



Capital Markets Day

16 April 2024



Agenda

Review & Achievements of Strategy 2023

Strategy 2030 at a Glance

Pure Play Plus

Top 5 Global Container Line

Undisputed Number One for Quality

Sustainability Driver

Top Performing Carrier

Wrap up

With Strategy 2030, we are continuing our successful strategic course while adapting to new market challenges and opportunities



Strategy 2023 PERIOD HAS ENDED

We have concluded the period of Strategy 2023, with most of our targets achieved



MARKET IS CHANGING

New market trends affect our industry that accelerate the need and pace for change



Strategy 2030 IS HERE

Our new strategy helps us to chart our course through uncertain waters



Over the past 5 years we have made very good progress along all four pillars of our previous Strategy 2023



Profitability

Record results, excellent Balance Sheet and room to invest in the future

Upgraded credit rating

Successful cost programs



Global Player

> 10%¹ market share in dry retained

> 10%¹ market share in Reefer achieved

Significant market share gains in Africa and India



#1 for Quality

Brand associated with “Number 1 for Quality”

Achieved NPS of >50

Global QSC² network implemented



Sustainability Accelerator

Comprehensive strategy determined for HL

Net zero target by 2045

First impact measures (e.g. biofuel, fleet upgrades)

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The market and business environment has changed...



Volatile supply / demand balance

Supply growth will outpace demand growth in the short term, but more capacity is needed for the energy transition and to cope with supply chain disruptions



Dynamic competition

Competitors are rapidly expanding their fleets and their business models, with a strong push into logistics and adjacent services



Geopolitical uncertainty

Geopolitical tensions rising, with possible effects on sourcing and supply chain configurations



Customer needs

Customers continue to look for price, service and operational quality; Sustainability on the up. Personal touch remains important



Industry decarbonization

Market requirements and regulatory developments will push energy transition, resulting in higher cost for new green fuels and rising capacity requirements



Digital transformation

Increasing opportunities and need to further improve customer experience by leveraging new Technology (e.g., AI)



With our new strategy we strive to make Hapag-Lloyd the “Undisputed Number One for Quality“ in the market



SHIFT FROM STRATEGY 2023 ...

... TO STRATEGY 2030...

... WITH VERY AMBITIOUS TARGETS

Pure Play

Pure Play Plus

Remain a **container shipping line at the core** supplemented by **terminals and inland**

Global Player

Top 5 Global Container Line

Slightly above-market growth in carefully selected growth markets

Number One for Quality

Undisputed
Number One for Quality

Step-change in operational quality improvement, particularly on-time delivery (80%+)

Sustainability Accelerator

Sustainability Driver

Aligning ambitions with 1.5°C target of Paris Agreement

Profitable through the cycle

Top performing Carrier

Continued strong **financial performance**, excel in **people & technology**

The Hapag-Lloyd Strategy 2030: 5 main building blocks

PILLARS OF OUR NEW STRATEGY



**STRATEGIC
DIRECTION**

Pure Play Plus

**WHERE-
TO-PLAY**

Top 5 Global Container Line

**HOW-
TO-WIN**

**Undisputed
Number One for
Quality**

**Sustainability
Driver**

**Top
Performing Carrier**

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The “Plus” in Pure Play Plus will help us build a superior quality liner product

Strategy 2023

Hapag-Lloyd is a
Pure Play
container line

Core beliefs moving forward



The segment for **integrated end-to-end logistics** is small, crowded and competitive



Customers and investors appreciate the long-term **strategic clarity** of HL and our **focus on the core business**



Evolving towards **“Pure Play Plus”** by gaining more control over **terminals and inland services** will allow us to build an **even better liner product**

Strategy 2030



Hapag-Lloyd goes

Pure Play Plus

We will focus on continually improving our core offering to customers: ocean-based container door-to-door transportation.

We will invest in our fleet, terminals, inland services, data and technology – to build a superior quality liner product.

We will continue to invest in growing our terminal portfolio where it makes sense for the group


WE TARGET TO GROW OUR TERMINAL PORTFOLIO BY UP TO 10-15 TERMINALS UNTIL 2030...



... AND FULLY ESTABLISH OUR NEW TERMINAL & INFRASTRUCTURE DIVISION

-  Generate synergies with liner business + additional earnings
-  Push strategic & operational control
-  'Stand alone' Terminal Business that serves all shipping line customers

 Terminals HL is invested in

 Potential future regions for investments

The new Terminal segment has been set up to bundle our terminal & infrastructure investments as a stand-alone business

The Terminal segment strengthens our core liner business by...

- Delivering **safe, sustainable, reliable** and **efficient terminal operations** to support “Undisputed Number One For Quality” strategy
- Generate sustainable **profitability**
- Delivering **synergies** between terminals and liner and delivering **investment business cases**
- Securing **capacity** in **strategic markets** and supporting Hapag-Lloyd’s **commercial strategy**



KEY FACTS



Own legal entity headquartered in **Rotterdam**



Independent business unit with **own brand & “Chinese Walls”** to liner business



Separate reporting via **own reporting segment**



Other container lines as important **customers**

In the future we will significantly grow our inland business



STRATEGIC RATIONALE FOR INLAND



Inland makes us a **more complete shipping company**



Inland creates **lock-in effect** and fosters **stickiness** with customers



Competition investing in intermodal capabilities and offering



Inland is an **additional source of profitability** next to Ocean and Terminal



Expected growth trajectory



Inland share (%)

2022

18%

2030

30%



How we drive growth of our inland business

Expansion of inland product network

Differentiated sales approach

Partnerships with inland vendors

Excellent customer experience

Dry Container Monitoring

Leverage our smart container fleet

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Hapag-Lloyd to slightly outgrow the market and rebalance the trade and customer portfolio

Strategy 2023

From our market share and scale, we derived the ambition to be a

Global Player and grow with the market

Core beliefs moving forward



Potential to grow above market by **servicing new growth markets**, while **defending our position in well-established markets**



To **reduce our risk exposure & demand volatility** we need to rebalance our trade and customer portfolio, e.g. by **growing overproportionately in the BCO segment**



Growth needs to be backed up by **higher standing capacity** to ensure **competitive cost position** and to compensate for **lower vessel speeds**

Strategy 2030



Hapag-Lloyd will strengthen its position as a

Top 5 Global Container Line

We will aim to grow above market to defend our Top 5 position and earn the right to play for tomorrow. We will defend our strongholds while leveraging growth opportunities where we see a right-to-win.

