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## Daimler Trucks Division Day 2013

September 20<sup>th</sup>, 2013

**Stefan Buchner**

**Head of Mercedes-Benz Trucks**



Mercedes-Benz



## Agenda

- 1 Mercedes-Benz Trucks business status and challenges

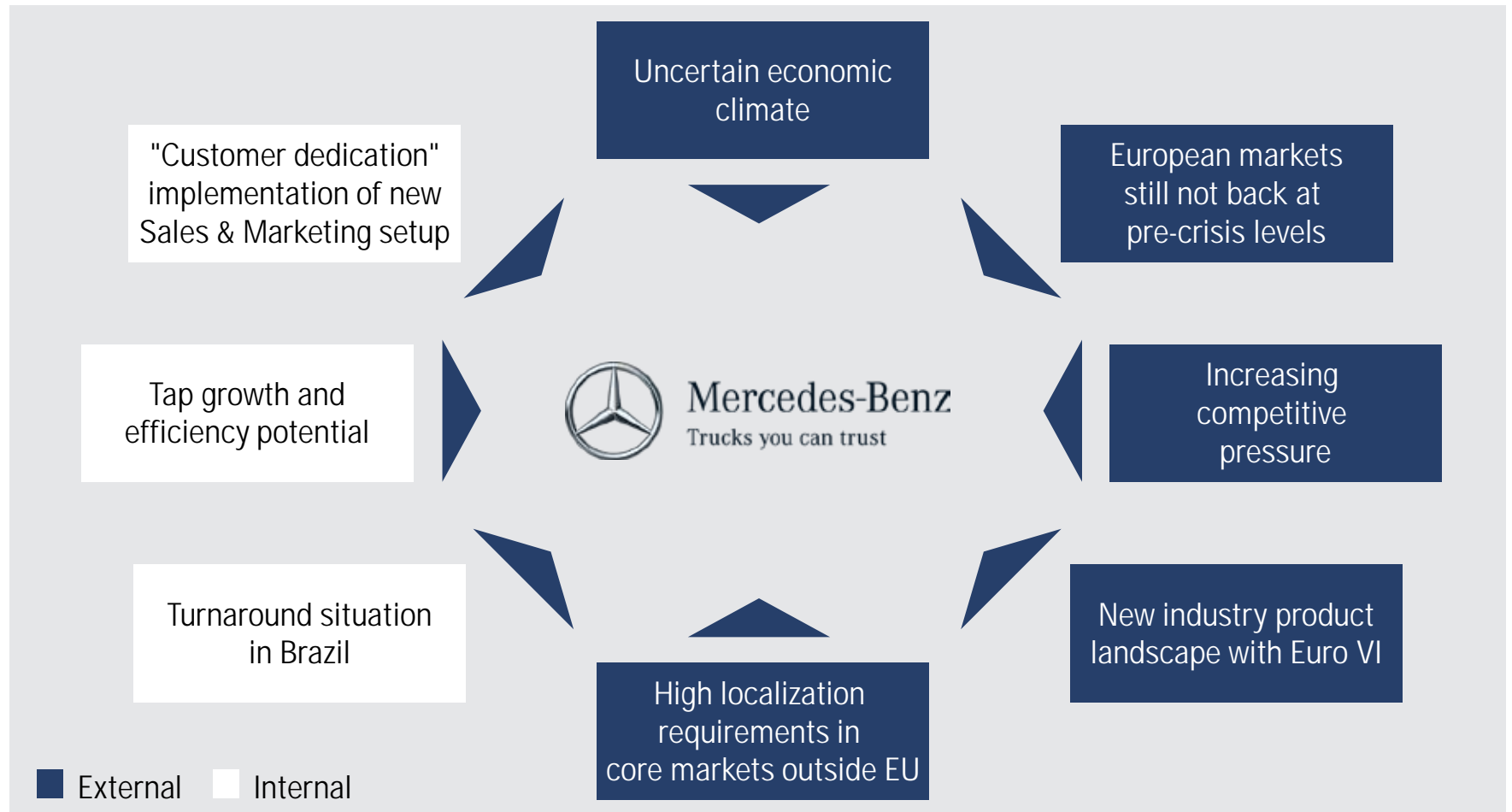
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- 2 Competitive product portfolio – successful Euro VI launch

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- 3 Strong market and sales performance

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- 4 MB Trucks#1 business optimization – growth and efficiency

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- 5 Summary

## Continued challenging business environment expected



## Mercedes-Benz Trucks business status

### Successful portfolio upgrade to Euro VI

- ✓ First OEM with complete Euro VI product range – including special vehicles
- ✓ Strong customer and media feedback on new Actros
- ✓ Significant fuel efficiency and TCO advantage
- ✓ Product portfolio upgrade also in Brazil and Turkey (new Actros in 2016) decided

### Strong market success in Europe and RoW – challenges in Brazil

- ✓ Market share expanded in EU 29 and Germany
- ✓ Clear market leadership in Turkey
- ✓ Critical market dynamics 2013 in Brazil stopped

### Performance challenges addressed with MB Trucks#1

- ✓ MB Trucks#1 program accelerated to improve earnings position
- ✓ Brazil turnaround on the way
- ✓ Earnings protection 2013/14

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## Euro VI product portfolio for Europe successfully launched



# A customer oriented product segmentation and positioning is successfully accomplished

Heavy Duty			Medium Duty
Long distance	Distribution > 18t	Construction	Distribution < 18t
			
 <b>Loader</b> - payload optimized			
 <b>Volumer</b> - load height optimized		 <b>Grounder-</b> load capacity optimized	
Comfort Driving dynamics Profitability	Class Handling Efficiency	Power Robustness Efficiency	Value Efficiency Dedication



