in 2016
(millions)

€636

Deliveries in 2016
(millions)

107 MM

Delivery experts

7,100

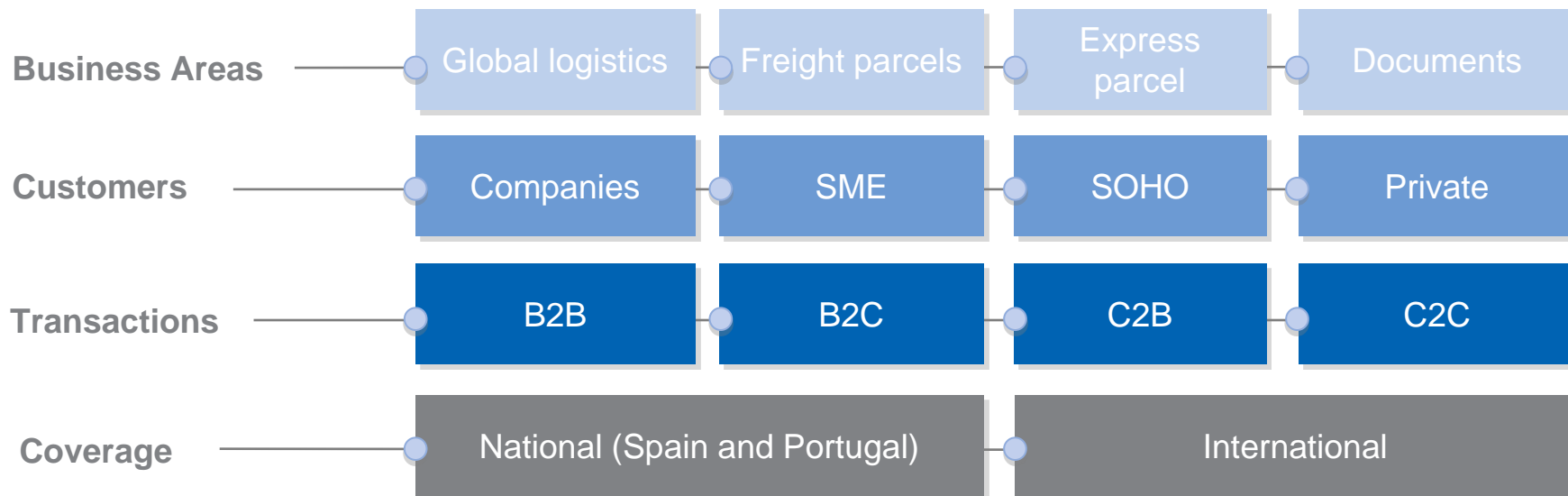
Fleet

4100
vehicles

We are SEUR



Multi-expert Mindset



We are SEUR

The best team



Sales School

- More than 1.400 professionals trained in Spain and Portugal
- 2016. First promotion: 471 students



