

A hand in a dark sweater sleeve points towards a glowing globe. The globe is composed of a wireframe mesh and is surrounded by a network of white lines and nodes. Some nodes are bright white, while others are dimmer or glowing with a warm orange light. The background is a dark blue gradient with some blurred light spots.

RABEN GROUP

**UNDERSTANDING AND BUILDING RESPONSES TO EUROPEAN
TRANSPORTATION AND LOGISTICS CHALLENGES**

**| YOUR PARTNER
IN LOGISTICS**

IMAGINE...

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WHAT WOULD HAPPEN IF TRANSPORT STOPPED?

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IMAGINE...

5 DAYS WITHOUT A TRUCK

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RABEN GROUP

IN A NUTSHELL



12 000
Employees



15
Countries



160+
Locations



9 500
Means of transport

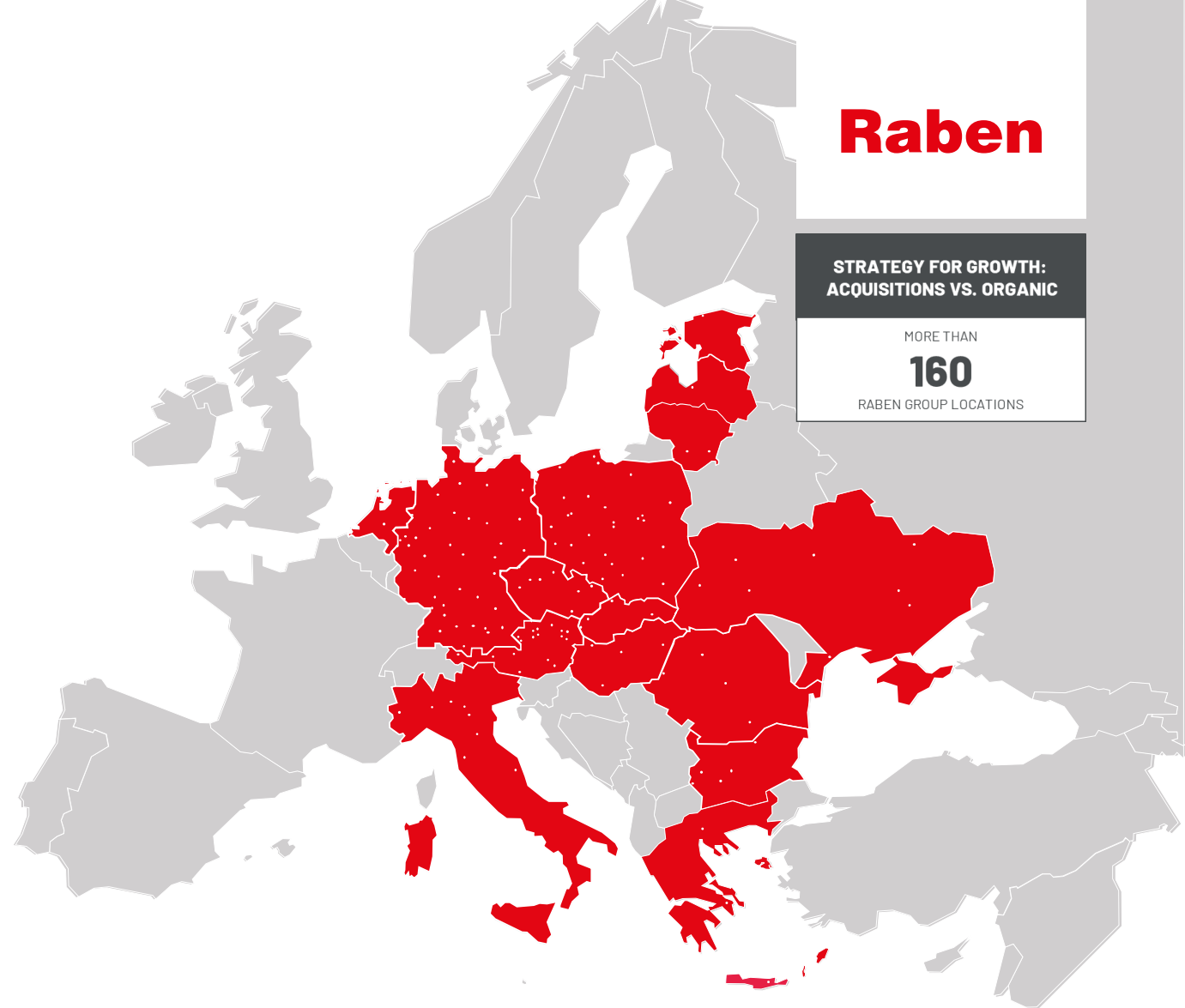


16 000 000
Shipments annually

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STRATEGY FOR GROWTH:
ACQUISITIONS VS. ORGANIC

MORE THAN
160
RABEN GROUP LOCATIONS



1931

1991

2003

2004

2005

2008

2010

2016

2017

2021

2023

YEAR

RABEN LOCATIONS

PARTNERS NETWORK

UNDERSTANDING

POST-COVID OUTLOOK



Uneven economic recovery



Reshoring and nearshoring trends to increase independency of Europe from China supply



Significant **increase in B2C business**



Constantly low unemployment rate



Minimum wages and general **salaries increase**



Rising inflation

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- New Normal = further digitalization
