



## **Investor Day in New York, March 7, 2014**

**Dennis Slagle – EVP Group Trucks Sales & Marketing Americas**

# Truck Sales & Marketing Americas

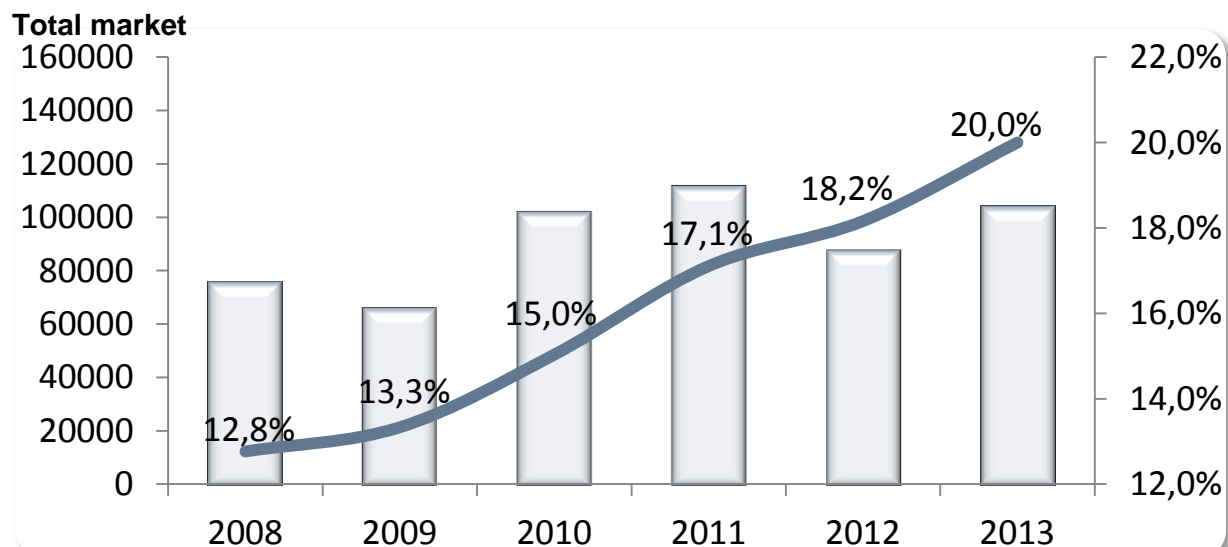
- 400,000 market volume
- 822 sales & service locations
- 550,000 active truck population



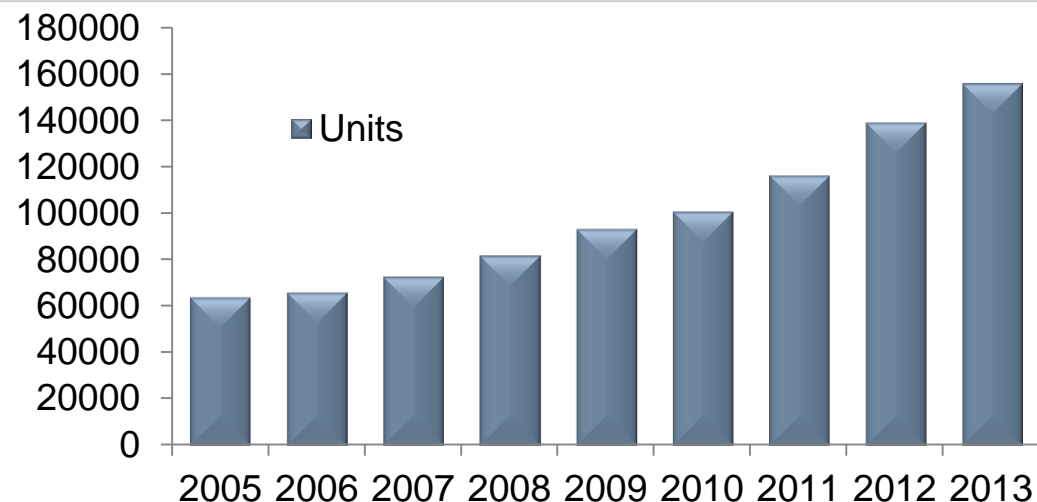
# Increasing share and running population

