



# DSV India and the Group

2015

# Introduction

## Global supplier of transport and logistics services

### A strong global network

- Approximately 23,000 employees worldwide
- Own operations in more than 70 countries
- More than 400 branch offices, terminals and warehouse facilities
- International network of agents in countries where DSV is not present

### One company – three divisions

- Air & Sea – global network
- Road – complete road-freight network in Europe
- Solutions – contract logistics services

### A strong logistics partner

- Top 5 global freight forwarder
- Annual revenue 6.5 billion EUR
- Headquartered in Denmark and listed on Nasdaq OMX Copenhagen
- More information on DSV.com



■ DSV countries

## We offer our services in the following countries

Argentina	Estonia	Kazakhstan	Philippines	Thailand
Australia	Ethiopia	Korea	Poland	Togo
Austria	Finland	Kenya	Portugal	Turkey
Bangladesh	France	Latvia	Romania	Uganda
Belarus	Germany	Lithuania	Russia	Ukraine
Belgium	Ghana	Luxembourg	Serbia	United Arab Emirates
Bulgaria	Greece	Malaysia	Singapore	United Kingdom
Canada	Hong Kong	Mexico	Slovakia	USA
Chile	Hungary	Morocco	Slovenia	Vietnam
China	India	Netherlands	South Africa	Zambia
Croatia	Indonesia	New Zealand	Spain	
Czech Republic	Iraq	Nigeria	Sweden	
Denmark	Ireland	Norway	Switzerland	
D. R. of Congo	Italy	Pakistan	Taiwan	
Egypt	Japan	Peru	Tanzania	



# The Divisions – facts and figures



## DSV Air & Sea



- 7,000 employees
- Strong global network
- More than 830,000 TEUs of seafreight annually
- More than 280,000 tons of airfreight annually

## DSV Road



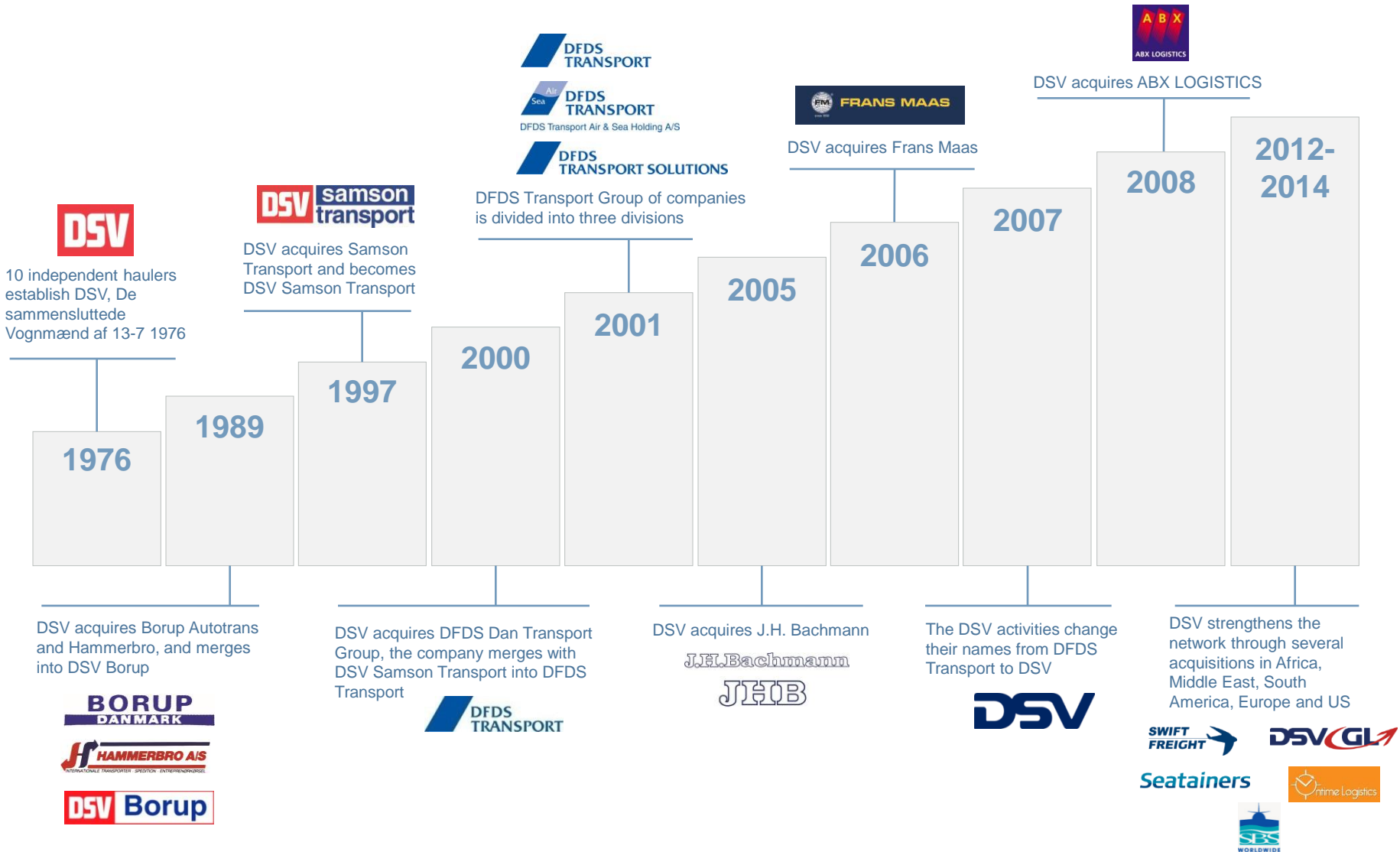
- 9,000 employees
- More than 200 road-freight terminals in Europe
- More than 17,000 trucks on the road every day
- Handles more than 20 million consignments annually