 - **Remote - work**-from-anywhere
 - The pandemic learned companies **remote human resource** management
 - Many people / organizations have implemented **on-line meeting tools**
 - The employee does not have to be tied to the place - remote teams can also be effective
- Covid contributed to the temporary disruption of the global and pan-European supply chains
 - China and Asia-Pacific have **failed as the world's factory**
 - **Shortening** the supply and distribution chain needed
 - **Diversification** of suppliers by global concerns
 - Investments in industry **close to places of consumption**
 - A few cross / boarder DC's more flexible and lock-down resistant than 1 pan-European
- Smart-supply chains / IoT / industry 4.0
 - More smart stock / demand planning necessary, etc.
 - Current models have very high inertia



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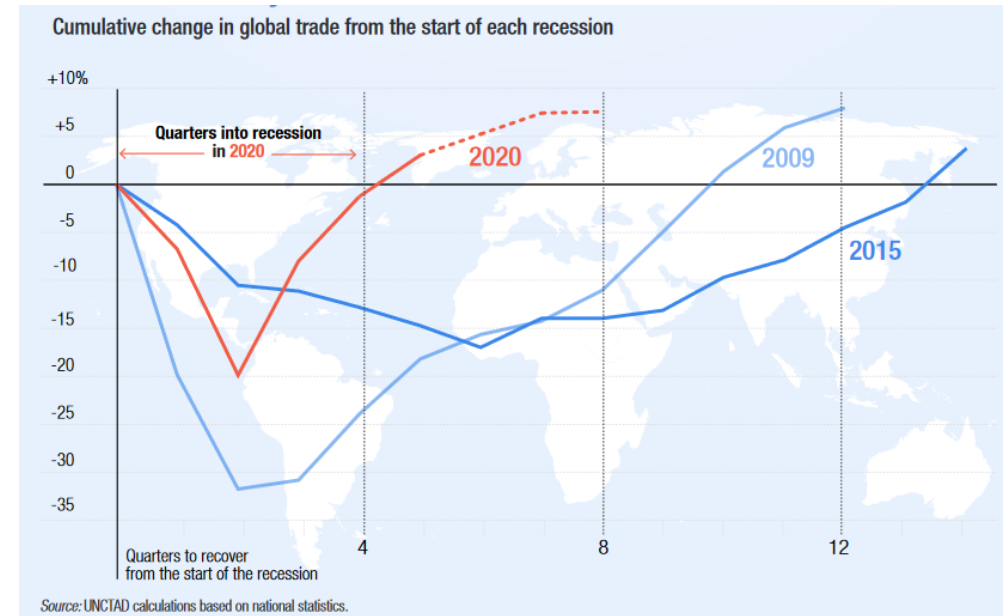
UNDERSTANDING

OVER PAST 2 YEARS

What we can see over the past 2 years is a continuous increase in logistics costs caused by several factors:

- **High demand for transportation** driven by the dynamic post-pandemic recovery of economies
- Increase in prices of **raw materials** on world markets
- **The mobility package**, which has forced carriers to make changes in the operational area
- High **inflation**
- **Wage pressure** from professional drivers, who remain in short supply throughout Europe
- The Russian aggression against Ukraine, which triggered an **energy crisis** and a spike in prices, including oil

