

A Full Service Workshop Concept for Truck and Trailer



Dr. Stephan Weng
Member of the Executive Board, Knorr-Bremse CVS

Knorr-Bremse is the world's leading manufacturer of braking systems for rail and commercial vehicles



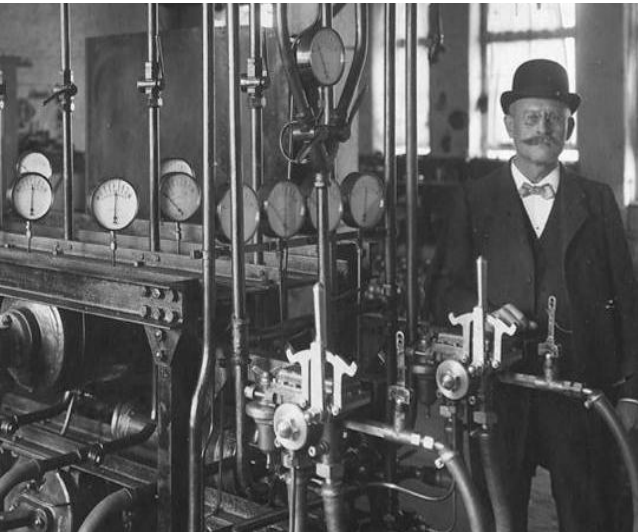
Rail Vehicle Systems

- Metros
- Streetcars
- Multiple units
- High-speed trains
- Locomotives
- Passenger rail cars
- Freight cars

Commercial Vehicles

- Trucks
- Buses
- Engines
- Special vehicles

100 years of experience with braking technology



Founding and initial development 1905-1945

- Knorr-Bremse GmbH first set up in 1905 in Berlin by Georg Knorr
- Development of compressed air brake for freight trains enables Knorr-Bremse to become the biggest manufacturer of rail vehicle brakes in Europe
- First Knorr air brake for trucks is patented



Post-war period and reconstruction 1945-1985

- Confiscation of Berlin plant at end of Second World War
- Munich becomes company's new headquarters
- KE control valve becomes new UIC standard
- Entrance into the USA market with AAR DB-60 valve for rail vehicles

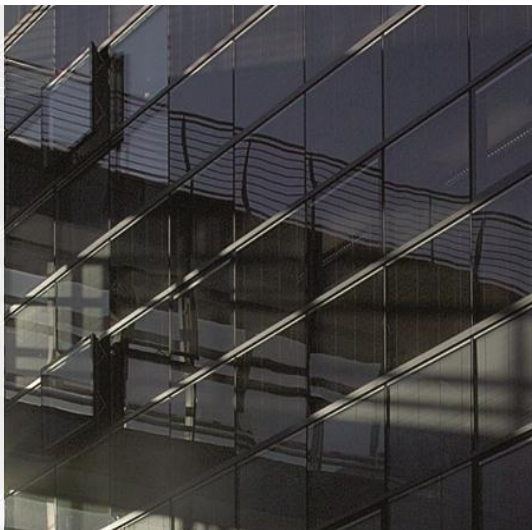
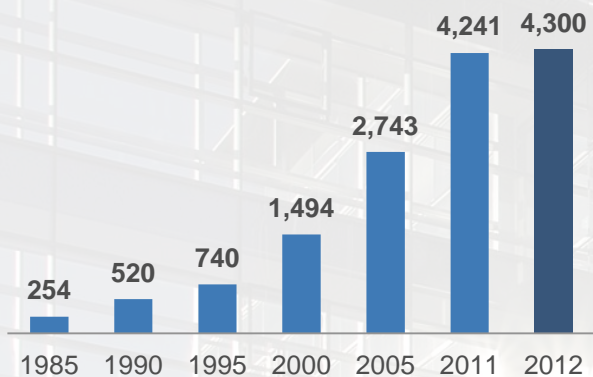