# The new Actros – the leader in long distance haulage



## Comfort

### Flat floor

3 rooms, 2.13 headroom

### Living

SoloStar concept

## Driving dynamics

### Power delivery

new engines up to 625 hp

### Safe driving experience

steering, frame, rear axle guide

## Profitability

### Consumption in Euro VI

up to -5% + PPC<sup>1</sup> + FleetBoard

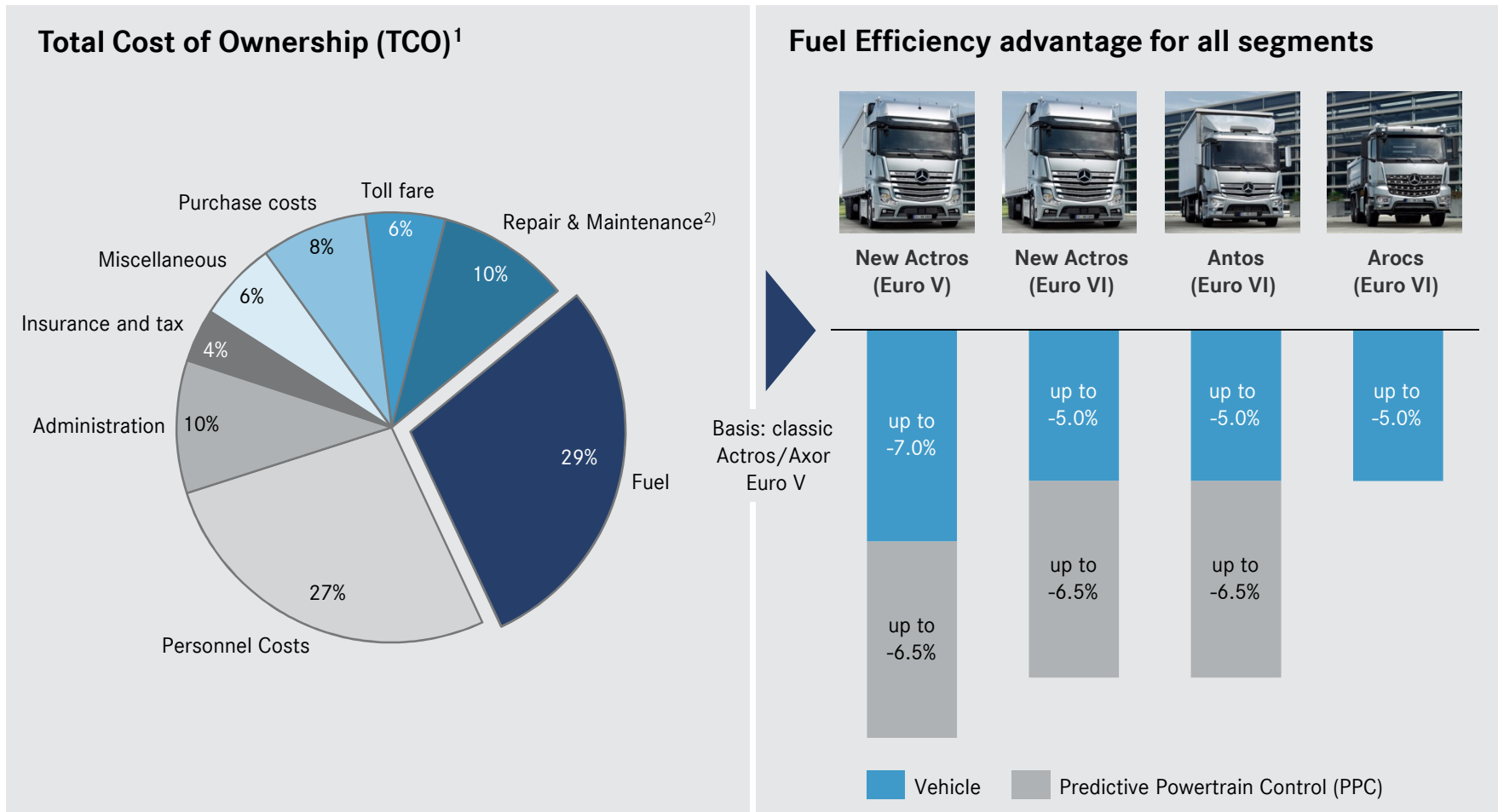
### Repair & Maintenance

compensation Euro VI-Effect

1) PPC = Predictive Powertrain Control



# New Actros provides competitive edge with remarkable TCO advantage despite Euro VI



1) Source: BGL, Stand 07/2013, www.bgl-ev.de/ 2) incl. tyres

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## Mercedes-Benz Trucks Brazilian product portfolio – covers all segments from light to extra-heavy





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## Mercedes-Benz Trucks Turkish product portfolio – basis for clear market leadership