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A faster recovery than in the last two trade recessions

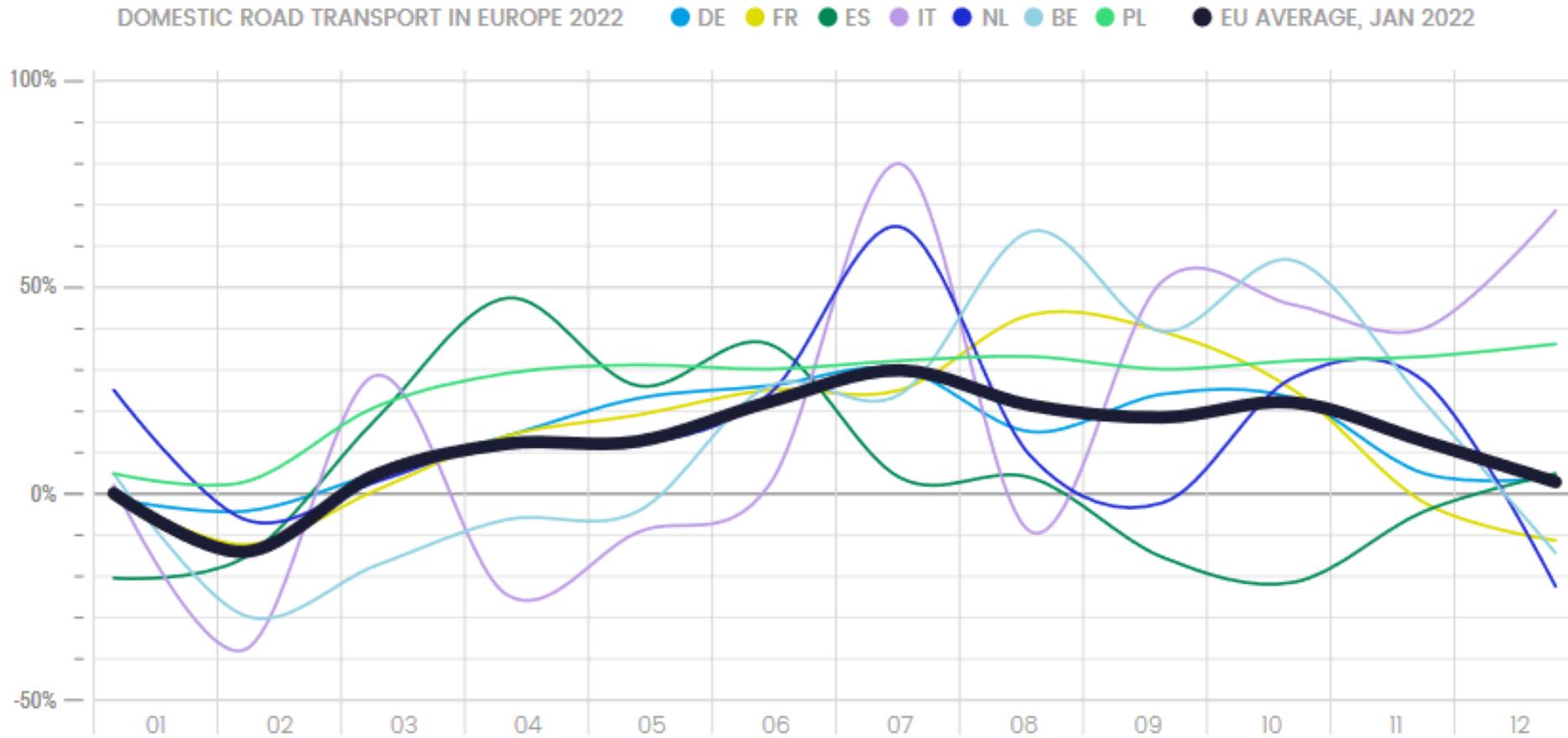
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War in Ukraine the influence on the European logistics market

- Many production companies have decided to **stop their activities** or have been forced to do so because of the military attacks
- Disruption of the supply chain has entailed **shortages of goods** as well as limited transportation capacity
- **Lack of labor** force – many professional workers have joined the army to fight for their country
- Regardless above **the supply chain needs to be continued** in order to assure the deliveries of food products. It is currently the priority in all the regions
- The longer the war will last, the bigger impact it will have on worldwide economy, raw material crisis, increasing inflation as well as on the global supply chain interruptions



