

The world of HOYER in figures

The HOYER Group is one of the global market leaders, with comprehensive logistics solutions to handle and transport liquid goods in the foodstuffs, gas, petroleum products and chemical industries. We link continents by road, rail and sea, and bring goods safely to their destinations in tank containers, road tankers and intermediate bulk containers (IBCs). With our extensive portfolio, we ensure smooth processes in on-site and off-site logistics worldwide, and employ look-ahead fleet management to optimise equipment use. As a digitalisation pioneer, HOYER already develops tomorrow’s solutions today.

Business Units

DEEP SEA

The overseas activities and global transports of liquid chemical products, gases and foodstuffs in tank containers, flexitanks and intermediate bulk containers (IBCs) are bundled in the Deep Sea business unit.

CHEMILOG

All European chemical transports in tank containers and road tankers are combined in the Chemilog business unit, which also offers additional logistics services off-site and on-site with its Supply Chain Solutions (SCS).

GASLOG

The European transport logistics business with industrial gases is located in the Gaslog business unit, specialising in transporting compressed as well as pressurised liquefied and cryogenic gases.

PETROLOG

In addition to supplying service stations across Europe, the Petrolog business unit distributes fuels to airports and refuels aircraft, delivers lubricants to the industry and performs bitumen transports.

NETLOG

Management of the entire tank container pool, its equipment and IBC logistics are the tasks of the Netlog business unit, along with services around cleaning, workshop and depot offered by cotac.

1,119

Turnover in million Euros 2020



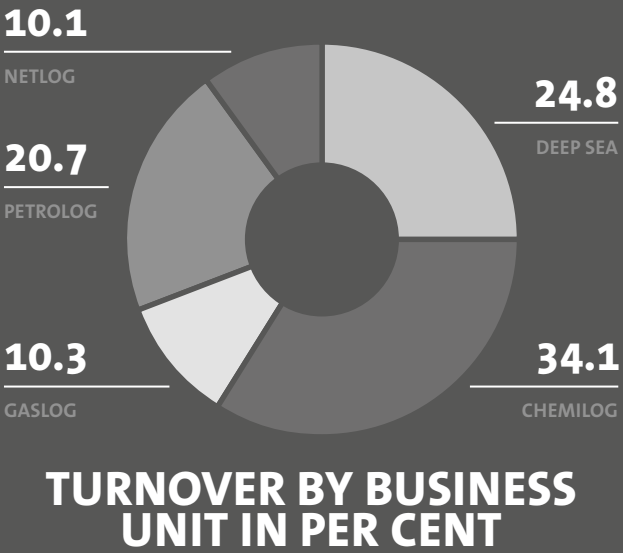
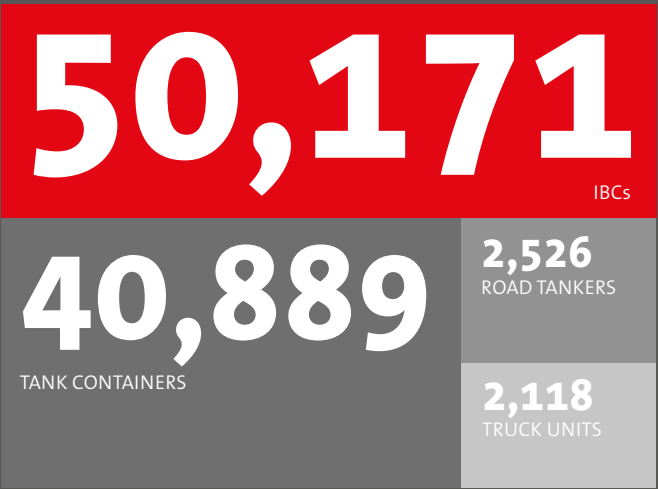
6,157
EMPLOYEES

2019

6,059

TURNOVER AND EARNINGS	2020	2019	2018	2017	2016
Turnover (TEUR)	1,118,685	1,177,346	1,166,869	1,202,927	1,188,534 *
Earnings before tax (EBT) (TEUR)	34,384	38,052	40,218	40,562	40,415
EBIT (TEUR)	39,195	43,423	45,387	46,682	46,741
EBITDA (TEUR)	108,196	107,266	106,675	110,156	104,443
INVESTMENTS AND FINANCING					
Investments in fixed assets (TEUR)	76,027	106,397	83,942	90,040	102,250
Cash flow from operating activities (TEUR)	92,513	82,807	78,492	75,239	65,310
CAPITAL					
Equity (TEUR)	386,861	380,729	355,360	331,487	321,837
Equity ratio (%)	44	44	44	41	42
Total assets (TEUR)	869,865	874,854	816,160	800,551	763,365
RETURNS					
Return on sales (pre-tax) (%)	3.1	3.2	3.4	3.4	3.4
Return on capital employed (ROCE) (%)	6.0	6.6	7.6	8.2	9.1

HOYER Group Equipment 2020



* Provisions of the German Accounting Directive Implementation Act (BilRUG) applied for the first time



Ladies and gentlemen,
friends of our company,

When my father founded our company more than 70 years ago and began transporting milk between Hamburg and Berlin, no-one could possibly foresee how much the logistics specialist's field of activity would enlarge. Today, HOYER inspires confidence not only with worldwide transport operations, but also with integrated services along the entire logistics chain: these include not only our provision of technical services in workshops, cleaning stations and depots, but also the management of fleets and optimisation of their capacity utilisation, versatile consultancy services and the development of projects and even of sites in the Supply Chain Solutions area. These "beyond transport" services – i.e. complementary services to our core business – enable our customers in the chemicals, petroleum products, gas and food-stuffs industries to devote themselves fully and completely to production, and to offer their own

customers an enhanced performance level. These services above and beyond the transport business form the focus of this Company Report.

2020 was the Covid-19 year. As a company with worldwide operations, the global pandemic confronted us with entirely new challenges. The biggest of these – in addition to the comprehensive protection of our workforce – was the ability to respond flexibly to volume fluctuations and to plan in the most forward-thinking way possible, even under difficult conditions such as border closures and testing. HOYER overcame these challenges masterfully, flexibly and in a solution-oriented way, and is performing very well despite the ongoing tense global situation: we managed sustainably in previous years, and our broad spectrum of services and sectors enabled us to satisfactorily balance out fluctuations and downturns in the flow of orders. Moreover, our solid financial situation allowed us to make strategic investments even in this crisis year, and to expand our global network and drive forward our successful digitalisation initiatives. Of one thing I am certain: HOYER will also be well-equipped for the future.

At this point, I should like to expressly thank Ortwin Nast, our former CEO, who guided the destiny of HOYER most positively for fourteen years. He left to begin his retirement, and handed over his office with effect on 1 February 2021 to Björn Schniederkötter, whom I hereby officially welcome once again. I also thank our employees worldwide for their willingness to accommodate changes and to show why HOYER is famous for its high standards of quality, safety and security. To you, to our customers and to all stakeholders, I send my heartfelt good wishes.

With warmest regards from Hamburg,

Thomas R. J. Hoyer

01

PEOPLE

04 | Family
05 | Advisory Board
06 | Executive Board

02

FINANCES

10 | Financial performance and earnings
13 | Business units

03

THINKING AHEAD IN LOGISTICS

20 | All-encompassing
22 | Always on the move
24 | In good hands
26 | More than just well networked

04

FULL SERVICE ALONG THE SUPPLY CHAIN

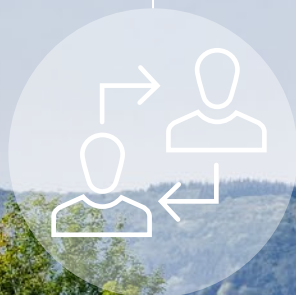
30 | Competence from top to bottom
32 | Integral on-site logistics
36 | Efficient provision
40 | Global presence

01

Leading the way to the future



HOYER is not only one of the leading logistics specialists in liquid goods handling and transport worldwide, but also a provider of comprehensive logistics solutions “beyond transport”. Employees throughout the world, with a high level of commitment, know-how and innovative spirit, constantly make further developments in our modular services portfolio – based on our quality standards deeply embedded in the company and a great awareness of responsibility when handling challenging products. A triad comprising the Executive Board, the Advisory Board and the family leads the way into the future for the logistics services of HOYER: by promoting innovative thinking, and by observing and assessing market changes and using them as a driving force. Clear corporate structures and processes ensure that even novel solutions conform to the high quality standards of HOYER.



left to right:
Annette Hoyer-Glasmacher,
Elisabeth Wetzer née Hoyer,
Martina Hoyer-Hertel,
Thomas R. J. Hoyer



ADVISORY BOARD

The consultancy body

The Advisory Board assists the company's management by acting as a counselling and control committee, reflecting corporate strategy, finance and investment planning and human resources policy. In addition, it makes decisions on development steps for which its approval is mandatory. Since 2020, the six-member Advisory Board has consisted of three external consultants, two representatives of the family's second generation and one representative of the third generation. The membership composition of the Advisory Board gives it profound experience in managing internationally positioned family businesses, and it regularly advises the Executive Board on opportunities and risks in the logistics sector and on long-term

future strategies. The control committee also acts as the think tank of the family business: it keeps an eye on market trends and provides forward-looking incentives in the areas of digitalisation and Industry 4.0. The family's third generation follows with particular interest the company's strategic considerations and portfolio development, which position HOYER in the market as one of the leading solutions providers in the specialised logistics of liquid goods in the future as well.

