

BESTER PAKETVERSENDER DEUTSCHLANDS.*

*DHL IST TESTSIEGER IM RAHMEN EINER GESAMTBEWERTUNG DES DISQ-INSTITUTS.



Logistics as the backbone for e-commerce in the 21st Century

Dr. Andrej Busch • Brussels • June 9, 2010

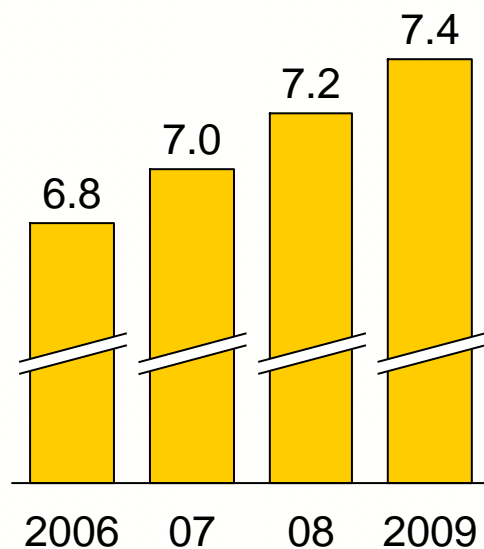
EINFACH. IMMER. ÜBERALL.



Delivery is a driver for e-commerce

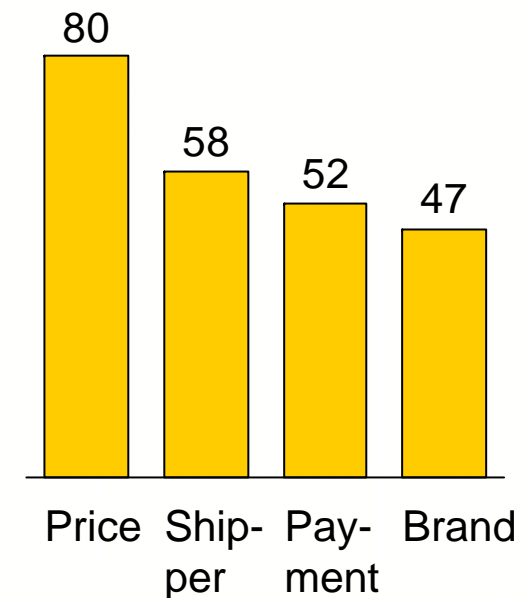
Share of distance selling in Germany

Percent



Selection criteria for online retailers

Agreement in percent

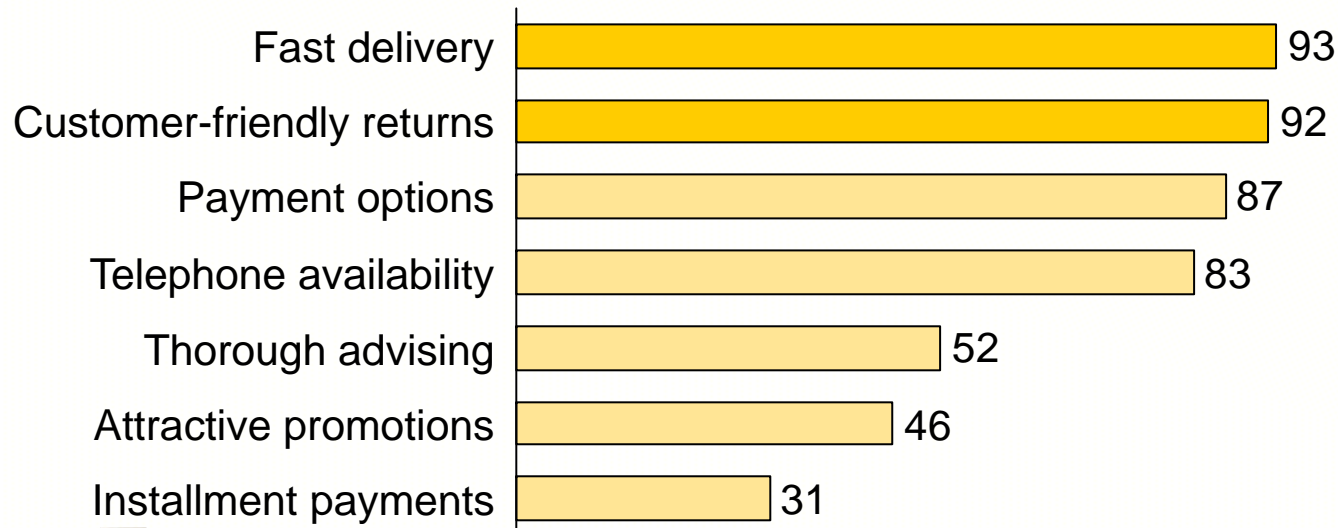


Shipping services are an important driver of distance seller selection and development

