

Media kit

October 2019



Company Background

This year marks the 175th anniversary of Hillebrand – a rare milestone for any company. All Hillebrand employees around the world have celebrated its anniversary locally, in 43 different events.

Founded in 1844 in Germany, the company is the global leading solutions provider in the forwarding, transport and logistics of beverages and other products that require special care.



The company has shown strength, flexibility, adaptability and resilience, growing from one small office and moving wine barrels on carts and barges, to the innovative global logistics network it is today. In 2019, it operates as a cohesive network generating revenue of €1.3bn with a team of 2,400 professionals, located in 90 countries, offering services and tailor-made solutions to help their customers' business grow.

The organisation was built on a vision to operate within every wine producing and consuming area around the world, with people who act locally and connect globally. Strategically locating offices close to market, it is also present in every country where beer and spirits are crafted and through this network every aspect of shipping is managed – from origin to destination. Hillebrand has achieved this through organic growth, mergers and acquisitions and its ability to adapt to the changing demands in both the logistics and beverage environment.



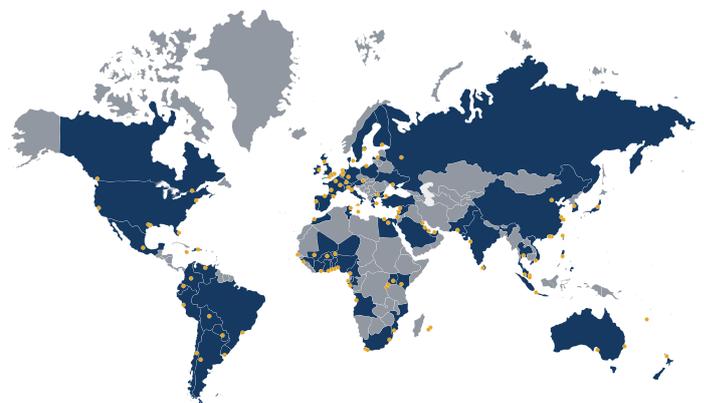
90
countries



2400
professionals



€1.3bn
turnover



Rebranding

To support the ambitious growth plans set out in its 2023 business plan the company has rebranded, bringing together its acquired companies, people and services under one core brand, Hillebrand.

Bringing together its services, people and skills will affirm the company as the undisputed global leading service provider in the forwarding, transport and logistics of beer, wine, spirits and bulk liquids and, adjacent to that, products that require special care in transport.



Rebranding to a single name, Hillebrand comes together with a refreshed brand identity and logo as a reflection of the company's core values; strength, leadership, expertise, empathy, human connection and care in every stage of the process.

The last value is represented by the brackets used to frame the logo, symbolising the two hands we use when we handle something important to us, with care.



The company's new strapline, 'Forwarding Passion', reflects its long-standing commitment to safeguarding the quality and value of its customer's products. It reflects the people, who are passionate about the products they manage, and the strategy with which the company seeks out growth.

Meanwhile, the forwarding of products is the founding purpose of the organisation, also indicating Hillebrand's forward thinking process to anticipate the future and its customers' needs.