- Projected flat market for 2014 in Brazil (105,000)
- Product renewal
- Service/aftermarket support
- Image

## Volvo market share development – Brazil



## Group running population – Latin America



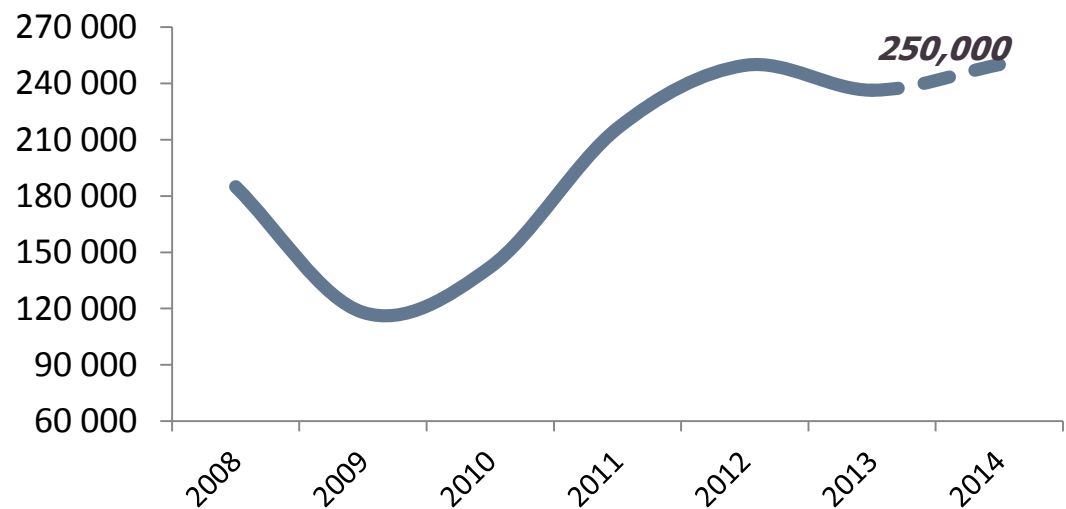
# Infrastructure expanding to support growth

- New locations in Argentina, Chile, Peru, Ecuador
- Brazilian network, YE2014 v. 2010
  - Outlets +28%
  - Service bays +75%
  - Technicians +80%



# Market and business environment stabilizing

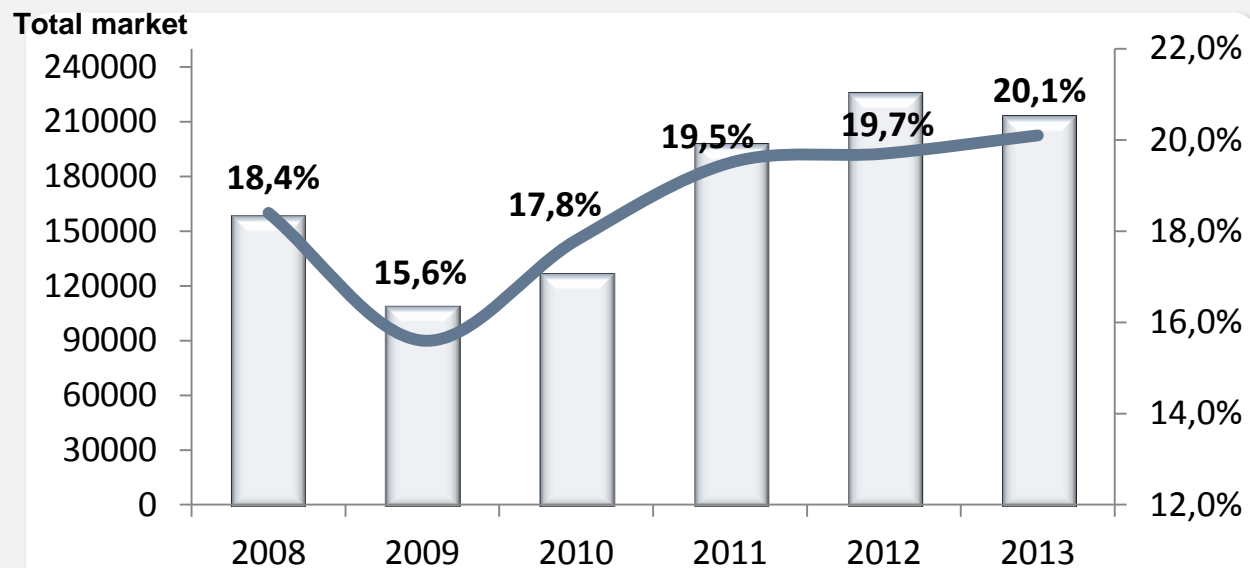
## NAFTA Market Development



- Stabilizing economy
- Construction rebound
- Highway volume returning
- Customer confidence growing