Based on the Strategy 2030 cornerstones we developed our Commercial Strategy from three main angles



ATTRACTIVE MARKETS

Expand coverage of growth markets and defend strongholds

Grow slightly above market



TARGET CUSTOMERS

Drive desired customer mix

Grow our BCO share over-proportionally, while continuing to grow with NVOs

Focus on **ringfenced customers**



NICHES AND POCKETS OF GROWTH

Grow reefer market share slightly above market

Grow DG & Specials

Target **attractive opportunities** in selected **Pockets of Growth**

We will remain a Global Player and double down on selected attractive markets as we defend our strongholds

ATTRACTIVE MARKETS CONCEPT



- **Deliberately focus on selected Attractive Markets** to realize slightly above market growth
- Actively **target growth markets** with strong momentum
- **Defend existing strongholds** against competition and keep our strong position

In January we already started a new cabotage joint venture in Brazil to combine integrated container transport with inland services

NEW PLAYER NORCOAST



Founded by Hapag-Lloyd and Norsul as a 50-50 partnership



Weekly service offering for cabotage & feeder cargo



Integrated container transport and inland services

STRATEGIC RATIONALE



- Brazil is the largest economy in South America with a constantly growing coastal transport sector
- Improved connectivity for deep-sea cargo to and from secondary ports in Brazil
- High synergy potential, such as added volumes and terminal cost savings

Norcoast



Feb 2024
successful
launch



NORSUL
JV partner

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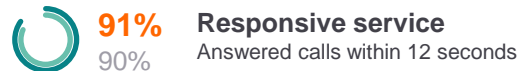
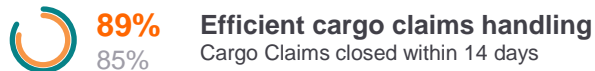
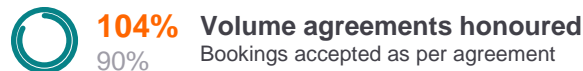
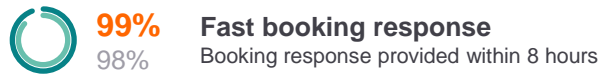
Wrap up

We have significantly improved our service quality and customer satisfaction

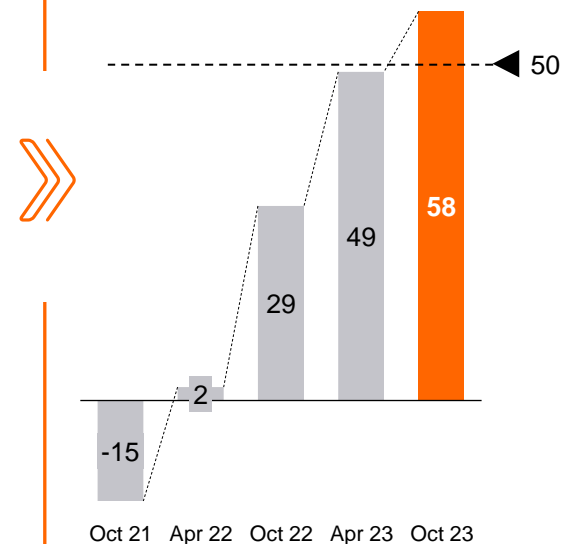


OUR 10 QUALITY PROMISES

FY 2023 vs. Target



CUSTOMER SATISFACTION Net Promoter Score (NPS)



Hapag-Lloyd to drive quality to best-in-class performance

Strategy 2023

The Hapag-Lloyd brand should be associated with **Number One for Quality**

Core beliefs moving forward



Delivering **high quality & best customer experience** is valued by customers and allows us to increase **loyalty and yield**



Customers perceive quality in terms of customer **service** and **operational quality**

- Increasing **ease of doing business** is important for customers, hence **service quality** is key
- The industry is **lagging behind in operational quality**, a breakthrough can make us gain a **competitive edge**



We need to continue to drive **quality excellence constantly and globally** to ensure rising trajectory of NPS scores

Strategy 2030



Hapag-Lloyd will further intensify its efforts and build on achievements to become

Undisputed Number One for Quality

We will continue our push to become a truly customer centric organization. We will further drive customer service quality and achieve a step change in operational quality with 80% OTD¹ performance on box level – delivered constantly, globally and through on- and offline channels.

We aspire to become "Undisputed Number One for Quality" and will make a step change in operational performance



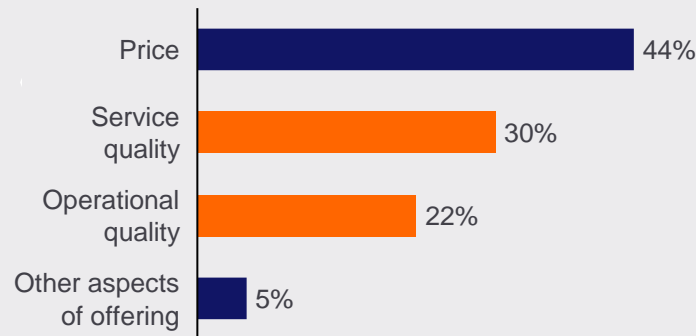
WE WILL ADAPT OUR QUALITY PROMISES IN 4 CLUSTERS TO CATER FOR OUR CUSTOMERS NEEDS



BASED ON...

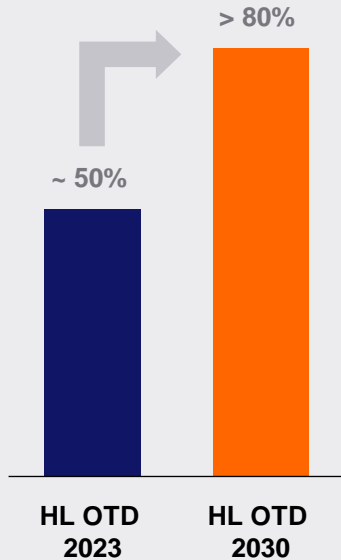
>6,000 Customers surveyed

...QUALITY IS DECISIVE FOR >50% OF CUSTOMERS



...AND WE DO SEE A WILLINGNESS TO PAY AS WELL

This means that a substantial increase in on-time delivery (OTD) at box level is needed to improve customer experience



➤ OTD currently at around 50%, significantly below 80%+ target

➤ Schedule Reliability (SR) as main driver, has been **below market average** previously

➤ **Breakthrough needed** to live up to ambition

SELECTED KEY MEASURES



Further **standardise our global operating model**



Simplified Network and consequent selection of **like-minded partners**



More control over involved assets
→ e.g. via Terminal & Infrastructure division

Gemini Cooperation



Ambition:

Industry leading schedule reliability of >90%

Accelerate decarbonization

Maintain cost competitiveness

Gemini Cooperation will be an important cornerstone for our quality ambitions

Hapag-Lloyd and Maersk agreed on a long-term operational partnership starting February 2025



A strong partnership on **key East-West trades**: Far East/Europe & Mediterranean, Transpacific (excl. India), Atlantic (excl. Canada) and Middle East



An **innovative hub & spoke concept** with an efficient mainliner network, complemented by a dedicated shuttle network and efficient large tonnage