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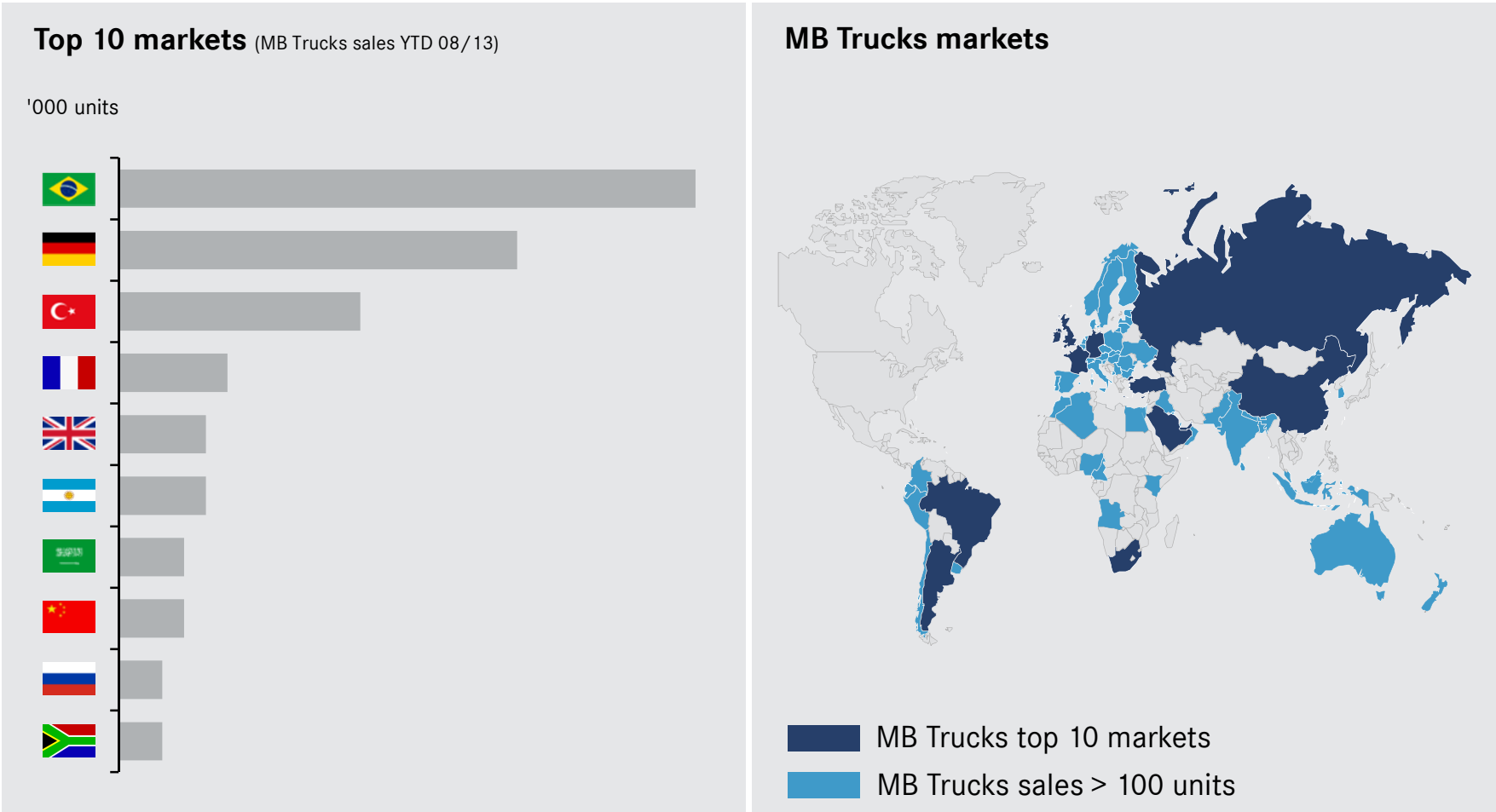
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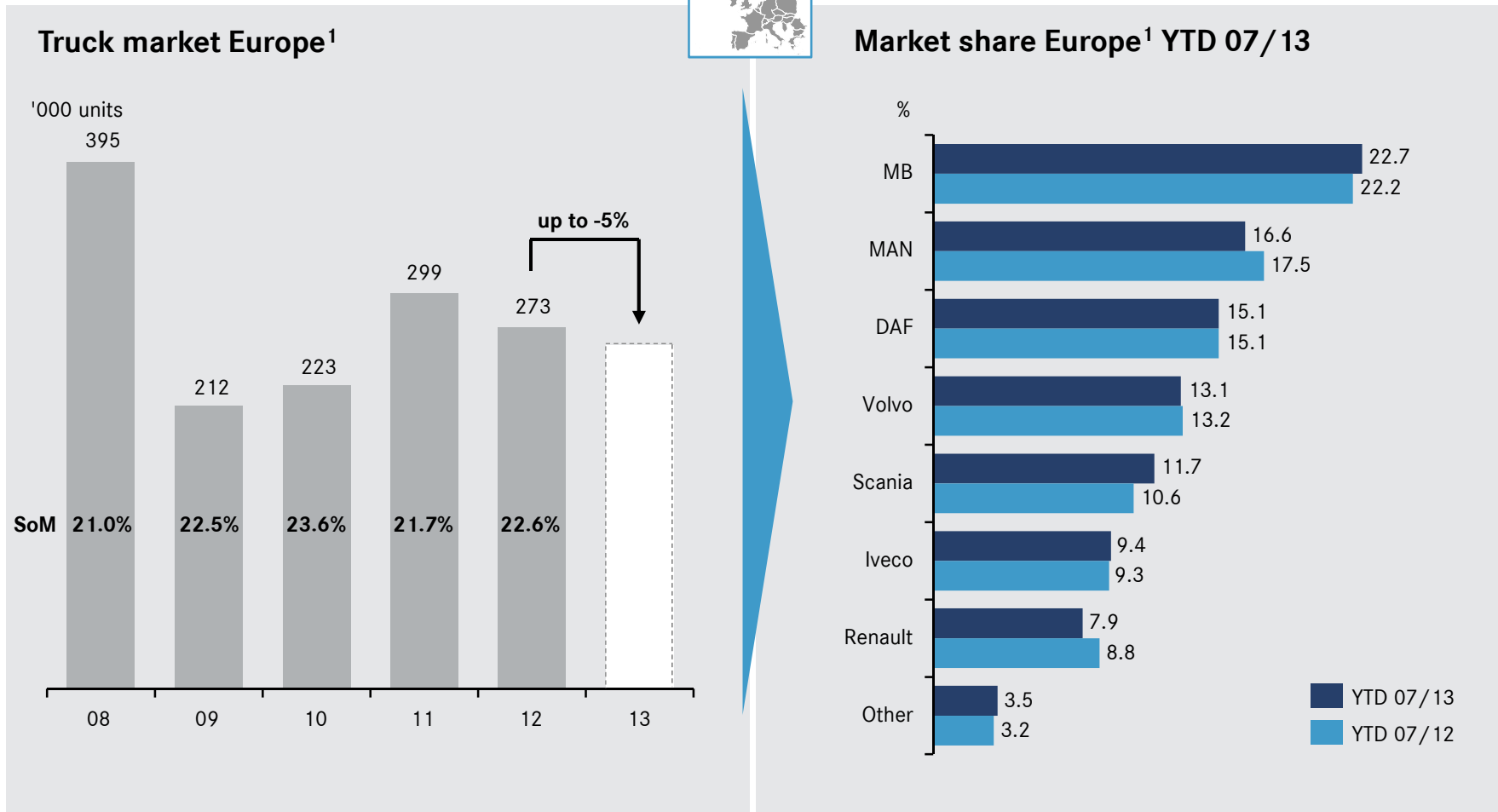
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## Strong global presence – seven of ten largest markets outside EU29