**We don't transport goods,
we transport dreams.**



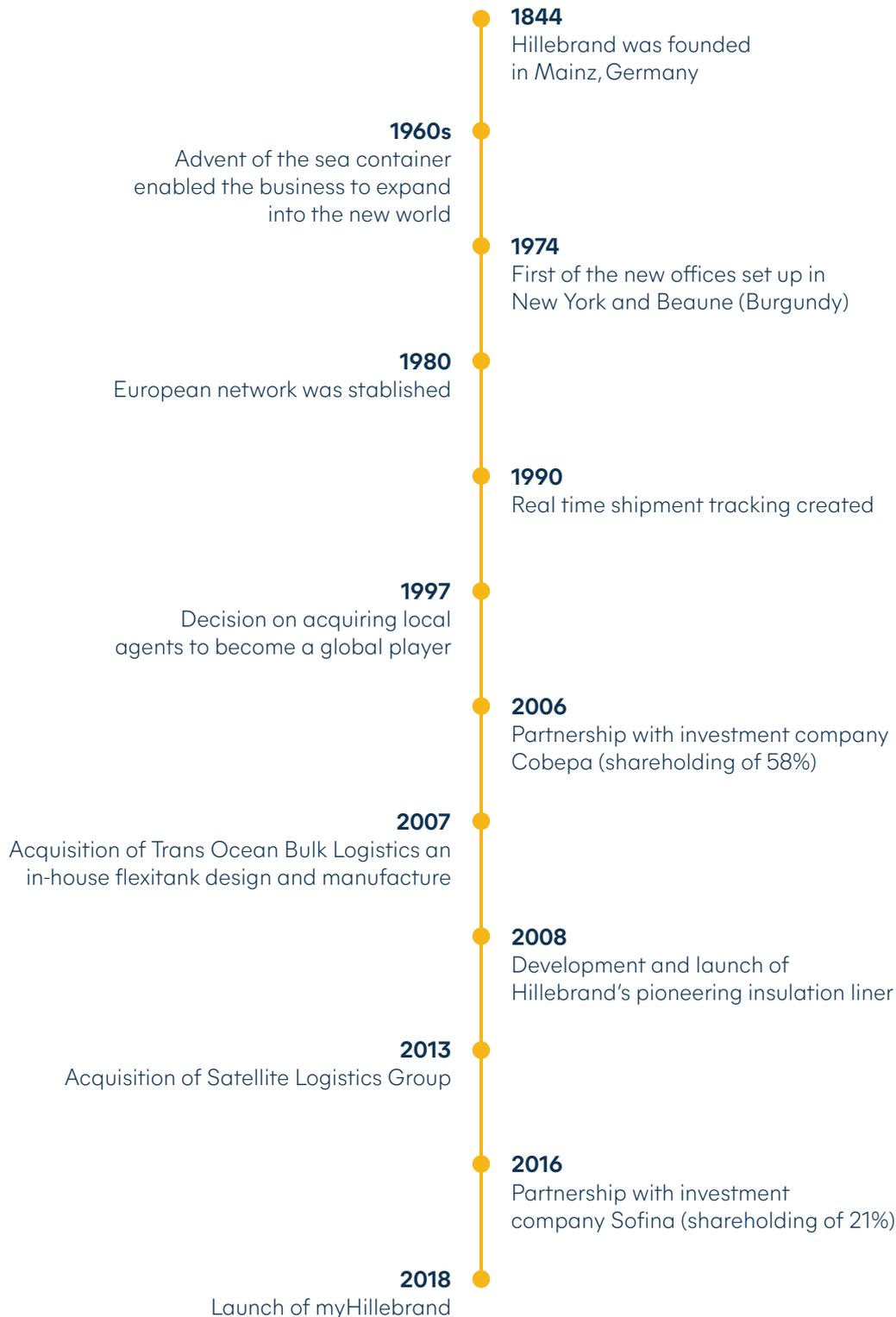
Acquired companies Trans Ocean and Satellite Logistics Group (SLG) will now also be recognized as Hillebrand. Their reputation and expertise in the areas of flexitank and bulk liquid solutions and keg supply chain management and reverse logistics, respectively, make Hillebrand a unique solutions partner for any company whose products require special care, cased or bulk.

The rebrand coincides with the company's 175th anniversary with both events providing a strong platform from which to continue implementing the growth strategy outlined in the 2023 business plan. CEO and Chairman of the Executive Board Cees van Gent has the company focused on the future with fast-paced development in the areas of customer experience, technological and digital innovation and expansion of its services for other commodities that require special care related to the customers it works with, such as malt or hops for brewers. Cees van Gent is also focused on enabling Hillebrand's teams to extend the business' footprint in emerging markets, such as Greater China, South East Asia and Africa, both organically and with a full program for growth through acquisitions.



