



Corporate presentation

2019





We are SEUR



DPDgroup



Innovative solutions



Our Commitment



We are SEUR



We are SEUR



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 to 230 countries through the GeoPost network

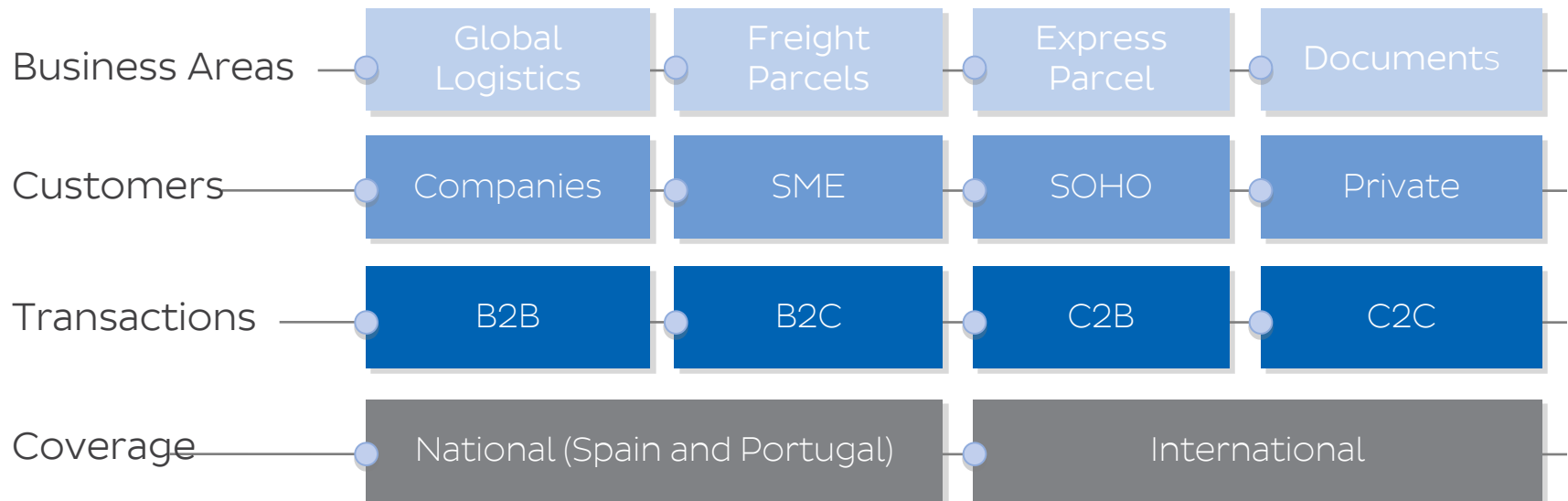


Committed to our customers

- Pro-activity in delivery solutions
- Adaptation to every customer's need
- Proximity and cooperation
- Quality, reliability and customer's full satisfaction
- We have the highest satisfaction ratio in the market: more than 90%

We are SEUR

Multi-expert Mindset



We are SEUR

The best team



Sales School



Leaders School



- More than **1.125** professionals trained in Spain and Portugal
- + **120** students
- Total training hours: **14.000**



We are SEUR



Our team



SEUR in figures



Revenue 2018
(millions)

690 M €

229 M€

e-commerce

International

198 M€

Parcels delivered
2018

+ 115
millions

Pickup network

+ de 1,400

2,5%

Growth in
volumes

Professionals

8,100

Fleet of vehicles

4,600

1,2 million customers trust us

Most of the achieved milestones and results in 2018 are key for developing our future goals



INTERNATIONAL
BUSINESS 29% OF
GLOBAL REVENUE



B2B
SUSTAINED
GROWTH ENGINE



10%
GROWTH
IN COLD SERVICE



GEOPOST
STRENGTHEN ITS
PRESENCE
94% SHAREHOLDERS



70%
GROWTH
IN CLICK&COLLECT
SERVICES



GROWTH
KEY
ACCOUNTS



+ TRAINING
HOURS



EMPLOYABILITY
AND CHARITY
PROJECTS

DPDgroup

2



Parcels per day

5.2
millions

Revenue 2018 (billions)

€7.3

Parcels delivered
in 2018 (thousands
of millions)

1.3 MM

Professionals

75,000

Fleet (vehicles)