Through the Advisory Board, HOYER ensures a continuous comparison between internal corporate and external sector perspectives. This pooling of competence guarantees the company's solid, soundly-based development.

left to right:
Thomas R. J. Hoyer,
Johannes Glasmacher,
Martina Hoyer-Hertel,
Hans-Christian Sievers,
Hans-Georg Frey,
Michael Zieseimer

FAMILY

Deeply-rooted values

Walter Hoyer founded a transport company in Hamburg more than 70 years ago, and by transporting milk between the Hanseatic city and Berlin he began an impressive growth and success story. Since then, the HOYER Group has developed into a leading solutions provider in the specialised logistics of liquid goods and products – providing services far beyond classical transport.

More than 6,100 employees worldwide contribute to the success of HOYER. They all share the values that are enshrined in the company and are exemplified and communicated by the family: unconditional reliability, trust and a great awareness of responsibility. The Founder's claim to be

“always one step ahead” is still valid today. The family sets clear priorities in this respect: it promotes innovative thinking and future-oriented action, and stresses well thought-out, sustainable company growth, for which responsible treatment of the environment is a precondition. With participation by what is now the third generation, it accompanies and guides the company's business alignment – three family members are represented on the Advisory Board, which supports the non-family Executive Board in strategic decisions. The HOYER Group remains at heart a value-oriented family business, despite its internationality and size. Employees, customers and partners can depend on that.





left to right:
Björn Schniederkötter (CEO)
and Gerd Peters (CFO)

**“SUPPORTING SERVICES
AROUND THE GLOBAL
SUPPLY CHAIN ARE DECISIVE
FOR EFFICIENT, SAFE AND
SECURE LOGISTICS.”**

BJÖRN SCHNIEDERKÖTTER, CHIEF EXECUTIVE OFFICER OF THE HOYER GROUP

EXECUTIVE BOARD

Prudent guidance

The Executive Board is responsible for the sustained, long-term growth of HOYER. It has an obligation to the latter's basic ethical principles and traditional values, and when performing its functions it is strongly aware of the social responsibility of a growing company with global operations. Together with the Advisory Board, it defines the overall strategy of the HOYER Group, and carefully adapts it to market changes.

Ortwin Nast, Chief Executive Officer until then, handed over his office in early 2021 to Björn Schniederkötter, who now heads the company together with Gerd Peters, Chief Financial Officer. After fourteen very successful years, Ortwin Nast leaves a company with an exceptionally good market position. Despite all the problems due to the Covid-19 pandemic, the Executive Board together with management staff and all the employees succeeded in keeping the internationally operating company safely on course.

HOYER has successfully completed its transformation from a purely transport-oriented company to one of the leading suppliers of integrated logistics solutions along the supply chain. Through strategic further development and by implementing and expanding value-added services, i.e. logistics solutions “beyond transport”, the Executive Board continuously intensifies the link between the company, its customers and their needs. Value-added provisions include excellent consultancy services and project developments, together with the use of proven experts in on-site logistics as well as full-service packages in the application of equipment and its maintenance, repair and cleaning – all using safe, secure, specialised information technology. HOYER invested strategically in expanding its integrated logistics solutions in 2020 and expanded its global network – the Executive Board placed an additional focus on the business process digitalisation area.



02

Solidity in times of crisis

2020 was the first Coronavirus pandemic year. The HOYER Group responded to it and its impacts quickly and appropriately: the workforce's reaction to fluctuating market dynamics was skilful, flexible and solution-oriented – and it got to work enthusiastically for our customers to maintain supply and production flows. Thus all the HOYER employees acting together showed that customers' trust in the reliability and quality of our services is justified even in times of crisis. We stayed true to our corporate values and, thanks to sustainable management and our well-balanced spectrum of services, came most satisfactorily through a year that was difficult in many respects. Our solid financial circumstances also gave us security in the global crisis at the same time. Strategic investments were also made in 2020.



BUSINESS PERFORMANCE

Financial performance and earnings

HOYER closed the financial year 2020 with very satisfactory key financial figures in spite of the Covid-19 pandemic.

Economic prospects for 2020 were already subdued even before the impacts of the Covid-19 pandemic, which caused severe gross domestic product downturns in all major industrialised nations. Thus economic performance decreased by 4.9 per cent in Germany, and by up to 10 per cent in other EU member states and Great Britain. Gross domestic product in the USA shrank by 3.5 per cent. Alone among the big industrial nations, China achieved economic growth of 2.3 per cent in 2020. Temporary business closures together with curfews and contact restrictions paralysed economic and social life in large parts of the world. Manufacturing facilities halted their production for several weeks, or drastically scaled it back. Massive financial support programmes by governments and eased rules for short-time working models prevented an even more significant rise in unemployment figures.

The chemical industry, an industry segment that is important for the HOYER Group and with which the company earns more than half of its turnover, reduced production activities especially in Germany, France, Italy and Spain, as well as in the USA. Only Asia recorded production growth due to the rapid recovery of the Chinese economy from

the second quarter onwards. Considerable demand reductions also occurred in the petroleum products industry, especially in supplies to service stations – another HOYER Group business area with a high turnover volume.

Even though the intensity of this crisis triggered by the pandemic had a noticeable effect on the financial development of the HOYER Group, the company was able to close the fiscal year with very satisfactory key financial figures.

TURNOVER

The HOYER Group achieved turnover amounting to EUR 1,118.7 million in the 2020 fiscal year, a 5 per cent reduction compared to the previous year. HOYER recorded the biggest turnover losses in supplies to service stations due to greatly reduced commuter traffic in the lockdown phases, together with an altogether smaller demand for fuels resulting from fewer business trips. In the context of a tender, HOYER significantly expanded its volume for a major service station supplies customer in Great Britain, thus partly compensating for the reductions in turnover. Declining production in the chemical industry led to lower demand for transport services,

and correspondingly reduced turnover in the chemical logistics area. The pandemic also adversely affected turnover in the gas transport division, albeit not as seriously as in supplies to service stations. The HOYER Group achieved turnover growths through tank container leasing. Turnover increased in the technical services area as a result of acquiring a majority stake in a company that provides cleaning, workshop and depot services at four sites in Asia.

RETURN ON SALES

The return on sales of the HOYER Group in 2020 was 3.1 per cent (earnings before taxes / turnover). The company achieved a return on sales of 3.2 per cent in the previous year. Absolute earnings before taxes for the 2020 fiscal year were EUR 34.4 million (previous year: EUR 38.1 million). The lower result is attributable exclusively to the reduction in demand for transport due to the Covid-19 pandemic.

The earnings before taxes planned for 2020 was EUR 33.9 million, which was below the previous year's earnings because of anticipated subdued economic prospects. Thus the HOYER Group was able to slightly exceed the planned earnings in

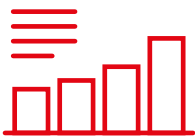
spite of the pandemic – and therefore a very satisfactory annual result.

The company group's profitability despite the time of crisis again shows that HOYER has a well-balanced business portfolio. Moreover, this result was made possible by very good crisis management in the business areas that were particularly affected.

The reduction in earnings before taxes compared to the previous year was recorded mainly in the Petrolog business unit, where it occurred in supplies to service stations and fuel supplies to airports and aircraft. As far as possible, capacities were adjusted to the lower demand volume in all the business units affected by the crisis, and extensive cost savings were achieved. Short-time working models were implemented quickly and on a temporary basis, mainly in Germany and Great Britain, and transport services were carried out primarily by our own personnel. HOYER reduced travel costs and other cost types, suspended the employment of new staff, and also achieved cost savings for the equipment used. HOYER did not allow any trade-offs in the quality of customer service, which stayed fully maintained at all times. It was also even possible to make a further increase in process efficiency. All these aspects contributed towards keeping the return on sales of the HOYER Group at a good level. We owe our particular thanks to all our employees, however, without whose great dedication and loyalty to the company this positive development would have been impossible.

INVESTMENTS, CASH FLOW AND FINANCING

The HOYER Group's investment budget for 2020 was EUR 146 million (previous year: EUR 106 million). The reasons for the increased investments in the planning for 2020 were essentially based on expenditures for purchased acquisitions of companies and to found joint ventures, together with



Return on sales, 3.1%, was almost at the previous year's level (3.2%).

1,119
MIO. EURO TURNOVER



EUR 34.4 million
earnings were achieved by the HOYER Group before taxes in 2020.



70% OF THE **TANK CONTAINER FLEET** IS NOW EQUIPPED WITH MODERN **TELEMATICS SYSTEMS** FOR DIGITAL FLEET MANAGEMENT AND SAFE, SECURE TRANSPORTS.

