

# DAIMLER

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## Daimler Trucks & Daimler Buses Division Day Daimler Trucks EU/LA

Hubertus Troska  
Head of Mercedes-Benz Trucks  
Wörth November 30th, 2010



## Agenda

● **Current performance**

● **Global Excellence**

● **Outlook 2011**



## Current Performance

- Market overview

## Main production sites of Trucks Europe/Latin America (MB)

### Germany - Wörth



### Turkey - Aksaray



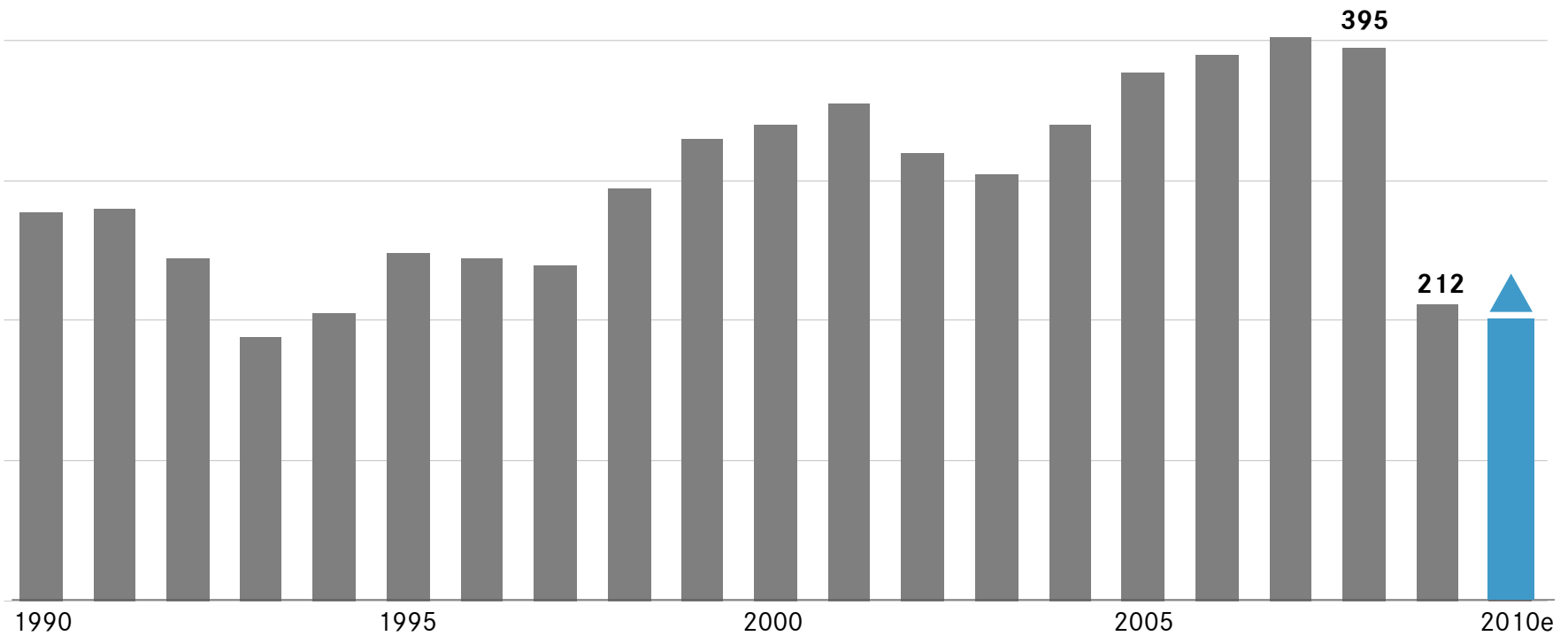
### Brazil – São Bernardo do Campo



# The European Truck market is recovering

## Truck Markt EU29 (MDT/HDT)\*

- '000 units -

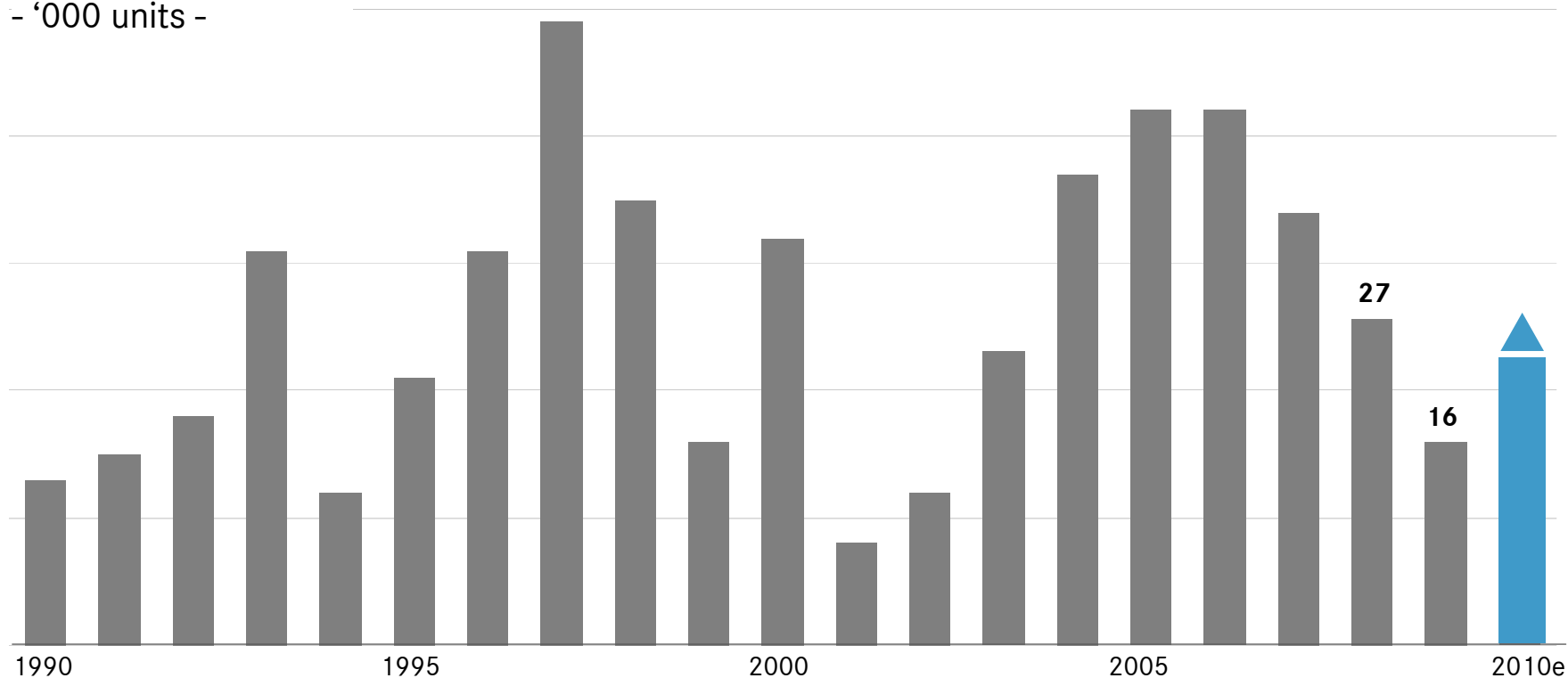


\*EU 29 (since 2000 EU 27 + Norway and Switzerland)