# Mercedes-Benz Trucks expanded market leadership



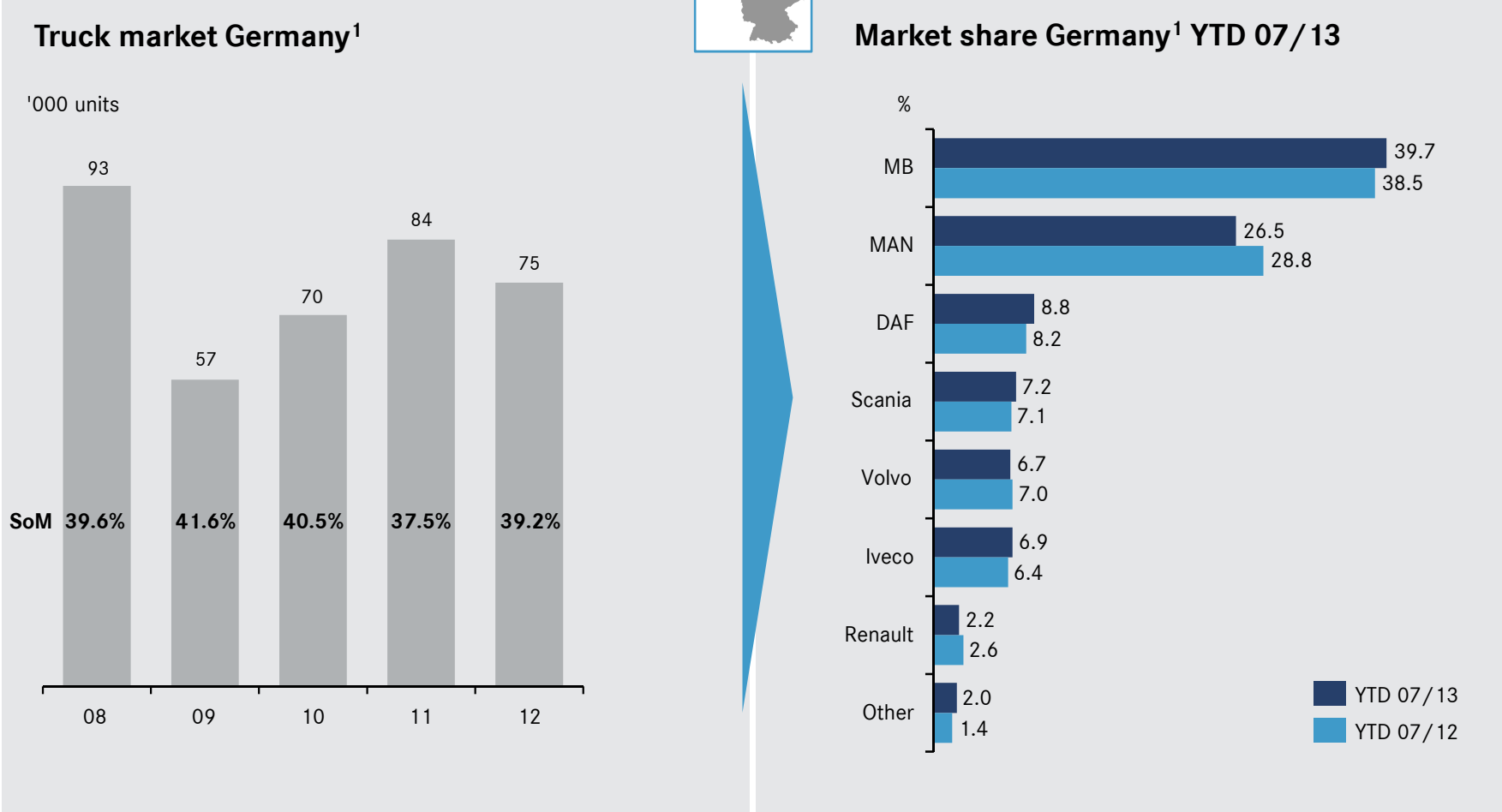
1. Truck Market EU29 (MDT/HDT) > 6t

SoM: Share of market





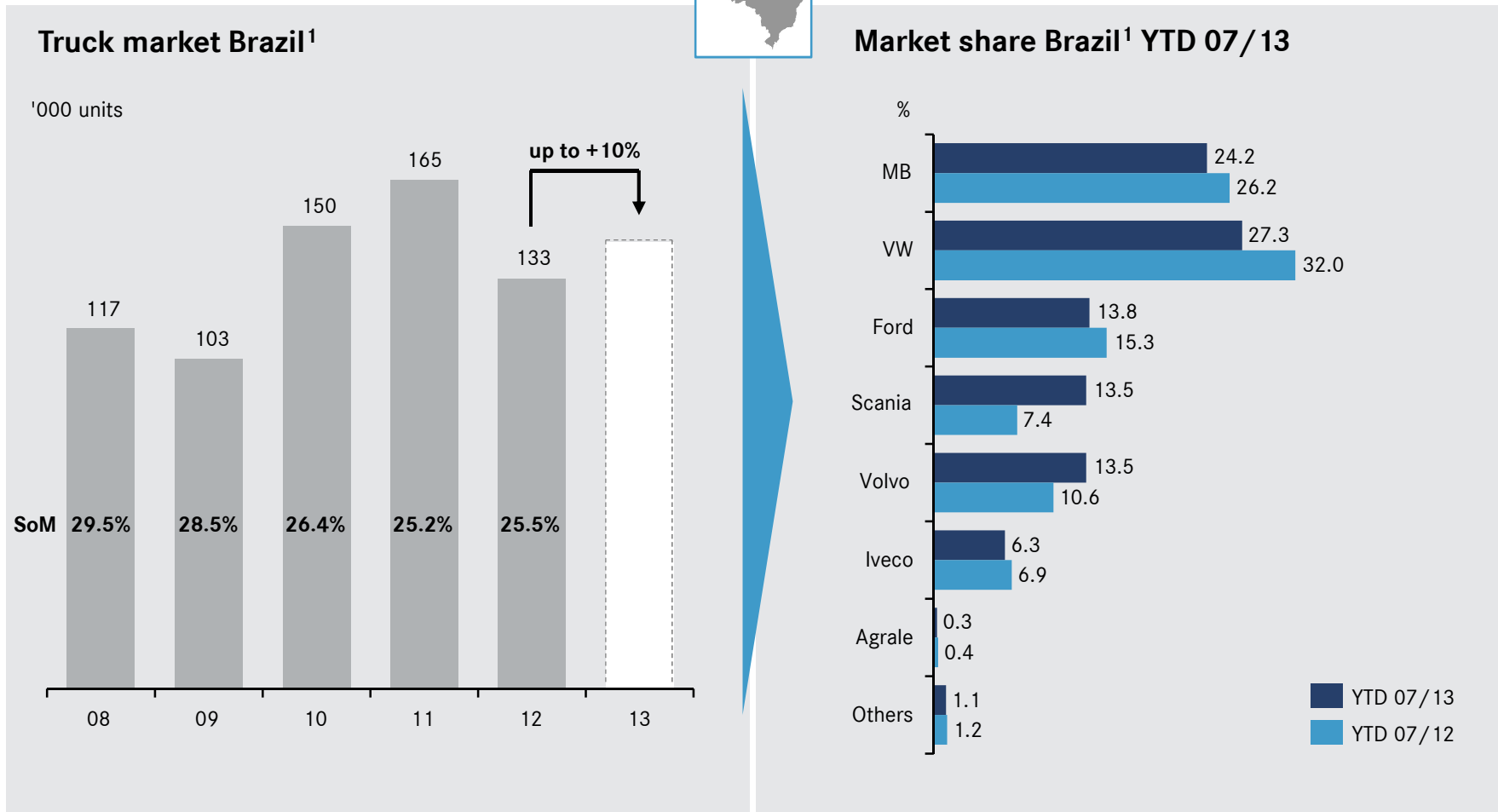
# Mercedes-Benz Trucks remains clear market leader in Germany