Source: TNS infratest and EHI Retail Institute in the service of the BVH

Services that matter in e-commerce

Classification as "important," percent



Shipping-related



- We're not just an anonymous provider "bringing parcels from A to B"
- We have a profound interest in our customers' business success
- We work with our customers to develop and support appropriate business models



Source: "Web Shopping 2009" trend study commissioned by the BVH

DHL Parcel's contribution as a service provider



Keeping up with change



Offer delivery and dropoff locations with round-the-clock availability to increase shipping **convenience**

Setting the standard



Offer leading innovation and sustainable quality to increase shipping **reliability**

Creating growth



Offers coverage and reach at all customer touch points to increase shipping **relevance**



SANICARE



beate uhse
SEX UP YOUR LIFE

mymuesli
custom-mixed cereals



EXAMPLES





Keeping up with change – Conrad Electronic




Conrad Electronic - Europas führendes Versandhandelsunternehmen für Elektronik und Technik - Mozilla Firefox

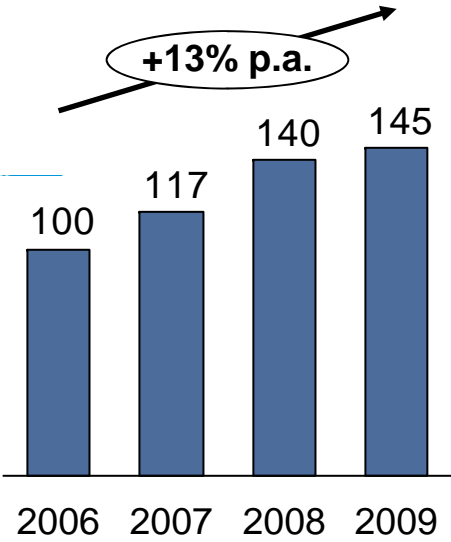
Conrad Shop | Xtreme.de | Conrad-Security | Licht-direct.de | Business-Shop | DVD+Games-Verleih | Handys | Modellbauclub | PDF-Kataloge | Filialen | Kontakt | Jobs | Impressum | AGB | Widerrufsrecht | Über Conrad



- Successfully developed e-commerce channel for entire product offering, thus becoming leading mail-order retailer in the consumer electronics business
- Makes consistent **use** of flexible access points available 24/7, especially **DHL Packstation and Paketbox** (Conrad among top 10 in terms of Packstation deliveries)
- Makes fast throughput times and delivery reliability a priority



Shipment volume development
Indexed, 2006 = 100



Year	Shipment Volume (Indexed, 2006 = 100)
2006	100
2007	117
2008	140
2009	145

From traditional mail-order business to full-fledged, successful multichannel retailer

Fertig

Keeping up with change – Sanicare



SANICARE - Die Versandapotheke

Die Versandapotheke
SANICARE
APOTHEKE
Die Versandapotheke

SANICARE - Versandapotheke | SANICARE - Gruppe | Gesundheitszentrum

STIFTUNG WARENTEST
TESTSIEGER
(GUT: 1,9)
Im Test: 15 Versandapotheken
best
10/2007

- Mail-order pharmacy was launched in 2004 and successively developed a leading position in the industry; with more than 1 million customers, among the top 50 mail-order retailers in Germany
- In line with positioning as quality leader, has **used DHL delivery services** from the very beginning
- All products sent with rigorously climate-neutral **GoGreen DHL service** starting in 2007



Shipment volume development
Indexed, 2006 = 100



Year	Shipment Volume (Indexed, 2006 = 100)
2006	100
2007	196
2008	269
2009	317

From a bricks-and-mortar pharmacy business to one of the Internet's leading mail-order pharmacies

Fertig



Setting standards – Amazon



- A leading online retailer – worldwide and in Germany with Amazon.de
- Rigorously prioritizes throughput-time quality with Amazon Prime (next-day delivery across Germany with DHL) and DHL Overnight Express
- Realizes spectacular shipping feats in Germany, such as **breakfast delivery** of new Harry Potter books
- No. 1 shipper to **DHL Packstations**