Timeline

Since its inception, Hillebrand has consistently expanded its business, both through organic growth and acquisitions. Below is a brief history of key events in the company's lifetime:



Freight forwarding at the core

Since 1844, freight forwarding has been the foundation of the Hillebrand business. Focus on the wine trade enabled the company to grow within a sector that relies on attention to international regulation, local legislation and a unique requirement for product care.

Flexibility to global changes in consumption trends and production allowed the company to grow and establish itself as the go-to for international alcoholic beverage logistics. Over two centuries, Hillebrand has expanded its expertise by researching the risks to the products it ships and innovating to reduce them. This includes products like its patented insulation liners and meteorological thermal monitoring tools.

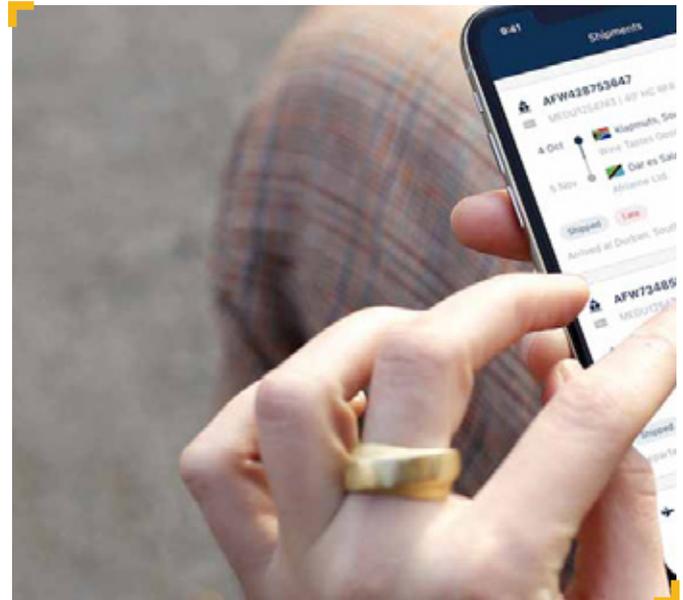
Hillebrand's customers are at the core of its business and their requirements have informed the company's research and development. The company goes much further than freight forwarding and transportation, having introduced services and solutions, including:

- Supply chain management to reduce inventory and lead times while increasing on-shelf availability.
- Its keg management programmes also help brewers to reduce their keg fleet and increase the rotation of the ones in use.
- Hillebrand's expansion into other commodities that require special care is now part of its service as its people have unrivalled expertise concerning their customers' needs and chain.
- Bulk liquid solutions to protect products quality and value during transport. In-house designed flexitanks to manage temperature control, sterilization for aseptic filling, agitation for high-density products, ventilation, industry-leading heating technology, among others.



Aided by an IT platform that allows customers to manage their shipments beyond track and trace, the Hillebrand is continually investing in improving the digital customer experience. The recent launch of myHillebrand incorporates carbon emission and other greenhouse data and temperature recording for specific points during a shipment's journey. It also offers visibility on quotes and inventory levels when customers warehouse with it.

The company uses all modes of transport – air, sea, road and rail – with its inland services recently bolstered by the acquisition of German transport operator 3W Logistik, enabling it to expand its intra-Europe groupage services and road freight. Hillebrand will continue with its growth plans, and offer expert advice of the most suitable option for each order, factoring in time, sensitivity and budget to its customers.



Overview of growth plans 2023

The next phase in the company's journey is inspired by its rich heritage and focusses on accelerated growth, enhancing customer experience and positioning it as the undisputed leader in logistics of goods that deserve special care.

Growth drivers:

- Expansion into other products, related to the beverage business or that require special care with similar needs to wine; temperature protection, careful handling, and prevention from oxidation and contamination, such as some olive and consumable oils, fruit juices and other food.
- Expansion of service offering to existing customers for other products they require, including the logistics of corks, bottles, malt and hops which also need to be transported with care and precision.
- Extension of presence in emerging markets to continue to growing its footprint.
- Reinforcement of inland transportation within USA and Europe. Hillebrand recently acquired 3W Logistik to strengthen the service between Germany and south Europe.
- Development of services: high value beverage transport, new routes to market, greener transport options, launch of new flexitanks in the market.
- Continue building a workplace that is fun, challenging and satisfying.
- Delivery of the best customer experience through a unique digital customer journey, and excellent quality of service.