1. Truck Market Germany (MDT/HDT) > 6t      SoM: Share of market



# Mercedes-Benz Trucks Brazil is #2 in market – goal to become #1 again

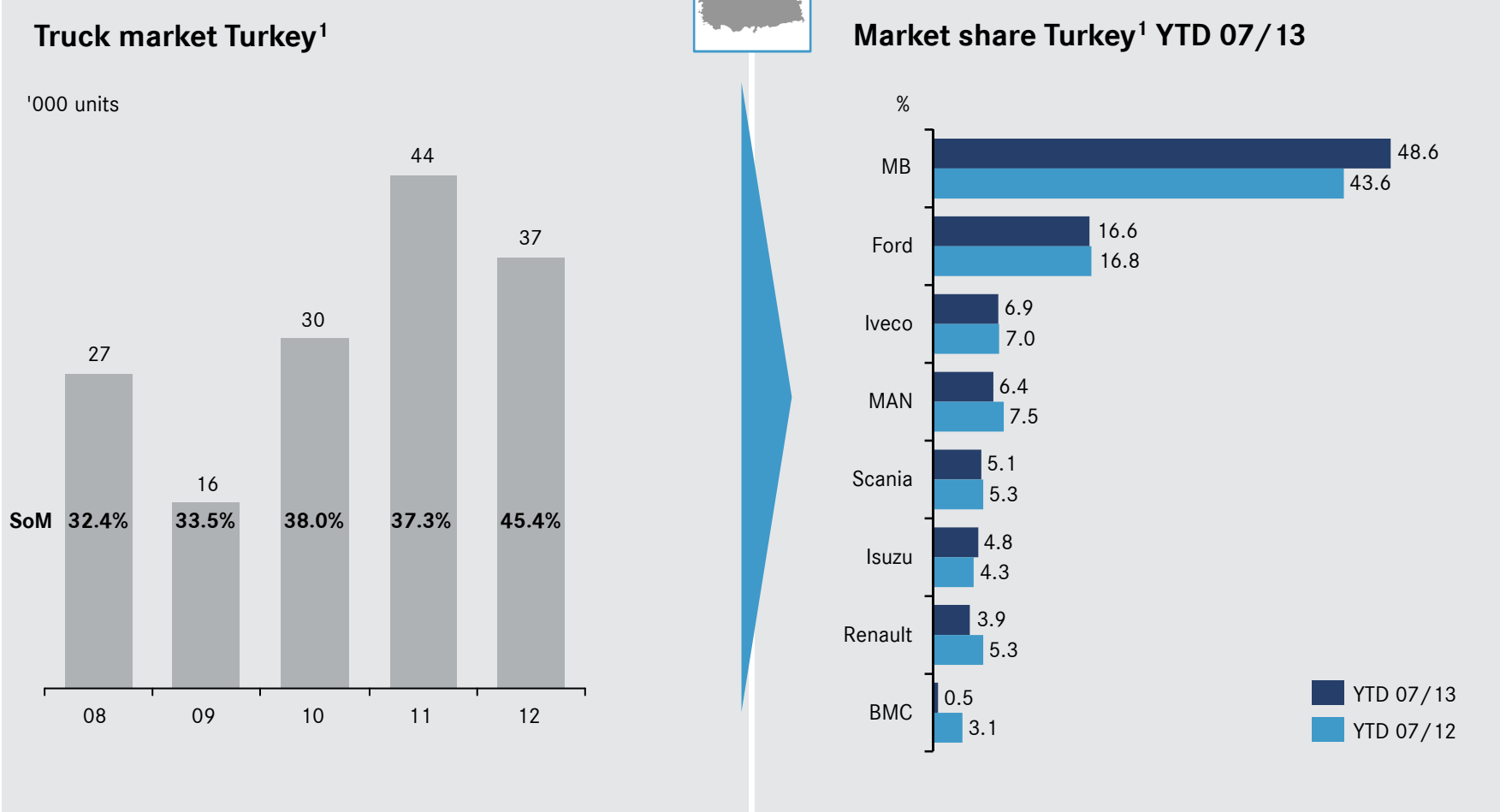


1. Truck Market Brazil (MDT/HDT) > 6t

SoM: Share of market



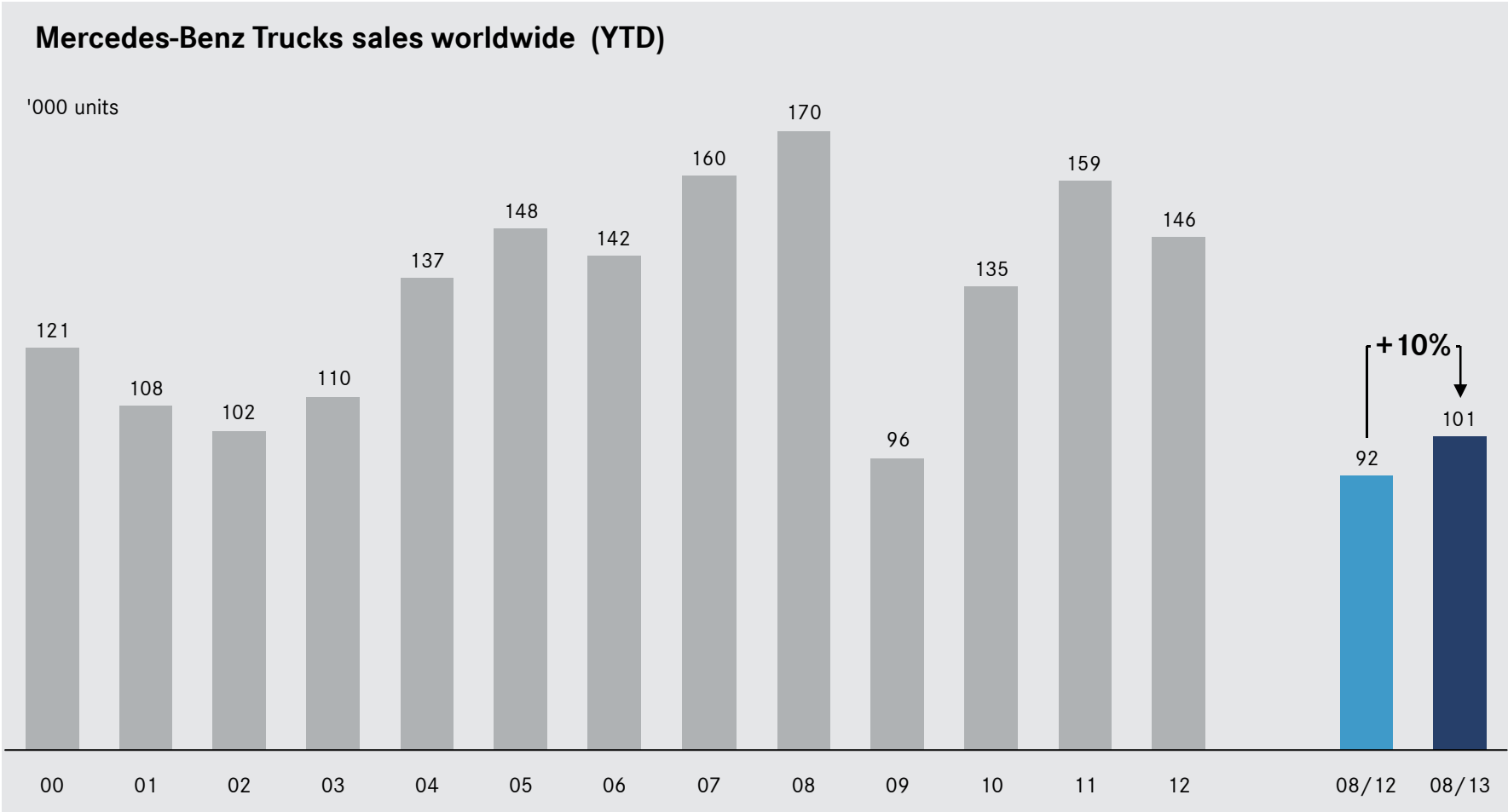
# Mercedes-Benz Trucks is also clear market leader in Turkey



1. Truck Market Turkey (MDT/HDT) > 6t

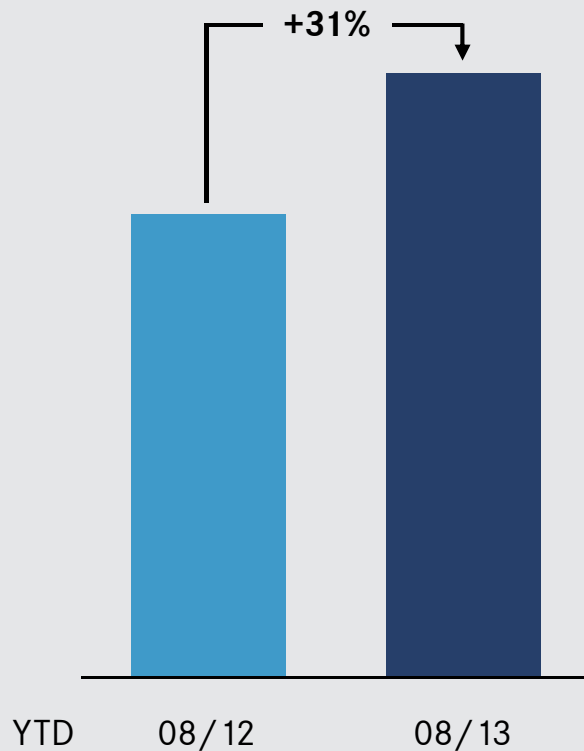
SoM: Share of market

# 2013 sales volume on strong trajectory



## Order intake increased more than 30% in EU29

Order intake EU29 (YTD)



### Comments

#### Euro V

- Some Euro V pre-buy demand – especially DE, UK & F
- Mainly driven by long haulage segment
- Steering of derogation process implemented

#### Euro VI

- In total >11,000 units Euro VI in the market (total 28,000 new HD trucks sold)
- Euro VI order intake increasing as planned
- In 2013 order intakes for New Actros Euro VI in EU 29 >50% and in Germany >80%

