

# Hapag-Lloyd Strategy 2030



## STRATEGY 2030

Undisputed Number One for Quality

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



## S2023 PERIOD HAS ENDED

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



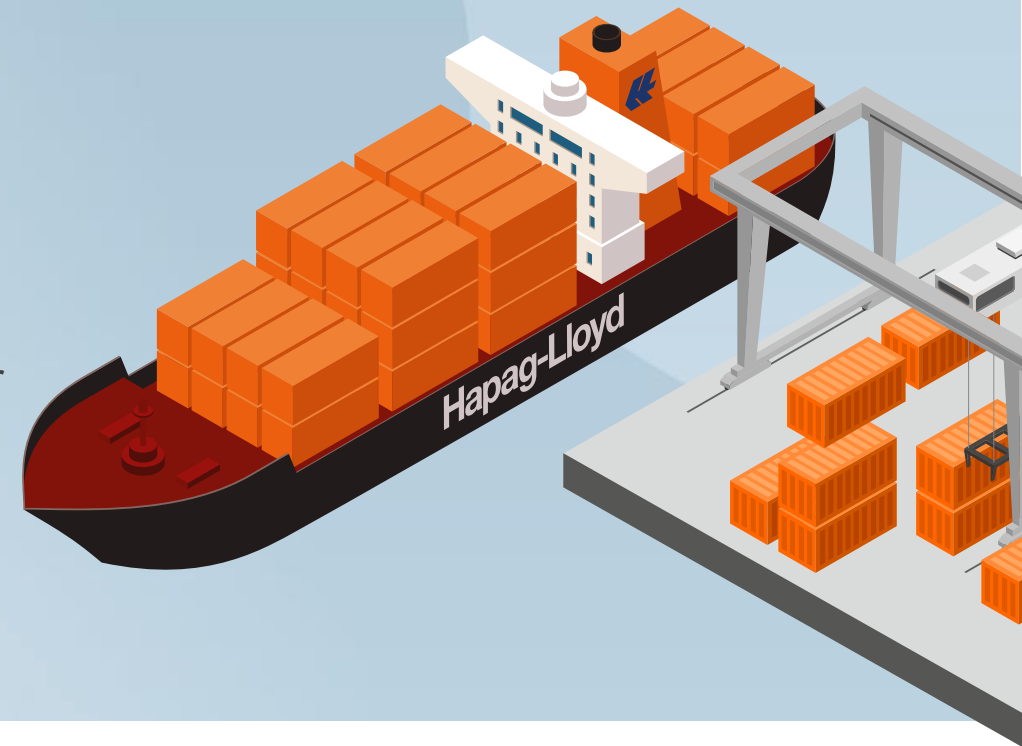
## MARKET IS CHANGING

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



## S2030 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

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

Upgraded credit rating

Successfully managed cost position vs. scale leaders



## Global Player

> 10%<sup>1</sup> market share in dry retained

> 10%<sup>1</sup> market share in Reefer achieved

Significant growth in Africa and India



## #1 for Quality

Brand associated with “Number 1 for Quality”

Achieved NPS of >50

Global QSC<sup>2</sup> network implemented



## Sustainability Accelerator

Comprehensive strategy determined for HL

Net zero target by 2045

Implementation of first measures (e.g. biofuel, fleet upgrades, speed reductions)

# The market and business environment has changed...



## **Volatile supply / demand balance**

Supply to outpace demand growth in the short term, but more efficient capacity needed in the long term for energy transition



## **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 and service and operational quality; Sustainability on the up. Personal touch remains important



## **Industry decarbonization**

Market pressures 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 Strategy 2030 we are building on our success and will become the „Undisputed Number One for Quality“



FROM STRATEGY 2023 ...

... TO STRATEGY 2030...

... WITH VERY AMBITIOUS TARGETS

Pureplay

Pureplay Plus

Stay close to our core as a **door-to-door container carrier** supported by our **terminal and infrastructure division**

Global Player

Top 5 Global Container Line

**Slightly above-market growth** in carefully selected growth markets while defending our strongholds

#1 for Quality

Undisputed #1 for Quality

**Step-change in operational quality** targeting >80% on-time arrival of boxes supplemented by **best-in-class customer service** delivered **personally and digitally**

Sustainability Accelerator

Sustainability Driver

Aligned ambitions with **1.5°C target of Paris Agreement**: become **carbon neutral in 2045**, and **reduce carbon emissions by 1/3<sup>rd</sup> until 2030**

Profitable through the cycle

Top Performing Carrier

Continued strong **financial performance**, delivered by one of the strongest **team in the industry** and **state-of-the art technology**

# Our customers will benefit from Strategy 2030



Through our five strategic pillars...