76

million EUR was invested by the HOYER Group in fixed assets in 2020.

the first rather large tranche of expenditures for a new administration building at the HOYER corporate headquarters site in Hamburg. As an immediate response to the outbreak of the Covid-19 pandemic, steps were taken to secure the company group's liquidity. The most crucial step in this respect was a significant reduction in investment spending for fixed assets in 2020 to EUR 76 million. This does not include the expenditures for the purchased acquisition of a company (technical infrastructure services in Asia). Investment expenditures by the HOYER Group remain at a very high level, considerably above depreciations.

Investments were mainly in fixed assets, chiefly in investments to replace and expand transport equipment (tank containers, road tankers and IBCs).

Investments to upgrade the tank container fleet to fulfil special customers' and transport requirements were continued. These include special coatings and heating systems. Fitting tank containers with modern telematics systems was also continued in 2020. 70 per cent of the tank container fleet is now equipped for digital fleet management and safer, more secure transport. In the Petrolog business unit, investment in road tankers was strengthened in the context of enlarged volumes of business with existing customers, and in equipment for new businesses. In the Chemilog business unit, as well as invest-

ments in transport equipment, there was also investment in logistics sites in the "Supply Chain Solutions" growth segment.

The operative cash flow of the HOYER Group was EUR 92.5 million (previous year: EUR 82.8 million).

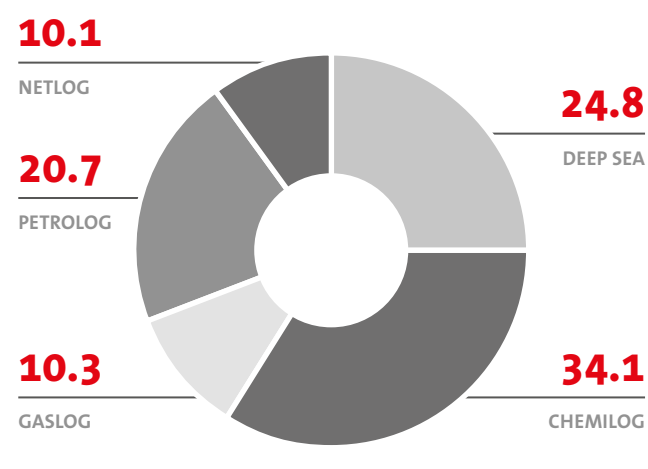
The key "debt ratio" figure (net indebtedness / EBITDA) increased slightly to a value of 2.3 (previous year: 2.2). The equity ratio rose to 44.5 per cent (previous year: 43.5 per cent).

OUTLOOK

After the large negative impact of the Covid-19 pandemic on the global economy in the second quarter of 2020, there was strong economic recovery in the third and fourth quarters of the year. The renewed lockdown in many countries from November 2020 onwards moderated expectations of a continued dynamic economic recovery in 2021. Availability of vaccines against the Covid-19 virus strengthens confidence that the upturn will continue in 2021. The sustained expansive monetary and fiscal policy in Europe promotes the upward trend. However, gross domestic product will not yet reach the pre-crisis level in 2021. Strong growths are expected in the Chinese economy in 2021. China was the only large national economy that achieved economic growth in 2020 despite the pandemic. Strongly exporting countries such as Germany will profit from this growth trend. A few economic risks remain alongside the ongoing development of the pandemic. They include, for example, the as yet unsolved trade disputes, principally between China and USA, political conflicts of interest and negative economic effects due to Brexit.

Based on these expectations regarding the economic trend in 2021, the HOYER Group assumes that it will be possible to increase turnover slightly compared to the previous year, mainly in the chemical transports area. At the same time, planned increases in intercontinental transports, a business billed mainly in US Dollars, are partly balanced by the US Dollar, which is weaker than in the previous year. No significant turnover increase is expected in the service station supply area. If no more prolonged "lockdowns" occur in 2021, HOYER assumes it will be able to achieve a satisfactory return on sales again in 2021.

Turnover by business unit in per cent



DEEP SEA

Globally on the move

Turnover of the overseas operations of the Deep Sea business unit, reported in Euro, decreased by 3.6 per cent in 2020 compared to the previous year. This downturn is due to exchange rate effects: the intercontinental transport business bills in US Dollars, which lost value against the Euro in 2020. When adjusted for this currency effect, turnover was slightly (-1.6 per cent) below the previous year's level. In spite of the difficult global environment, Deep Sea was able to increase the number of transports carried out by more than 5 per cent compared to the previous year. There is continuing high pressure on prices and margins for this business as a result of worldwide tank container overcapacity. The business unit was particularly challenged by the turbulent development in container shipping in the second half of 2020. The rapid economic recovery – in China in the second quarter and in other countries from the third quarter onwards – led to a significant freight space shortfall on container ships, and an associated extreme rise in freight rates for particular overseas connections.

Deep Sea was able to hold earnings before taxes at the previous year's level despite these strong influencing factors. A significant contribution to this was made by systematically centralised network management, which enabled well-balanced transport flows, significantly improved capacity utilisation of our own tank container fleet, and thus increased efficiency and lowered repositioning costs.

Within the HOYER Group, Deep Sea achieved above-average returns on sales, although further potential for improved results still remains. The management of Deep Sea has announced additional process and structure improvements to exploit this potential. HOYER considers the overseas business to have a promising future and is investing in the business area, including in the tank containers and special equipment that are being used. As equipping tank containers with smart technology progresses, product quality, safety and security over long distances will also increase further in future.



GASLOG

Focus on special gases

The Gaslog business unit's portfolio comprises transport logistics business with industrial, chemical and special gases in European Union countries. It includes transporting compressed gases and gases liquefied under pressure and cryogenically. The turnover of this business unit decreased by 9.0 per cent compared to the previous year, mainly due to the Covid-19 pandemic. Moreover, intentional turnover reductions occurred through a volume reduction with loss-making contracts. However, it was possible to make up for part of the turnover deficits through an increased demand for special gas transports. The pandemic resulted in an intensification of the transport business with oxygen and dry ice. This transport area was able to grow significantly.

The profitability trend of Gaslog was very pleasing. Earnings before taxes rose considerably in 2020 compared to the previous year in spite of lower turnover, and it was possible to improve the return on sales by one percentage point. We were

able to make a further reduction in operating losses in our Polish subsidiary. Cost savings and high efficiency in business processes also contributed significantly to this increase in the results. However, further profit improvements are necessary. A significant step in this direction will be the attainment of the profit threshold in Poland planned for 2021.

Attractive future business prospects exist for Gaslog. The increasing importance of liquefied natural gas (LNG) and hydrogen in the context of climate protection initiatives, and the logistics challenges associated with them, could play a very important role. HOYER is very familiar with the particular requirements entailed by this dangerous goods logistics, and can provide comprehensive logistics solutions for this business. Gaslog is already using trucks operated with the alternative LNG fuel in order to gather experience. The truck fleet fitted with LNG engines is to be expanded further in 2021.



CHEMILOG

A reliable provider

By digitalising our logistics processes and providing digitalised information, we offer a significant contribution to our customers' supply chain optimisation.

The Chemilog business unit comprises the European chemicals logistics business including the Supply Chain Solutions (SCS) area, which supplements the business unit's portfolio with added-value services. Turnover decreased by 5.2 per cent in 2020 compared to the previous year, due to the pandemic-related lower demand from the chemical industry for transport services. Production shut-downs and short-time working by customers reduced the volume of orders, especially in European road transport logistics, but also in the intermodal business. Chemical industry production operations that depended on the automobile industry were particularly affected.

Other product areas such as disinfectants recorded growing demand, although this only compensated to a limited extent for the declining trend in orders.

SCS's turnovers and result developed positively compared to the previous year. Declining turnover due to the termination of a loss-making contract was balanced by larger turnovers with

new operations. These include a dangerous goods tank container terminal and our new logistics centre in Dormagen, Germany, in which HOYER offers contract logistics services tailored to specific customer requirements. Overall, Chemilog achieved a very satisfactory result before taxes despite reduced turnover. Through strict cost management, fast responses to the reduced volume of activity and efficient business processes, the return on sales remained approximately at the previous year's level.

The business unit's return on sales is below the average of the HOYER Group. Business development measures and projects and process improvements will increase it. HOYER records a growing demand for integral logistics services along our customers' supply chains. As a high-performance partner for value-added services, we can significantly contribute to optimising our customers' supply chains by digitalising our logistics processes and through the provision of digitalised information.

PETROLOG

Agile management

The Petrolog business unit's business comprises essentially supplies to service stations for customers in the petroleum products industry, supplying fuels to airports, aircraft refuelling and bitumen transport operations.

The bulk of the business unit's turnover is achieved in Great Britain, Germany and Norway. In these countries, considerable reductions in the demand for fuels occurred during the "lockdown" periods in 2020 as a result of the drastically reduced volume of road traffic. For a time, turnover in the second quarter in Great Britain declined by more than 40 per cent, and in Germany by more than 30 per cent. The business area recorded correspondingly high losses in that quarter. The business recorded reductions in turnover of more than 90 per cent for fuel supplies to airports and for aircraft refuelling. However, this business field makes up only a relatively small proportion of Petrolog's total business. It was possible to limit the decline in turnover compared to the previous year by 13.5 per cent thanks to an expansion in business with an existing UK customer.