Expansion through concentration 1985-2013

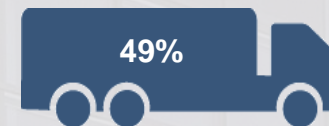
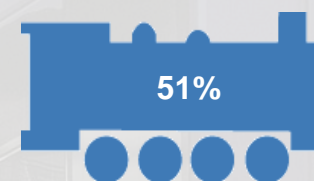
- 1985: Heinz Hermann Thiele takes over company
- Radical restructuring and expansion strategy
- Consolidation of market by Knorr-Bremse
- Development into world's leading braking technology company

Knorr-Bremse Key Figures

Sales
in € millions



Distribution of sales 2012

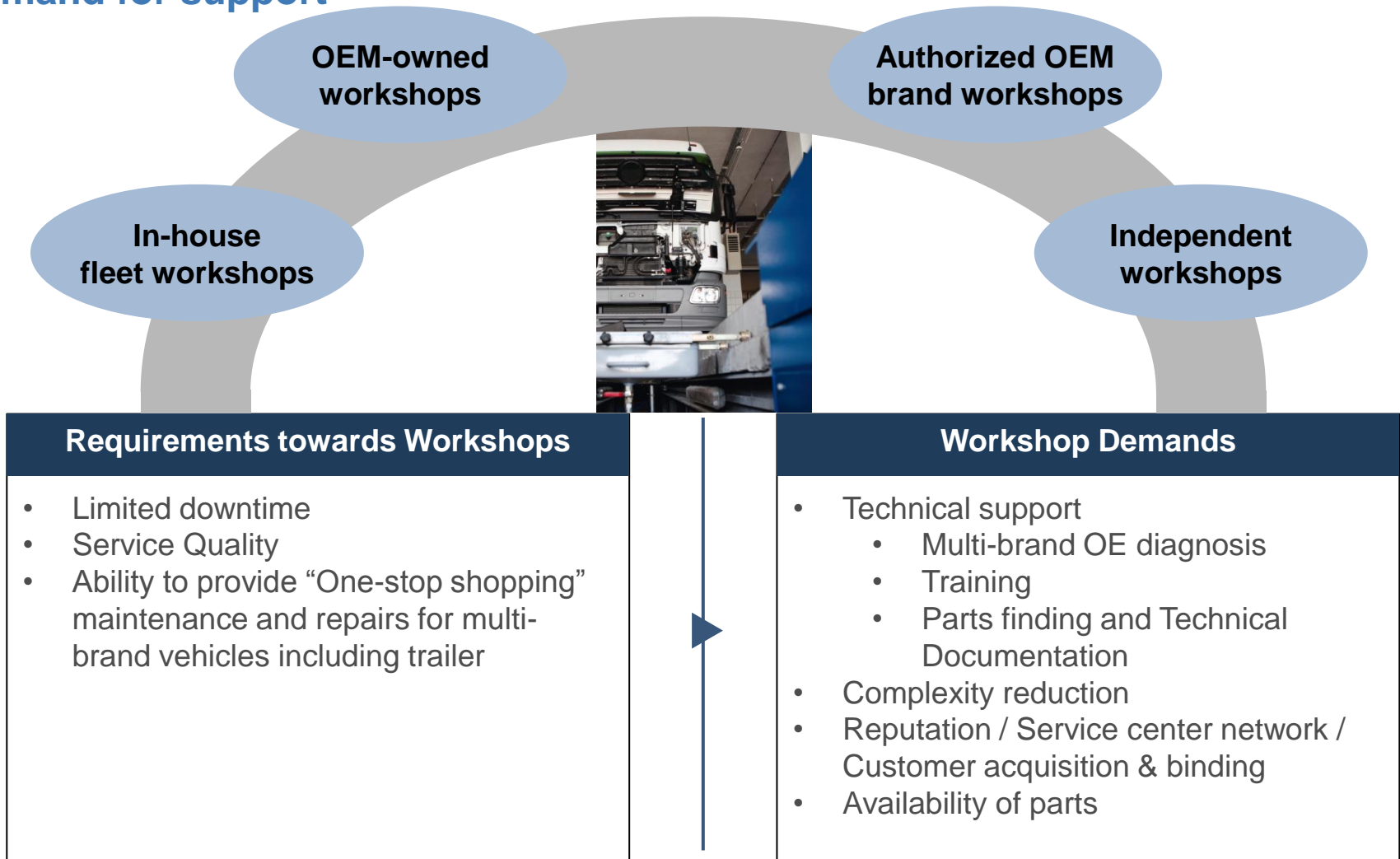


| Sales | 2011 | 2012 |
|---|-----------------|-----------------|
| Knorr-Bremse Group | € 4,241 million | € 4,300 million |
| Rail Vehicle Systems | € 2,187 million | € 2,217 million |
| Commercial Vehicle Systems | € 2,068 million | € 2,098 million |
| R&D Expenditures / Employees | 2011 | 2012 |
| Research and development expenditure | € 209 million | € 250 million |
| Employees (incl. leasing; per Dec. 31) | 20,050 | 19,120 |

Customers of the Commercial Vehicle Systems division (selection)

| | | |
|--|---|--|
|  | <p>Tractor vehicle manufacturers</p>  <p>Trailer manufacturers</p>  <p>Axle manufacturers</p>  |  |
| <p>America</p> | <p>Europe</p> | <p>Asia/Pacific</p> |

Requirements towards workshops are continuously increasing driving their demand for support



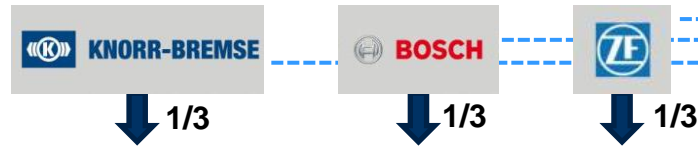
Alltrucks combines the technical expertise of three CV suppliers...

Teamwork für die Werkstatt.

The image displays a white semi-truck with the following logos on its side: ALLTRUCKS TRUCK & TRAILER SERVICE, KNORR-BREMSE, BOSCH, and ZF. The truck is surrounded by various mechanical components categorized into boxes:

