



MAIL



EXPRESS



LOGISTICS



FINANCE

The Mail International Business: The Way Forward

Klaus Knappik, Member of Divisional Board

- Our achievements

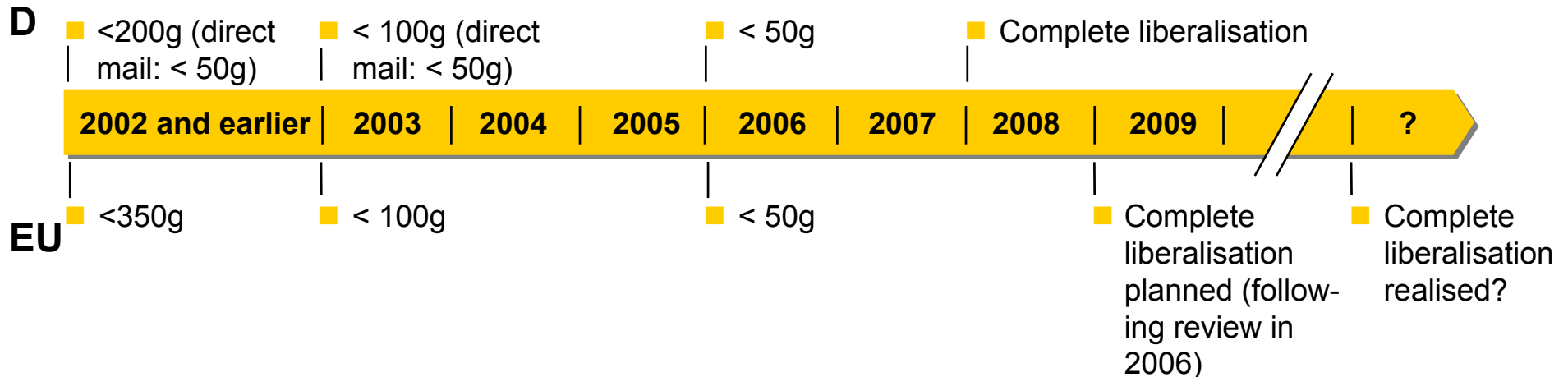
- Our way forward

- Our achievements

- Our way forward

Liberalisation – offset risks in home market with opportunities abroad

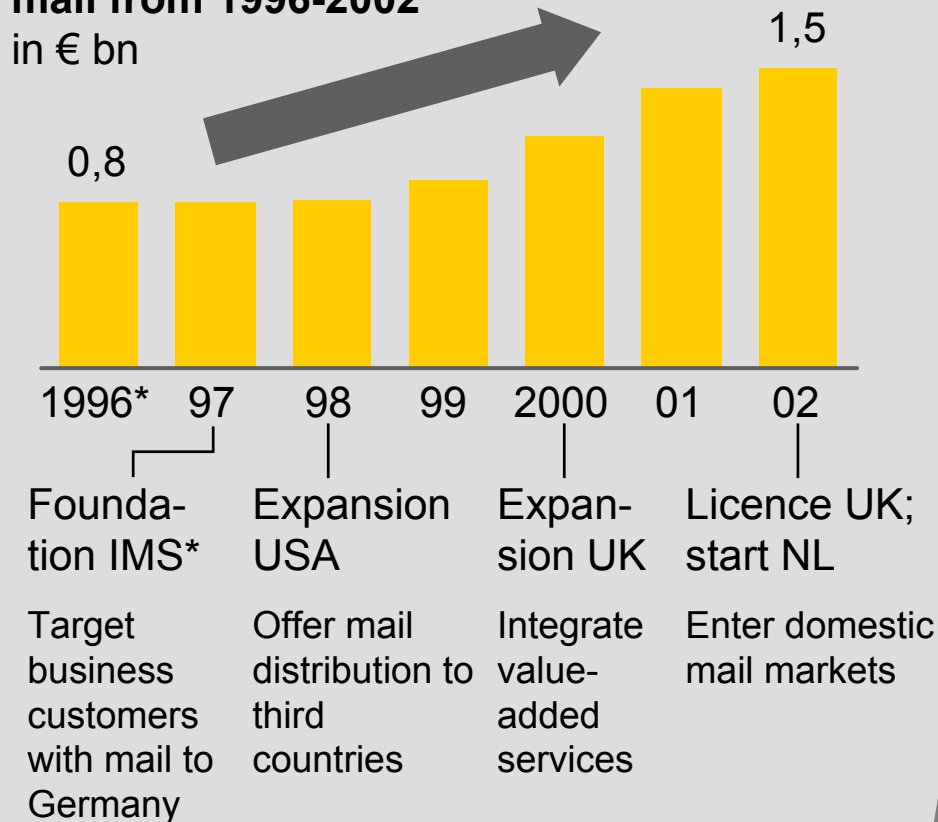
Road map for liberalisation (reserved area)