# The Turkish truck market is recovering to the level of 2008

## Truck Market Turkey (MDT/HDT)\*

- '000 units -

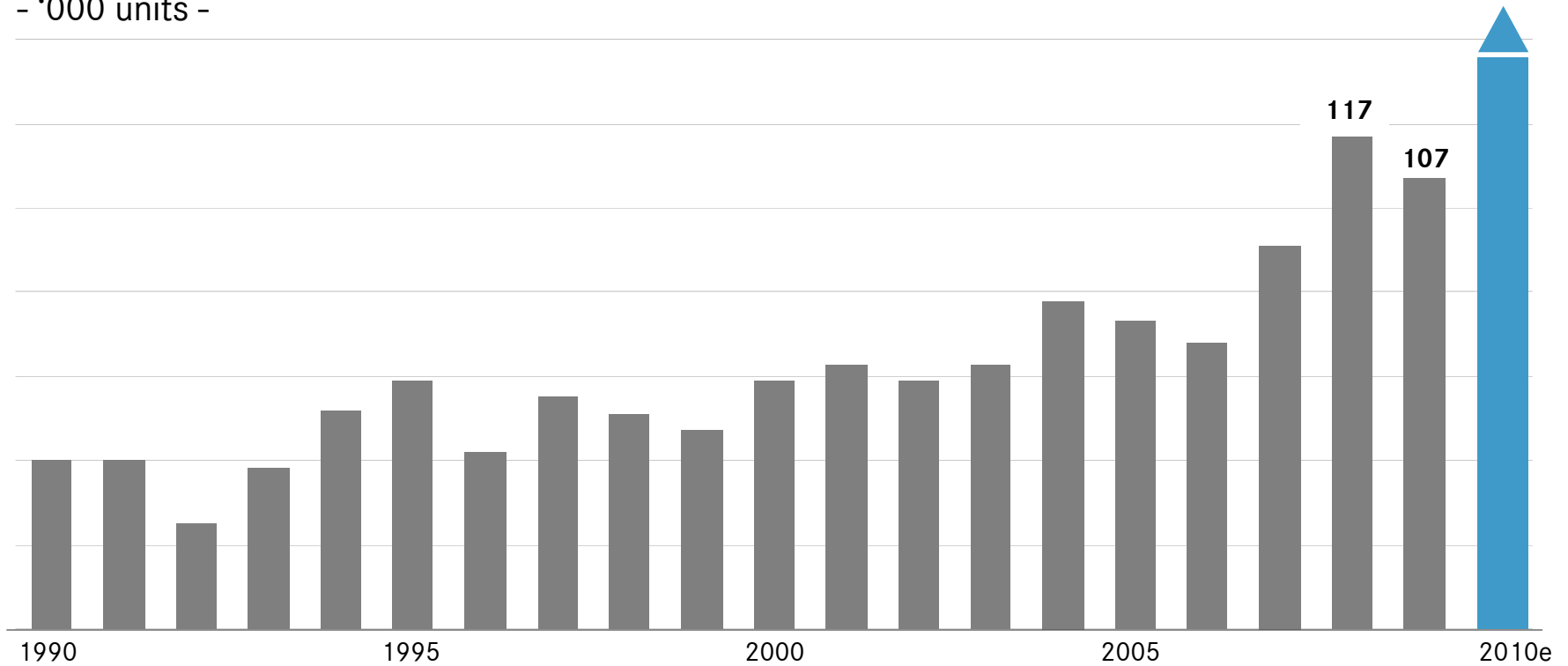


\*Trucks > 6 t without Vans > 6t

## Brazil is booming!

### Trucks Market Brazil (MDT/HDT)\*

- '000 units -

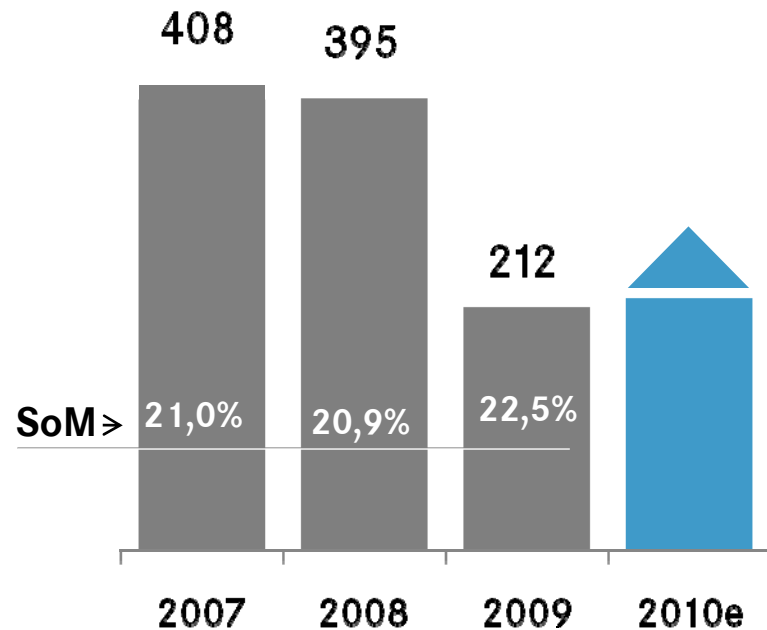


\*Trucks > 6 t without Vans > 6t

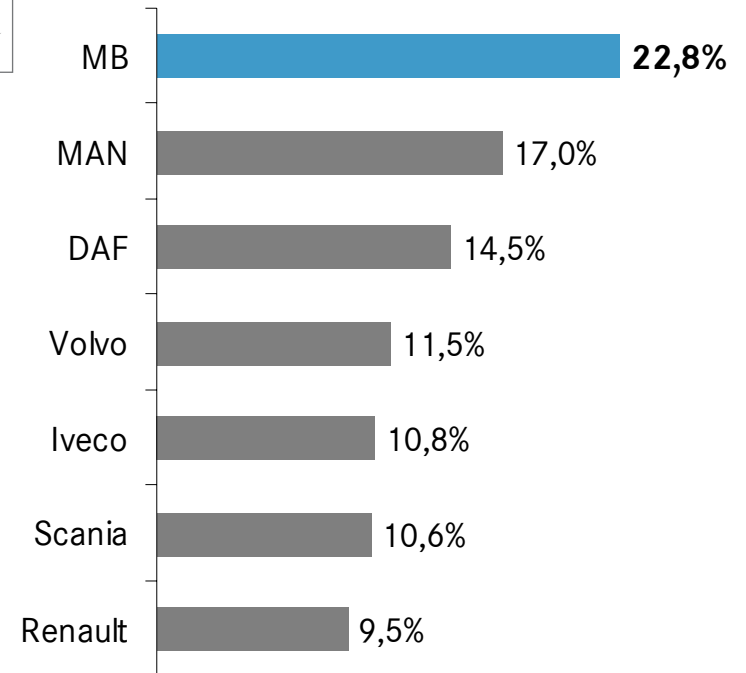
# Mercedes-Benz Trucks clear market leader in Europe

## Truck Market Europe\*

- '000 units -



## Market Share Europe\* YTD 09/10



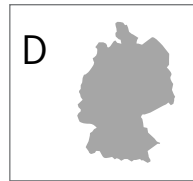
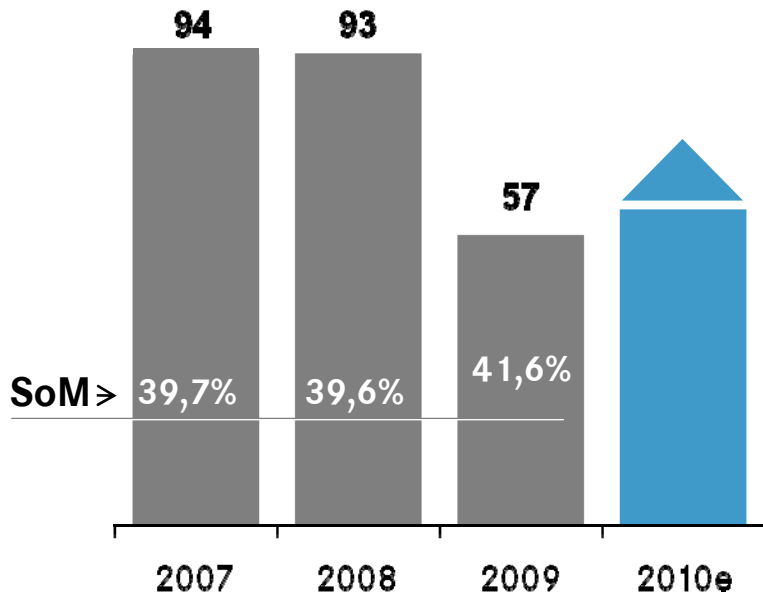
\* EU29 = EU 27 + Norway + Switzerland; Trucks > 6 t without Vans > 6t



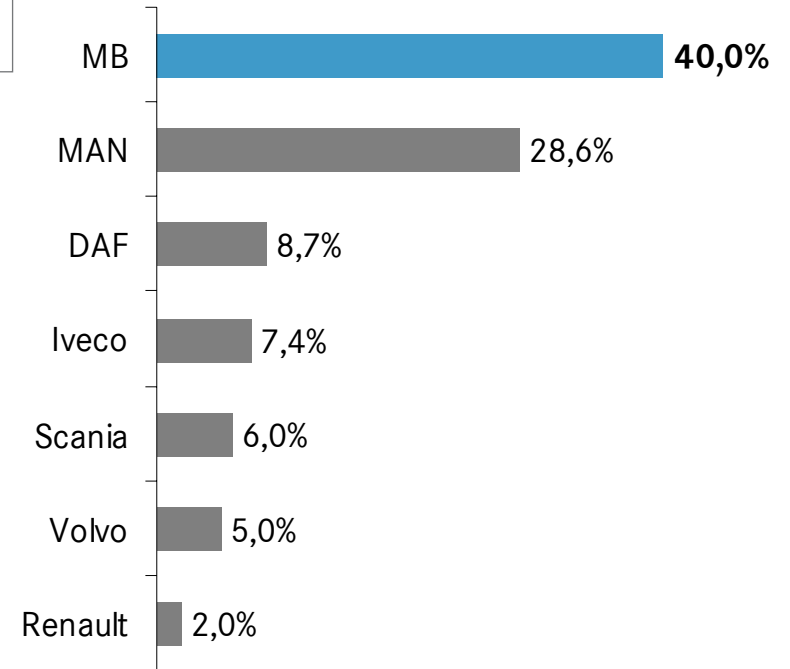
# Mercedes-Benz Trucks also clear market leader in Germany