The rising volume of business, stringent cost management and very high process efficiency led to Petrolog being

able to report positive results in 2020 – despite more lockdowns in European countries towards the year end.

The business unit closed the fiscal year with a profit, although this was below the previous year and less than the plan for 2020 as a result of the large downturn in demand. The ending of a loss-making situation in our Norwegian organisation contributed to stabilising the result. The bitumen business in Germany, which is still loss-making, continued the successful restructuring course in 2020 with a clear improvement in the result.

The reliability of our logistics services in such a challenging, dynamic crisis year was recognised and appreciated by our customers.

Petrolog countered the general decline in the service station supply business, caused by efficient vehicle engines and the growing number of electric and hybrid vehicles, by establishing new business fields and increasing market shares in the service station supply and bitumen business in the existing core markets. The available know-how, excellent operating processes and the opportunity to offer a full range of "end to end" logistics services, strengthen this business unit's market position and competitiveness.



NETLOG

An expanding network of technical services

The Netlog business unit comprises the three business fields of tank container leasing, IBC logistics and technical services in the cleaning, workshop and depot areas via the cotac subsidiaries. Responsibility for integrated Group-wide management of the tank container fleet and the provision of tank containers to the business areas has been pooled by the HOYER Group in the Netlog business unit.

Netlog increased turnover by 21.4 per cent compared to the previous year. The essential reason for this growth in turnover was the acquisition of a majority stake in a company that offers cleaning, workshop and depot services at four sites in China and south-east Asia. This acquisition in the strategic growth segment of technical infrastructure services improves the availability of these services to the overseas activities of the Deep Sea business unit in the region. Thus the acquisition is an important step for the HOYER Group's profitable international growth. Technical service operations in Europe were able to increase turnover slightly despite the pandemic. Above all, the chemical tank container leas-

ing business recorded significantly increasing turnovers. Turnovers in IBC logistics and the business of leasing gas tank containers for CO₂ transports declined slightly as a result of the pandemic.

The Netlog business unit was able to increase its absolute earnings before taxes compared to the previous year, mainly in the area of technical services in Germany and Belgium. Netlog thereby performed very well in the 2020 crisis year.

Large investments in modernising and equipping the tank container fleet with innovative tank container technology were also continued in 2020. The complete equipping of the HOYER tank container fleet with "smart" technology will be completed in 2021. With the innovative technologies that will then be comprehensively available, HOYER will meet the highest standards and will create the preconditions for even greater transparency and an even higher level of safety and security for tank container transports, together with improvements in capacity utilisation and thereby in efficiency.

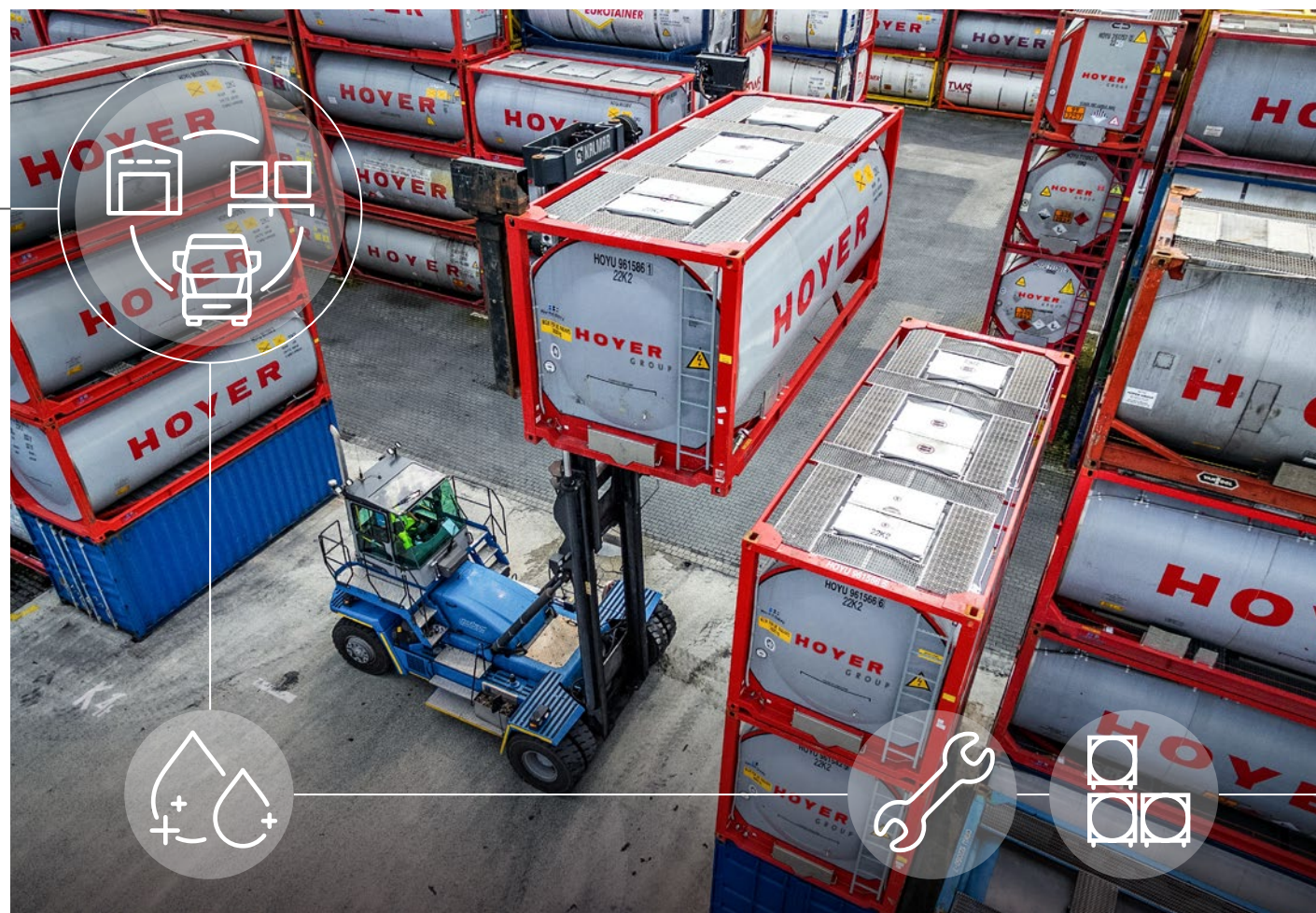


Acquiring a majority shareholding in a company with four sites in China and south-east Asia contributed significantly to enabling Netlog to increase its turnover by 22 per cent.



03 Thinking ahead in logistics

Bringing liquid goods to their destination safely, reliably and worldwide by road, rail and sea – HOYER is famous for it. Getting tank container logistics moving correctly, however, needs more than transport. The services portfolio of the HOYER Group has developed further along the entire deployment of equipment. Our customers profit from comprehensive services, e.g. servicing, maintaining, repairing and cleaning of tank containers and IBCs, or digitally assisted fleet management. Our special strength are our employees, who use their expertise to advise all customers, to find the best solution for every need or to develop it for them individually. Our aim to be already working on tomorrow's solutions today also applies to our digitalisation initiatives: intelligent logistics services from HOYER allow customers to concentrate fully on their core business.



TECHNICAL SERVICES

All-encompassing

HOYER consolidates its position as a leading full-service logistics provider with strong engineering competence and a worldwide network of workshops, cleaning facilities and depots.

For a long time, HOYER has been more than “only” a transporter of liquid goods. The company, with its origin in Hamburg, is now among the biggest independent providers of comprehensive technical services in the tank container logistics area. With an expanding network of workshops, cleaning facilities and depots, HOYER offers full service to its worldwide customers. The strong engineering competence and innovative spirit of its employees are decisively important in this respect. They regularly develop innovations that strengthen the worldwide leading position of HOYER, especially in the tank container technology area.

INNOVATIVE MATERIAL AND DESIGN CONCEPTS

For example, under contract to a major chemicals customer, our engineers pooled their specialist knowledge and, in two years of work, developed a new generation of titanium tank containers for highly corrosive dangerous goods. These are among a series of advanced designs that enable the transport of dangerous goods, or even make it safer, in parallel with rubberised or coated stainless steel containers. Two units of the latest generation were brought into operation recently. Their special features: the attachment of the steel frame to the titanium vessel – an absolute novelty – and a

TECHNICAL SUPPORT

We also undertake maintenance and repair management in other areas of logistics. For example, as a supplement to the inventory management of fuels in storage tanks at airports, we also look after the technical installations. In our Supply Chain Services for the chemical industry, maintenance management of the operating facilities handed over to us is an integral part of the range of services we offer on the customers’ own operational areas.

cleverly devised heating system with approval for use in highly sensitive explosion hazard areas. Like all our most recent container innovations, these titanium tank containers are equipped with smart technologies linked to the Smart Portal: for even more monitoring during transport, and additional product security, economic efficiency and sustainability.