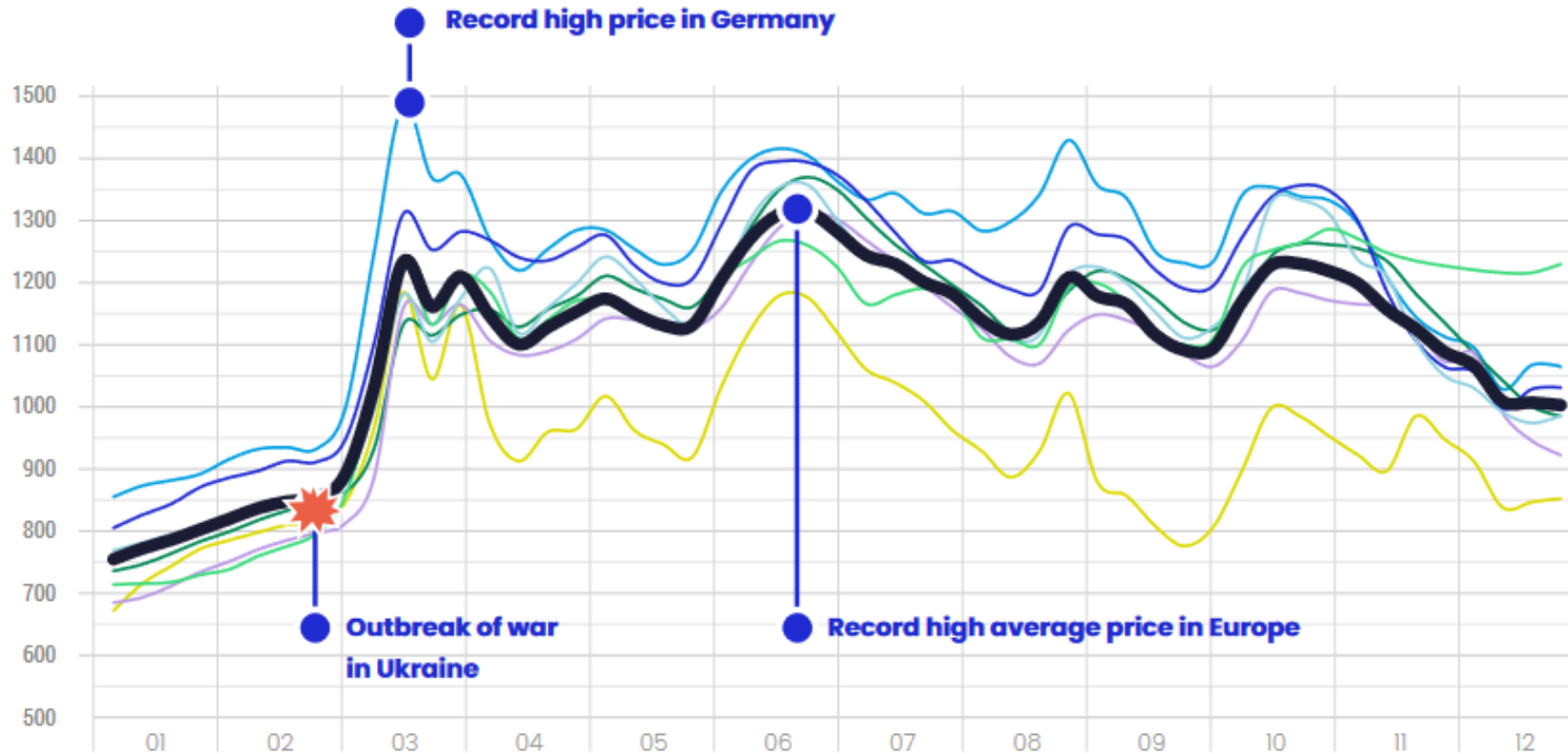
CHANGE IN THE AVERAGE TRANSPORT RATE IN 2022



Source: CargoON platform, Trans.eu

PRICE OF DIESEL IN EUROPE IN 2022 (€/1000L)