## Truck Market Germany\*

- '000 units -



## Market Share Germany YTD 09/10

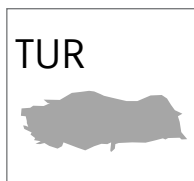
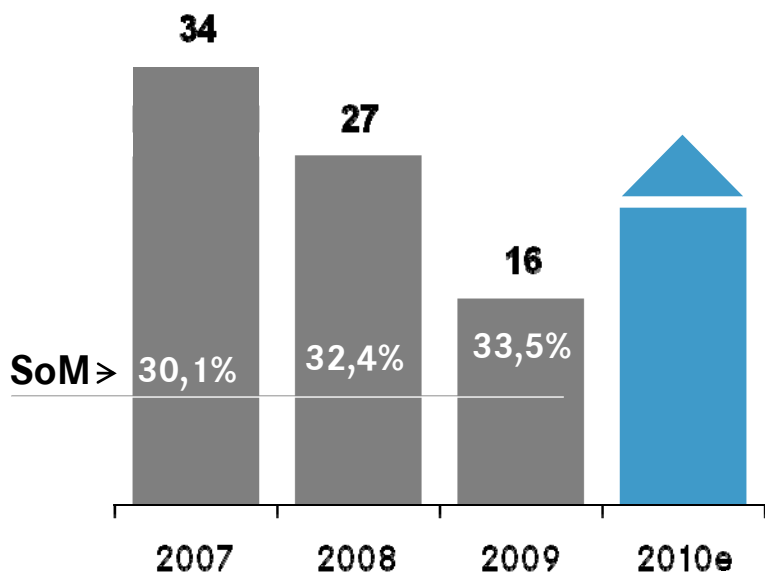


\*) Trucks > 6t without Vans > 6 t

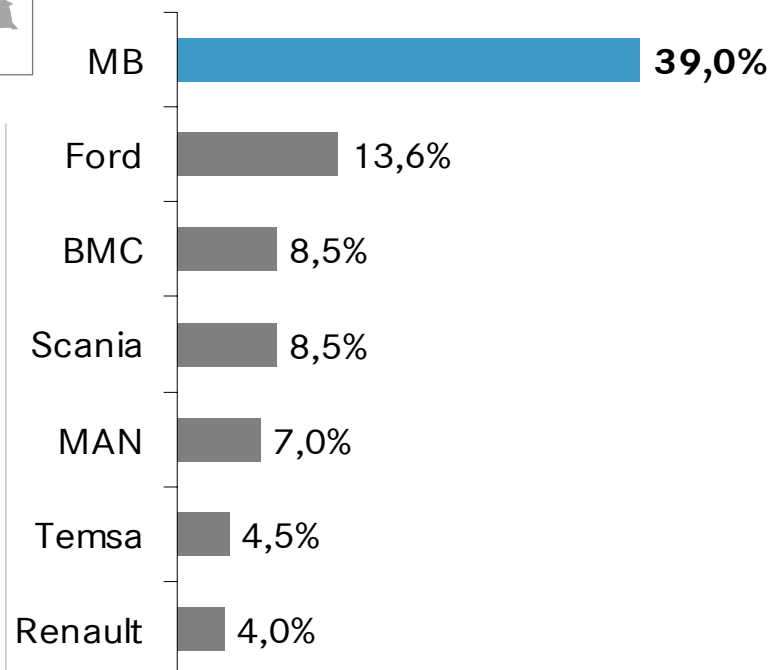
# Mercedes-Benz Trucks with excellent performance in Turkey

## Truck Market Turkey\*

- '000 units -



## Market Share Turkey\* YTD 09/10

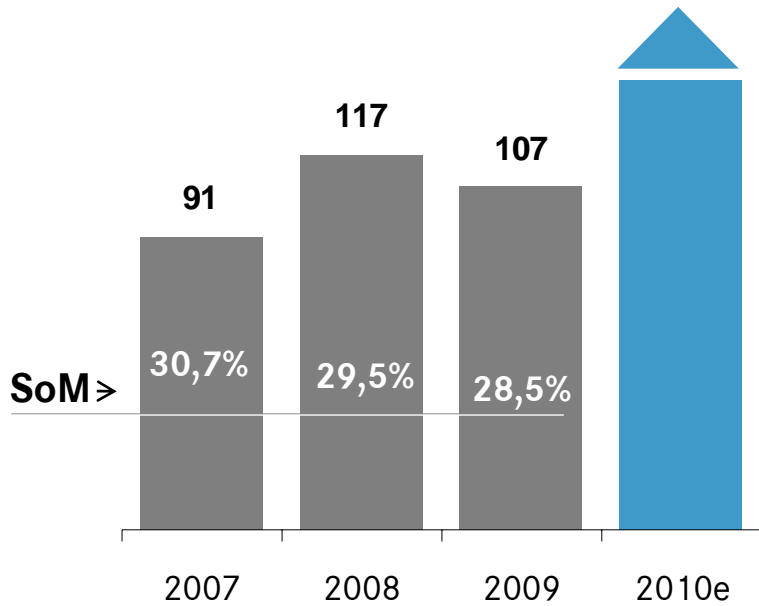


\*) Trucks > 6t without Vans > 6 t

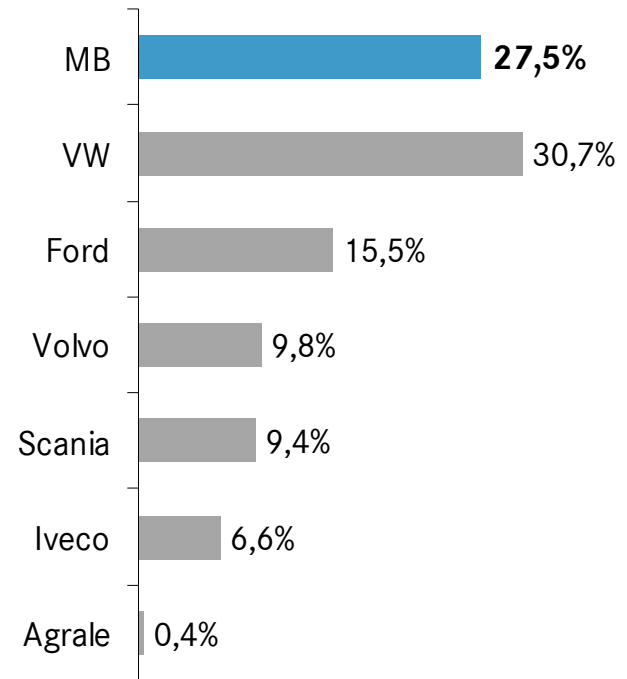
# Brazil is biggest truck market for Mercedes-Benz Trucks