EQUIPMENT TO MATCH EVERY CUSTOMER’S NEED

But materials compatibility is not the only aspect to which we give top priority; our engineers and chemists also develop innovative equipment regarding tank container weight – always with an eye to product-specific standards and customers’ requirements. For example, our composite tank made of plastic is so lightweight that up to 2,000 kg more product, e.g. dispersions or plasticiser, can be loaded for each transport; an enormous ecological and economic advantage. Qualitatively faultless products are also guaranteed by our ISO reefer tanks, which are used for the overseas transport of foodstuffs, among other things. They score points with a newly-developed cooling system and state-of-the-art control technology – and are fitted with integrated agitators when needed. The most diverse requirements are also covered by the provision of containers designed specifically for gas transport including payload-optimised swap-body tank containers, for example, that are often used as an alternative to air gas road tankers, or tailor-made 30-foot T50 tank containers with product-specific pumping systems.

COMPACT ALL-ROUNDERS

Last but not least, with our fleet of more than 50,000 intermediate bulk containers (IBCs), we offer customers in the chemicals, foodstuffs and cosmetics industries an ideal alternative means of transport for volumes up to 1,100 litres. The containers, which are available in various grades of stainless steel, designs and sizes, are used for both transport and storage. As one of the leading IBC suppliers worldwide, we have developed electrically heatable containers, thus setting a sector standard. The IBC fleet also includes special equip-

ment such as mini-pressure tanks. We also follow our reputation as a digitalisation pioneer in the IBC business, and are currently working on a comprehensive concept, namely to make the stainless steel all-rounder smart, thus further developing our services to a hitherto unprecedented level.

COMPREHENSIVE CONTAINER SERVICES FOR AN OPTIMUM TANK CYCLE

However, strong engineering competence in the tank container technology area is only one of the many advantages of HOYER. Ultimately, our aims include not only offering state-of-the-art equipment but also ensuring an optimum tank usage cycle through our comprehensive “beyond transport” container service. Our customers can profit from our independent, worldwide service network, including workshops, cleaning facilities and depots. The latter played a key role in 2020: transport operations would have been considerably limited without forward-looking capacity utilisation and maintenance management despite the numerous restrictions due to the Covid-19 pandemic.

Apropos comprehensive: it goes without saying that our technical services also include safety solutions using the latest hardware and software, e.g. forward-facing cameras and onboard technologies in trucks, digital solutions such as software-assisted servicing plans and much more. In short: HOYER has its eye on all the technical services that help us and our customers to protect the product, the environment and people in the best possible way, to use resources effectively and to keep the entire logistics process transparent and lean.

OUR CONTAINER SERVICES

WORKSHOPS

Our workshops perform repairs and maintenance on tank containers, IBCs and road tankers. We also carry out modifications. Trained employees work on container insulation, frames and coatings, as well as installing or re-installing heating and cooling systems. We also supply safety and periodic inspections from a single provider.

CLEANING

Specialists in our cleaning facilities take care of the interior cleaning of tank containers, road tankers and IBCs. This includes removing residues from the chemical, petrochemical, pharmaceutical, gas and foodstuffs industries. For foodstuff container cleaning, our plants are approved for kosher cleaning. Handover is completed by proof of cleaning from SQAS-certified cleaning facilities.

DEPOTS

The adjacent depots store empty containers before or after cleaning, repair or maintenance. Dangerous goods storage and heating or cooling is also possible at some sites. With our own locations and partners, we have a tightly-meshed service network, thereby guaranteeing the equipment’s safety, quality and faultless technology.

FLEET MANAGEMENT AND OPTIMISATION

Always on the move

Through the innovative use of new technology and digitally-assisted services to yield more efficient tank container fleet capacity utilisation and optimised operational planning.

35,000

GPS positions and 1,300 truck reports per hour are exchanged between the drivers, trucks and HOYER Vista.

Managing and optimising fleets is one of the key competences of HOYER, and it is one by which we emphatically prove our leading position in the specialist liquid goods logistics sector again and again worldwide every day. Transporting challenging chemical products, foodstuffs, gases or petroleum products by road, rail and sea in Europe and the world would be impossible without intelligent fleet management. This is where it all comes down to efficiency and the best possible utilisation of equipment capacity, while taking account of complex factors and customers' requirements.

STRONG FLEET, POWERFUL SERVICE

Regarding the HOYER fleet, this equipment comprises around 41,000 tank containers and more than 50,000 intermediate bulk containers (IBCs), which are used primarily in international and overseas traffic. It also includes more than 2,500 road tankers and approx. 2,100 trucks, mainly for road and intermodal transport in Europe. This fleet, and our representative offices in more than 115 countries, enable us to carry out smooth transport operations worldwide, taking country-specific standards into account. Our

centrally controlled internal network helps us to constantly optimise transport movements at the same time, and to analyse the best routing. Empty repositioning and prolonged downtimes are avoided, fleet sizes optimised, fuel and costs saved, the environment protected and drivers' work made easier. This is how we support active resource conservation.

GREATER EFFICIENCY IN EUROPEAN ROAD AND INTERMODAL TRANSPORT

HOYER took a big step forward in carrying out chemical and gas transport operations in European intermodal transport by developing the HOYER Vista transport management system. Around 800 employees work using this software at all the sites worldwide today. From the offer and dispatching to billing the transport services, all the associated data is stored in Vista (the digital provision of billing data has been the rule since paperless workflow was introduced). Dispatchers plan the routes on this basis. The telematics data from our Smart Trucks and Smart Tanks are also integrated into Vista.

INTELLIGENT NETWORKING FOR OPTIMUM CAPACITY UTILISATION – WORLDWIDE

Smart Truck and Smart Tank are among the central initiatives of the HOYER Group in the Smart Logistics area, which have changed the fleet management of international and overseas transport operations at an impressive speed: sensor-based, digitally networked service offers not only allow the clear optimisation of fleet capacity utilisation, but will also attain a hitherto unachieved level of safety and quality for the entire logistics process in the future. The information pooled and presented

WELL THOUGHT OUT

Our optimising work does not end with planning the deployment of our fleets. In petroleum products logistics, for example, we constantly review the ratio between the capacity of underground storage tanks and product throughput. Based on our analysis we recommend tank swaps that increase delivery size and reduce the number of transports required.

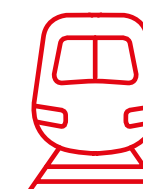


in our Smart Portal are a central feature in this respect: they can be linked to the customer's own transport management system, for example, and allow highly efficient fleet management through evaluation of the key figures that are collected. Weak points in the logistics chain are identified and use of the container fleet is optimised. Incidentally, around 70 per cent of our tank containers had been upgraded to Smart Tanks by the end of 2020. The figure will be 100 per cent in 2021.

RELIABLE SUPPLY

Our petroleum products logistics also illustrates the importance of high quality fleet management in improving the quality of a logistics service. HOYER is among the market leaders in European supplies to service stations, where it excels in

using the latest technologies and optimised processes with which we control the logistics service "end to end". Thanks to our expansive operational network, we maintain a constant overview of demands for our products and predict the most efficient and optimised time to despatch transports. For Scandinavian customers, we recently set up a new dedicated Operations Control Centre that undertakes the full logistics process, from stock management, order generation, physical execution and product reconciliation. Our customers in argon gas logistics also depend on reliable supplies. The loading points situation also fluctuates dynamically due to differing production capacities. In this case, our intermodal teams support the supply chain by flexibly re-routing the tank container fleet.



As a rule, intermodal rail transport is cheaper than road transport from approx. 400 km onwards – and is more environmentally friendly.



CONSULTANCY AND PROJECT DEVELOPMENT

In good hands

A broad spectrum of expertise and long years of experience in transporting and handling liquid goods make HOYER a well-versed logistics consultant. We support the logistics processes of the chemical industry, among others, with our services along the supply chain.

Rail, sea or road – sustainability, time and costs. The correct combination is what makes the right transport.

Every successful logistics process starts with soundly-based logistics advice. That is why HOYER devotes sufficient time to its customers' issues; enquiries are always individually dealt with and answered. Regardless of the complexity of our customers' tasks and needs or the country in which they are situated: our specialists are available for in-depth consultancy on all questions relating to logistics. We know the importance of an eye for detail when it comes to finding the best possible solution.

FROM CONTAINER CONSULTANCY ...

In this respect, our consultancy services are as varied as the logistics projects themselves. We and our expertise are available to help customers when choosing the right container: that includes the equipment features and the suitability of various tank containers and smaller intermediate bulk containers (IBCs), together with their technical and product-specific advantages.

In addition to standardised tank containers, we also have a wide spectrum of special equip-

ment and specialised accessories available. Together with leading tank container manufacturers, our team of engineers and chemists – so-called "Commercial Chemists" – develops novel tank containers exactly tailored to the needs of our customers' products. Here, we can fall back on decades of experience with coatings and tank container materials, and offer in-depth foodstuffs and dangerous goods consultancy. Our special bonus: with HOYER, customers profit from quality and safety standards that even partly exceed statutory regulations.