Leaders School

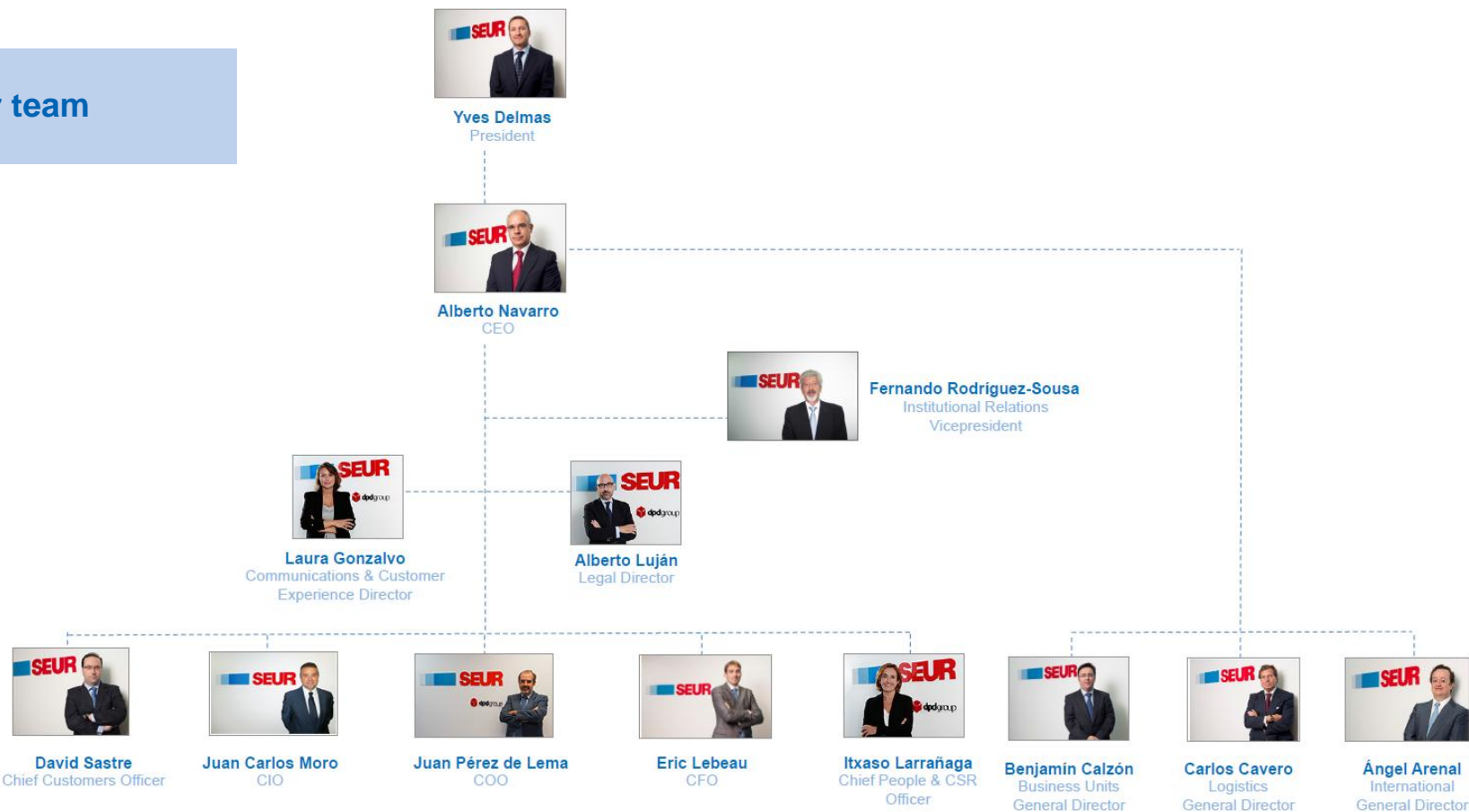
- II Edition: 80 students
- Total training hours: +8.000



We are SEUR



Our team



DPDgroup 2

A new identity

SEUR



Our brand architecture



Our group



Our holding



Our international network



Our commercial brands



Our solutions



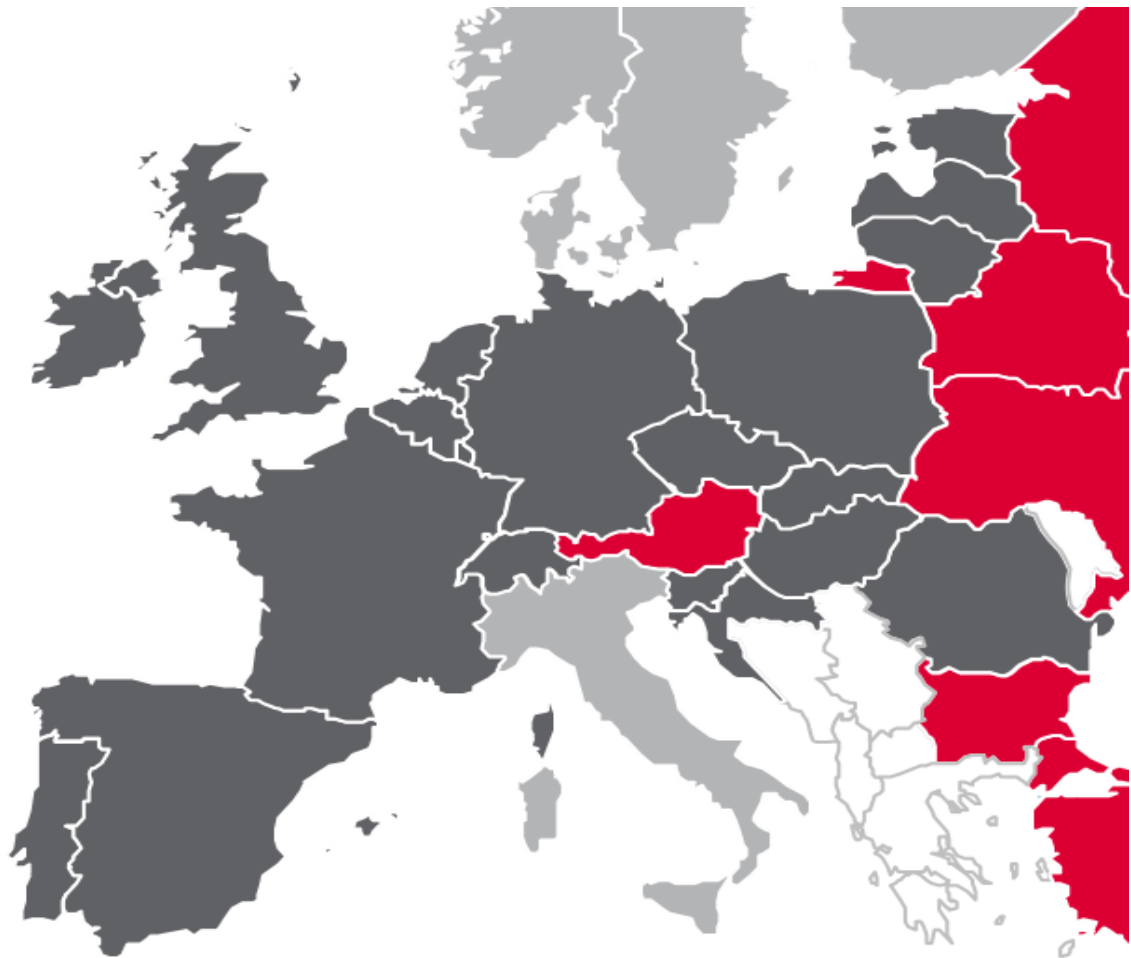
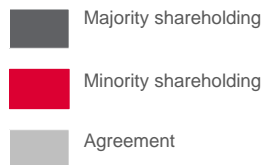
Predict Pickup