## DSV Solutions



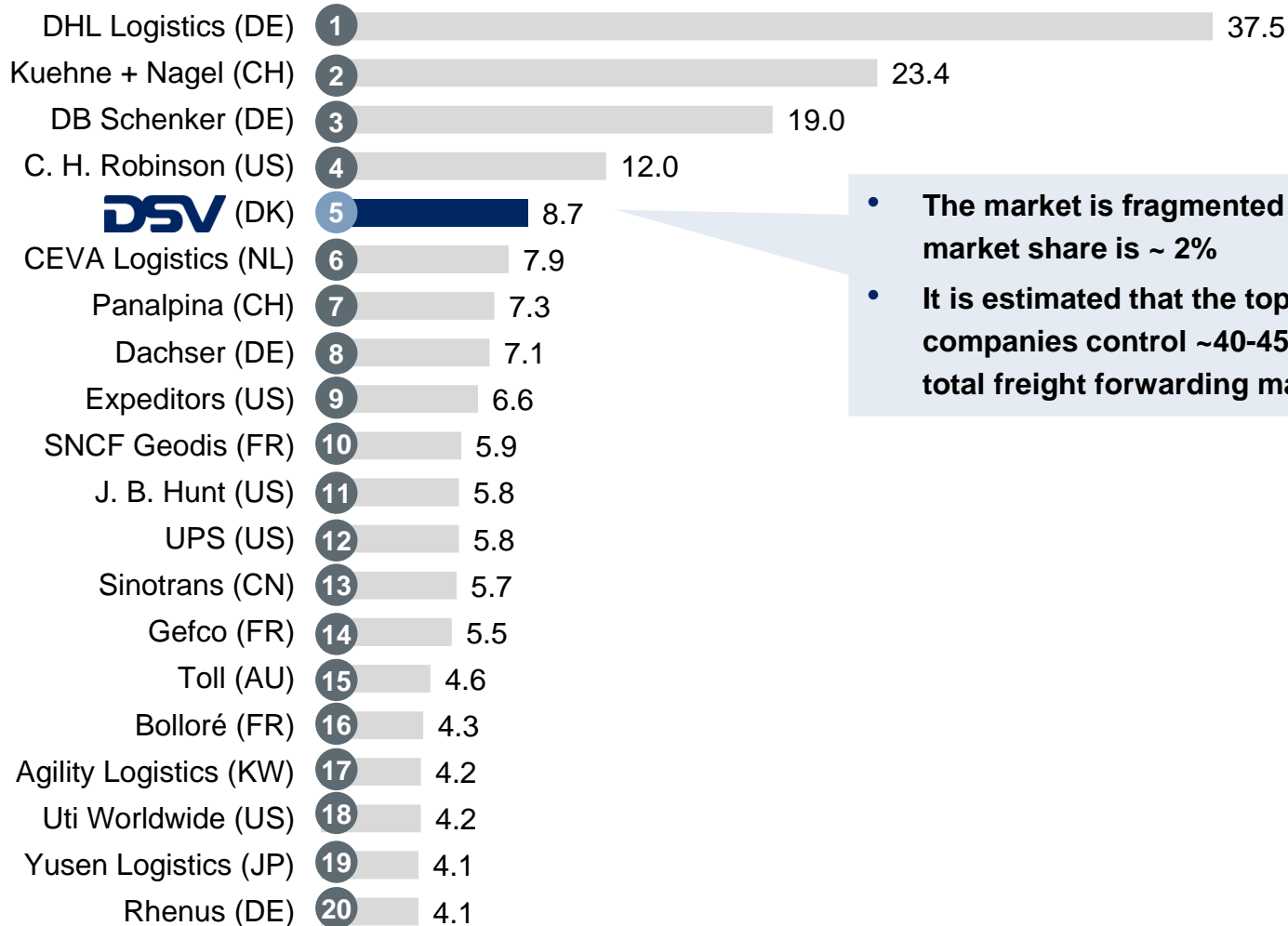
- 6,000 employees
- Warehousing and supply chain management
- Strong presence in Europe and global service offerings in cooperation with Road and Air & Sea
- 2,300,000 m2 of warehousing facilities

# Milestones – creation of a global network



# A fragmented industry

– global top 20 freight forwarders based on 2014 revenue (billion USD)