Amazon Prime™ Jede Lieferung am nächsten Tag Mehr Details

Net sales worldwide
Indexed, 2005 = 100

Year	Indexed Sales (2005 = 100)
2005	100
2006	126
2007	174
2008	226

World's leading online retailer with the highest possible standards for logistics

Fertig



Setting standards – Beate Uhse



Beate Uhse Home - Mozilla Firefox

Conrad Electronic - ... x SANICARE - Die Versa... x Amazon.de: Günstige ... x 69 Beate Uhse Home x Müsli individuell online ... x Cleenbox - Der beque... x

beate uhse

SEX UP YOUR LIFE

HOME SHOPPING ONLINE SEX MAGAZIN FILIALEN

- Germany's leading provider of erotic products
- Jointly developed seamless approach to **checking age and identity** with DHL Parcel for all shipments subject to restrictions
- Hand-scanner-supported service for parcel market that fulfills **all legal criteria**



Shipment volume development
Indexed, 2006 = 100

+15% p.a.

Year	Indexed Volume
2006	100
2007	99
2008	165
2009	154

Breaking ground in Germany in ensuring child protection and determining recipient identity on the Net

Fertig

Generating growth – MyMuesli



Müsli individuell online mixen! Bio-Müsli. - Mozilla Firefox

Conrad Electronic - ... x SANICARE - Die Versa... x Amazon.de: Günstige ... x 69 Beate Uhse Home x Müsli individuell online ... x Cleenbox - Der beque... x

mymuesli custom-mixed cereals

muesli specials blog fragen

Young Business Award 2008
Der Bundesverband des Deutschen Versandhandels

- Offers 566 quadrillion combinations of muesli over the Internet
- Founded in 2007; received 2008 "Young Business Award"
- Strongly promoted with DHL newsletter and offers, especially to particularly online-friendly Packstation customers (more than 1.4 million registered users)
- Consistent climate-neutral shipping with DHL GoGreen

Shipment volume development
Indexed, 2007 = 100

+219% p.a.

Year	Shipment Volume (Indexed, 2007 = 100)
2006	n/a
2007	100
2008	586
2009	1,020

Fertig

Innovative, extremely successful startup in underrepresented food segment


Generating growth – Cleenbox



Cleenbox - Der bequeme und günstige bundesweite Wäscherservice und Bügelservice für zuhause und unterwegs - Mozilla Firefox

File Edit View Chronik Lesezeichen Extras Hilfe

Conrad Electronic - ... x SANICARE - Die Versa... x Amazon.de: Günstige ... x 69 Beate Uhse Home x Müsli individuell online ... x Cleenbox - Der beque... x




DER SMARTE WÄSCHESERVICE

DEINE WÄSCHEREI MIT BUNDESWEITEM HOL & BRING SERVICE

[STARTSEITE](#) |
 [SO FUNKTIONIERT'S](#) |
 [UNSERE QUALITÄT](#) |
 [UNSERE PREISE](#) |
 [JETZT ANMELDEN](#) |
 [KUNDEN LOGIN](#)

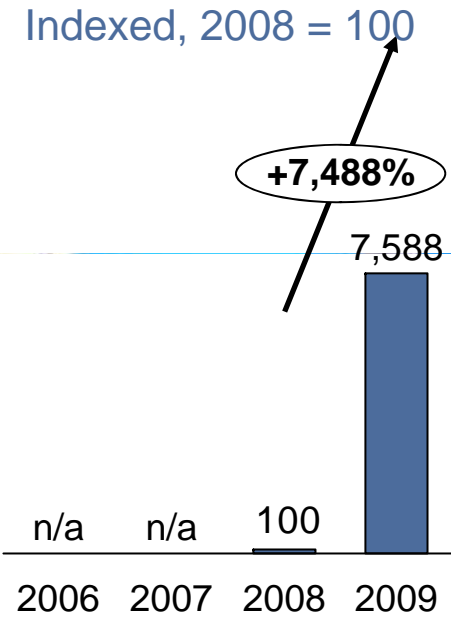
- Innovative business model involving a **parcel service for laundry**, which is picked up, washed, ironed, folded, and delivered back at a flat rate
- Offering a **DHL Packstation box** that makes optimal use of Packstation dimensions link the service to the benefits of DHL's Packstation and Paketbox