## Truck Market Brazil\*

- '000 units -



## Market Share Brazil\* YTD 09/10



\*) Trucks > 6t without Vans > 6 t

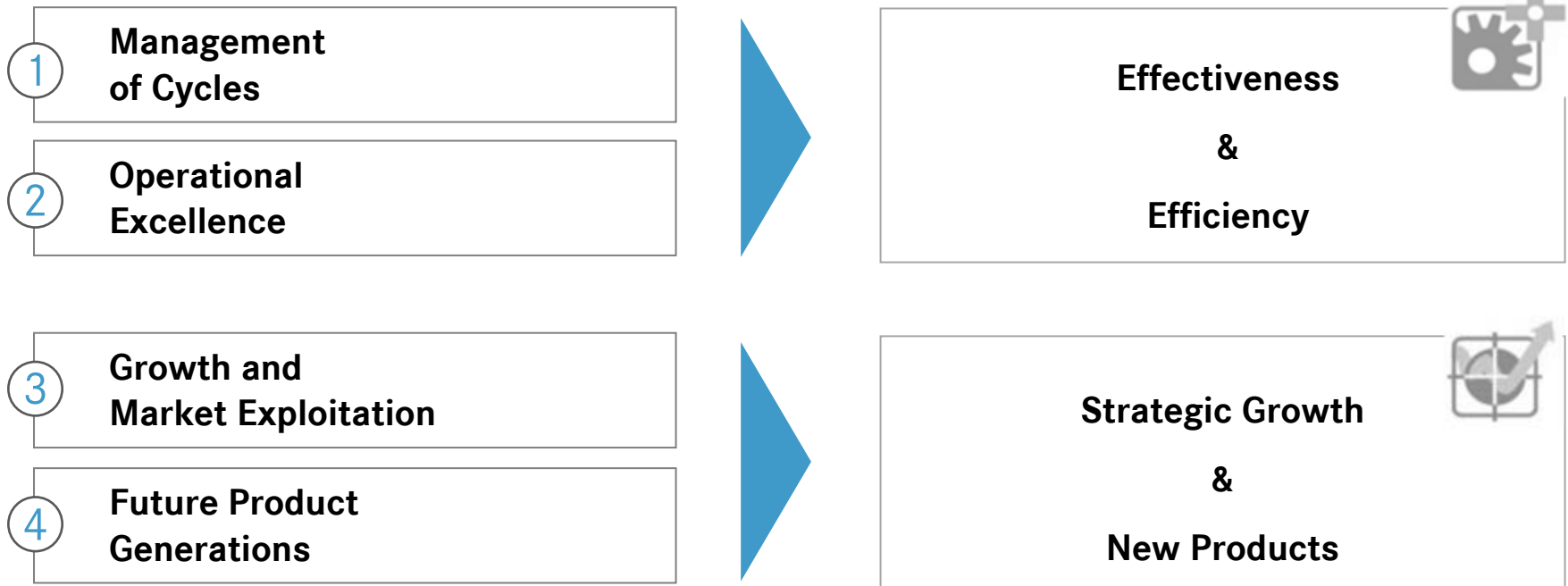


## Global Excellence

- **Operational Excellence**
- **Growth Opportunities**
- **Mercedes-Benz Products**

# “Global Excellence” as underlying strategic program

## Global Excellence - Pillars

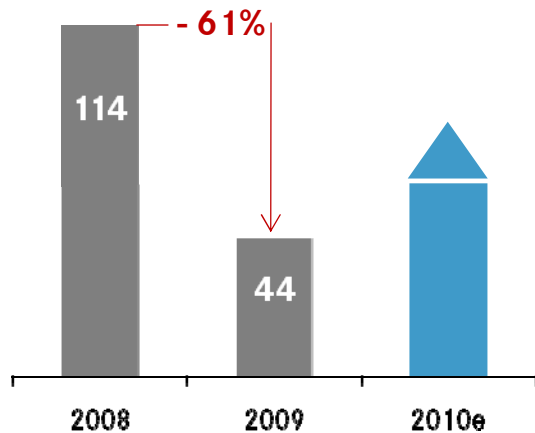


## Adaptation of production volumes in all three production sites

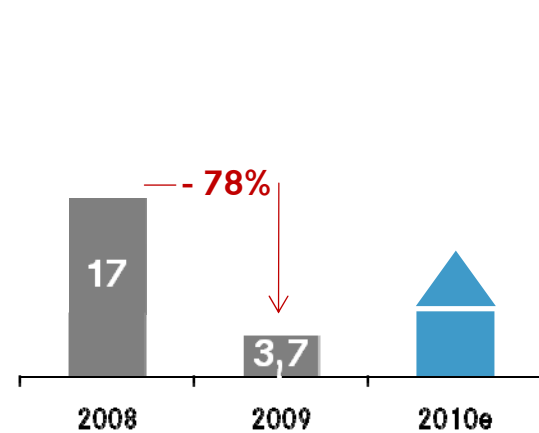
### Production Wörth (Germany)\*



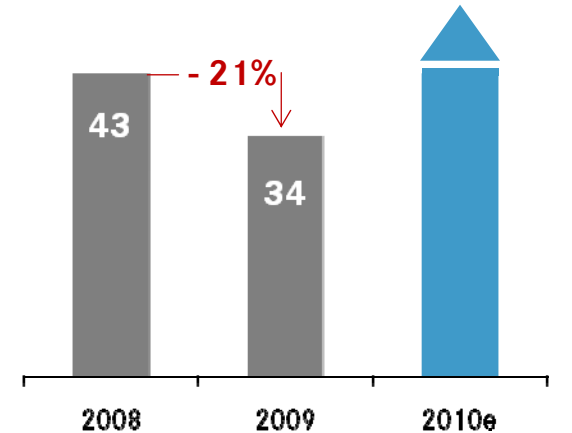
Production program [in '000 units]