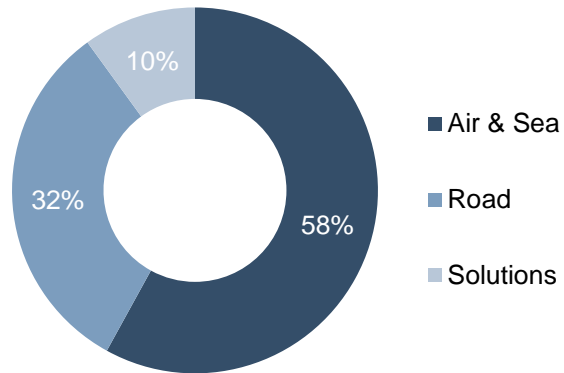


- The market is fragmented and DSV's market share is ~ 2%
- It is estimated that the top 20 companies control ~40-45% of the total freight forwarding market

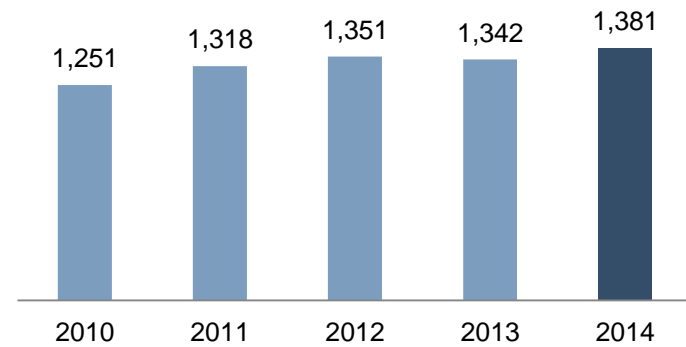
Source Journal of Commerce, 15 April 2015, Transport Intelligence