International mail will reach a share of approximately 13% in MAIL division revenues

Revenues of international mail have almost doubled over the last 6 years ...

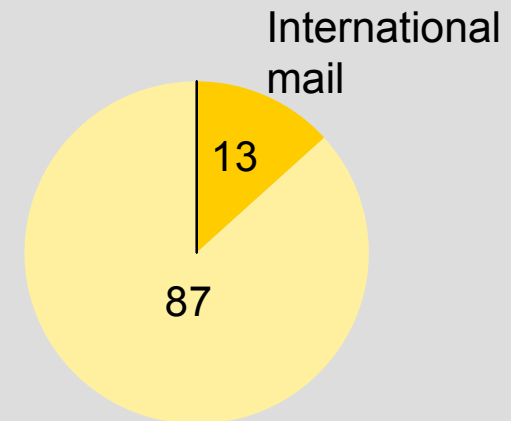
Revenues international mail from 1996-2002 in € bn



* International Mail Services

... and will reach a share of approx. 13% in MAIL division revenues

Share of International mail in MAIL division revenues in %



A worldwide hub and mail distribution network has been set up

**DPWN market share worldwide
cross-border mail: 14%**

Americas

3 processing centres,
3 sales offices

Europe

3 processing centres,
sales offices in 9
European countries

Asia/Pacific

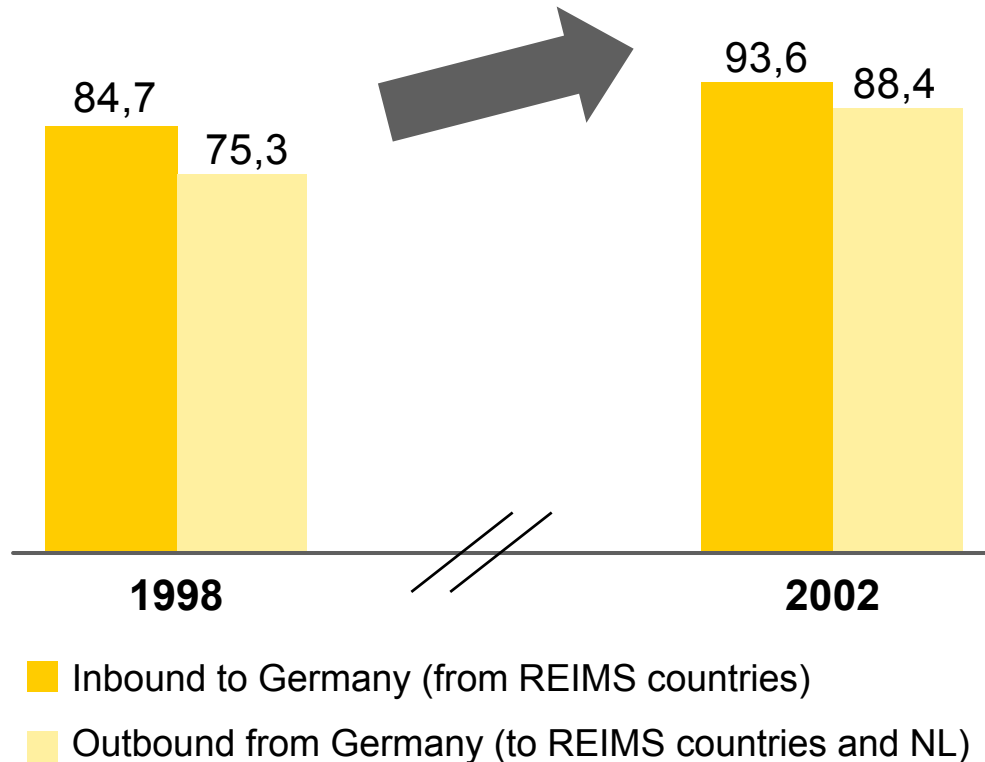
3 processing centres,
3 sales offices

Worldwide

Hand Delivery
Service to over 300
cities

Transport quality for inbound and outbound mail to and from Germany

% of priority mail items arriving at destination within one day (J+1); REIMS countries



Comments