59,000

The Group continues to grow

Principals acquisitions in 2018



Brazil

Great start &
fantastic work
achieved this
year



South East Asia

GeoPost to become
a shareholder in
Ninja Van



France

Chronopost to
acquire
Delifresh and
Freshlog



Europe

Big investments
in hubs
launched

Trends 2019

#1

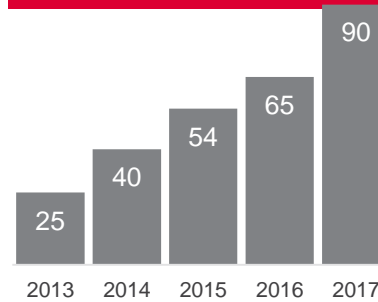
Strong B2C growth



B2C captures the whole growth of the CEP market in Europe

#2

Faster deliveries



AMZ Prime customers growth in million (USA)

#3

Last mile as a service



In the B2C market, the recipients expectations are about everything making their life easier

#4

Urban logistic as a milestone



One emerging concept: urban space to be given back to inhabitants and visitors

Trends 2019

#5

Big data improvement



The main focus of Big data is detailed customers knowledge

#6

Robot inside



Chinese manufacturing companies and Parcel operators are moving very quickly towards robotization

#7

E-merchants concentration



AMZ and ALIBABA are competing to dominate e-commerce market worldwide

#8

Strong e-food development

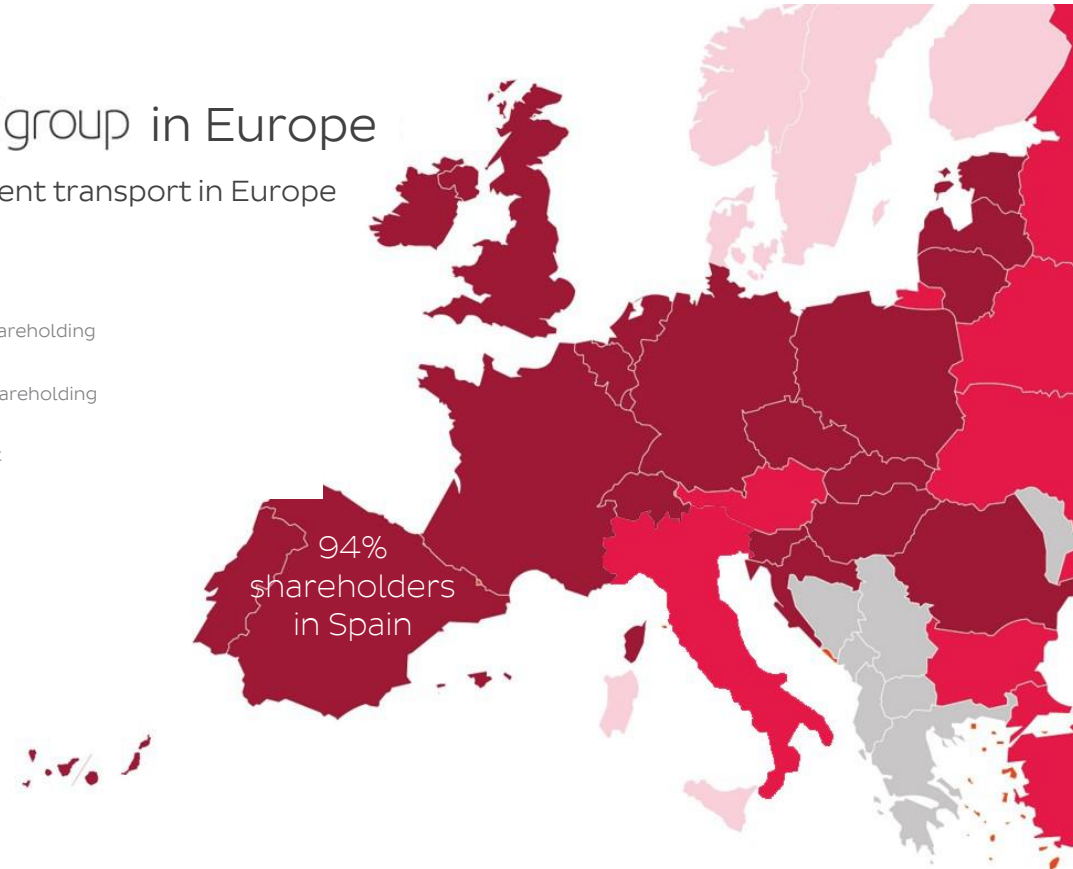
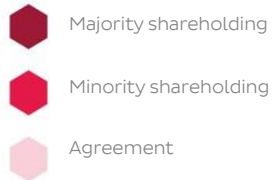