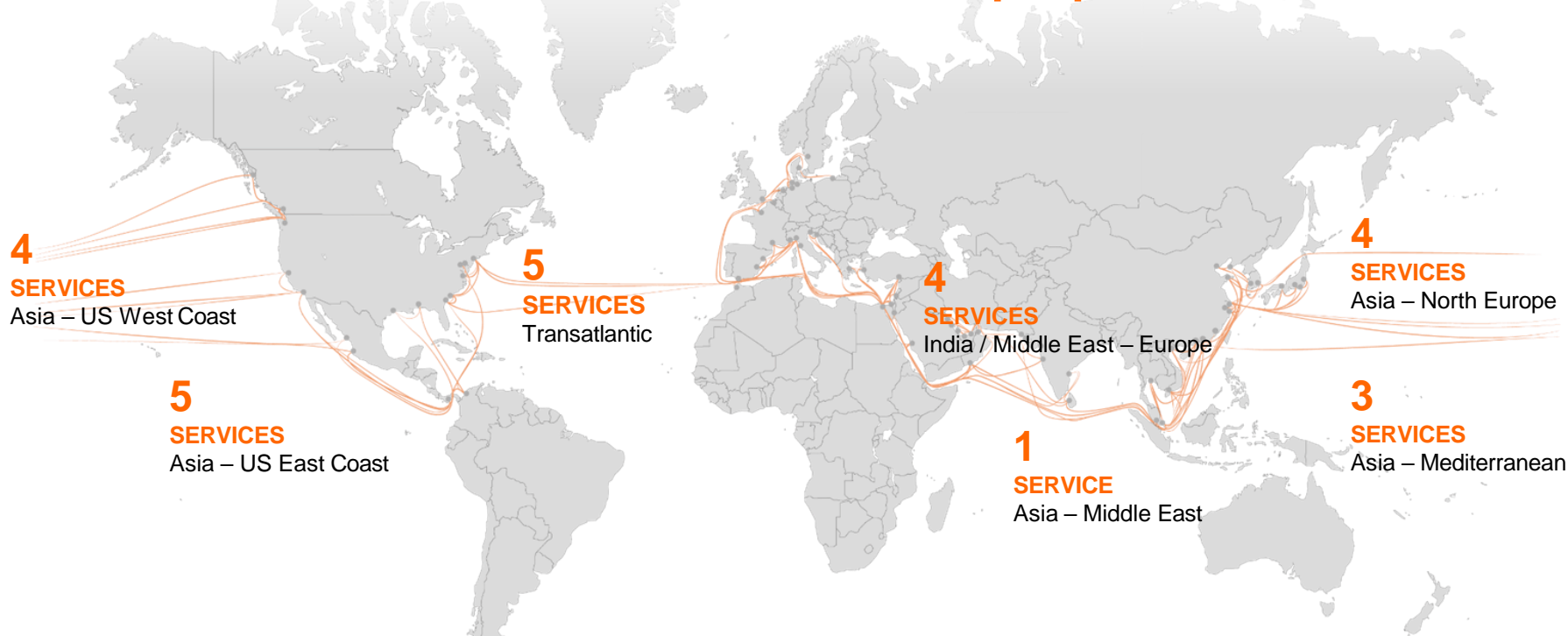


Strong terminal operations in **strategic hubs** that are **mostly owned and controlled** by the Gemini partners, providing world class productivity and **highly efficient transshipment operations**



Sustainability commitments with annually increasing sustainability targets

This partnership will strengthen our key East-West trades while major North-South trades will be served with multiple partners



26 MAINLINE SERVICES

32 SHUTTLE SERVICES

85 UNIQUE PORTS

290 VESSELS

3.4 TEU M CAPACITY

The Gemini network will be centered around owned and / or controlled terminal hubs significantly increasing the reliability of our services

HUBS PLAY A CRUCIAL PART IN THE ON-TIME DELIVERY

- All hub terminals are owned and / or controlled by Hapag-Lloyd or Maersk (except Singapore and Cartagena) and have been carefully selected for top quality & reliability
- Many of these hub terminals already have industry-leading reliability and we will continue to work on innovative concepts like side-by-side connectivity
- Controlling the hubs enables close integration of planning and execution between liners and terminals

On-time departure and arrival and berth on arrival will create fast and reliable connections

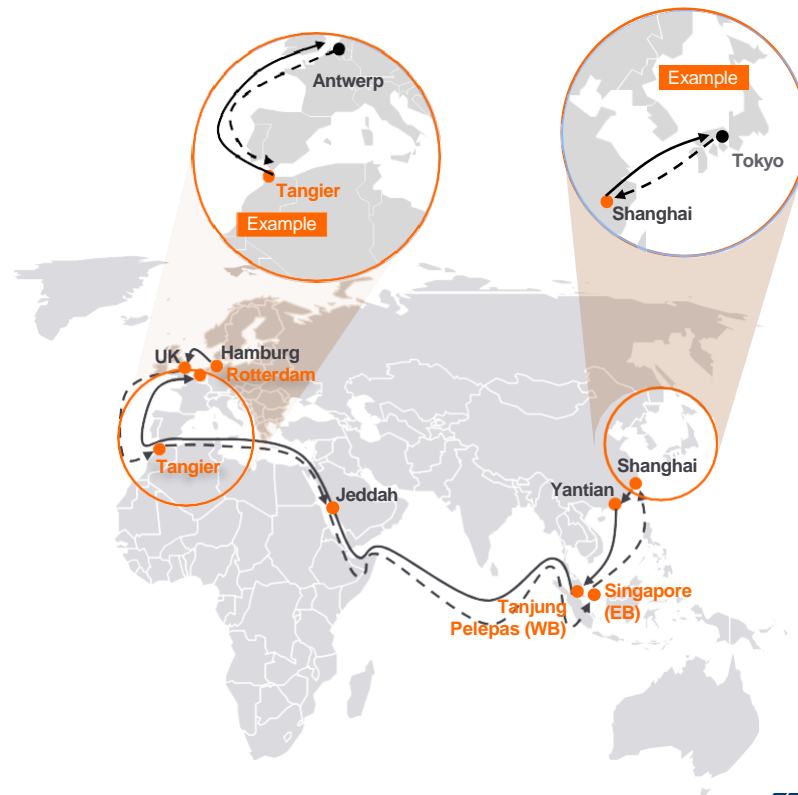


The joint network uses a hub & spoke model to make it much more reliable and resilient, with fast connectivity

NETWORK PRINCIPLES

- **Setup** with 2-3 main port calls per region including strategic hubs will enable shorter round voyage times and better reliability
- Hub & spoke with multiple shuttles will provide **wide coverage** and **fast connections**
- Connections from **mainliners to mainliners** and **to shuttles** will be **synchronized** to significantly reduce dwell times