# Financial highlights

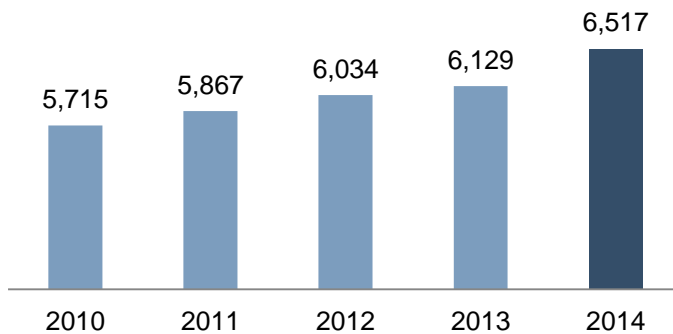
Operational profit by division (FY 2014)



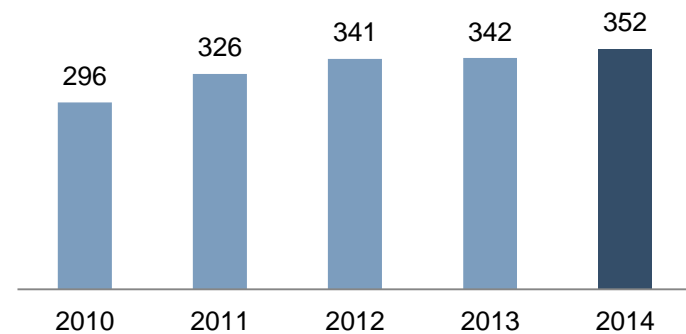
Gross profit in million EUR



Revenue in million EUR

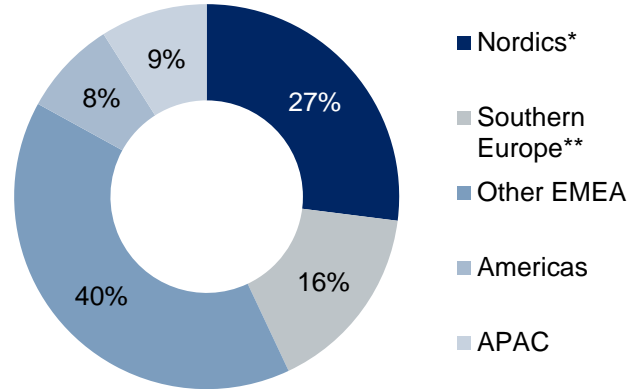


Operational profit in million EUR

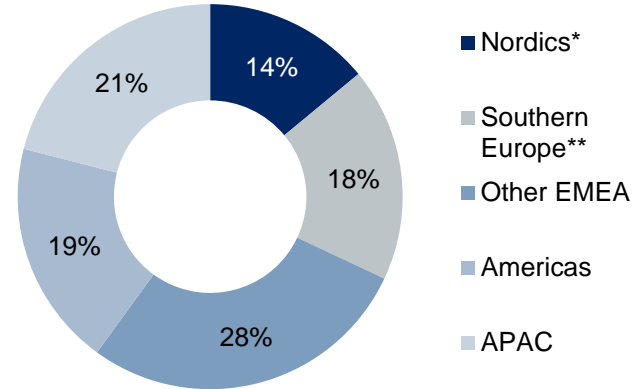


# Geographic Exposure by Revenue (2014)

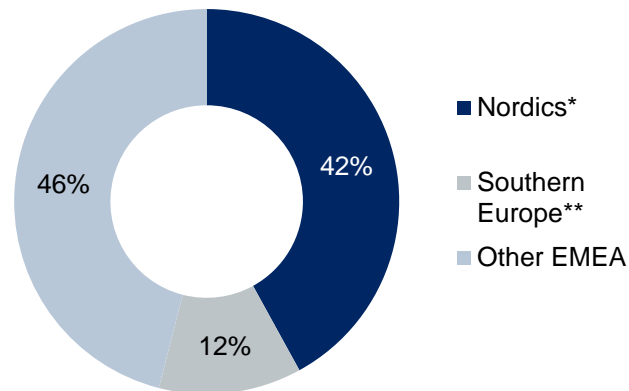
DSV A/S



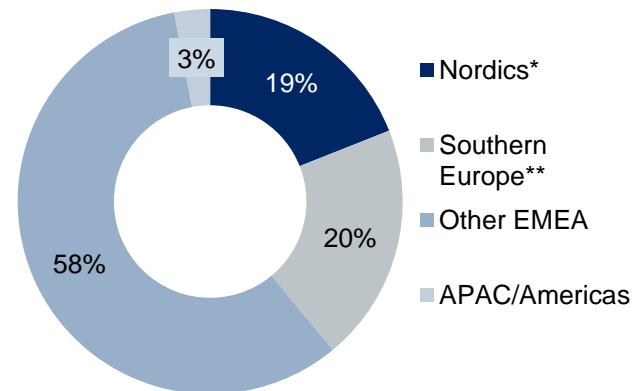