Two main characteristics of the food business:

- provide a better “repeat”
- better customer knowledge

- Nº1 in Spain, UK, Poland, Estonia y Lithuania
- Nº1 in B2C, domestic parcel delivery and international road services
- Nº2 in Portugal, France, Austria and Latvia
- Nº2 in parcel services in Europe

 **dpdgroup** in Europe
Nº2 in urgent transport in Europe



Innovative solutions



SEUR

Now



#WEARENOWERS



1-2 hour time
window from click

From 8:00 to 00:00



Send whatever you want, even
food with temperature controlled
requirements

Dedicated fleet
and customer care



IT platform

Livetracking and SMS
and e-mail confirmation



SEUR

SUBSIDIARY
FIRM



20 YEARS OF
EXPERIENCE



MADRID,
BARCELONA
AND VALENCIA



YOUNG TEAM
AVERAGE 31
YEARS Y.O.



IMPROVING OUR
IT PLATFORM



280
DRIVERS



OWN
VEHICLES



85% ECO-
VEHICLES in 2018
(GNC + ELECTRIC)



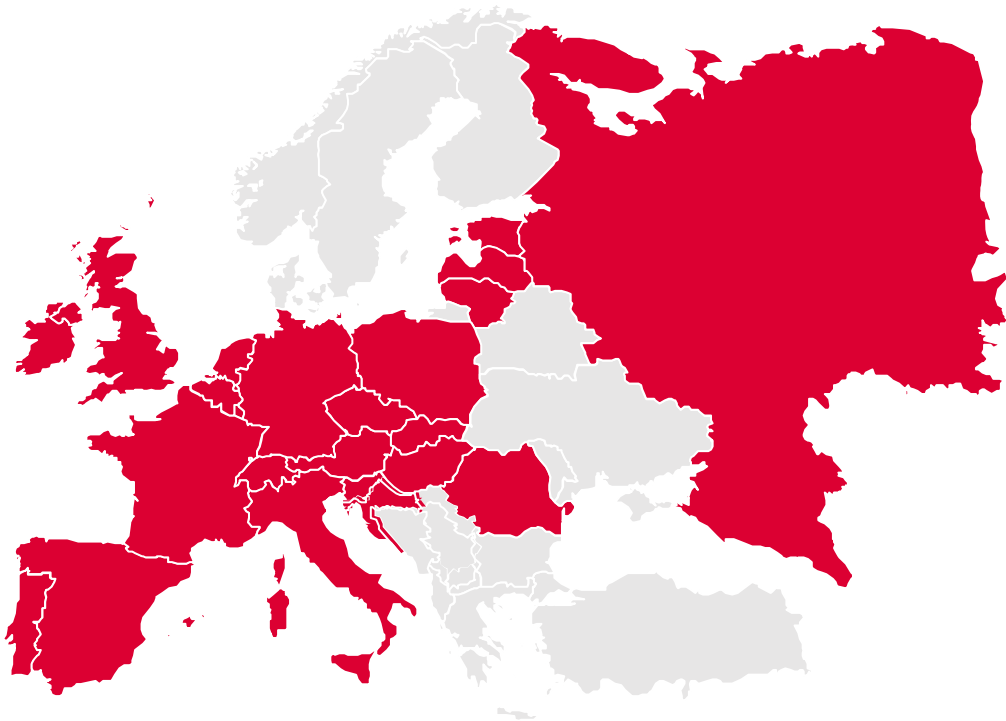
2.100
DELIVERIES
/ PER DAY



NEW CUSTOMERS
ATTRACTED AND
EXTENDING

440.000 deliveries in 2018

Predict



 Available

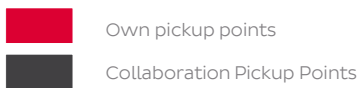
Predict

- DPDgroup is the first network offering Predict service in Europe
- Benefits: pre-warning, 1 hour time interval, live tracking and inflight options
- Available in 22 countries