- Top Row:** Denotronic, Dieseleinspritzsystem, Filter, Elektrik/Elektronik/Sensorik, Batterie
- Right Side (Vertical):** Starter/Generatoren, Riemen, Wischblatt, Beleuchtung/Signalanlage, Lenkgetriebe, Luftaufbereitung, Luftbeschaffung
- Bottom Row (Left):** Radbremse, Bremssteuerung, Stoßdämpfer, Radbremse, Fahrwerk, Luftaufbereitung
- Bottom Row (Right):** Getriebe, Kupplung, Bremssteuerung, Lenkung, Kupplungsbetätigung

... to support workshops according their needs



ALLTRUCKS
TRUCK & TRAILER SERVICE

KNORR-BREMSE **BOSCH** **ZF**

- heading a full-service & multi brand CV workshop concept
- franchise concept targeting CV workshops servicing medium & heavy-duty trucks, trailers and buses
- concept for IAM but also brand-bound workshops that want to extend their business to other brands

The first and unique truck and trailer concept by leading automotive and CV suppliers that offers the **width in support of multi brands** of an IAM workshop concept combined with the **technical depth of a single OEM** workshop concept

Wholesalers

| | | | | |
|-----------------------------------|----------------------------------|--|--|--|
| <p>Technical Hotline</p> | <p>Technical Training</p> | <p>Technical Information for Maintenance and Repair (Parts Finding)</p> | <p>Technical Diagnosis Solutions in Hardware & Software</p> | <p>Marketing Support & Q-Management</p> |
| <p>Concept Sales Force</p> | | | | |

Concept & Services

Full access to the core competencies of the founder companies to perform customer-oriented maintenance and repair