### Production Aksaray (Turkey)

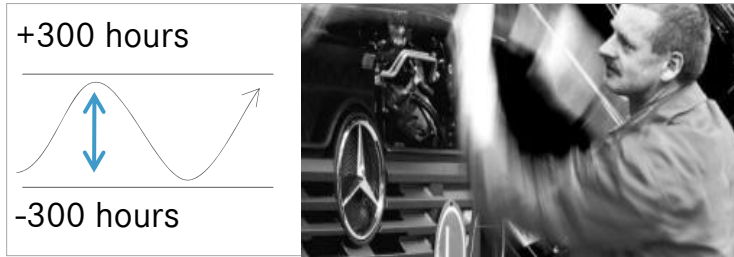


### Production São Bernardo (Brazil)



## Production flexibility of over 30% in Wörth

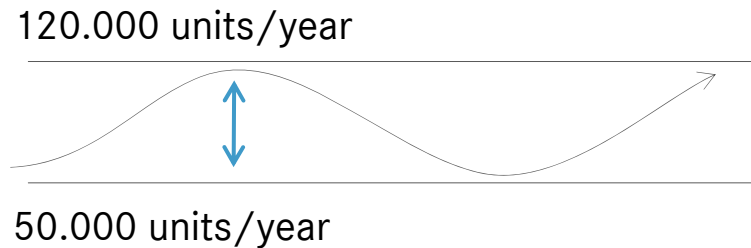
### Flexible working hours



### Flexible cycle time

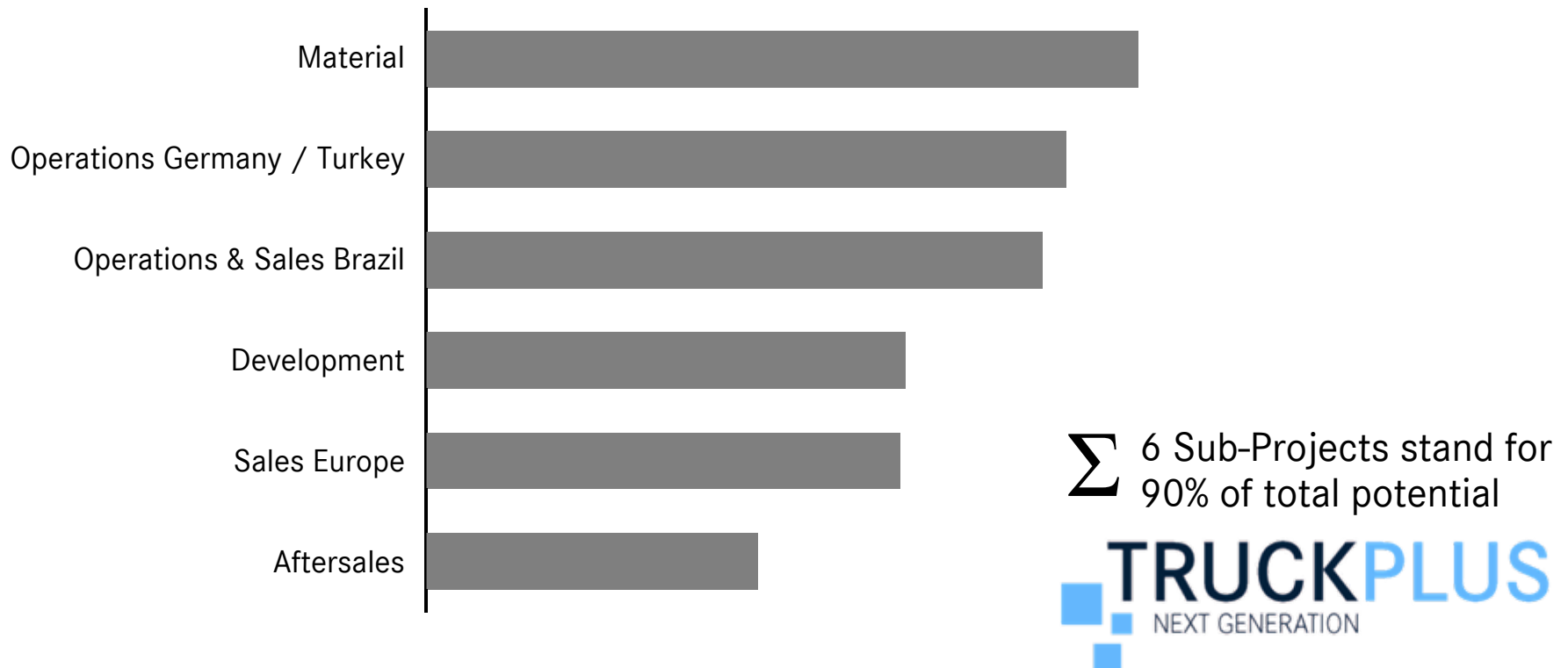


### Flexibility



## Excellence program improving profitability with focus on processes, growth and costs

### TruckPlus Next Generation Potential 2011: Top Six Sub-Projects



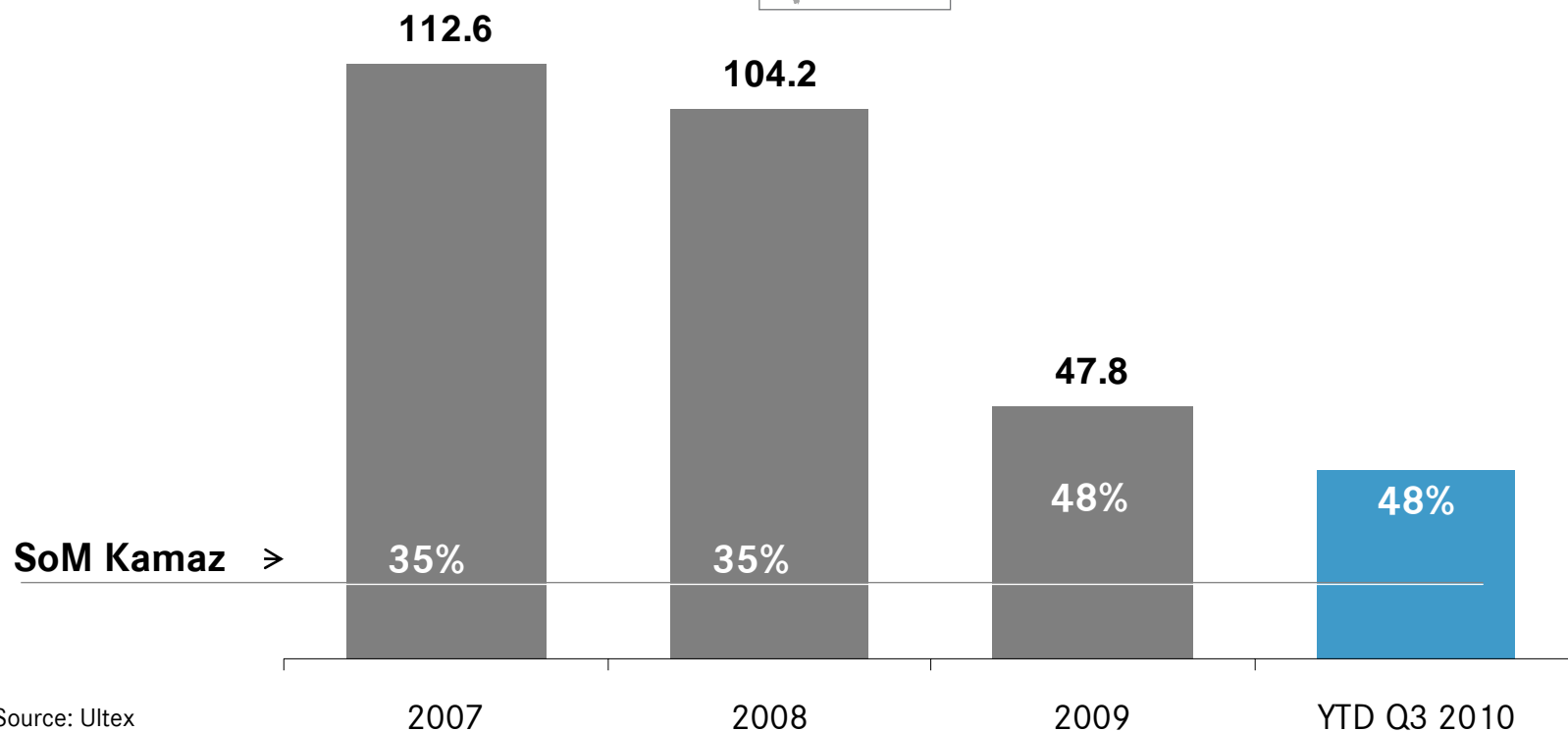
Source: Truck Plus Next Generation Project



# Kamaz is dominant market leader in Russia

Local & Asian Truck OEMs in Russia\* >6t

- '000 units -



\* Source: Ultex

## Joint Venture “MB Trucks Vostok” founded

### JV “MB Trucks Vostok”

- Share structure: 50% Daimler, 50% Kamaz
- Scope: Manufacturing MB Actros/Axor, Sales of MB Trucks & MB/Setra Buses
- Concept: CKD production, step plan for localization
- Start of sales: Q1/2010
- Start of manufacturing: Q4/2010
- Capacity: 4.500 units



## Transformation of Juiz de Fora into a full fledged commercial vehicle plant

### Juiz de Fora



- MB Passenger Vehicles, MB Trucks
- Workforce 2010: 800 employees

- ▶ Products (2011): Actros and Accelo
- ▶ Planned capacity of 15,000 units
- ▶ Employment of 1,500 people
- ▶ With 2,8 mio m<sup>2</sup>: sufficient space for further growth

## Actros commercialization and production preparation in Brazil

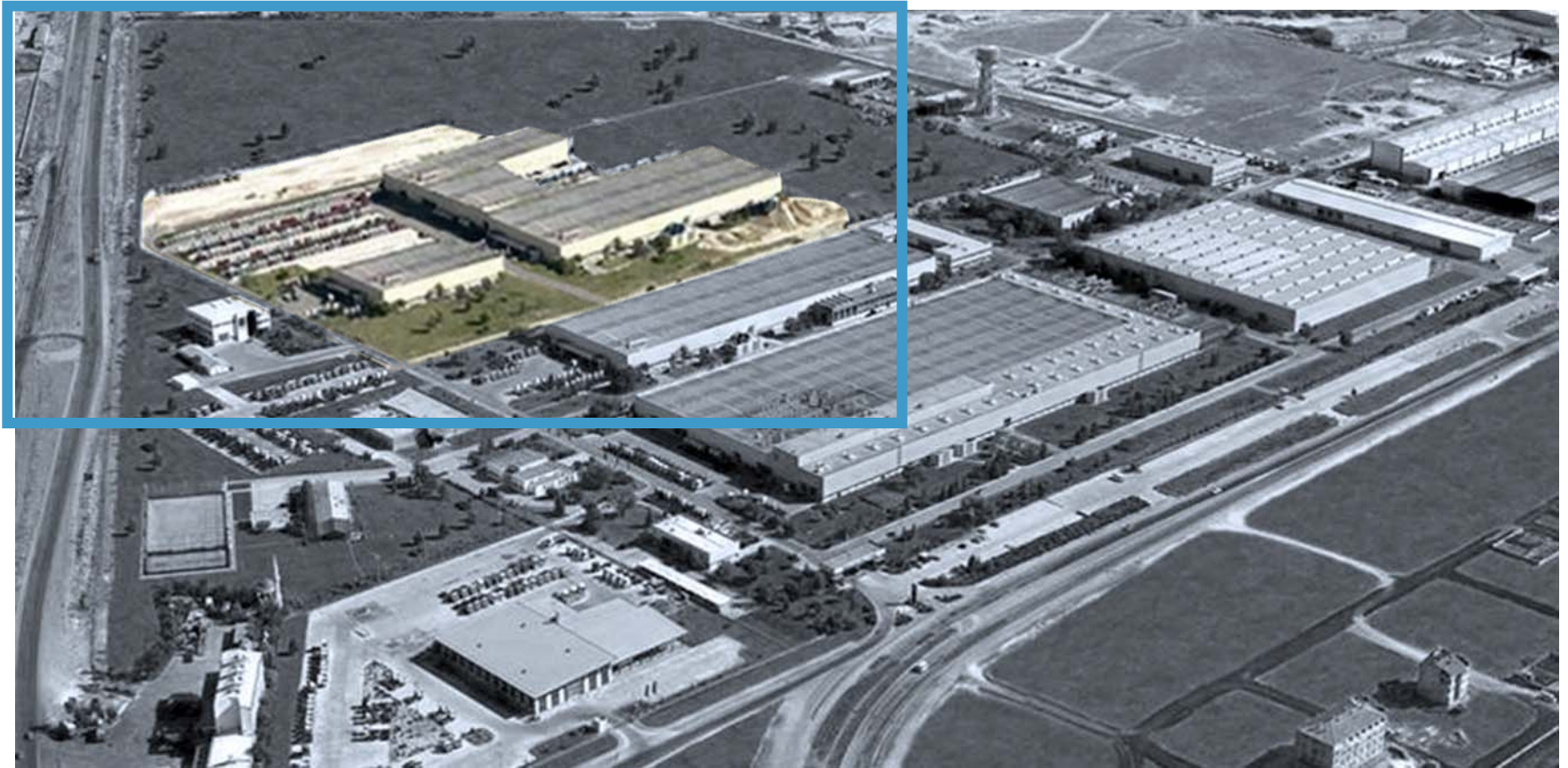
### Actros

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- ▶ HD segment (+60% in 2010): fastest growing Brazilian truck market segment
- ▶ Actros on-road market introduction in 2010
- ▶ Actros 60% nationalization targeted

## Investments in Aksaray



## Actros in Turkey

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## Actros



## Actros (construction)





## Atego and Axor



## Unimog



## Econic



## Zetros



# Shaping Future Transportation

**Shaping  
Future  
Transportation**



Shaping Future Transportation.  
CleanDrive Technologies.