Pickup



Pickup points network 2018



Pickup

Pickup Points in Europe

42,000

Countries covered by Pickup network

26



Parcels delivered per month through the Pickup network

6,500,000

Our commitment

Carbon neutral
commitment

Smart urban
delivery

Closer
communities

Innovative
entrepreneurship



Our commitment

DrivingChange™



"Dedicated to making every parcel we deliver carbon neutral, for all our customers,

Carbon neutral
commitment

"Improving everyday urban life by giving greater delivery choices, while reducing our impact on the road"

Smart urban
delivery

"Bringing people together to support and build the communities we are closest to"

Closer
communities

"Sharing our expertise and entrepreneurial spirit to help local enterprise thrive"

Innovative
entrepreneurship

Our commitment

1 Measure



Respire

KPI monitored quarterly on environmental impact and carbon footprint of our activity. Externally verified since 2012

2 Reduce



Reduction of GHG emissions per parcel

- Tour optimization for delivery vehicles
- Increase efficiency with Predict and Pickup
- Deployment of **eco-fleet**, fuel efficient & alternative solutions

Predict Pickup

3 Offset



Offsetting with Carbon credits

7 low carbon projects situated closer to our locations, 70% in Europe related to renewable energy and energy transition.

1st

Company of our industry in the Platform of "Companies for energy efficiency"

-10,77%

of CO2 reduction per parcel by the end of 2016

1st

CEP (Courrier, Express, Parcel) leader worldwide on the Voluntary market"
100% deliveries are *Carbon neutral*

ALTERNATIVE FLEET



- ✓ Nissan e-NV200 (electric)
- ✓ Renault Kangoo (electric)
- ✓ Nissan leaf (electric)
- ✓ Dual-fuel transformed van
- ✓ FREVUE (won Low Carbon Road Transport Initiative of the Year Award)

+8%

Eco-fleet Annual Objective
LNH (LNG,CNG and Mega-Trucks)
Transform current fleet to CNG
Include new eco-vehicles

INFRASTRUCTURE



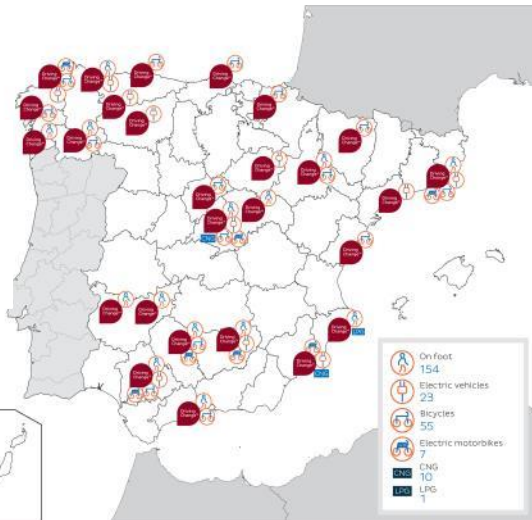
- ✓ 14 Micro Depots
- ✓ Madrid, Barcelona, Valencia, Córdoba
- ✓ Our own stores used as hubs

Urban logistic

Eco- maps

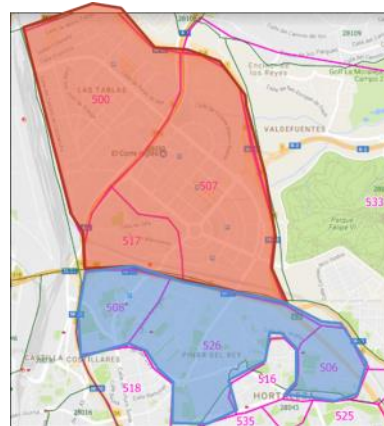
Eco- means & vehicles

250
eco-
vehicles
and eco-
means



PROCESSES

Permanent
Wave



TOOLS

Delivereasy

Predict



1

“Bottle taps for a new life”

Tapones para una nueva vida®



+ 1 million €

raised by recycling 5,000 tons of plastic to help 155 children

4 Charity logistics



Charity logistics

2,000 tonnes in 10,000 shipments

3

Volunteer's Programme



+300 volunteers
dedicating over 2,500 hours, 32% in hospitals

 **SEUR**

 **dpd**group