- After arrival at Deutsche Post's Office of Exchange in Frankfurt/M., 93.6% of all inbound mail has been delivered to the addressee the next day (increase by 8.9%-points).
- After posting by the sender in Germany, 88.4% of all outbound mail has arrived at the Office of Exchange in the addressee's country for further delivery (increase by 13.1%-points).
- 17 European countries are signatories of the REIMS contract.

Mail international Netherlands

SELEKT MAIL NEDERLAND

- Nationwide B-to-C delivery of direct mail
- Joint venture with Wegener

interLanden

- Nationwide B-to-C delivery of folders, weeklies, samplings
- Joint venture with Wegener

Deutsche Post

Global Mail

- Export mail from the Netherlands

Synergies:

Joint customer base/cross-selling

Selective use of DHL's operational and commercial infrastructure

- Our achievements

- Our way forward

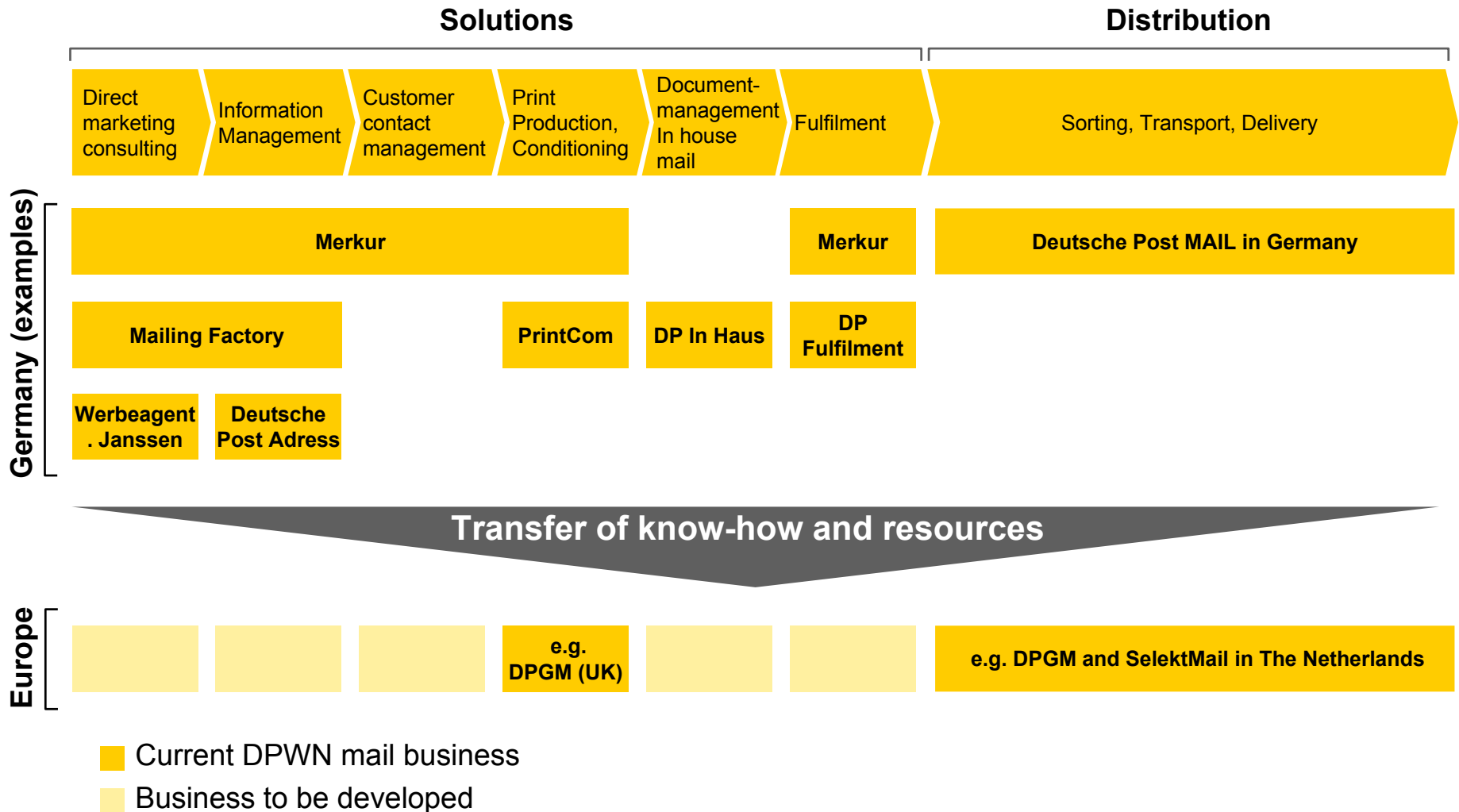
Liberalised areas for mail delivery in selected European countries