Shaping Future Transportation.  
SafeDrive Technologies.



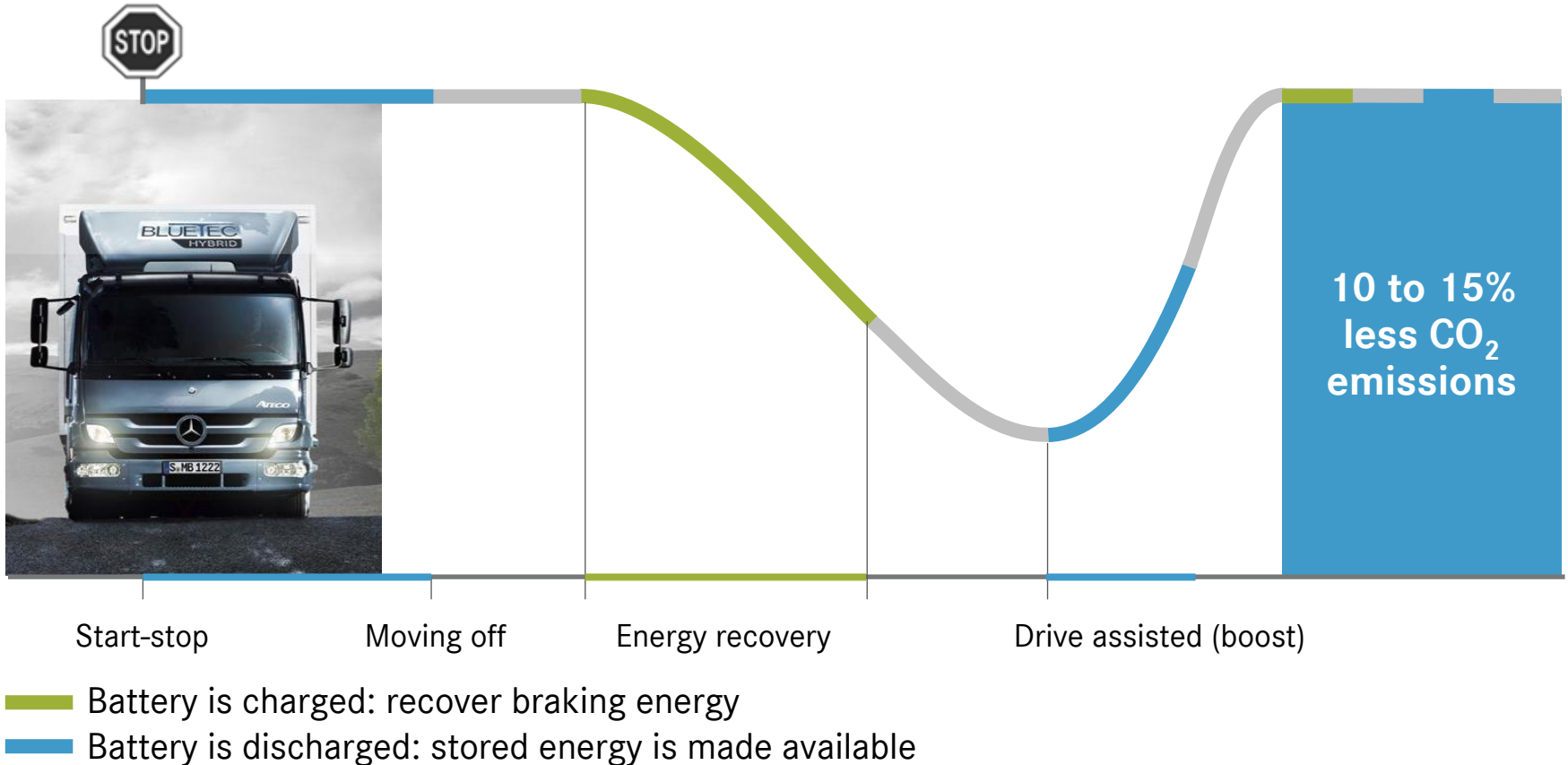
## BlueTec is the reference with regard to truck efficiency

- Introduction in 2005:  
First Euro 5 truck
- „Goldener Öltropfen“ award in 2005 (-3% fuel consumption compared to Euro 3)
- More than 250,000 BlueTec trucks on the road
- World record in 2008, with a fuel consumption of 19.44 litres/100 km and entry in the Guinness Book of Records



Nardo, Mai 2008: 1019 rounds, 12,729 km – 80,17 km/h – 19,44 l/100 km

## The Atego BlueTec Hybrid makes best use of every driving situation and achieves CO<sub>2</sub> emission savings of 10 to 15%



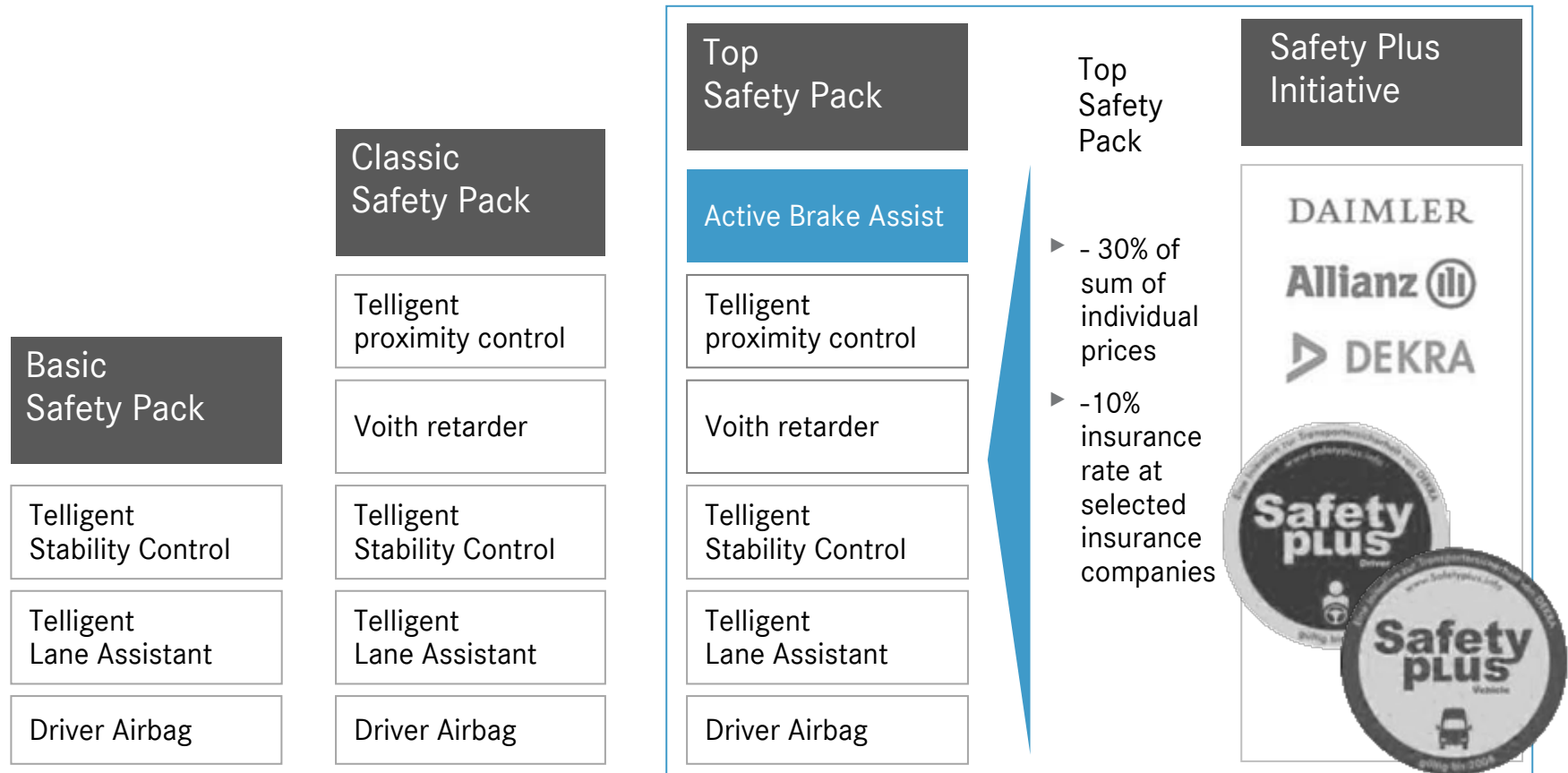
## The new Atego won ...