**Second in the european
CEP market**



- #1 in Spain, UK, Poland, Estonia y Lithuania
- #1 in B2C, domestic parcel delivery and international road services
- #2 in Portugal, France, Austria and Latvia
- #2 in parcel services in Europe



Number of parcels we
deliver every single day

4 MM

Total revenue in 2016
(billions)

€6,200

Deliveries in 2016
(millions)

1,100

Delivery experts

60,000

Fleet

38,000
vehicles

Accelerated development in the B2C market



+22% growth in
2016

European operator
with highest growth

30% of turnover

+25% growth in 2016



Strong international development

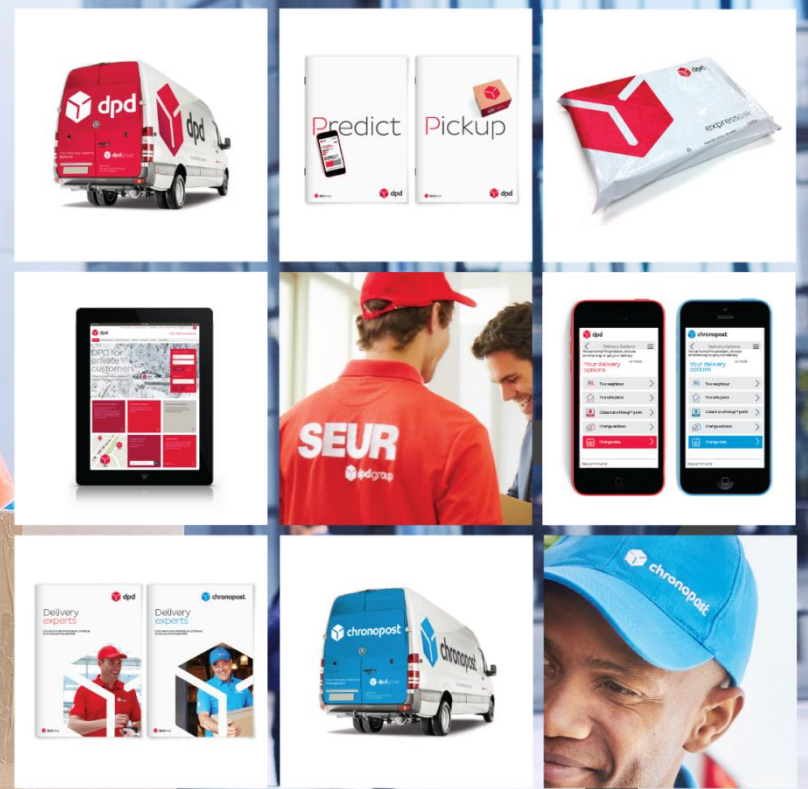
13% of the volumes

18% volume growth
in 2016

150 million euros

10% growth in 2016






Innovative solutions 3


A complete and differential offer

The e-Buyer has the last Word to receive his parcel, when, where and how he wants