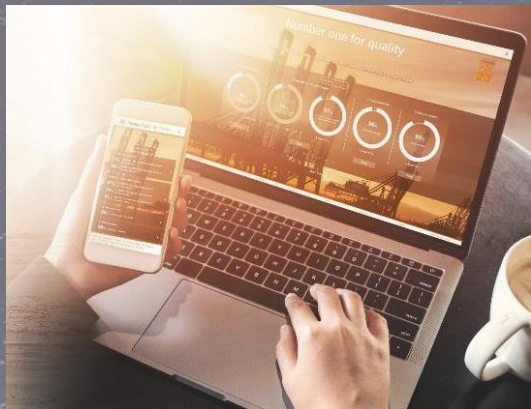
This network is much more **reliable** and **interconnected** than traditional setups, increasing **resilience** against external effects



We also aim to deliver our service through digitalization and personal interaction – both will contribute to our quality ambitions

DIGITAL

One stop digital experience,
real-time responsive
via **Web, Mobile** and **API**



PERSONAL

Customized, proactive solutions
and consultative support through
trained experts



Higher service level

Customized solutions

Empathy driven and intelligent personal touch

AI supported pro-active resolution

Our investments in IT and people enable us to deliver a state-of-the-art digital customer experience

INVESTMENTS IN DIGITALIZATION



New IT locations

- Opening of the **Hapag-Lloyd Technology Center** in Chennai (India) in cooperation with our partner Solverminds
- Expansion of the **Hapag-Lloyd Knowledge Center** in Gdansk
- Expansion of the **IT location in Hamburg**



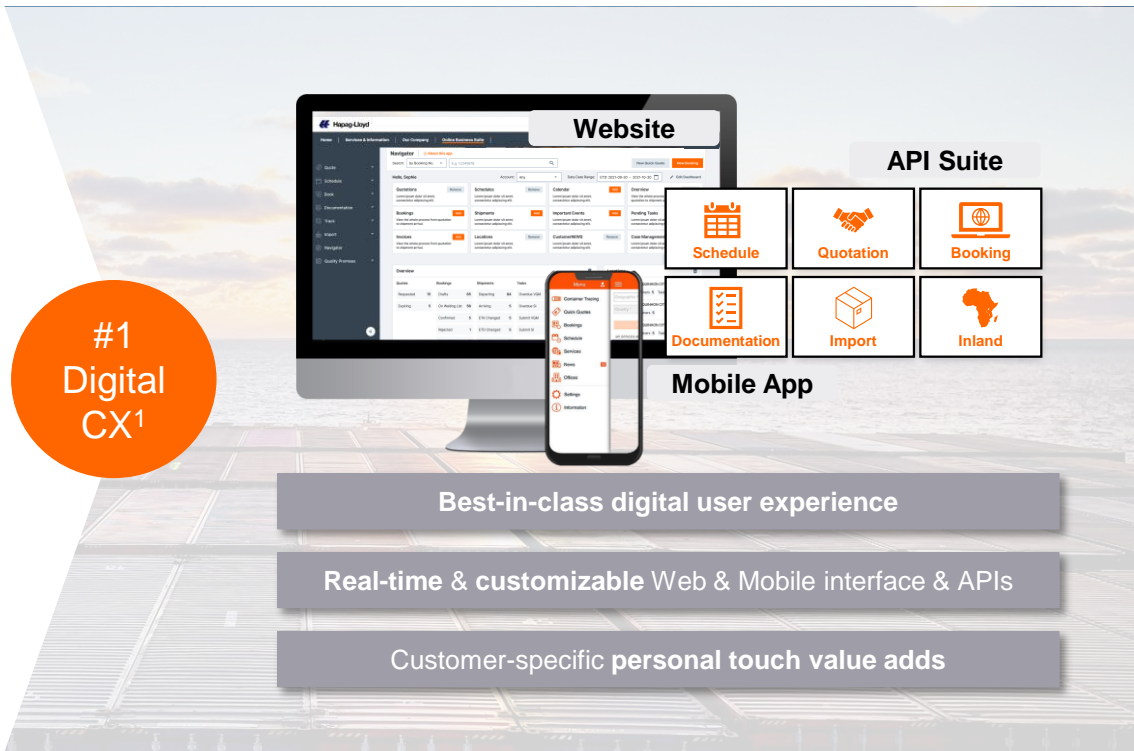
Digital architecture

- Introduction of a self-developed **modular cloud-based operating system** (FIS 3)
- Use of **best-in-class 3rd party software**, e.g., Salesforce




New digital solutions


- More than **20 digital products** available online



Real-time container tracking for all standard and reefer containers improves transparency along the supply chain


REEFER CONTAINERS


 Almost entire **reefer fleet** equipped with **Track & Trace** devices

 Commercial Product **Hapag-Lloyd LIVE** enables customers **to monitor** perishable and sensitive goods demanding temperature control – **remotely** and in **near real-time**



DRY CONTAINERS

 Tracking of dry containers through **permanently installed devices**

 More than **1 million boxes** already equipped

 Commercial product **“Live Position”** will be rolled out in Q2 2024

Towards 2030 we will build a state-of-the-art tech and data platform



OUR CUSTOMER FACING AMBITION



World-class web / mobile offering



Leading supply-chain visibility

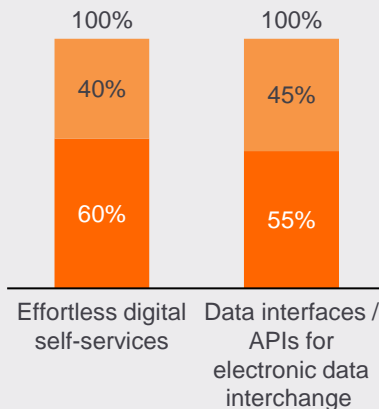


Comprehensive API connectivity

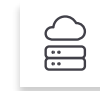


>55% OF CUSTOMERS VIEW DIGITAL OFFERING AS DECISIVE

Decisive Not decisive



MAIN BACKEND INITIATIVES



Cloud based main operating system



SAP S/4



IT Resilience & Cyber Security



Data & Artificial Intelligence

While we are growing our digital offerings, personal interaction with our customers will remain imperative