Hillebrand fact file:

The surge in growth of the global alcoholic beverages market is driven predominantly by an increase in a global young-adult demographic, an increase in disposable income and an increased consumer demand for premium and super premium products¹.

- Hillebrand has 2,400 employees
- Hillebrand is present in 90 countries
- Connecting more than 25,000 companies
- Shipping over 600,000 TEUs
- Annual turnover of €1.3bn
- Manufacturing over 100,000 flexitanks a year

Facts and figures about the industry

The global alcoholic beverages market is driven predominantly by an increase in a global young-adult demographic, an increase in disposable income and an increased consumer demand for premium and super premium products².

Europe's food and drink industry means: 4.57 million people are employed throughout the EU which creates a turnover of €1.1 trillion and €230 billion in value added, which make it the largest manufacturing industry in the EU³.

· In half of the EU's 28 Member States, the food and drink industry is the biggest employer within manufacturing⁴.

· The global alcoholic beverage market was valued at USD 1,547 billion in 2018, and is expected to reach USD 1,784 billion by 2026, registering a CAGR of 2.1% during 2019–2026⁵.

· Europe accounts for largest share of the global alcoholic beverages market. It is expected to grow significantly with optimum CAGR⁶. (2)

· According to the Eurostat, more than 30% of people aged 15 years and over consume alcohol every week in Europe. Additionally, demand for alcohol consumption is higher in the U.K with 45% people drinking every week as compared to 41% in Ireland & Luxembourg and 40% in Germany & Denmark.

· According to the BREWERS ASSOCIATION, in North America the sales of craft beer, import beer, and export craft beer has grown by 5.0%, 3.2%, and 3.6% in 2017.

· In Asia Pacific demand for alcoholic beverages has increased by 1.2% in 2017 as compared to 2016.

· The British Soft Drinks Association reported a year on year growth of 0.2% in the consumption of fruit juice from 2017 – 2018⁷.

· Containerised ocean trade growth increased by 2.1% in 2019 Q1, however this denotes the lowest quarterly growth since 2016.

· Shorter legs trade, which includes Intra Americas; Middle East to Europe; and Europe to Africa, continue to grow steadily⁸ 65% of the total world capacity is controlled by the top five carriers – 82% by the top 10.

· NET capacity is not to grow over 2.5% to 3% for the years ahead with an order book accounting for 11% of the existing capacity.

· With fewer players, shipping lines are now able to adopt tighter capacity management and very reactively adapt supply to very volatile demand.

1 <https://www.psmarketresearch.com/press-release/alcoholic-drinks-market>

2 <https://www.psmarketresearch.com/press-release/alcoholic-drinks-market>

3 <https://www.fooddrinkurope.eu/publication/data-trends-of-the-european-food-and-drink-industry-2018/>

4 <https://www.fooddrinkurope.eu/publication/data-trends-of-the-european-food-and-drink-industry-2018/>

5 <https://straitresearch.com/report/alcoholic-beverages-market>

6 <https://straitresearch.com/report/alcoholic-beverages-market>

7 https://www.britissoftdrinks.com/write/MediaUploads/BSDA_Annual_Report_2019_final_version.pdf

8 State of the Industry report July 2019

Spokesperson

Cees van Gent

CEO and Chairman of the Executive Board

Cees is Chief Executive Officer and Chairman of the Executive Board. He joined Hillebrand in 2017 with significant experience across various multinational logistics and waste management companies. Previous roles include CEO at DHL Freight Germany GmbH, Group CEO at Lehnkering Logistics and Services GmbH and Group CEO at Van Gansewinkel Groep BV.



Cees van Gent, CEO



www.hillebrand.com