



# E-Commerce in LATAM

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Cargo Facts LATAM May 2023

An aerial night view of a DHL airport terminal and tarmac. The terminal building has a red and yellow facade. Several DHL-branded aircraft are parked on the tarmac, and several DHL trucks are visible in the foreground. The scene is illuminated by airport lights.

Connecting People, Improving Lives



# WHO WE ARE

DHL Express is the most international company in the world.

## Our offer

- International door to door service on a scheduled express network
- Pieces up to 30kg and shipments up to 300kg
- Full track and trace capability throughout the network.
- **We help facilitate world trade by enabling our customers to expand their business to and from any country.**

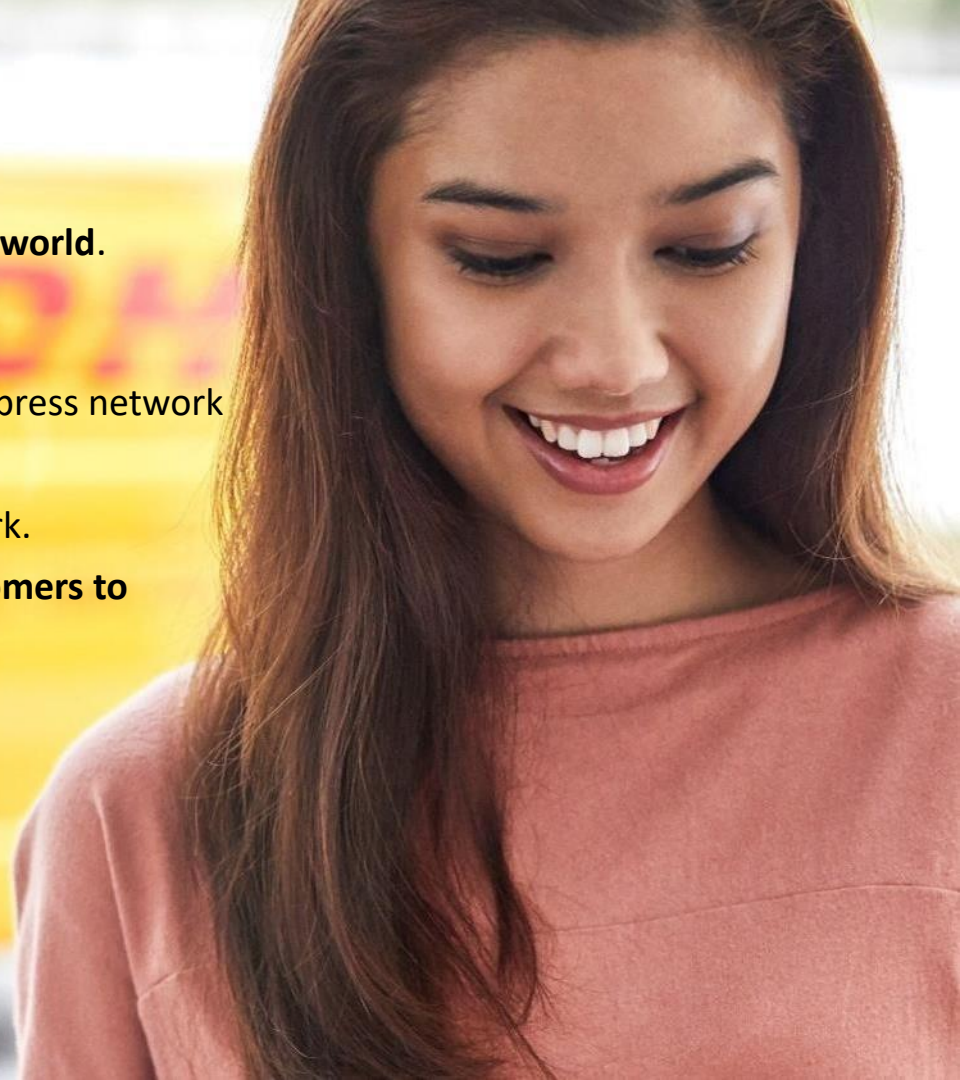
## Global trends defining logistics

Digitalization

E-commerce

Sustainability

Global Trade



# GLOBAL TRADE

*Trade is a force for good*

## Trade contributes to prosperity

- Higher trade openness has been associated with higher life expectancy, lower infant mortality, and lower prevalence of undernourishment\*