	United Kingdom	The Netherlands	France	Spain
Standard letters	> 100g	> 100g	> 350g	> 100g
Direct mail	> 100g	Fully liberalised	> 350g	Fully liberalised
Further liberalised areas	Large mailings			Local letter mail
	Consolidation			

Different liberalisation levels require different entry approaches as growth opportunities in mail delivery only exist in significantly liberalised areas

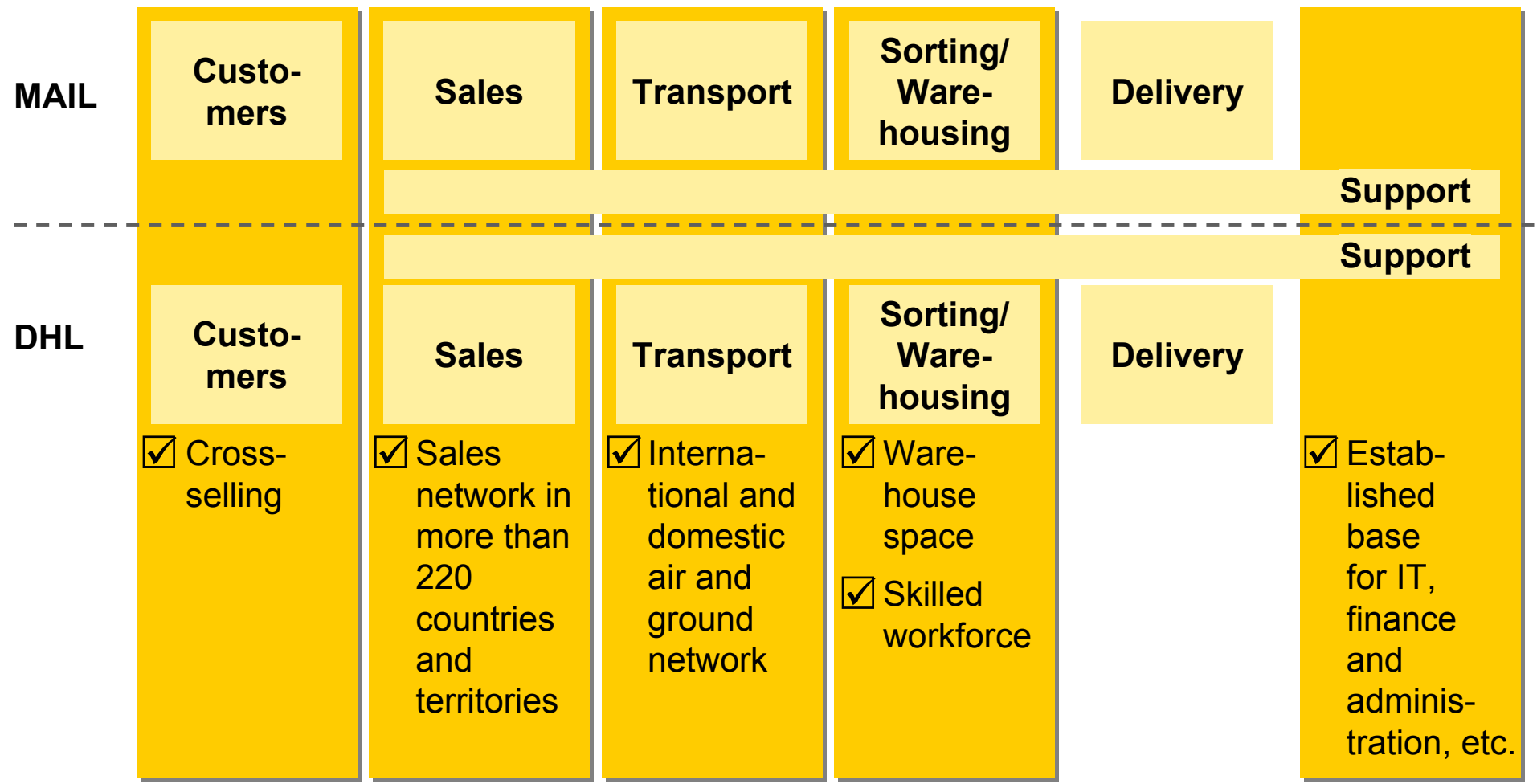
Our objective: to cover the mail supply chain