ALLTRUCKS TRUCK & TRAILER SERVICE **KNORR-BREMSE** **BOSCH** **ZF** **Workshop**

Alltrucks offers a complete service portfolio

Main elements of Alltrucks service portfolio

Personal Assistance



Technical Hotline



Customized Trainings



Workshop portal



Allmakes Vehicle Diagnostics



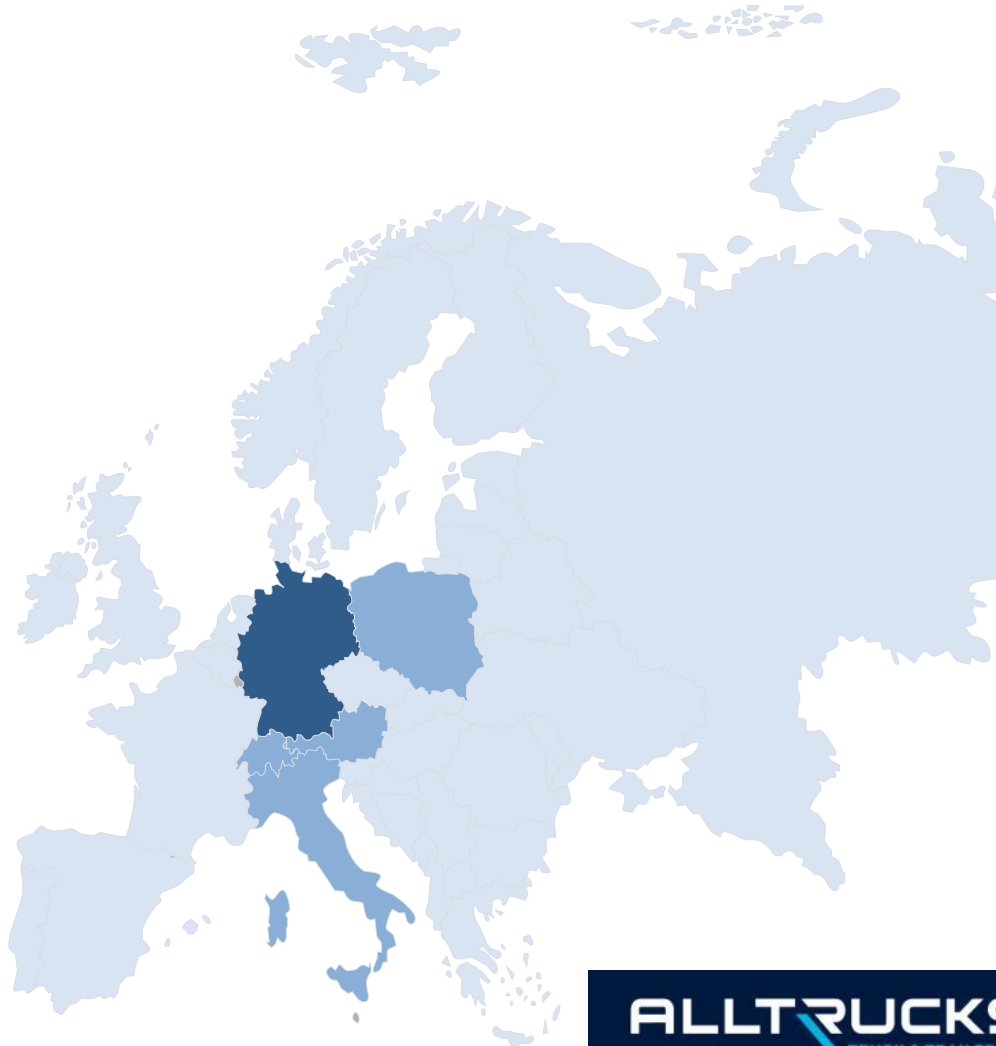
Quality Assurance and Partner Development Program



Marketing support



After start in Germany concept will be rolled-out European-wide



- Start (2014)
- Planned Expansion – Stage 1 (2015)
- Planned Expansion – Stage 2 (2016 ff)