## Trade lifts people out of poverty

- Increases productivity, generates jobs

## Trade accelerates solutions

- International cooperation and collaboration on knowledge-sharing, technology transfers and developing unified standards is be critical



# OUR EXPRESS NETWORK

## DEDICATED AIR

- **500 airports worldwide**
- More than **300** dedicated aircraft globally, **65 in Americas**
- **3** global hubs, **19 regional**

**> 2,400**  
daily flights worldwide

**> 570** daily flights in  
Americas

## GROUND FOOTPRINT

- **Approx. 34,500** vehicles worldwide & **11,500 in Americas**

**> 3,500**  
facilities worldwide  
**1,300 in Americas**

## EMPLOYEES

- **Approx. 120,000** worldwide & **27,000 in the Americas**

**> 3M**  
customers worldwide  
**600,000 in Americas**

## SHIPMENTS 2022

**484M Shipments full year (296M TDI Shipments Full Year)**





Volatility: Our Reality

# ADAPTABILITY

*Being nimble is the key*

## World Scale Events

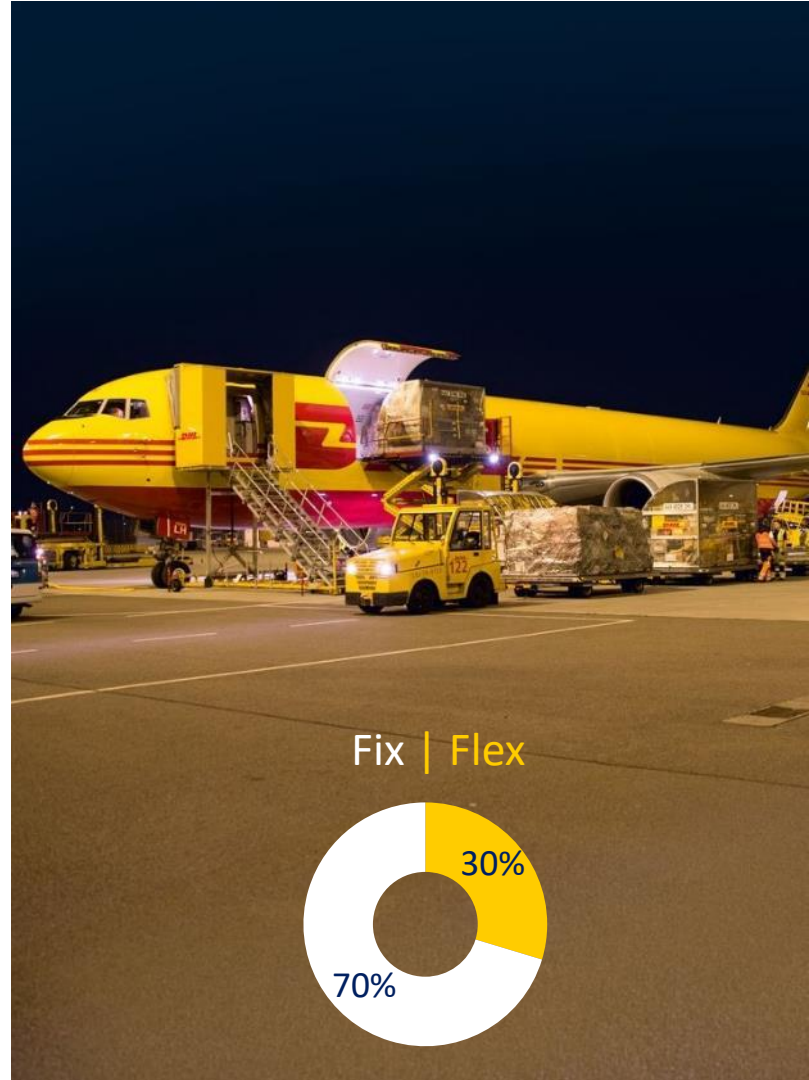
- China Closures
- Ukraine/Russia War
- Economic Recession