Mail International will benefit significantly from DPWN's existing expertise



Our strength: to utilise synergies with DHL

Process chain

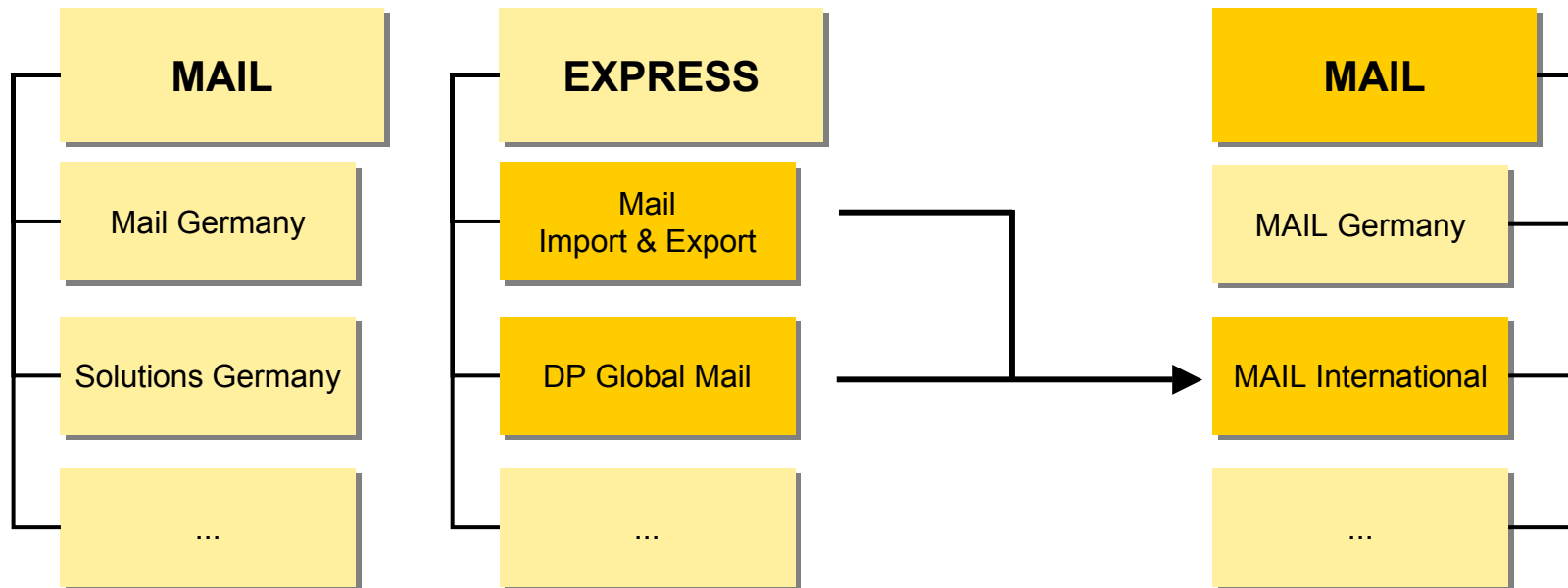


 Synergies

Our structure: seamlessly integrated into the MAIL division

Until 2002:
Mail business divided between
corporate divisions **EXPRESS** and **MAIL**

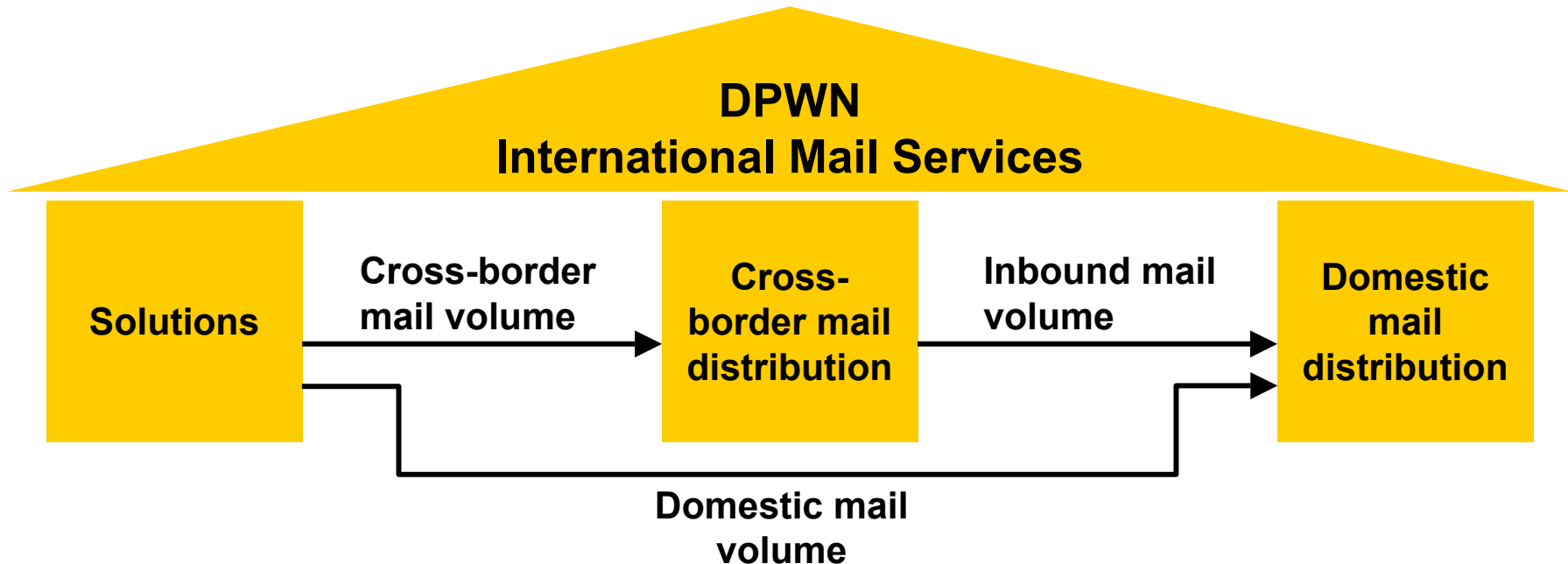
New structure:
Entire mail business integrated into
corporate division **MAIL**



The new organisational structure ensures the effective and efficient use of resources and know-how in the domestic and international mail business

Our vision:
to build a one-stop shop for all mail-related solutions

The 3 pillars of DPWN's international mail services



By offering the full range of mail services along the mail value chain, DPWN will

- generate mail volumes controlled by DPWN for delivery
- ensure the use of cross selling opportunities between the different products
- become **the** one-stop-shop for all mail related services