When

- NextDay
- SameDay
- SaturDay
- SunDay
- Now



Where

- At home
- SEUR Pickup stores



How

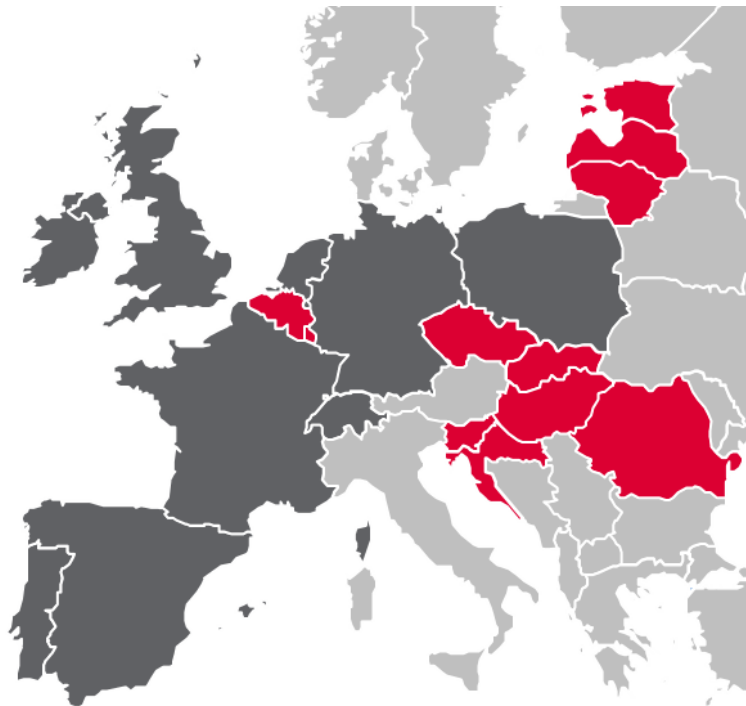
- SEUR Predict 1H:
 - ✓ Interactive Deliveries
 - ✓ Follow your shipment
- Manage your absence

e-Crossborder

- Without borders with DPDgroup
- DPD Predict 1H: interactive deliveries and follow your parcel in Europe
- DPD Pickup: 26.000 stores in Europe

e-Devoluciones

- Within 24 hours from pickup
- At home or in SEUR Pickup stores



Available
Coming soon

1 hour delivery window in 20 countries since 2015.

Additional solutions: changing delivery date.



50.000 shipments/day in Spain.

Pickup



- 2014: 16 000 Pickup shops
- 2015: 22 000 Pickup shops
- 2016: 26 000 Pickup shops

#1 in Pickup shops across Europe as of December 2016.

26.000

countries covered by Pickup network.

14



Pickup shops available in Spain in 2016.

1.400

4

Our commitment
DrivingChange™

Our conviction



We believe in being a responsible partner to the people, businesses, and communities we work closely with

DrivingChange™

Compromiso *Carbon neutral*

Nos esforzamos cada día para que todos los envíos que transportamos, para todos nuestros clientes, sean *Carbon neutral*

Reparto urbano inteligente

Mejoramos cada día el reparto urbano, ofreciendo distintas opciones de entrega, a la vez que reducimos nuestro impacto ambiental

Más cerca de la sociedad

Acercamos a las personas para apoyar y desarrollar sociedades y comunidades cada vez más cercanas

Apoyo al emprendimiento

Compartimos nuestra experiencia y espíritu emprendedor para contribuir al desarrollo de las empresas y la innovación

Four axes

Reflect and demonstrate our position as delivery experts and our commitment to being a pragmatic and responsible business



Carbon neutral commitment



Our commitment to neutralising our carbon footprint:

- Objective to reduce our transport related GHG emissions per parcel by 10% by 2020
- Half of DPDgroup's fleet is less than 5 years old



Smart urban delivery



Adapting to modern ways of living in urban environments:

- Predict available in 22 European countries
- 95% of Europeans within 15 minutes of a Pickup point



Innovative entrepreneurship



Innovation inside and outside of our business:

- 75 Quality Awards projects presented by group employees from 18 countries in 2015
- Partnership with Ashoka



Closer communities



Making a positive contribution on the communities we're closest to:

- Over 5000 employees participated in community actions in 2014
- Over 300 associations supported

 **SEUR**

 dpdgroup