... AND ADVICE ABOUT DIGITAL SERVICES ...

We also find an increased demand for consultancy in the Smart Logistics area, which is still quite young. As a digitalised logistics pioneer, HOYER has set new sector standards and gathered valuable knowledge by developing the Smart Tank, Smart Truck and Smart Portal. Therefore, we can advise our customers comprehensively about all the aspects and advantages of digitalisation and new digital services in the transport and leasing areas, and can offer or further develop smart logistics solutions specifically tailored to their requirements. We occupy a top position in the entire sector through the combination of our many years of technical expertise and specialist competence with digital services.

... TO SUPPORT WHEN SETTING UP NEW PRODUCTION SITES

Well thought-out strategies, lean processes, successful projects and satisfied customers: to achieve these aims, we use the combined know-how of our employees – from consultancy and planning to implementation. Consultancy projects vary in project duration and scope, of course, depending on the target that is set. However, our eye for detail and specific industry requirements always remains the same – and we also use it to support our chemical industry customers when setting up new production sites and planning plants. In close coordination, we plan and design all activities, worldwide, including the associated customer's assets, processes and individual solutions. In this respect, we can fall back on a global logistics infrastructure and the knowledge gained from many successfully implemented projects.

CUSTOMISED PROJECT DEVELOPMENT

As well as consultancy regarding the transport of liquid goods and equipment leasing, one of our main focuses is on developing and implementing the tailor-made logistics solutions that we devise

14

to 16 days a railway train is on the move between Europe and China.

FROM PRACTICAL EXPERIENCE

For many customers, our ability to advise them about the opportunities of alternative transport routes and the advantages of intermodal transport is a powerful unique selling point. We always take economic and sustainability aspects equally into account in our calculations, and advise our customers transparently and comprehensively in a spirit of partnership before the transport occurs. Our network solutions are likewise greatly appreciated – e.g. in helium logistics. We offer our customers efficient logistics solutions through a holistic consideration of the supply chain and in conjunction with an intelligent customs duty payment strategy.

INTEGRATED LOGISTICS SOLUTIONS

There is no standard solution for every logistics challenge. Our service aspiration is to develop tailor-made, integrated logistics solutions along the entire supply chain that are in tune with the times and allow our customers to respond quickly, safely and efficiently to market demands and changes. We make an exact stocktaking to understand our customers' requirements and needs. The results of the analysis then act as input to the concept design and planning. The aim: to develop and implement a perfectly attuned logistics concept.

HYDROGEN: A TOPIC OF THE FUTURE

The subject of fuel cell technology and hydrogen is gathering speed. HOYER is regarded as one of the market leaders in this segment, with more than 100 trained drivers for hydrogen transport, the appropriate transport equipment and excellent technical expertise in the gases area.



in close cooperation with our customers. Throughout the whole duration of the project, they are supported by a project team which develops a comprehensive understanding of the logistics infrastructure together with the company's strategic orientation and specific requirements. This is how we succeed in offering a service that provides our customers with significant competitive advantages for their business.

SMART LOGISTICS

More than just well networked

HOYER is a pioneer in the area of intelligently networked logistics solutions and modular services. Customers profit from innovative services with a hitherto unequalled level of safety, security and quality.

HOYER accepted the challenges of the digital transformation, and has developed from a purely transport and handling expert to become a provider of innovative, digitally networked logistics solutions and modular services “beyond transport”. We now occupy a leading position in this function throughout the sector.

SENSOR DATA AS RAW MATERIAL FOR NEW LOGISTICS SOLUTIONS

Sensor technology installed on the tank container – the Smart Tank – and the data captured by the sensors are key elements of the digital transformation. HOYER derives starting points to optimise transport safety and efficiency from their analysis and intelligent combination. The sensors continuously measure important parameters such as pressure, temperature and filling level, and display these almost in real time on a

dedicated online portal – the Smart Portal. The processed information in adapted form can also be provided via interfaces to the customer’s own IT systems. In teamwork with information and warning systems, this allows optimum monitoring of the load. For example, a single glance shows where a Smart Tank is currently located and whether there is any need for action, e.g. because the product’s temperature is increasing. HOYER is currently working intensively on finding models to develop a predictive alarm system based on analyses of the temperature and product behaviour.

HOYER also uses Smart Truck to track and trace the transport of chemical products in road traffic: equipped with the very latest technologies, it undertakes the capture, assessment and provision of location, status and ETA (estimated arrival time) data – and serves as a communications instrument between the dispatch department and drivers. Smart Truck enables all the stages of order execution to be digitally registered and reported. Thus maximum transparency is achieved through the opportunity for direct control and data can be processed immediately. Order progressing in paper format becomes a thing of the past.

MORE TRANSPARENT, MORE EFFICIENT, BETTER

The advantages for customers are obvious, first and foremost: guaranteeing consistent product quality during the entire logistics process, resulting in greater safety for drivers, freight and the environment. New potentials in fleet management are also released through intelligently networked logistics solutions: assessment of the key figures that are collected enables effective fleet capacity utilisation, the identification of weak points in the logistics chain, more efficient use of the equipment and the avoidance of empty repositioning – which not only conserves the environment and resources but also saves time and costs.

HOT AND COLD

Alongside the CLT20Ex, the HCT is another small technology miracle: this “Heating and Cooling Terminal” (HCT) is in use on approximately 700 electrically heated or cooled tank containers, and offers two-way communication: today, the temperature of tanks equipped with HCT is already remotely controlled via the Smart Portal. If the Portal reports a temperature deviation from the setpoint, it can be readjusted via a portal setting. The heating check information that is communicated, and the operating hours accumulated, enable a smooth maintenance cycle. This increases the safety and quality of the product and transport.



CERTIFIED SECURITY

The HOYER Group's information security management system was certified in accordance with ISO/IEC 27001 in 2020.

Networked logistics services have great potential, which is still far from being exhausted. HOYER is therefore equipping its entire tank container fleet, one by one, as Smart Tanks – the upgrade project being carried out in the context of the company’s digitalisation offensive will be completed in 2021. HOYER is thereby further consolidating its pioneering role in the market, and is decisively shaping the future of networked logistics.

FAR-SIGHTED USE OF STATE-OF-THE-ART TECHNOLOGY

Technical developments in the digitally networked logistics area do not stand still, of course. HOYER consciously focuses on high-quality, powerfully-performing technologies. One example from the sensor technology field is the CLT20Ex. This “Communication and Location Terminal” not only records the tank container’s location and temperature, but also captures its movement and stationary state – factors that play a role in the subject area of product and driver safety, for example, or theft. The solar-powered battery is rechargeable using the sun’s energy, and lasts for up to ten years. Information security is a weighty argument for the new generation of sensors: the CLT20Ex processes data in compliance with ISO 27001,

and satisfies the highest ATEX IIC industry standard. This makes it the “Best in Class”, and in future it will be part of our tank container fleet’s standard equipment.

THE FUTURE OF SMART LOGISTICS

HOYER also took many steps to drive forward the Smart Logistics area in 2020. These included systematically implementing our digital strategy by harmonising our IT systems and data landscape, and also by collaborations with business partners with whom we are working on novel digital solutions. Our Smart Tank and Smart Truck programs underwent further forward-looking development through the implementation of new functions such as digital transport status updates.

“THE ENTIRE
HOYER FLEET WILL
BE EQUIPPED AS
SMART TANKS BY THE
END OF 2021.”

MARLEN BLECHSCHMIDT,
HEAD OF DIGITAL SOLUTION TANK EQUIPMENT

04

Full service along the supply chain

HOYER keeps pace with chemical production plants through “Supply Chain Solutions” (SCS). The spectrum of modular services offered by this business line is enormous: HOYER undertakes project development for site planning and implementing building projects for plants upstream and downstream of production. Our analyses and advisory services regarding optimised production processes significantly improve the quality and efficiency of existing sites. Our SCS services also include inventory management of drums and palletted goods in storage, and the operation of dangerous goods terminals and dangerous goods warehouses. Always on site: our reliable specialist personnel, who undertake the filling and correctly formulated blending of liquid products. HOYER experts are also there to help customers in relation to safety: they examine and optimise site processes and equipment. On-site and off-site, our supply chain services get to work wherever customers need us – and do so all over the world.



SITE DEVELOPMENT

Competence from top to bottom



HOYER undertakes logistics activities for chemical industry customers worldwide, and also employs its extensive skills to develop new sites for individual users and multi-user plants.

HOYER undertakes not only the planning and design of storage facilities. We also examine and optimise the safety and security concepts of existing sites, and create entirely new ones in the context of site developments.

In recent years, HOYER expanded its product range by adding services beyond simply the transport business: tailor-made services for the chemical industry, in outstanding quality and with the highest safety standards, on- and off-site. We make our extensive portfolio of services in the Supply Chain Solutions area available wherever there is a requirement for logistics solutions “beyond transport”.