IN THE BACKGROUND ARE FLUCTUATIONS IN RATES IN SELECTED EUROPEAN COUNTRIES ● DE ● FR ● ES ● IT ● NL ● BE ● PL



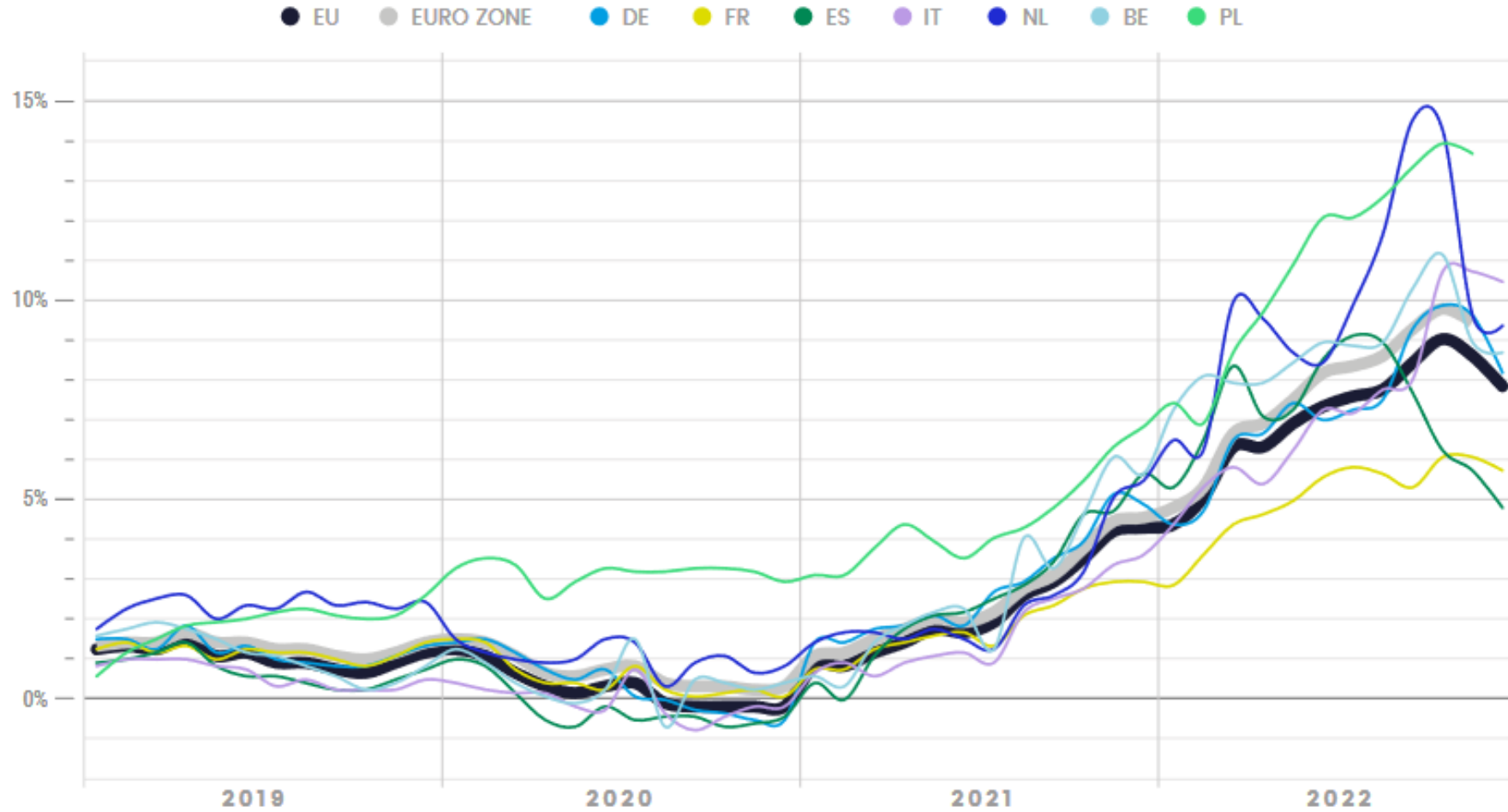
Source: Weekly Oil Bulletin, European Commission

MARKET SITUATION

INFLATION IN REVERSE?