SERVING OUR CUSTOMERS

>400 offices in 140 countries

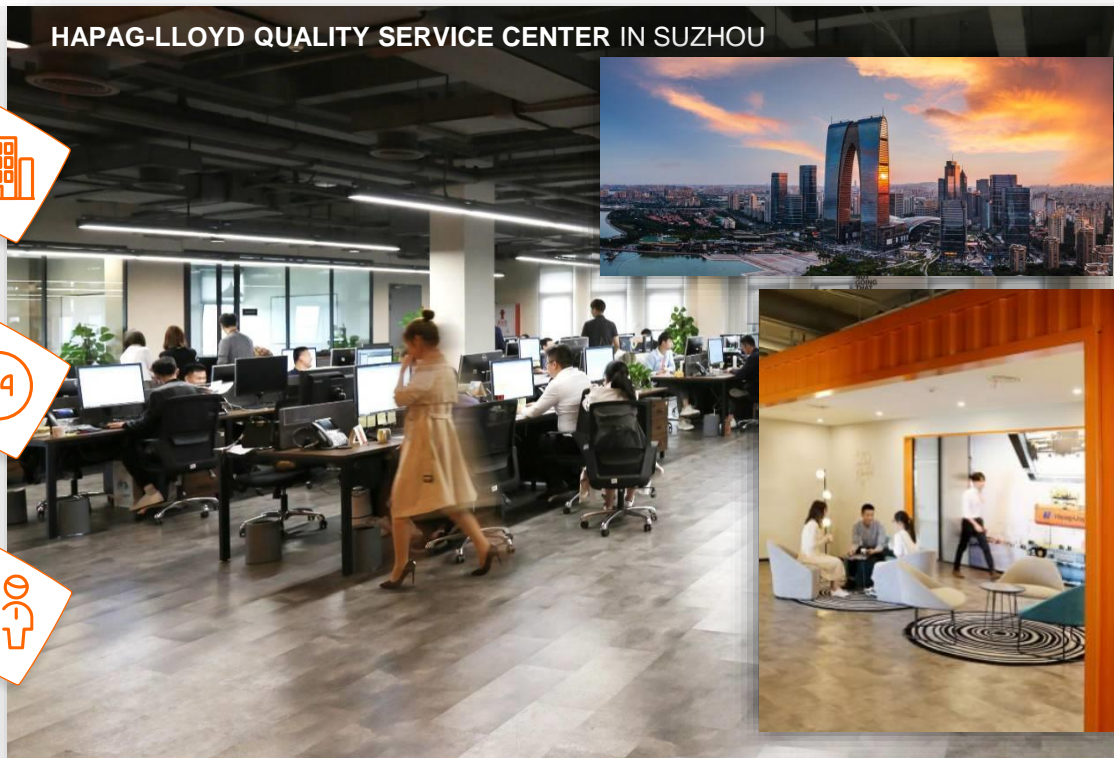
Our global presence enables us to provide local expertise and consultative support to our customers.

11 Quality Service Centers (QSC)

Customer Service, Operations and Business Administration for specific regions are bundled to deliver our Quality Promises to our customers more efficiently and effectively.

3 Global Capacity Centers (GCC)

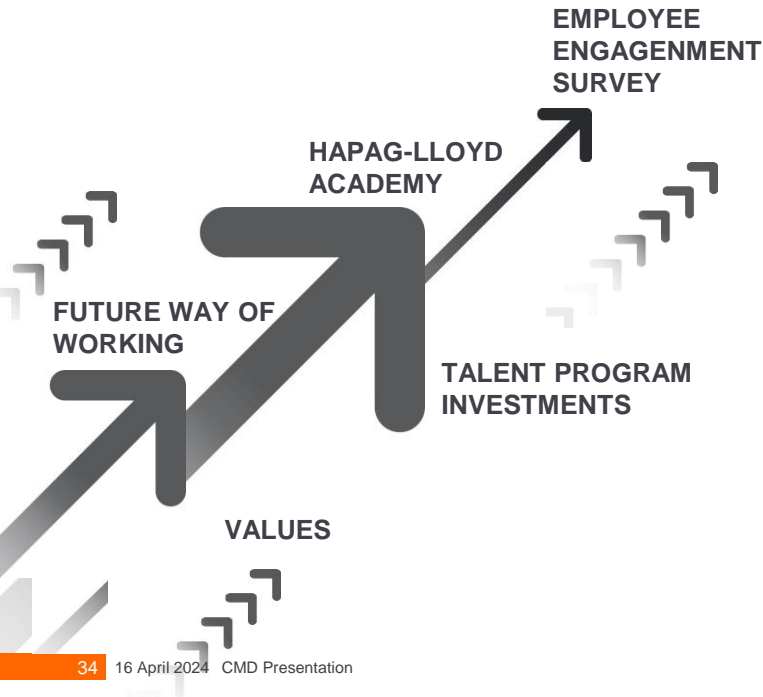
Supporting many customer related processes, including booking and documentation.



We will continue to invest in our people and work environment – as our people will deliver our strategy



WE HAVE MADE A LOT OF PROGRESS ON OUR JOURNEY...



...AND HAVE DEFINED OUR FOCUS TOPICS FOR THE COMING YEARS



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Strong push for decarbonization from different angles



RESPONSIBILITY

Motivation

3% of global emissions stem from shipping

Key takeaways

Responsibility of industry to join forces to ensure a just transition

"Right thing to do" to create a livable planet for next generations



COMMERCIAL

45% of customers with CO₂ reduction targets

11 of top 30 clients with scope 3 targets

Clients **pooling demand**, first contracts in '25

~20 m green TEUs by '30¹



REGULATION

1.5° Paris agreement as guardrail for rule makers

EU ETS already impacting EU voyages from '24

Fuel EU Maritime as of '25

IMO tightening regulation, discussing **global carbon tax**

We will deliver on a 1.5°C Sustainability target

Strategy 2023

We took a comprehensive approach to be a **Sustainability Accelerator**

Core beliefs moving forward



The time to act is now: With green technologies maturing, new regulations upcoming and demand for green fuels rising, we want to **play a leading role in decarbonizing shipping**



We need to **double-down on emission reductions to comply** and support our customers' **supply chain decarbonization** and have the right-to-play tomorrow



We believe that the **demand for green shipping will grow** significantly until 2030, already creating a new segment that we want to **serve exceptionally well**

Strategy 2030



Hapag-Lloyd will intensify its decarbonization efforts to become a

Sustainability Driver

for the shipping industry

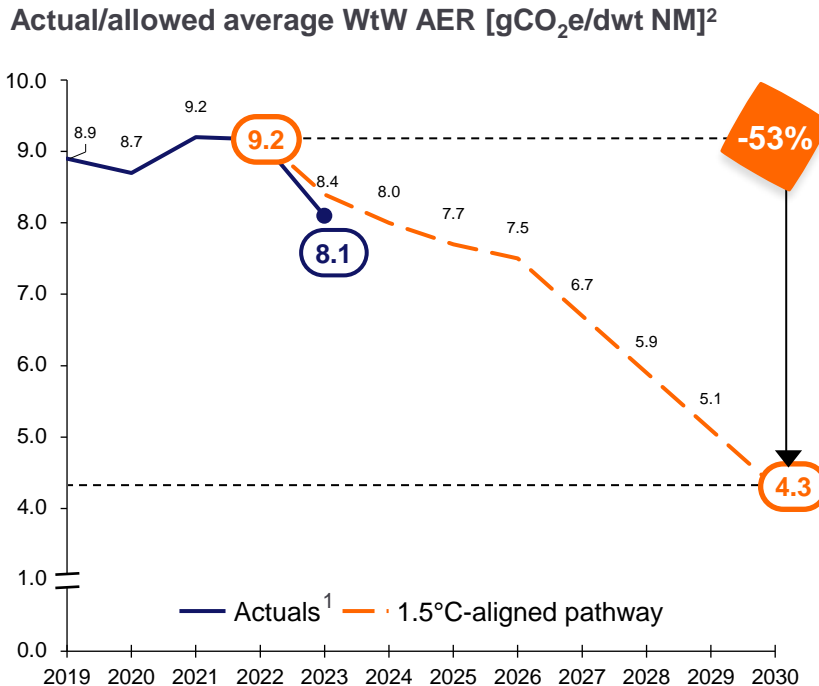
We target to **limit our absolute emissions by ~1/3** until 2030 vs 2022 resulting in ~10.0mt CO₂e