ALL FROM A SINGLE SOURCE

As a full-service provider, HOYER thinks holistically and knows its customers’ process structures from A to Z: from production through filling, packing, transshipment and transport, and all the way to unloading. Decades of experience, in-depth expertise and a strong innovative spirit make us the ideal partner to optimise logistics structures for production at a customer’s own sites – and put us in a position to redesign it from top to bottom, to

implement its construction and operate it with professional expert personnel. True to the motto: “All from a single source”.

FROM ANALYSIS TO SITE DEVELOPMENT

A site development in Dormagen, Germany, is among the most important in recent years: in the Chempark there, HOYER implemented a logistics centre in which all the processes from production to transport are ideally coordinated with each other. At 38,000 m², the new logistics centre is one of the biggest and most complex supply chain projects that HOYER has taken care of from the very start. After a construction phase lasting around two years, the plants were brought into operation step by step in the summer of 2020. The building project’s design was preceded by extensive analyses of the needs of several customers who use the site, and of their supply chain processes. Using specially developed warehouse stor-

“THE LOGISTICS CENTRE IN DORMAGEN IS BUILT AND STRUCTURED ACCORDING TO **DIFFERENTIATED CUSTOMERS’ REQUIREMENTS.**”

ULRICH GRÄTZ, GLOBAL DIRECTOR SUPPLY CHAIN SOLUTIONS (SCS)

age software, around 30 employees in five operating facilities now ensure smooth procedures along the supply chain of the chemical industries resident on the site.

In one of the five sub-units making up the logistics centre, HOYER designed and built two filling plants where employees fill dispersions into drums and bulk packs. In another area there is a warehouse hall with storage bays ready for 10,000 metal boxes – filled with synthetic rubber. HOYER transports these from a customer’s plant in the chemicals park to the warehouse, where our workforce takes care of putting the boxes into and out of storage, preparing them for dispatch and loading them onto trucks for transport.

Another example of smooth processes is our work in the packaging materials warehouse, which has more than 2,700 storage bays where HOYER undertakes a series of logistics processes such as storing and warehousing packaging materials, and taking them out of storage and loading them. The use of physical measuring methods for quality control of the packaging materials, their labelling, together with various special activities on request, are also a part of the extensive services we provide, as are storing and handling filled containers, preparation for shipping, order picking, loading and dispatch. In short: the complete service package “from a single source”. Our customers profit from an enormous increase in efficiency, time and cost savings, and much more besides.

A PACKAGE OF SERVICES IN SAUDI ARABIA AND CHINA

But Dormagen is only the latest of a series of SCS sites with whose development and operation HOYER sets new standards in the sector. HOYER commissioned a logistics facility with four storage tanks, two blending tanks, a filling plant and a warehouse for palletted goods in Al-Jubail on the east coast of Saudi Arabia in 2019 after a one-and-a-half-year construction period.

This, the first off-site blending and filling plant operated by HOYER in Saudi Arabia, is very attrac-

SUPPLY CHAIN SOLUTIONS

The Supply Chain Solutions (SCS) business line undertakes all logistics processes, both in the customer’s plant as well as off-site. The core activities of SCS include project development, on-site logistics, filling and blending, operating intermodal terminals and dangerous goods terminals, and dry-bulk logistics. SCS is represented in more than 30 different operations of international chemicals producers at fifteen sites in six countries. Around 700 employees currently work for SCS.

tive for chemicals groups with international operations: chemical products can be blended, filled and stored at a single site here. HOYER is thus the first service provider in the region that offers these off-site services in accordance with European safety standards – and as a specialist for hazardous chemical goods, inspires confidence in particular through high environmental and quality standards.

In addition to various sites in Germany, HOYER is also present with Supply Chain Solutions in China. SCS has worked for a customer in the Shanghai Chemical Industry Park since 2016, followed by two more orders for on-site projects in 2018. More than 100 employees now take care of logistics activities at the Shanghai site. Comprehensively and successfully.

OFFERING SOLUTIONS AND SETTING STANDARDS

HOYER services in the Supply Chain Solutions area are used worldwide – and strengthen our name as a logistics services specialist along our customers’ entire supply chains. With every site development, we offer our customers individually customised, needs-oriented solutions, and set new standards from analysis and design concept to construction and operation. The Supply Chain Solutions business line is now represented in more than 30 different operations of international chemicals producers. And SCS continues to grow: new projects are already being planned.

80,000

transports per year are carried out by the SCS business line in all the on-site logistics activities.

DORMAGEN CHEMPARK

The site’s production focuses on developing and producing plant protection products, polymers, plastics and rubbers.



SUPPLY CHAIN

Integral on-site logistics

Wherever we are needed, we are there – even on our customers' own plant sites. Our qualified specialist personnel optimise existing processes on site, and ensure smooth-running production and logistics operations.

42%

more volume was what we recorded at the SCS site in Brunsbüttel in 2020 compared to the previous year.

Through our Supply Chain Solutions (SCS) business line, we support our customers worldwide – including at their production facilities. We understand logistics as an integrated principle that dovetails seamlessly into our customers' production processes. Our experts analyse the existing processes and assess how the quality and performance efficiency of the on-site logistics can be optimised. To make the design of the entire delivery chain more efficient, HOYER also provides qualified personnel to take care of all the logistics processes.

INDIVIDUALLY CUSTOMISED LOGISTICS CONCEPTS

Among other things, an eye for detail is a measure of the quality of logistics. Even small things, and especially these, can have a disruptive impact on the whole operation. That's why HOYER carefully examines its customers' operating procedures – including both individual customers and user communities – and checks the performance efficiency and capacity utilisation of plants and equipment, determines potential weak points and assesses the current safety situation. This analysis is the basis for our individually customised logistics concepts in which we record the plant's processes in detail.

This eye for detail allows HOYER to integrate its Supply Chain Services to exactly fit into the customer's logistics processes. Our concepts are always aimed at optimising processes and increasing safety. From these we derive recommendations relating to, among other things, the infrastructure, the arrangement of the individual logistics processing steps, and the production line machinery and equipment being used.

SERVICE FOR THE OPERATION

Together with our customers, we define the service package with which we can give their operation the best possible support. Our clients should be able to concentrate on their core business, namely production, marketing and development. That is why HOYER undertakes the deployment planning of its own professional, regularly trained work-



force, who reliably devote themselves to the smoothly-running logistics processes with a high degree of safety awareness. This allows production peaks and bottlenecks to be intercepted more easily and the operation to be supported in an optimum way through appropriate planning, control and monitoring. Our service package includes regular checks of the functionality and safety of the production machinery in the operations entrusted to us. Transparency, partnership-based collaboration and cost efficiency are especially important here, as in all the services that we undertake.

FILLING AND CORRECTLY FORMULATED BLENDING

On the factory site, our specialist personnel take intermediate and end products from the production plant and fill them. We coordinate the filling of bulk volumes into tank or silo containers, and carry these out ourselves. We bring smaller amounts of products in big bags or octabins, e.g. granular plastics or rubber, for handover to the warehouse or for shipping out. We blend and fill melts at up to 35 m³ per batch. Using our own fully or semi-automatic filling plants, we fill liquid products, temperature-controlled, into various drums or intermediate bulk containers (IBCs). We also carry out the blending of chemical raw materials in individually developed blending plants. As a logistics expert specialising in dangerous goods, we know the importance of the correctly formulated blending of substances as a central precondition for a product's quality and safety. With our highly-developed culture of safety, regular work-

HOYER has its own blending and filling plants available in Germany, the Netherlands and Saudi Arabia.

1998

was when HOYER undertook the first SCS order in Schkopau.



MAINTENANCE AND REPAIRS

On our customers' plant sites, we undertake the testing, maintaining and repair of machines in the production sections entrusted to us. We regularly examine the proper functioning and capacity utilisation of the plants, and also make recommendations for new purchases.

force training and our specialist knowledge of chemical products, we are a strong, reliable partner for the chemical industry.

ON THE MOVE

Production processes vary in their complexity: many chemicals producers process their raw materials in supplementary operations, while others ship the products to more distant sites for further processing. Once the raw material or intermediate has been filled into tank containers, tank wagons or other containers, this is followed by transport logistics. Whether by using platform trailer trucks for small packages and palletised goods, or stackers to transport individual units – the HOYER workforce reliably undertakes the loading and unloading of the means of transport, carries out on-site transports and distributes the products. With our experience in process automation, we offer customers an additional bonus. Moreover, a modern, digitally equipped fleet of electric stacker trucks is used. At sites with a rail connection, we undertake wagon sequencing, the segment-specific unloading and loading of tank wagons, and shunting for their further use. In future, we will also be able to assist our customers with advice about driverless systems.

DIGITALLY-ASSISTED SAFETY

Minimising risks, protecting people and the environment, and guaranteeing product quality and safety – these are important aspects in the sustainable handling of challenging chemical products. HOYER relies on digital assistance for this purpose, in addition to regular workforce training sessions that support technically correct handling and also prepare for possible emergencies. Together with our partners, we have equipped almost the entire fleet of stacker trucks with digital technology and new functions: for example, as well as audible signals, there are now also visual signals to warn about shunting traffic, and the speed limit of the stacker trucks in the various areas of use can be centrally defined. This increases safety in areas with a reduced overview, while improving the handling tempo in areas with very good visibility at the same time. Among other things, the additional safety advantages include an authorisation check of each stacker truck user before driving starts. Moreover, the system records strong vibrations and analyses both these and the type of use and capacity utilisation. This allows correspondingly efficient deployment planning to take place. Anomalies in operation are reported immediately and can be examined promptly before the stacker suffers long-term damage or failure. What this means for our customers is faster handling of transport orders, more efficient use of the equipment, a reduction in potential downtimes, improved control of servicing and repair cycles, and greater safety through human know-how and the equipment's supporting accessories.