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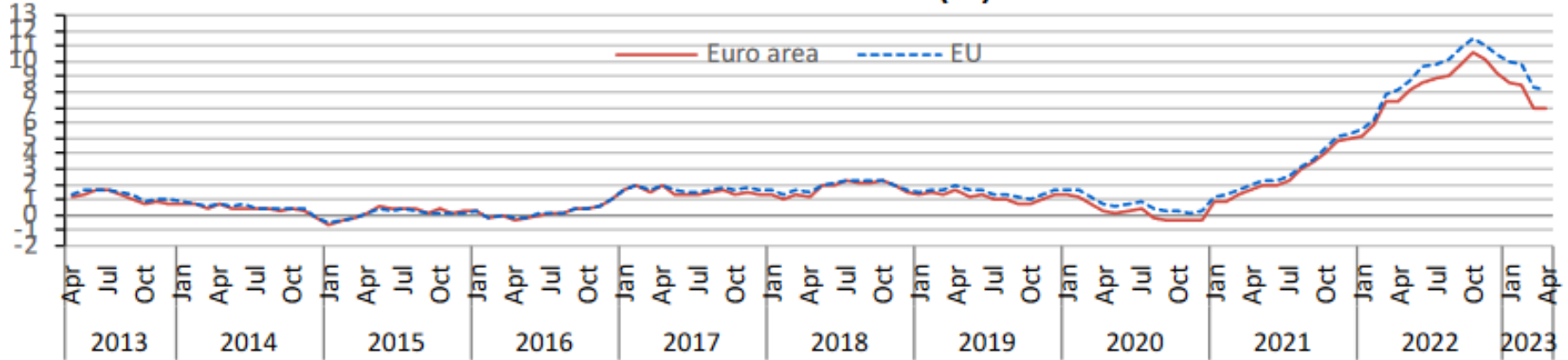
EUROPEAN AVERAGE AGAINST INFLATION IN SELECTED COUNTRIES AND THE EURO ZONE (2022)



Source: own elaboration

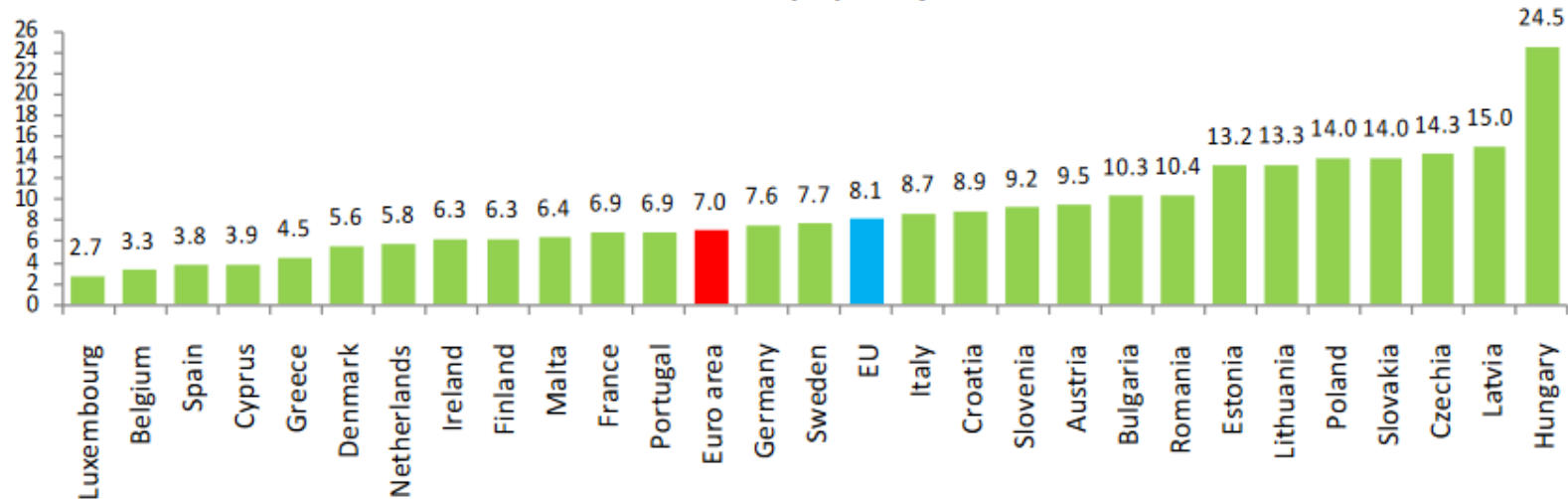
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Annual inflation rate (%)