DSV Air & Sea



DSV Road



DSV Solutions



\*Nordics include: Denmark, Sweden, Norway and Finland

\*\* Southern Europe include: France, Spain, Portugal, Italy and Greece

# General DSV India facts and figures

Established in 2006

2014 Annual turnover

\$50 million

DSV India 2014 statistics

White collar employees: 230

## Offices:

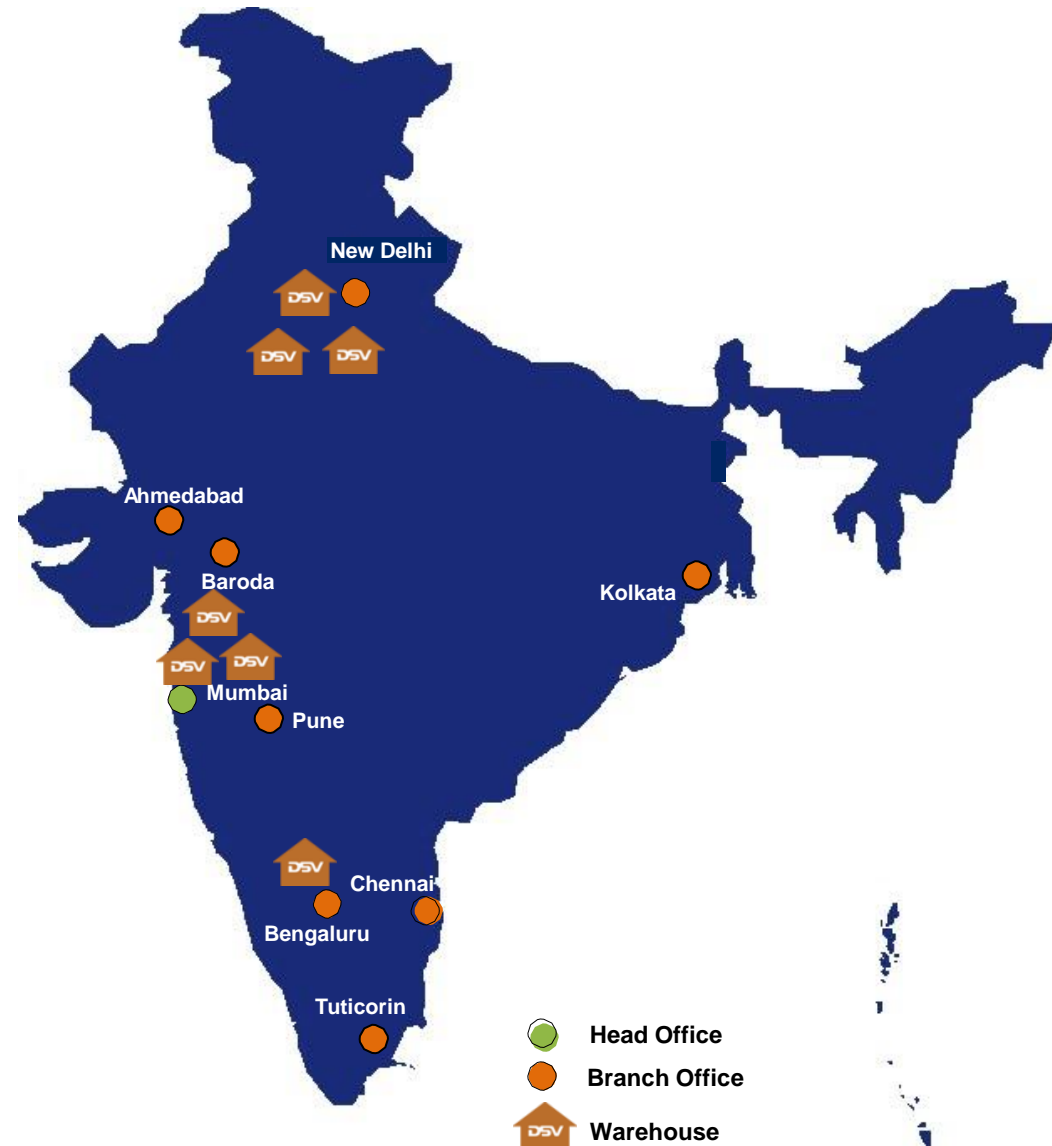
- Mumbai (HQ)
- Delhi
- Ahmedabad
- Baroda
- Pune
- Kolkata
- Bengaluru
- Chennai
- Tuticorin