„Truck of the Year 2011“ in Germany

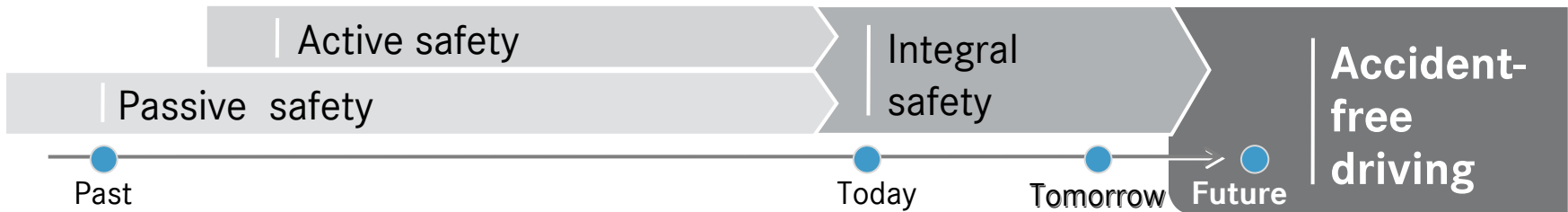




# Mercedes-Benz Trucks with the broadest offering of safety features

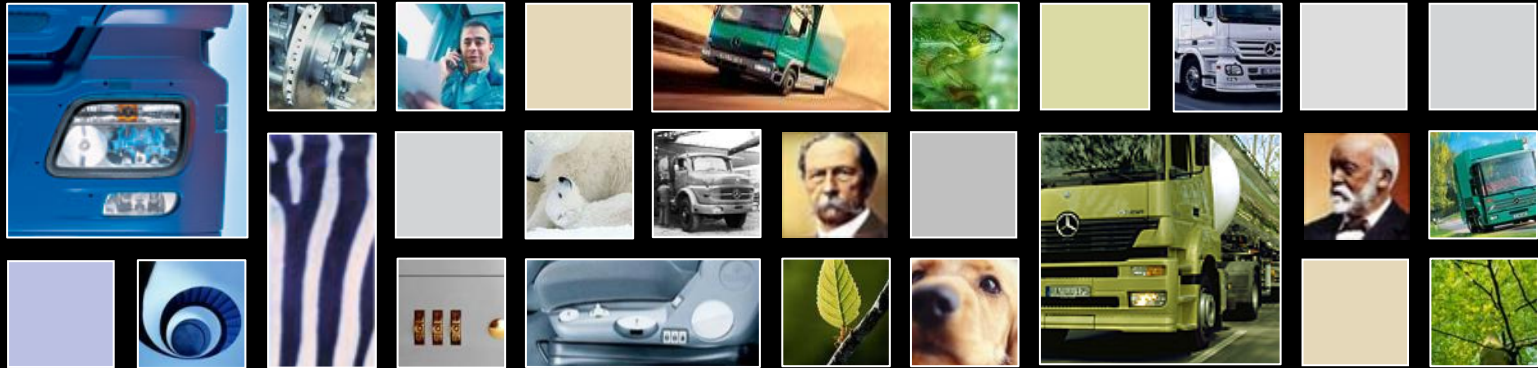


## Keep pioneer position of active safety features



## The heritage of Mercedes-Benz Trucks





Trucks you can trust

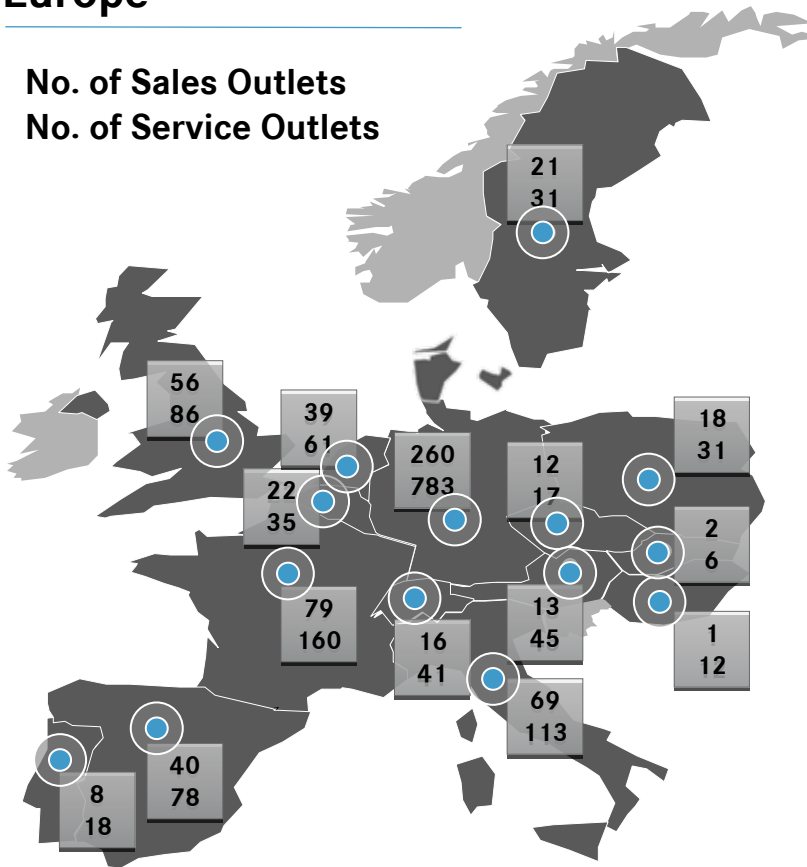


Mercedes-Benz

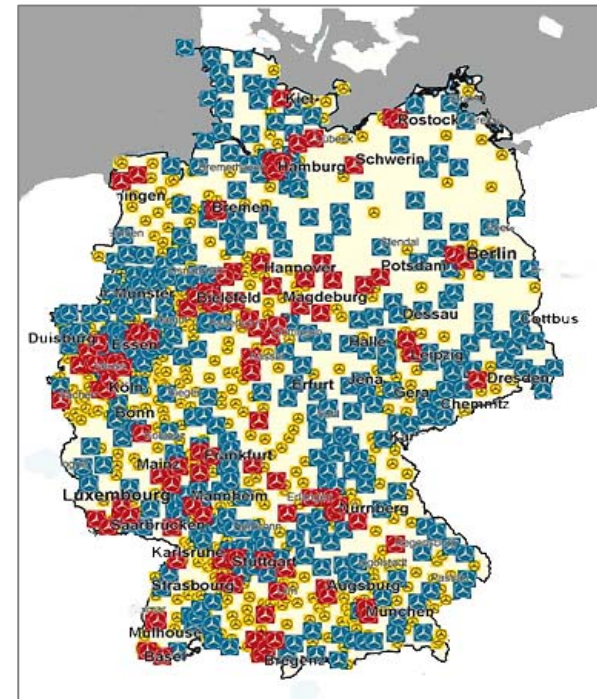
# Mercedes-Benz Trucks Sales and Services Network