AIRPORT SUPPLY LOGISTICS

We also support smooth-running operations in other areas: in petroleum products logistics, we not only deliver supplies to airport fuel storage facilities but also undertake product sampling and refuelling of flight-ready aircraft. Everything we do is subject to the strictest safety and security standards.

SUPPLY CHAIN SOLUTIONS (SCS)

The scope of our modular SCS services includes project development for site planning, the implementation of construction projects for plants upstream and downstream of production facilities, and integrated on-site logistics.



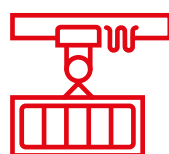


IN A NUTSHELL

Efficient provision

Indispensable in a production process: a punctual supply of components for further processing in a plant, and executing transport services outside the works.

Keeping a product's quality constant and guaranteeing its safe treatment – both in handling and in storage – are indispensable in a multi-stage production process. Look-ahead planning and transport facilities used efficiently are the central means to achieve these goals. HOYER has both at its disposal, and also inspires confidence through a broadly diversified portfolio together with employees who ensure a smooth supply chain and keep the path free for our customers.



In Europe, we operate our own intermodal terminal in Schkopau, and participate in other terminals in Rotterdam, Antwerp and Ludwigshafen.

SOLUTIONS FOR SMALL AND LARGE VOLUMES

Appropriate packaging materials are all part of filling various kinds of raw materials, intermediates and solids. Depending on the product, they can be big tank containers, but also drums, intermediate bulk containers (IBCs), big bags and boxes or canisters – the decisive factor is how the product will undergo further use. Small containers find their place in high-bay, rack or block storage warehouses. HOYER operates warehouse storage in corresponding facilities both on-site and off-site. A warehouse stock management system is used to determine, based on demands, how stockholding and call-off can be optimised – this allows products to find their right place according to their usage profile, and they can be made available efficiently. HOYER will use driverless transport systems, among other things, for this purpose in future.

SHORTENED WAITING TIMES

We offer drop-and-swap concepts, and not just for the chemical industry. We also help the gas industry with efficient, safe loading and unloading logistics – including with the gas cylinder transport logistics that we carry out. Truck fleet capacity utilisation can be optimised by preloading during the evening and at night. We use state-of-the-art technologies to design particularly safe night-time workplaces.

TRANSPORT ON TAP

By implementing booking software for in-plant transport logistics, we operate so-called Time-Slot Booking at many sites: our customers dial in, enter a starting point and time of day, destination and delivery timeframe in available slots – and we're already there. That is how resources can be used individually, efficiently and optimally.

By using our warehouse management software, we create high stock level transparency and substance availability, not only for ourselves but also for our customers. We also use the pre-emptive procurement of products and materials whose availability in the warehouse must be guaranteed. Interfaces between our software and customers' systems allow an uncomplicated full overview.

Double safety is provided by our employees' experience and competence, in conjunction with the software – which determines, based on product classifications, which substances can be stored together and which not. We undertake safe sampling, and carry out the sample dispatch. Order picking and identification labelling round off the service we offer.

ALWAYS THE RIGHT PACKAGING

HOYER undertakes not only filling and warehouse storage, but also packaging materials procurement logistics and their inventorying and correct disposal. We also advise our customers as to which containers are best suited for their processes and products, and give them reliable support, even when it's a question of the (further) processing of rather large volumes.

We make a large number of tank container types with differing specifications available to store raw materials and intermediates in tanks. Many HOYER tank containers are usable not only for transport but also for intermediate storage. Thanks to our many years of experience in the safe, secure transport and handling of dangerous goods, even particularly sensitive products are in good, safe hands with us.

We know the specific product requirements regarding the nature of tanks, and offer soundly-based advice about material compatibility. Our solutions for special tanks comprise lightweight tank bodies such as composite tanks, as well as special tanks made of titanium, or even special formats such as 45- and 52-foot special tanks. The tanks, which are fitted with modern sensor systems, continuously transmit information about product temperature, pressure and filling level, as well as location data, and are usable not only in the works but also for subsequent transport movements – thus guaranteeing that the product's quality remains stable from the production site to unloading at the destination.

ON TRANSHIPMENT INSTALLATIONS

HOYER is involved in several intermodal terminals in Europe in which on-railing is used – tank containers are put onto

container carrier wagons. Through synergies, we create efficient handling and thus short transshipment times. Our large-area transshipment installations offer on-site repair opportunities as well as heating and cooling facilities for optimum product quality. Use of our Smart Tanks allows the retrieval of information about the product's state and transport status via our Smart Portal and, through interfaces, even into our customers' own systems. If parameters pass above or below predefined values, an alarm is automatically generated. This enables fast intervention – important in the case of temperature-sensitive products, for example. Tank containers fitted with the "Heating/Cooling Terminal" (HCT) are ideal for their transport: HCT allows two-way communication, i.e. the temperature can be remotely monitored and adjusted if necessary. This guarantees stable product quality – by road, rail and sea.

EVEN BIG VOLUMES ARE ON CALL

When slightly more is needed: our dangerous substance storage guarantees safety when transshipping, storing and managing large containers, e.g. tank containers. Here again, HOYER offers an efficient logistics service with system-assisted storage and transshipping, and ensures that products – dangerous goods as well as harmless substances – are on call and available at all times. In addition, we undertake both the weighing and the cleaning and maintenance of tank containers.

OPTIMISED HANDOVERS

To give efficient transport processing, HOYER makes a detailed search for process optimisation opportunities – as a transport logistics specialist, we know the importance of smooth-running, efficient, prompt handovers. Loading for transport outside the factory is an example of a frequent problem point. Here, and in many other places, we support our customers with a large number of preloading concepts which we develop in an individually customised, needs-oriented way. We also offer handover processes on our customers' plant sites and on our own sites, and create interfaces between our own services and those of customers and third-party providers. We thereby succeed with faster, more efficient handover handling – using our own professional personnel and state-of-the-art equipment.

BEYOND TRANSPORT

At a glance: the comprehensive logistics solutions of the HOYER Group along the supply chain of the chemical, gas, petroleum products and food industries.





HOYER GROUP

Global presence

HOYER connects continents: with representatives in more than 115 countries, we support our customers worldwide with well thought-out logistics solutions. Here is an overview of our central locations.

- HOYER Belgie N.V./Antwerp
 - HOYER Slovenská rep. s.r.o./Bratislava
 - HOYER Italia S.r.l./Busto Arsizio
 - HOYER Middle East Ltd./Dammam
 - HOYER Global Transport FZE/Dubai
 - HOYER Ireland Ltd./Dublin
 - HOYER Svenska AB/Gothenburg
 - HOYER GmbH Internationale Fachspedition/Hamburg
 - HOYER Finland OY/Helsinki
 - HOYER Limited/Hong Kong
 - HOYER Global (USA) Inc./Houston
 - HOYER UK Ltd./Huddersfield
 - HOYER Polska Sp. z o.o./Katowice
 - HOYER Baltic Expedition UAB/Klaipeda
 - HOYER Uluslararası Nakliyat Limited Sirketi/Kocaeli
 - HOYER Bitumen-Logistik s.r.o./Kourim
- HOYER Norway AS/Lena
 - HOYER Logistics Australia Pty Ltd./Melbourne
 - HOYER (Schweiz) AG/Mendrisio
 - HOYER Portugal Unipessoal Lda./Palmela
 - SIA HOYER Latvia/Riga
 - HOYER Nederland B.V./Rotterdam
 - HOYER France S.A.S./Rouen
 - HOYER Mednarodna Spedicija d.o.o./Ruse
 - HOYER Global (Brasil) Transportes Ltda./São Paulo
 - HOYER Sinobulk Transport Co. Ltd./Shanghai
 - HOYER Global Singapore Pte Ltd./Singapore
 - HOYER RUS LLC/St. Petersburg
 - HOYER Deepsea Malaysia Sdn. Bhd./Subang Jaya, Selangor
 - HOYER Gaslog Hungary Kft./Szekesfehervar
 - HOYER Estonia OÜ/Tallinn
 - HOYER España S.A./Tarragona
 - HOYER Austria GmbH/Vienna

PUBLISHER
HOYER GmbH Internationale Fachspedition
Wendenstraße 414 – 424 | 20537 Hamburg | Germany
www.hoyer-group.com

CONTACT
Corporate Center Communications
Phone +49 40 21044 0 | Fax +49 40 21044 246
marketing@hoyer-group.com

PHOTOS
Markus Heimbach, Oliver Pracht, Stefan Trocha

© HOYER Group, May 2021