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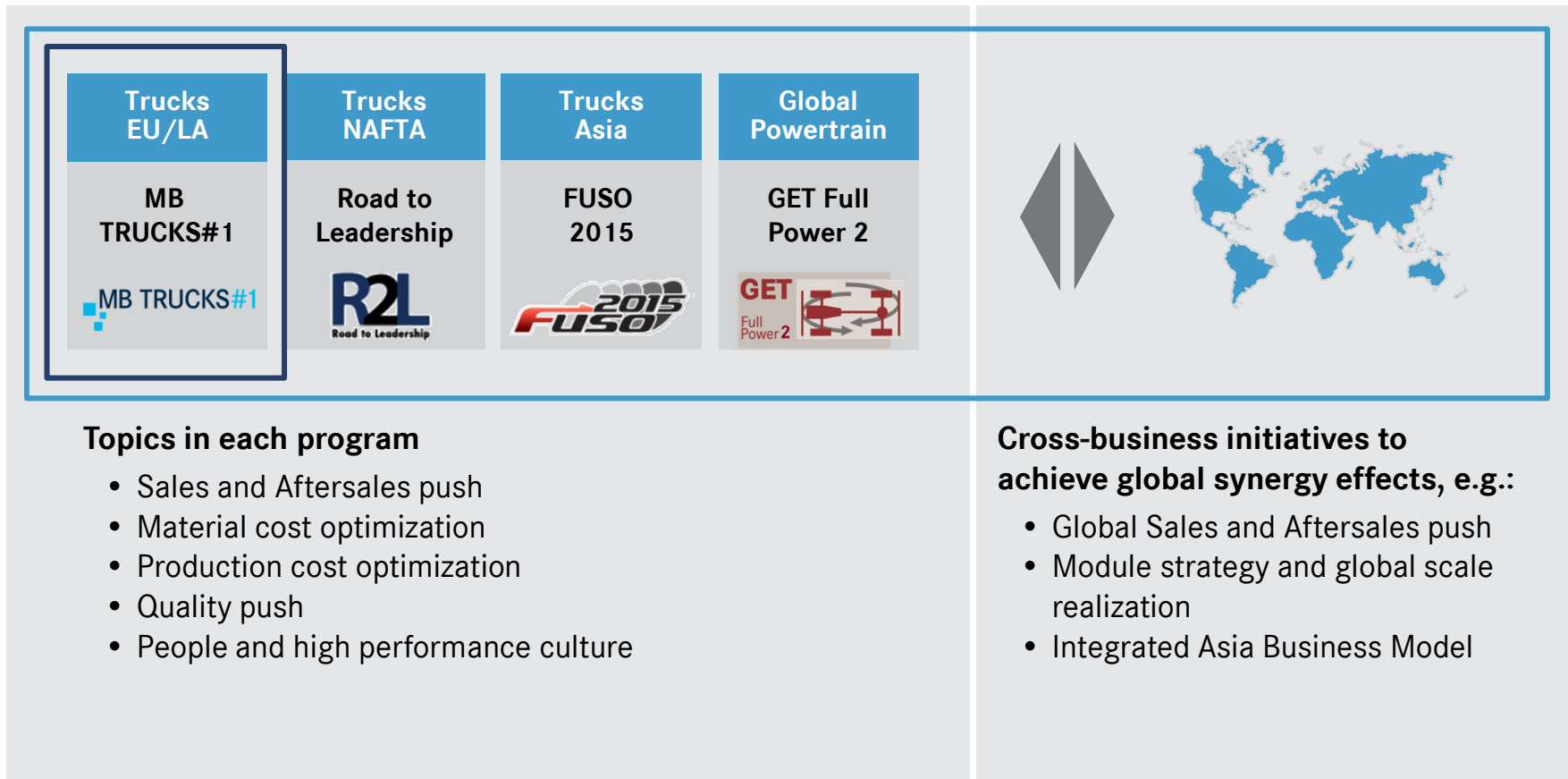
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## MB Trucks#1 integral part of DT#1



## MB Trucks#1: Ten focus areas to ensure sustainable competitive position



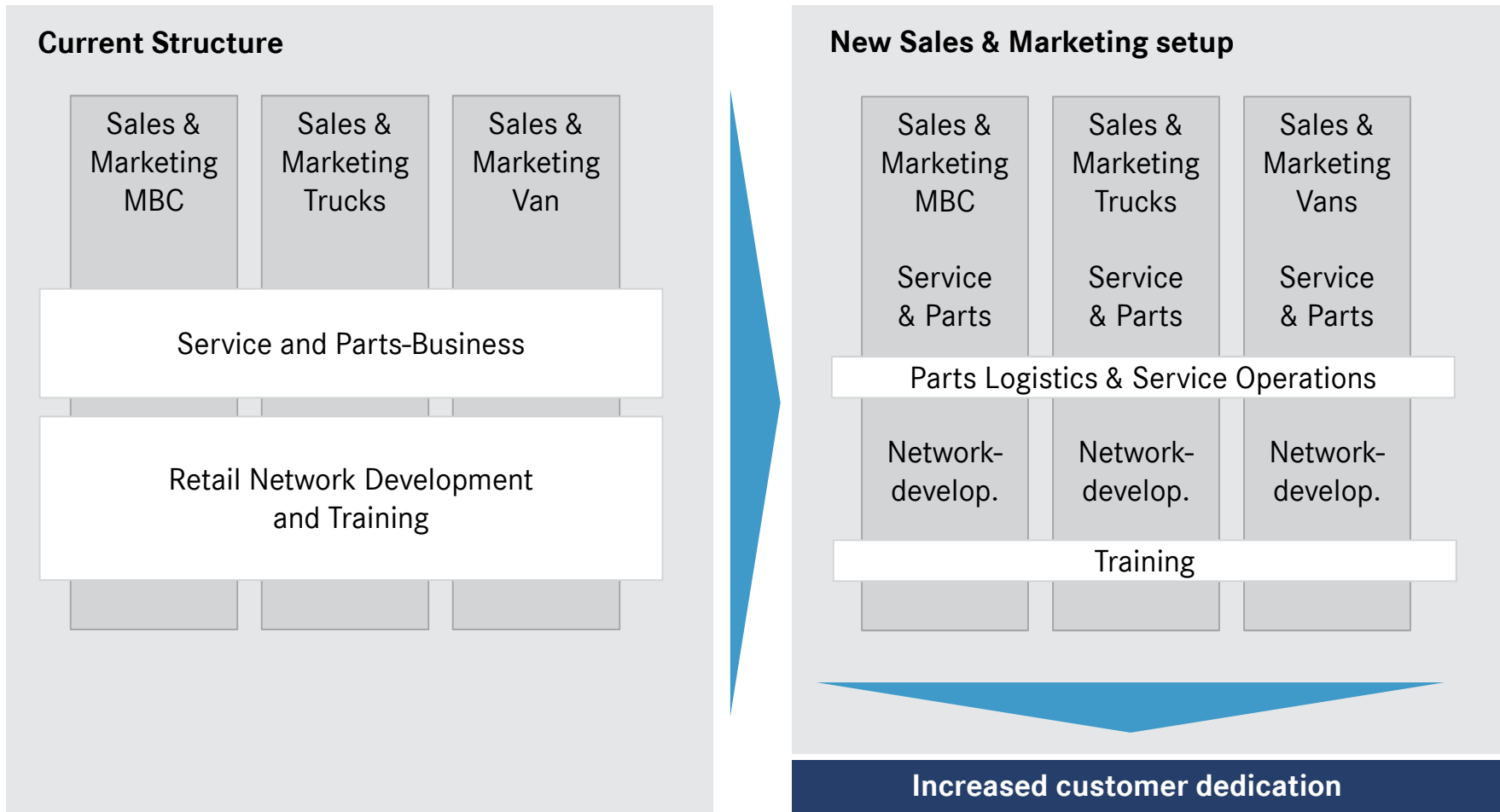
### Operational (short-/medium-term)