We are committed to reducing the carbon intensity of our entire fleet by ~50% by 2030, resulting in a 1/3 reduction in absolute emissions

Absolute CO₂e emissions by 2030
10.0 mt
 - 1/3 vs. 2022

Net zero
 by 2045

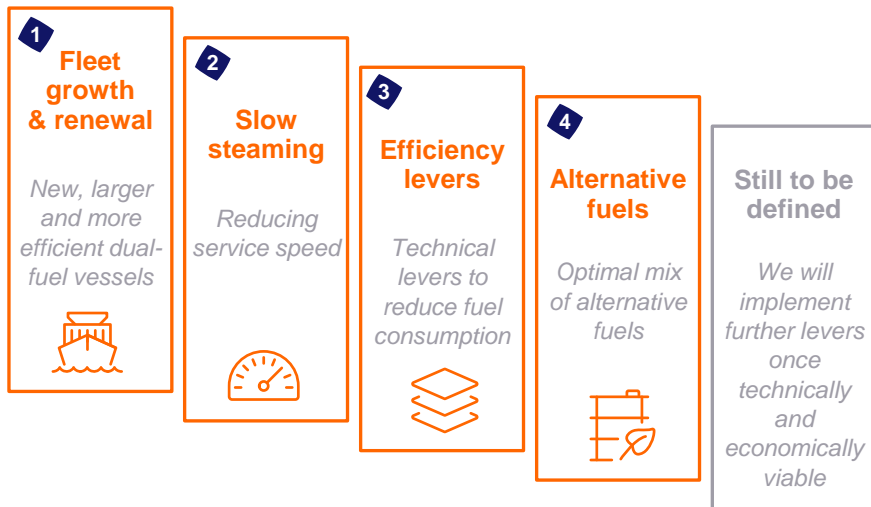
Trajectory fully aligned to
1.5° pathway



KEY FACTS

- To underline our increased decarbonization ambitions we have **updated our AER Trajectory** to reflect a **1.5° aligned pathway**
- The pathway has been **aligned externally** with DNV
- The new targets cover our **entire fleet** and are based on **well-to-wake emission factors**

We identified 4 levers to decarbonize our fleet



2022

Reduce by ~ 1/3rd

2030

ABSOLUTE CO₂e EMISSIONS



Strive for net-zero carbon from 2045

Ambitious interim targets for 2030

starting with scope 1 emissions, and extending to scope 2 and 3 over time

1 Fleet growth & renewal

Between 2023 and 2025 we will receive more than **400 TTEU** in new and efficient tonnage

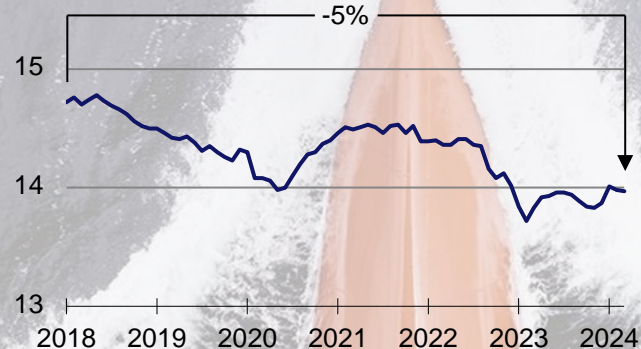
In addition, we have started to phase out inefficient tonnage that we own or charter in



2 Slow steaming

Lowering the speed of our network by **3 knot** would save up to **5 million tons of CO₂e p.a.**

Global average container vessel speed [knots]



Source: Clarksons



>80 vessels
already retrofitted



3

Efficiency levers: with our fleet upgrade program we will renew more than 150 vessels

„LOADABILITY PUSH“

Increase of slot capacity by means of ...

- Extension of the lashing bridge systems
- Increase in draught
- Raising the bridge

FUEL EFFICIENCY

Increase in fuel efficiency by...

- New propellers
- New flow-optimized bulbous bows
- Improved coatings
- Optimization of engines



70 – 100 TTEU
Capacity increase

USD 360 m
Σ Investments


2 – 3 years
Amortization period

6 – 7%
Fuel savings

USD 390 m
Σ Investments

1 – 2 years
Amortization period

Alternative Fuels: Bio- and e-Methane as well as green Methanol to play vital role in our fuel mix

	>2022	>2024	>2026	>2030
	Biofuels	Bio- and e-Methane	Green Methanol	E-Ammonia
Scalability and availability	Good availability but scalability is limited due to feedstock constraints.	Availability and scalability of Biomethane is limited but growing, e-Methan to play bigger role towards the end of decade.	Attractive (subsidized) green (e & bio) methanol projects in China and USA to increase availability soon.	E-ammonia has a good chance to be the ultimate green fuel for the maritime sector because of cost advantages and its scale up potential.
Challenges	Increasing competition for feedstock from road and aviation sectors.	Increasing competition from road, heating & power sectors.	Competition from aviation sector, sourcing of biogenic CO ₂ .	Propulsion technology still in development phase, missing regulatory regimes for bunkering and operations.
 STRATEGY 2030	Part of the long-term fuel mix, current consumption of > 200,000 t p.a. to be increased further.	First trials have started, consumption to increase in the next years.	First bunkering in 2026 expected, following the retrofit of vessels to methanol propulsion. Potential to become most important green fuel in mid-term.	Expected to be a significant part of the fuel mix in 2030s and beyond.