## Europe

No. of Sales Outlets  
No. of Service Outlets



## Germany



\* Source: GBM

## Truck Dedication - professional dealership network for completely customized services

**Opening Aachen – 19.03.2009**



**Opening Berlin - 19.10.2009**



**Schmolck - Emmendingen**



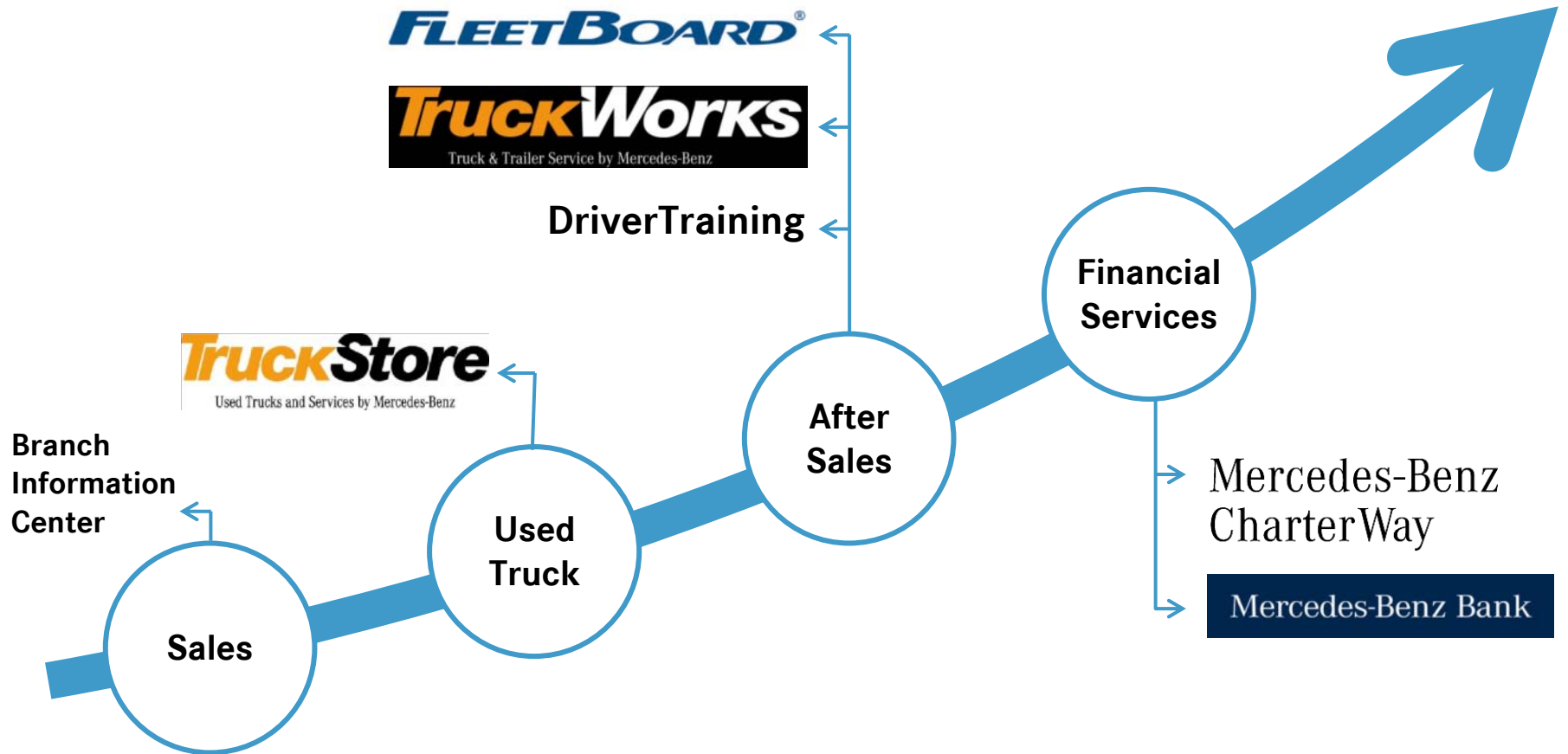
**Liebrecht - Lemgo**



**Widmann - Meißen**



# Tailor-made services along the value chain



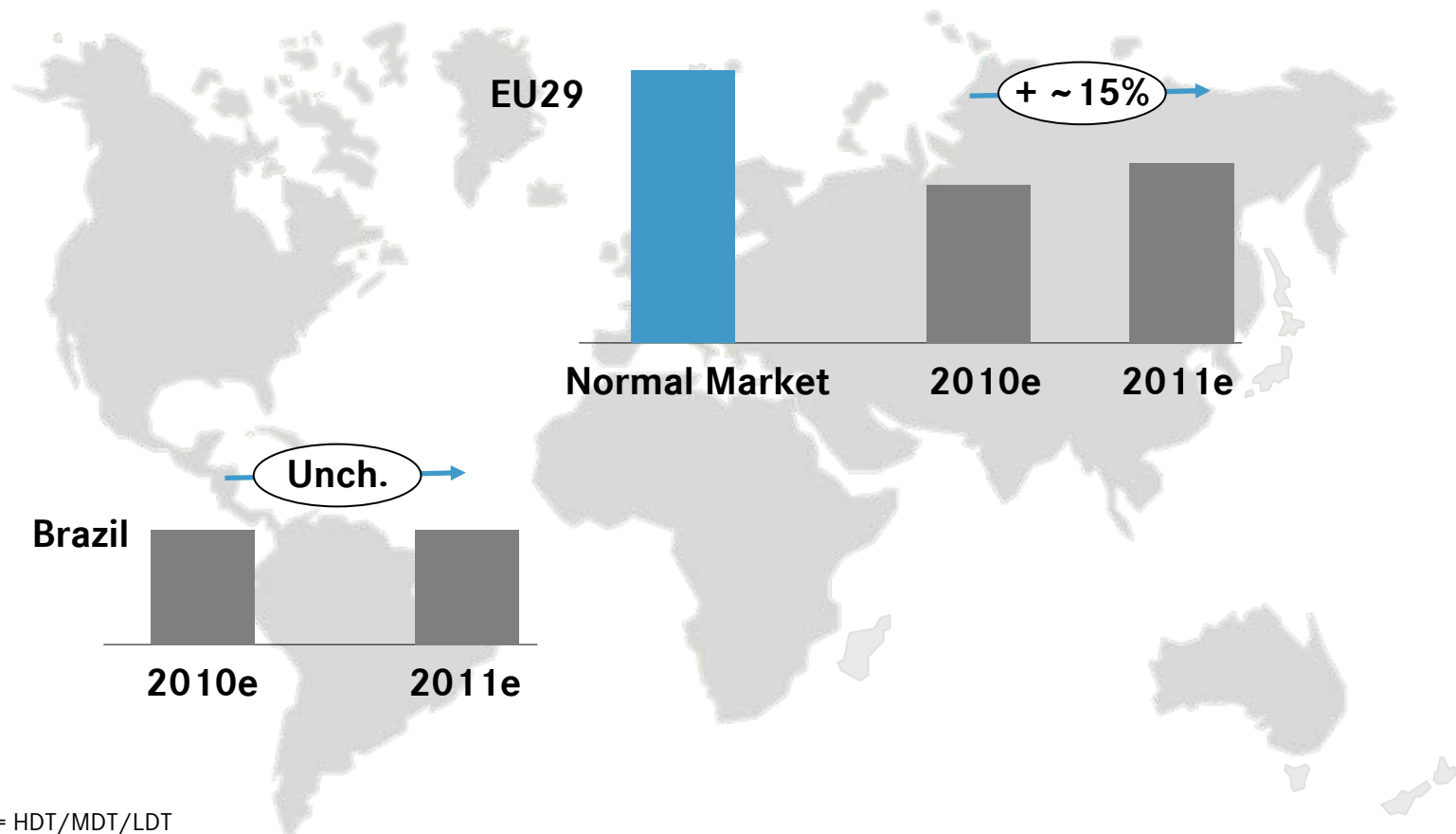


## Outlook 2011



# Further market growth in 2011

Market (HDT/MDT) – Normal Market / 2010e / 2011e



N.B: Japan = HDT/MDT/LDT



Trucks you can trust

## Disclaimer

This document contains forward-looking statements that reflect our current views about future events. The words “anticipate,” “assume,” “believe,” “estimate,” “expect,” “intend,” “may,” “plan,” “project,” “should” and similar expressions are used to identify forward-looking statements. These statements are subject to many risks and uncertainties, including a lack of further improvement or a renewed deterioration of global economic conditions, in particular a renewed decline of consumer demand and investment activity in Western Europe or the United States, or a downturn in major Asian economies; a continuation or worsening of the tense situation in the credit and financial markets, which could result in a renewed increase in borrowing costs or limit our funding flexibility; changes in currency exchange rates or interest rates; the ability to continue to offer fuel-efficient and environmentally friendly products; a permanent shift in consumer preference towards smaller, lower margin vehicles; the introduction of competing, fuel-efficient products and the possible lack of acceptance of our products or services, which may limit our ability to adequately utilize our production capacities or raise prices; price increases in fuel, raw materials and precious metals; disruption of production due to shortages of materials, labor strikes, or supplier insolvencies; a renewed decline in resale prices of used vehicles; the effective implementation of cost-reduction and efficiency-optimization programs at all of our segments, including the repositioning of our truck activities in the NAFTA region and in Asia; the business outlook of companies in which we hold an equity interest, most notably EADS; the successful implementation of the strategic cooperation with Renault-Nissan, changes in laws, regulations and government policies, particularly those relating to vehicle emissions, fuel economy and safety; the resolution of pending governmental investigations and the outcome of pending or threatened future legal proceedings; and other risks and uncertainties, some of which we describe under the heading “Risk Report” in Daimler’s most recent Annual Report and under the headings “Risk Factors” and “Legal Proceedings” in Daimler’s most recent Annual Report on Form 20-F filed with the Securities and Exchange Commission. If any of these risks and uncertainties materialize, or if the assumptions underlying any of our forward-looking statements prove incorrect, then our actual results may be materially different from those we express or imply by such statements. We do not intend or assume any obligation to update these forward-looking statements. Any forward-looking statement speaks only as of the date on which it is made.