## Force Majeure

- COVID Pandemic
- Climate Events

## Market Shifts

- Generational Tendencies
- Customer Expectations



# ADAPTABILITY

*Being nimble is the key*

## B2B

- Tech
- Fashion
- Start-ups
- Auto

## B2C

- Diversification (B2B as well)
- Trade Flow stretched over distance
- Tariffs, Customs and Transit Time

## C2B & C2C

- Reverse Logistics
- Marketplace





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# TDI, ACS & CAL: A Balancing Act



## 3 OPTIONS TO BETTER SERVE

*Think Globally, Act Locally*

### Time Definite International

- Our core business and classic e-commerce
- Fast, adaptable and reliable

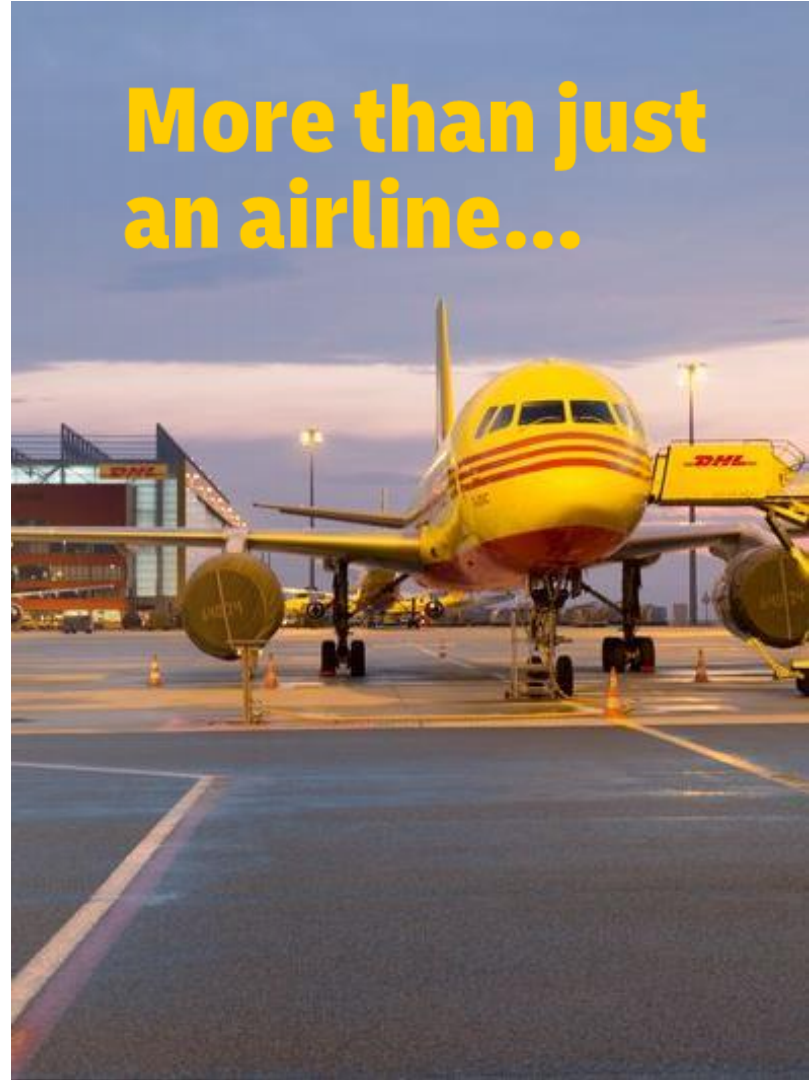
### Air Capacity Sales

- Indirect e-commerce through Freight Forwarder
- B2B growth due to higher sea transit costs

### Commercial Air Lift

- Brings in flexibility for peaks and seasonal ops
- Provides ideal environment for market exploration
- Promotes B2B relationships

More than just  
an airline...