eurostat 

Annual inflation rates (%) in April 2023



eurostat 

Source: <https://ec.europa.eu/eurostat/>

WE SECURE YOUR BUSINESS

OUR ACTIONS

TO MAKE DRIVER WORKING PLACE MORE ATTRACTIVE

Responsible Trucking CSR Europe Initiative, together with BMW Group, H&M Group, IKEA Supply AG, A. P. Moller - Maersk, PostNord, Scania, H&M, Volkswagen, Volvo Cars, Volvo Group.

- **Truck Transport Social Guidelines** - a set of standards improving the quality of working conditions throughout the supply chain.

Drive to Driver internal **Raben** program

- **Regional experts** staying in contact with drivers
- granted access to welfare facilities
- **myCarrier** - application for subcontractors cooperating with Raben Group
- **Trainings for drivers** - ADR, safety, security etc.

Respect for the driver's work

An aerial photograph of a vast vineyard with rows of green grapevines stretching across rolling hills. A winding road cuts through the vineyard, and a white Raben truck is parked on it. The Raben logo is visible on the side of the truck. In the top right corner, the Raben logo is displayed in a white box with red text.

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OUR ACTIONS

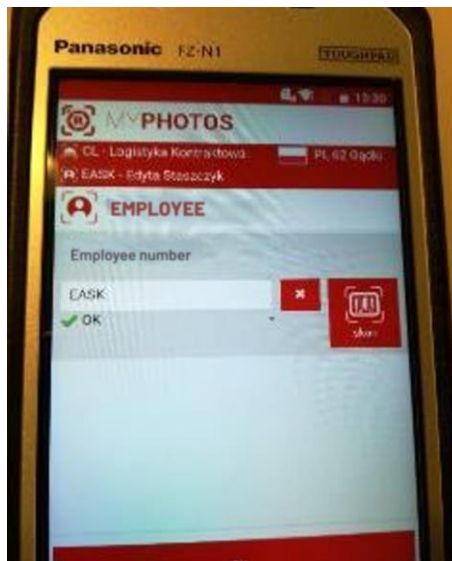
DIGITALIZATION AND AUTOMATION

NEW TECHNOLOGIES IN WAREHOUSE

INVESTMENTS IN OPERATIONAL SYSTEMS AND RPA

MODERN FLEET & DEVICES

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WE ADD VALUE THROUGH SUSTAINABLE SOLUTIONS

We have developed a Sustainability Strategy for 2021-2025, based on three pillars:



THE STRATEGY INCLUDES THE FOLLOWING GOALS:



30% REDUCTION IN CO₂ EMISSION INTENSITY

(Scope 1 and Scope 2) from offices and warehouses



10% REDUCTION IN CO₂ EMISSION INTENSITY

from transport activities



96% OF THE FLEET

with EURO5 and 6 or LNG/CNG/Electric/Hydrogen



34% FEMALE MANAGERS RATIO

To achieve these goals we are taking numerous steps, some of which are:



implementing green energy-based solutions



introducing electric trucks



finalizing the construction of the Group's first zero-emission warehouse in Oss, the Netherlands

THE IMPLEMENTATION OF THE ESG STRATEGY BRINGS ALSO FINANCIAL BENEFITS:

In 2021 we received a Sustainability Linked Loan (SLL) of €225 million, the margin of which depends precisely on meeting the conditions set by the five ESG KPIs.

WILL IT BE ENOUGH?

NO....

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...WE NEED AN OPEN DIALOGUE

BETWEEN ALL SUPPLY CHAIN PARTICIPANTS

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BUILDING RESPONSES

ON THE ROAD - EUROHUB SYSTEM



FAST AND EFFECTIVE ROAD TRANSPORTATION NETWORK ACROSS EUROPE

Now it's the time to connect those networks by **development of the strategically located Raben Eurohubs**. Six locations in Germany, Poland and Czechia



600+

Direct daily connections in Europe



131

Direct LH connections between Eurohubs



27

Countries connected directly



7,800,000

Capacity / pallets / year



40,000 m²

Cross-docking capacity

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