...we will for our customers...

STRATEGIC DIRECTION

**Pureplay Plus**

NOT end-to-end logistics

...build a higher quality liner product through more control along the container transport chain

WHERE-TO-PLAY

**Top 5 Global Container Line**

...remain a truly global container line with a competitive offering

HOW-TO-WIN

**Undisputed #1 For Quality**

**Sustainability Driver**

**Top Performing Carrier**

...continue to differentiate through best-in-class customer service and operational quality

...drive our own carbon emissions down to help decarbonize supply chains

...stay a reliable and financially sound partner through the cycles

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



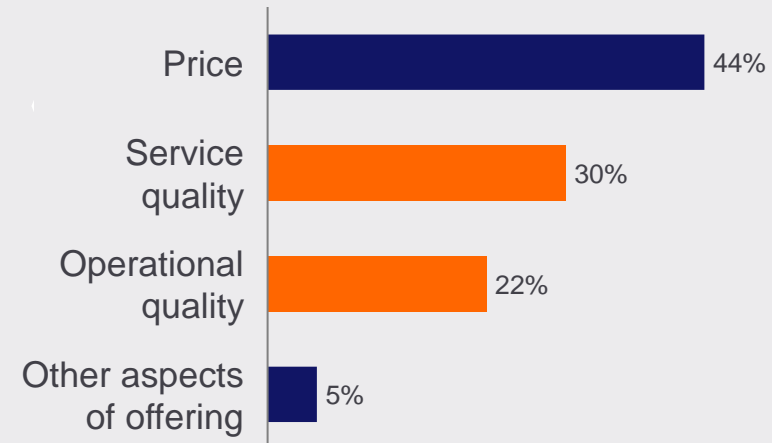
WE WILL ADAPT OUR QUALITY PROMISES IN 4 CLUSTERS TO CATER FOR OUR CUSTOMERS NEEDS



BASED ON...

**>6,000** Customers surveyed

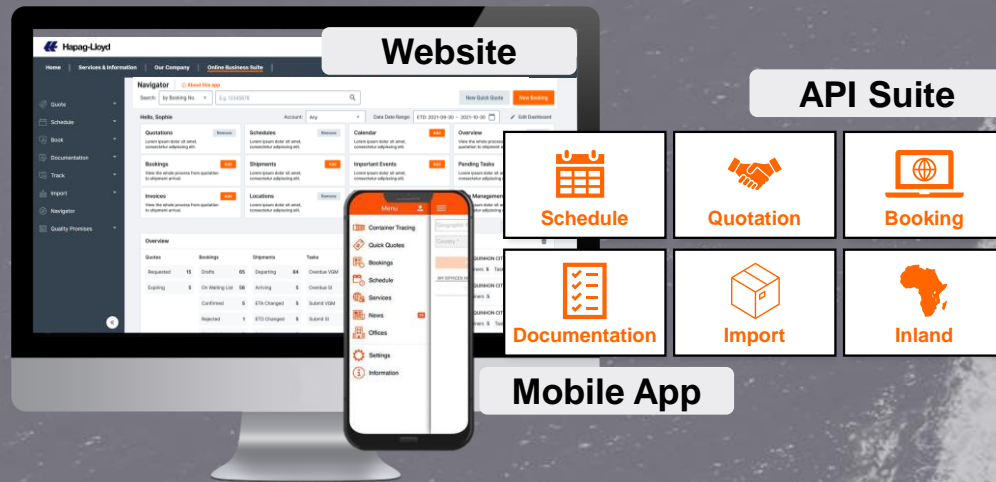
...QUALITY IS DECISIVE FOR >50% OF CUSTOMERS



# We will deliver our quality service seamlessly through personal and digital interaction with our customers

## DIGITAL

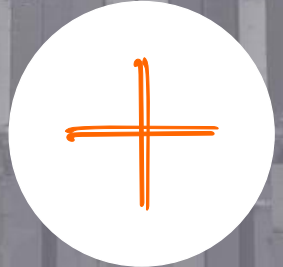
Best in class digital experience along the customer journey



Best-in-class digital user experience

Real-time & customizable Web & Mobile interface & APIs

Customer-specific personal touch value adds



Higher service level

## PERSONAL

Customized, proactive solutions and consultative support through trained experts



Customized solutions

Empathy driven and intelligent personal touch,

AI supported pro-active resolution



# 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

# 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

Looking forward to the  
joint journey ahead!