## Own warehouses:

- BLR – 53,000 sq.ft.
- BOM – 14,500 sq.ft
- DEL – 10,000 sq.ft

## FTWZ:

- DEL - 1500 sqft. (60 pallets)
- BOM – 6250 sqft. (250 pallets)





# DSV air & sea services

## AIR FREIGHT

### 1. Fast and flexible air freight

- Daily departures to all major airports in the world
- Both fixed schedules and creative routing to suit any situation
- Consolidation at own facilities reduce handling and costs
- Full compliance with all transport standards and regulations

### 2. Special air freight services

- Full and part charter
- Express services
- On-board courier
- Hazardous air cargo

## Value added to your supply chain

- Transport consultations with our logistics experts finds most efficient routes and services to optimise your specific supply chain
- Comprehensive e-services enhance visibility and transparency of shipments with booking and tracking systems, EDI, e-billing, barcoding and reporting of KPI's
- DSV insurance at competitive rates. We insure with full cover from pick-up to delivery, even for shipments transported by other freight forwarders
- Pick-and-pack, storage, door-to-door and domestic distribution. With our sister organisations, DSV Road and DSV Solutions, we can improve your entire supply chain

## SEA FREIGHT

### 1. Efficient global sea freight

- Full container loads door-to-door or port-to-port
- Expert handling of special equipment such as dry, temperature-controlled, refrigerated, flat rack and open top containers
- Global network ensures space on the best routes at low cost

### 2. Special sea freight services

- Non-containerized loads / special equipment
- Break bulk cargo
- Buyer's consolidation cargo consolidates cargo from multiple suppliers
- Hanging garments



# DSV India - additional services

## BACK OFFICE

DSV Mumbai handles the processes quality functions For Bangladesh & Dubai.

- Impart training in CargoWise EDI.
- Trouble shooting technical snags related to software.
- Design and implementation of standard operating process vis-à-vis operational software (EDI).
- Constant endeavor in improvement of current procedures and process.
- Design KPI's and monitor the performance.