Die DHL-Packstation-Box



Shipment volume development

Indexed, 2008 = 100



Year	Shipment Volume (Indexed, 2008 = 100)
2006	n/a
2007	n/a
2008	100
2009	7,588

Revolutionary laundry concept that frees commuters and singles from the limitations of opening hours

Fertig

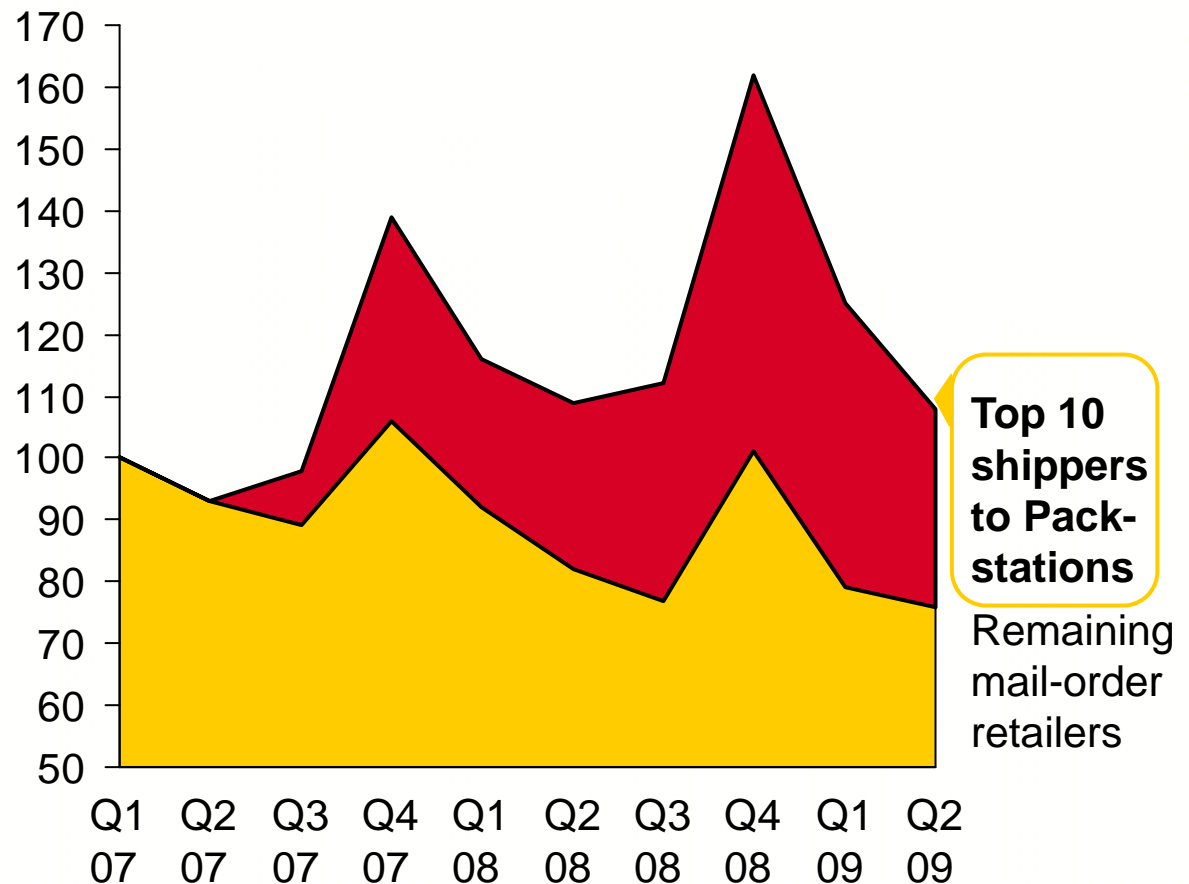
Selling more with great shipping

Key takeaways

- Business success for mail-order companies goes hand in hand with innovative, high-quality parcel shipping
- The contribution of a parcel service thus extends far beyond shipping alone
- Making optimal use of your parcel service and working together to introduce new shipping tools translates into growth for both parties

Shipment development Top 10 retail Packstation shippers vs. mail-order retailers overall

(Indexed, 100 = Q1 2007)



Source: DHL Parcel

Selling more with great shipping



Thank you for your attention

Deutsche Post DHL

EINFACH. IMMER. ÜBERALL.