Hapag-Lloyd will retrofit 5 vessels to methanol propulsion together with MAN and Seaspan



5 x 10 TTEU Seaspan vessels



Built: 2014
Nominal capacity: 10,100 TEU
Reefer plugs: 1,000 FEU
Length / beam: 336 m / 48 m



COOPERATION DETAILS

Hapag-Lloyd has negotiated a **methanol retrofit package with Seaspan and MAN Energy Solutions**



Time charter until 2040 to secure long-term asset access



Existing **MAN S90 engines will be retrofitted to methanol dual fuel propulsion** on chartered Seaspan vessels starting in 2026

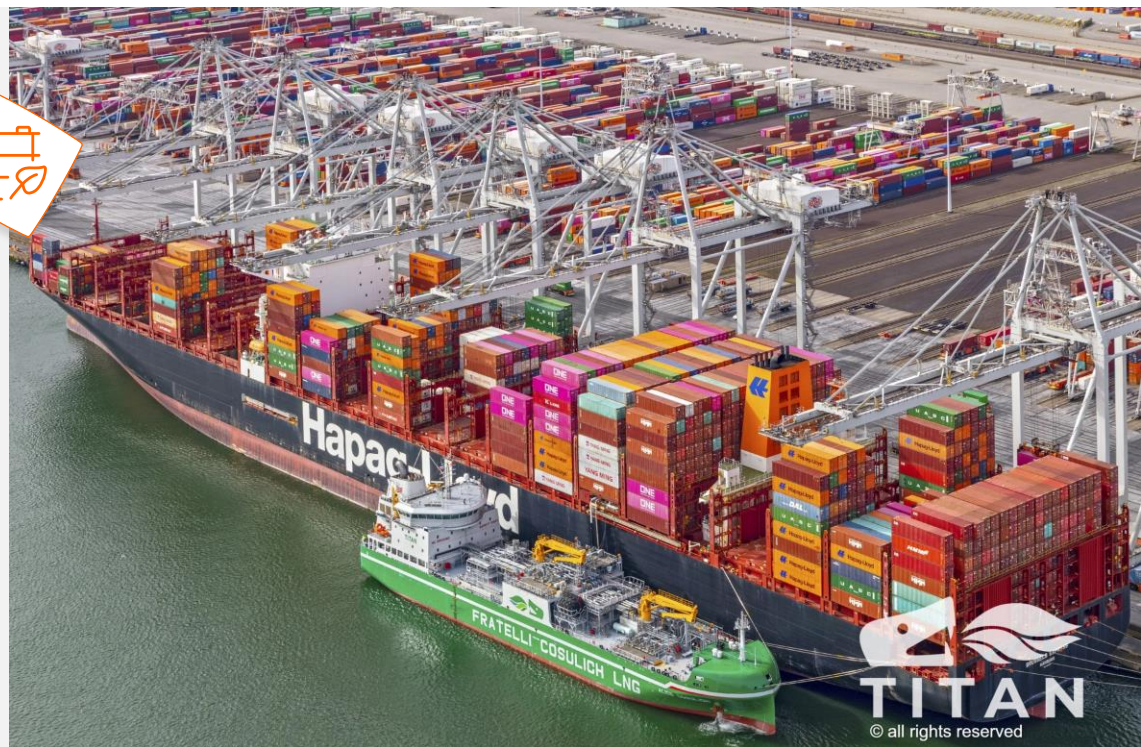


Benefit from a **project partner with experience, supplier network and scale** to meet growing customer demand for green transportation

In April, we have concluded the largest ever ship-to-ship bunkering of liquefied biomethane

KEY FACTS

- Together with STX Group and Titan Clean Fuels, we have concluded a ship-to-ship bunkering of **2,200 tonnes of ISCC EU certified Liquefied biomethane** (LBM), for our Brussels Express container vessel in the Port of Rotterdam.
- This transaction marks Hapag-Lloyd's entry into the use of LBM as a sustainable marine fuel and is the **largest ship-to-ship bunkering** transaction to date.
- In the next years we **will expand the use of LBM** as a second pillar of our green transport solutions.



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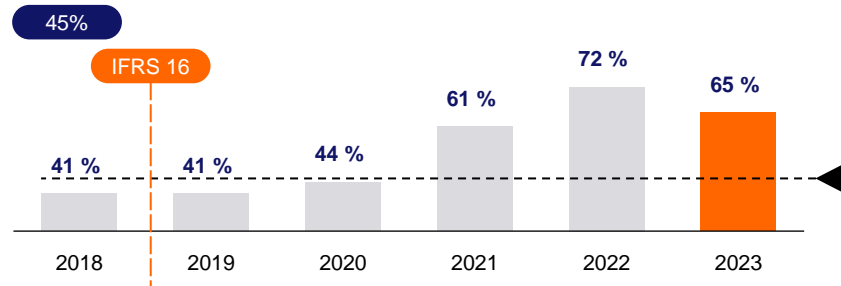
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Top Performing Carrier

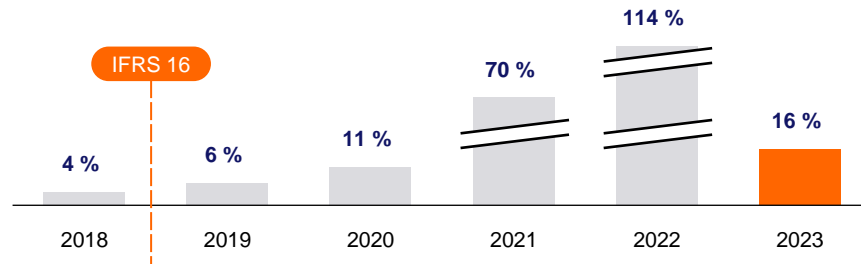
Wrap up

We have delivered a very strong financial performance since 2018, also thanks to the extraordinary market environment

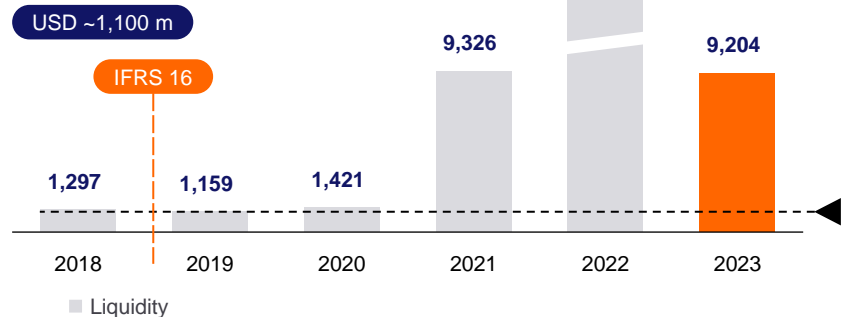
Equity ratio



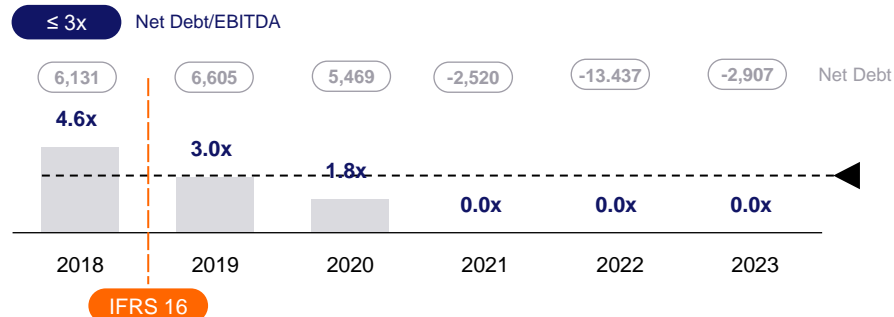
ROIC



Liquidity Reserve



Net Leverage



To remain a top performer, we will focus on competitive cost, best talent and key technology