## CARGO INSURANCE

DSV has arranged a global open cargo policy that can provide insurance for our customers. The benefits of such will be lower overall premiums, better coverage and better service.

### Global Cargo Insurance Program benefits:

- Lower overall premium costs
- Better Insurance coverage
- Same or better service from the insurer
- Less referrals and higher limits than locally available

## CUSTOM CLEARANCE

### Export

All general export clearance i.e.:

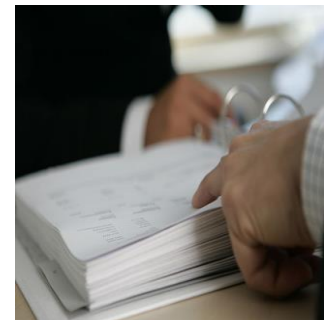
- Factory stuffing
- Factory stuffing using ICD permissions (if own license not available)
- Port loading - as preferred by most shippers.
- Either through own or CFS terminal
- Shipments from SEZ (Special Economic Zone)



### Import

All general import clearance i.e.:

- Commodity specific clearances
- HSS (High Seas Sales)
- In bond transfer
- Transfer, storage and Clearance from bonded warehouse
- Import fiscal agent representation

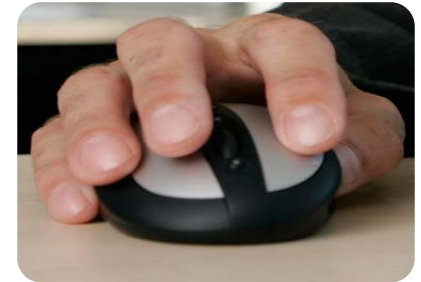


### In-house clearing agent.

All custom clearance stages closely monitored by DSV operations staff.

# DSV India contract logistics

Warehousing, distribution and integrated logistics solutions



## FTWZ

- Import distribution via FTWZ
- Inventory Management
  - Faster Customs Clearance
- Kitting & Packing,
  - Palletisation
  - Quality checks
- Other value added services
- Buyers consolidation for exports
  - Re-packing
  - Re-Export

## General Warehousing

- National & Regional DC
  - Inbound to Manufacturing Distribution Centers
- Block & High Rack Storage
- Customs Bonded Warehouses
- Excise Bonded Warehouses
- Returns Management
- Information Tracking

## Transportation

- Full Truck Loads
  - Part Loads
- Reefer Full Truck Loads
- Express Air Transport
  - Express Surface Transportation
- Transport Compliance Support
  - Track & Trace
- Transport Insurance

## IT Suite

- State of the Art Warehousing Management System, Multi Client-Depot configuration.
- EDI Integration
- Web based visibility
  - Work flow configuration
  - eDoc Storage
- Customer Specific Documentation.

# DSV IN Core tradelanes

Incase your focus is majorly on a specific tradelane, develop it further with the help of DSV IN core tradelanes

Italy



China



USA



Germany



Denmark



UK



Spain



France



Africa



Our tradelane specialists, guide you with the nuance of each country and advice tailor made solutions thereby ensuring seamless service between key international markets.



# Vision

“

*We want to be a leading global supplier, fulfilling the customer needs for transport and logistics services, targeting extensive growth and being among the most profitable in our industry. This way we are able to set the pace and direction of our own development while being an attractive business partner.*

”



# DSV's five strategic focus areas



# DSV Corporate Social Responsibility

DSV is aware of and acknowledges its social responsibility as one of the world's largest transport and logistics providers.

We find it natural to take good care of our employees and the environment and to ensure that our work is based on an ethical business model. That is the reason why we have joined United Nations Global Compact initiative.