ALLTRUCKS
TRUCK & TRAILER SERVICE



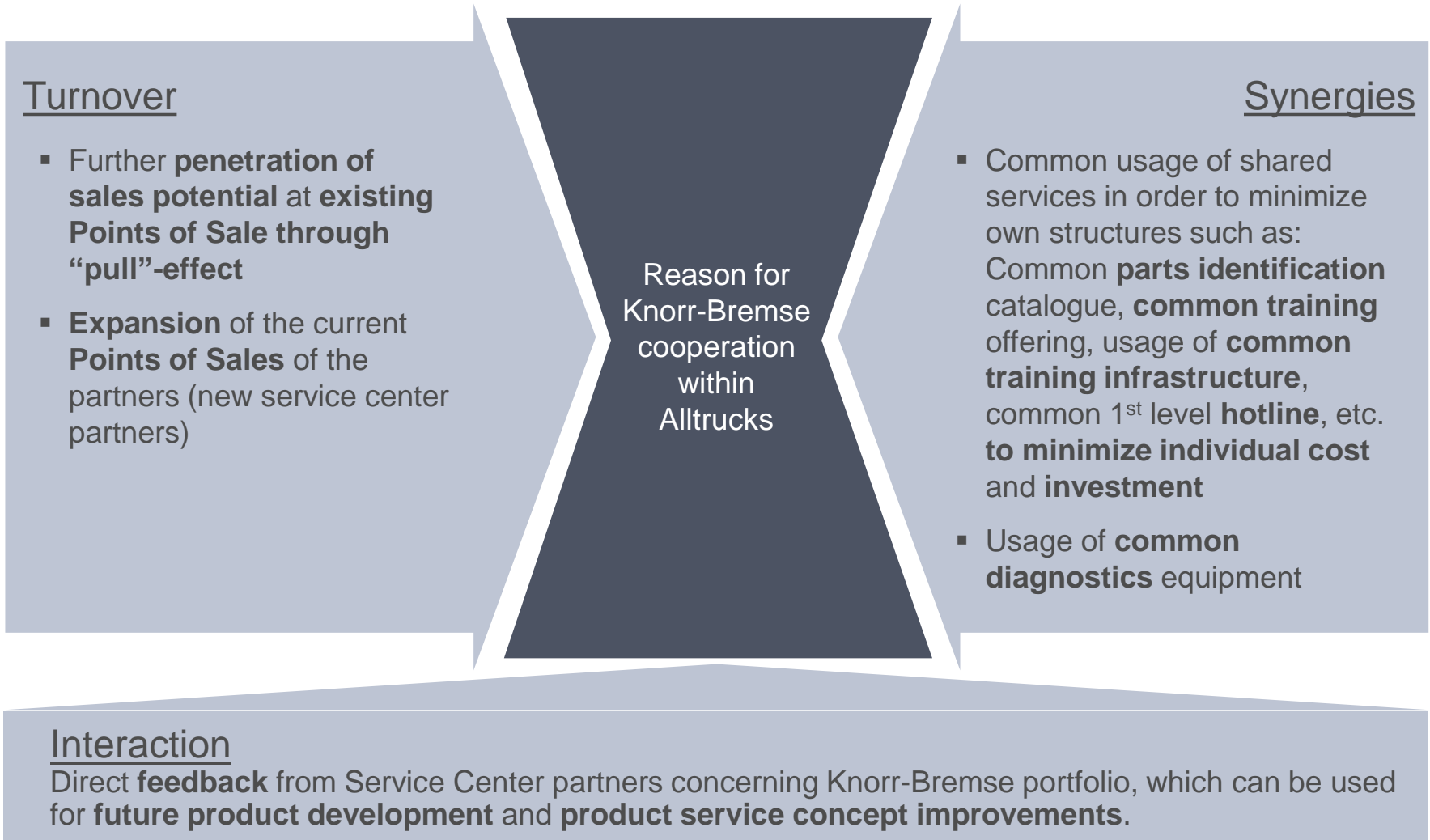
KNORR-BREMSE



BOSCH



Knorr-Bremse reasons for participations within Alltrucks cooperation are caused within the segments Turnover, Synergies and Interaction



Focus on generating workshop benefits by reducing complexity



1 brand powered by three
Best-in-class CV system suppliers

1 face to the customer

1 call solves all

1 click to information

1 diagnostic tool

1 training concept

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Thank you very much for your attention