Strategy 2023

We want to prove that we can be **Profitable through the cycle**

Core beliefs moving forward



Razor-sharp cost focus is required to retain the right-to-play in a difficult market environment with mid-term overcapacity



To deliver on our ambition, it is an imperative to secure access to the **best teams and talents** across the industry



We need to continue to **strengthen our technology & data foundations** and deliver **best systems** to our teams to stay productive and agile

Strategy 2030



Hapag-Lloyd will sharpen focus on being a

Top Performing Carrier

Being cost competitive gives us the right-to-play in a difficult market environment. By having the best talents and building a strong IT/digital foundation we can boost productivity and agility at once.

We must achieve significant unit cost savings to keep us competitive in a challenging market environment



SELECTED COST LEVERS



Increase **scale**



Drive **network simplification**



Increase **average vessel size** and **bunker efficiency**



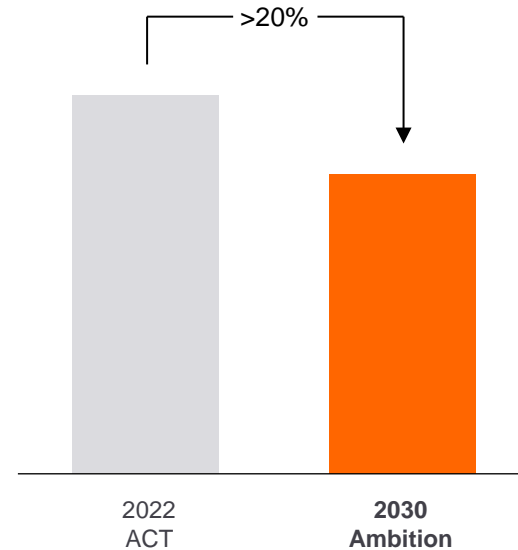
Tackle **procurement excellence** levers



Push **process excellence and automation**

UNIT COST IMPROVEMENT 2022 VS. 2030

ILLUSTRATIVE



Need to address **counter-effects** from deliberate choices and external factors, e.g.:

- Sustainability requirements
- Regulation (e.g., CO2 tax)
- Inland push
- High inflation environment in parts of the world
- ...

Executing Strategy 2030 will allow investments of about USD 20-25 bn and deliver an incremental EBIT of USD >2 bn



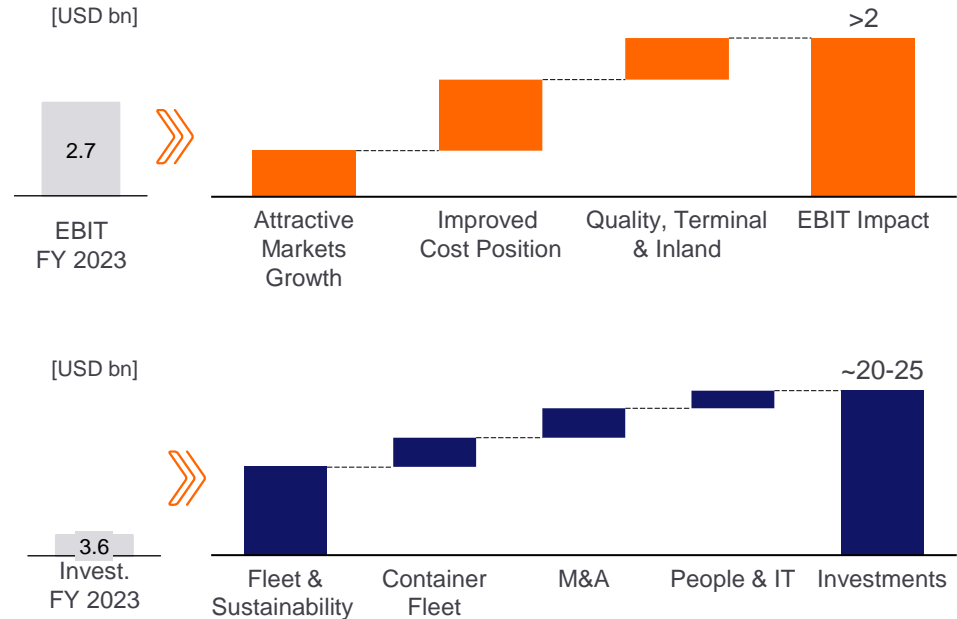
KEY RESULTS

Incremental EBIT effect of USD >2 bn until 2030

as a direct result of strategy measures estimated

Growth investment of USD ~20-25 bn until 2030

UNDERLYING INVEST AND P&L IMPACT



All strategic initiatives will be decided based on individual business cases

With Strategy 2030 we will continue to pursue a prudent financial policy

LONG-TERM FINANCIAL TARGETS

Profitability

Top performing carrier

We want to earn our cost of capital through the cycle

Net Leverage

≤ 3.0x

Net Debt/EBITDA

We strengthen resilience with adequate leverage

Liquidity

>USD 1.1 bn

liquidity reserve

We will always retain sustainable liquidity

Equity

> 45%

Equity Ratio

We strengthen resilience with a solid equity base

Dividend Policy

≥ 30%

of Group EAT

We are committed to shareholder participation

Investments

~USD 20-25 bn

until 2030

We will invest to grow our business and make it more competitive



Agenda

Review & Achievements of Strategy 2023

Strategy 2030 at a Glance

Pure Play Plus

Top 5 Global Container Line

Undisputed Number One for Quality

Sustainability Driver

Top Performing Carrier

Wrap up

Wrap up: Our targets are integrated in the 5 building blocks of Strategy 2030



STRATEGIC DIRECTION

Pure Play Plus

>30
Terminals

>30%
Inland share

WHERE-TO-PLAY

Top 5 Global Container Line

Growth slightly above market

HOW-TO-WIN

Undisputed Number One for Quality

>50
NPS

>80%
OTD¹ on
box-level

#1
Digital CX²
vs. peers

Sustainability Driver

~1/3
absolute CO₂ emissions
reduction vs 2022

Top Performing Carrier

Top
profitability

-20%
Unit cost

+30%
FTE
productivity

QUESTIONS & ANSWERS



An aerial view of a container ship's deck, heavily loaded with multi-colored shipping containers. The ship is moving through the water, leaving a white wake. In the background, another ship is visible on the horizon under a dramatic sunset sky with a bright sun and scattered clouds. The overall mood is serene and professional.

Thank you!