1	Market performance push (market share and price realization)	Growth
2	Downstream acceleration	
3	Brazil turnaround	
4	Variable cost reduction	Efficiency
5	Fixed cost reduction	
6	Capex/funding optimization	

### Strategic (longer-term)

7	Product portfolio strategy
8	Operations & footprint strategy
9	Customer & market strategy
10	Working and leadership culture

## Sales & Marketing: New setup will significantly improve customer dedication



## Sales push: Fleet conquest program showing success

### Initiative overview

- Conquest program launched  
Focus: largest European fleets
- Special product offerings and customer support

### Impact: example of a new customer

- ~700 trucks in operation,  
mainly from competitors
- 2013: 400 units ordered from MB Trucks



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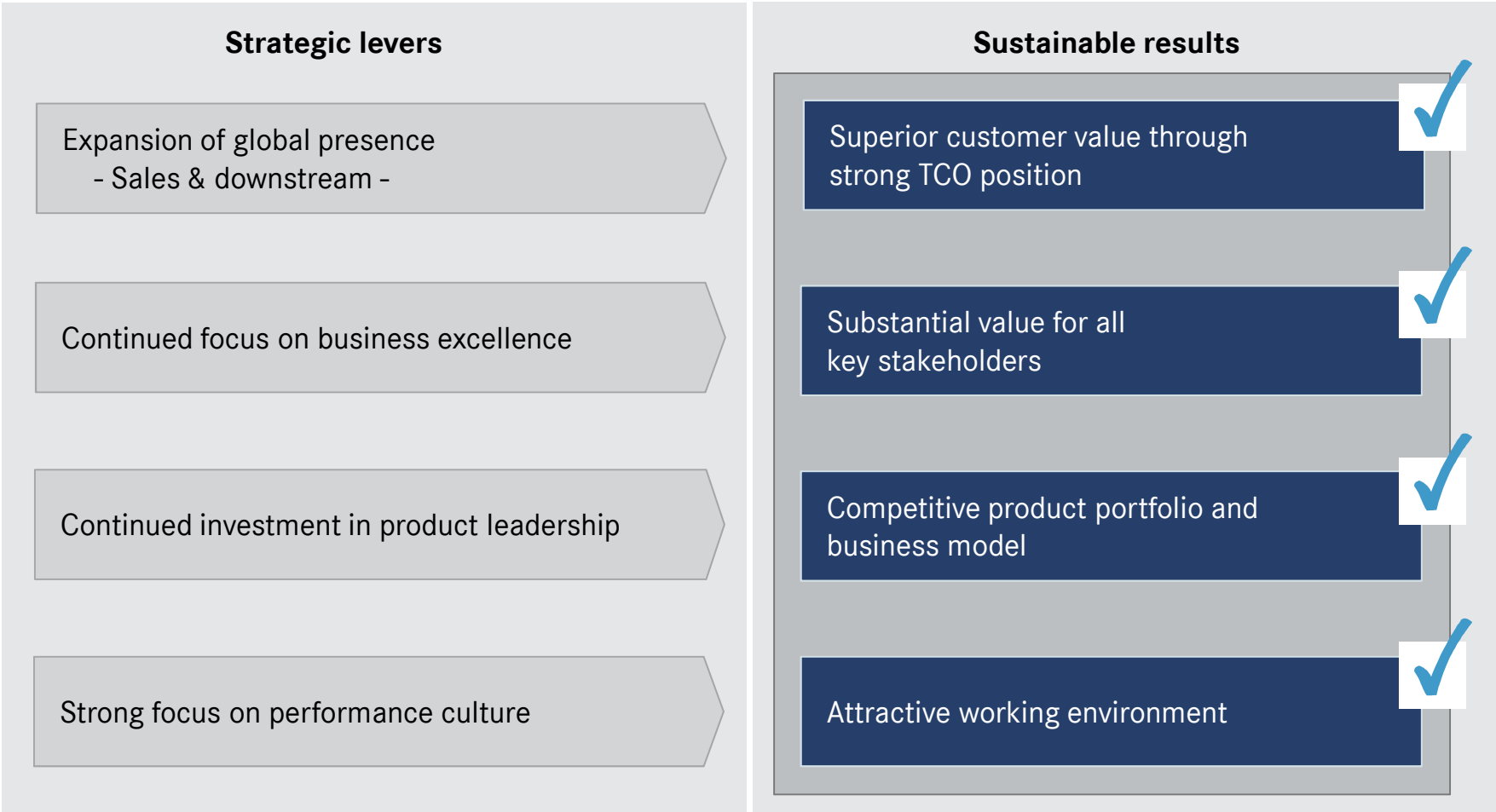
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# We are committed to delivering sustainable results for Daimler Trucks







Mercedes-Benz

Trucks you can trust

## Disclaimer

**The figures in this document are preliminary and have neither been approved yet by the Supervisory Board nor audited by the external auditor.**

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