# MIA HUB

## Transit time to LATAM

### Reduced Connection Times

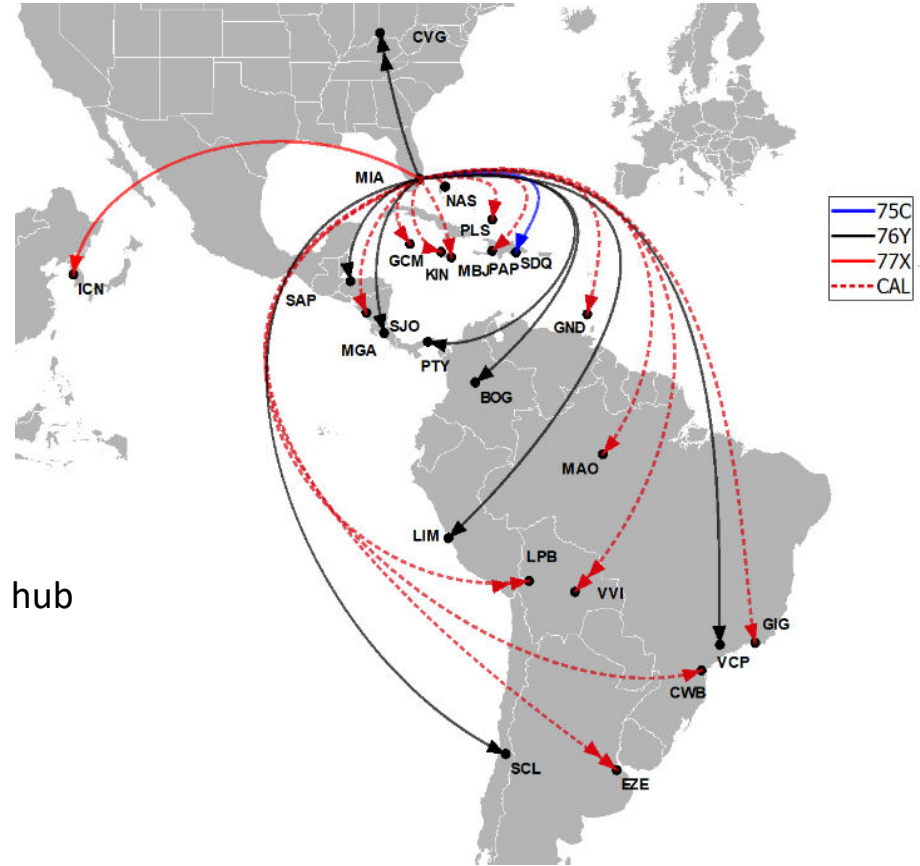
- E-commerce demanded faster deliveries
- More direct routes were created

### Increased Volumes

- Wide bodies are the trend
- Reverse Markets were stimulated
- Economies of scale were strengthened

### Connectivity

- Connected to DHL's Tier 1 CVG intercontinental hub
- Platform for new "Yellow Tail" flights



# PTY HUB

## *Intra LATAM Hub*

### Reach

- Adaptability to smaller markets
- Support for emerging businesses
- Intra region Hub & Spoke model

### Connectivity

- Panama Canal Free Trade Zone
- Ideal geographic location
- 3 days door to door max, across the Americas

### Stability

- Dollarized economy
- E-commerce Operating Model
- Laws designed to promote commerce





Asia-LATAM: C + 1 is not enough

## CHINA + 1 HAS EVOLVED

*World trade is +10% than pre-pandemic levels*

### Asia is more than China (>+3)

- India, Vietnam & Taiwan
- Asian countries considered western allies are getting attention

### Reverse Trends: Mexico is emerging (-1)

- “Near” and “Friend” shoring under way
- EU and US companies are expanding their ops
- Quality has improved to the next level

### ASIA LATAM TDI

- Double digit traffic YoY increase to CO, BR, PE & EC
- Mexico has doubled its numbers YoY

# NEW HORIZONS





**NOW**  
**MORE THAN EVER**

# REDUCING AVIATION-RELATED CO2 EMISSIONS IS A KEY PRIORITY ~90% OF GHG EMISSIONS COME FROM OUR AVIATION NETWORK

1

Air Fleet  
Renewal

2

Fuel  
Optimization  
Program

3

Sustainable  
Aviation Fuel

4

Decarbonize our  
ground handling

5

eCargo plane  
'Alice'





The background of the slide is a collage of three images related to a DHL facility. The top-left image shows an aerial view of a large airport terminal at night, with several DHL aircraft on the tarmac and a DHL truck in the foreground. The top-right image shows the interior of a DHL sorting facility, featuring a complex network of red conveyor belts and yellow sorting equipment. The bottom image is a close-up view of a long, straight conveyor belt with yellow sorting chutes on either side.

THANK YOU