**Global Compact is based on ten universally accepted principles relating to:**

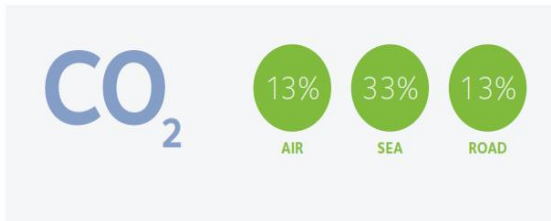
- Human Rights
- Labour Standards
- The Environment
- Anti-corruption

## We are on a journey

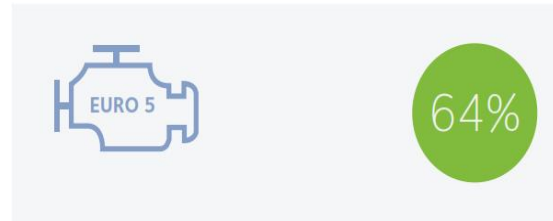


# Corporate Social Responsibility

- brief status on selected targets at the end of 2014



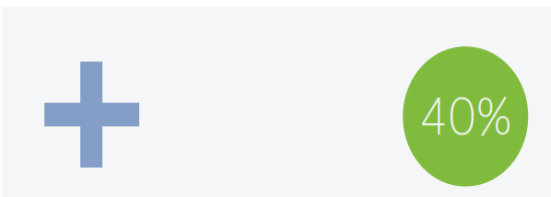
**Goal:** We need to improve energy efficiency by 15 % per transport mode from 2010-2015



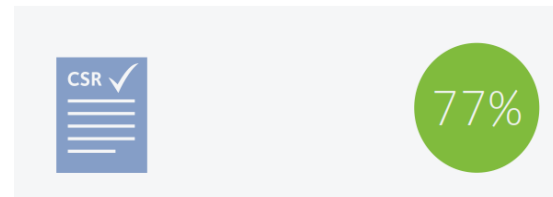
**Goal:** The Road Division (including its suppliers) must use Euro 5 engine vehicles or better for at least 60 % of all road transports by 2014



**Goal:** All employees at management level must have completed training in the DSV Code of Conduct by the end of 2014



**Goal:** The rate of occupational accidents must be reduced every year. From 2013 to 2014 frequency dropped by 40%



**Goal:** All suppliers of DSV must be encouraged to observe the Supplier Code of Conduct, and it must have been communicated to at least 75 % of all suppliers of the group by the end of 2014

**Prohibition against facilitation payments implemented**



We are determined to eliminate this behaviour which, unfortunately, is part of doing business in certain areas of the world



# Why is DSV the right partner?

## Flat Organizational Structure

- ✓ Proactive involvement of Senior Management
- ✓ Innovative and flexible people
- ✓ Global key account structure
- ✓ Single point of contact

## Strong Global Presence

- ✓ Solid financial background
- ✓ One-stop-shop model
- ✓ Independency of divisions

## Quality First Approach

- ✓ Long-term commitment focus
- ✓ Reliable partner

## Special Services

- ✓ Cargo Supervision
- ✓ Port and Road Surveys
- ✓ Logistics feasibility studies



# DSV strengths

## GLOBAL STRENGTHS

- Known in overseas destinations.
- Procedures as well as key contacts for import handling in place.
- Uniformed global handling procedures.
- Proved track record for performance and report.
- Global focus.

## INDIA STRENGTHS

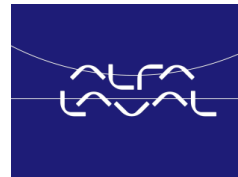
- Staff empowerment – front line decision taking.
- Flat organization direct management involvement and ownership.
- Prompt to change and implement new procedures.
- Innovative and proactive approach.

## NETWORK STRENGTHS

- Unified IT developments.
- Global advantage of newly developed procedures / SOP's.
- Consolidated deliveries at destination leading to:
  - 1) Reduced costs.
  - 2) Lower environmental impact.
  - 3) Less administration costs.



# DSV India Reference





# Thank you

For more details you can log into our website [www.dsv.com/in](http://www.dsv.com/in)