# Volvo Group share growing

## Mack + Volvo market share – U.S. & Canada



## In focus

- Transformed distribution
- Aftermarket leadership
- Captive components
- Natural gas
- Mack brand revitalization

# Improvements driven through network

- 60 additional outlets since 2010 (560 total)
- \$350M in private investment
- 30% increase in bay capacity
- 50% more technicians
- 45% increase in service capacity
- 150% increase in master technicians

***Record profitability in the network***



# Comprehensive strategy for aftermarket leadership

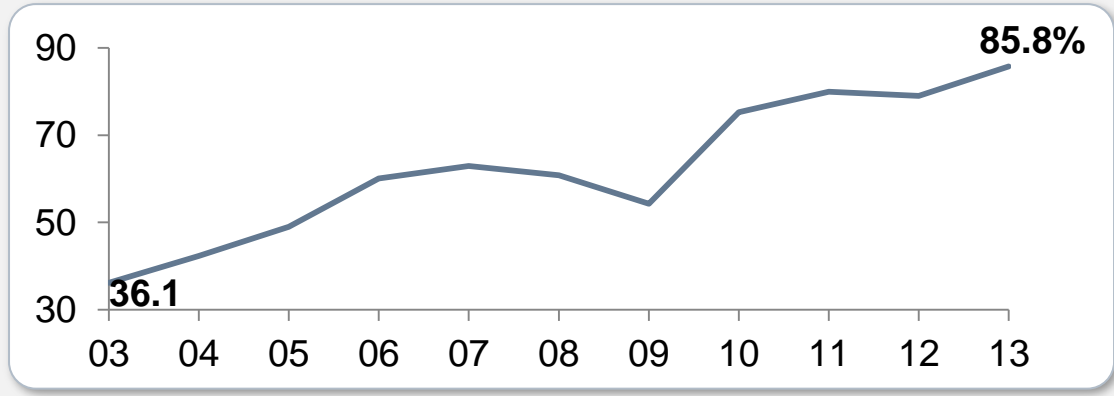
- Uptime Center
- Telematics / “Connected Truck”
- Expanding parts sales
- Warranty & contract maintenance
- Leasing



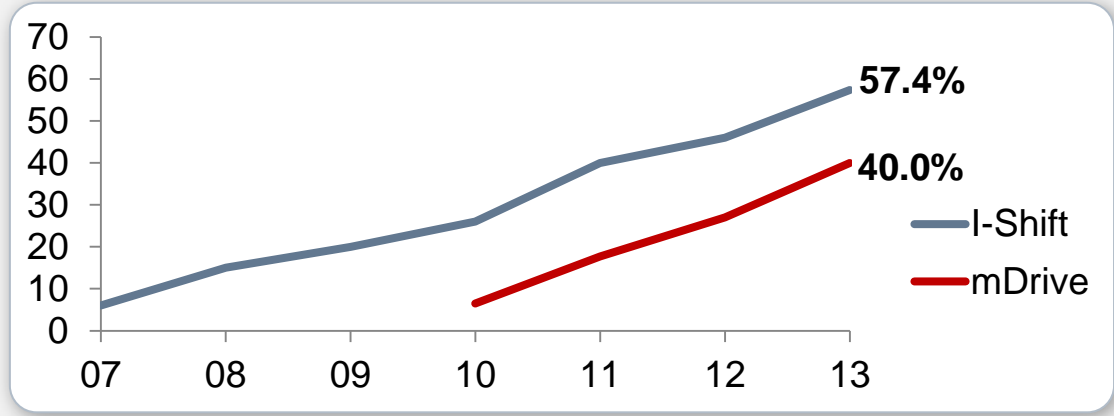


# Captive component strategy has momentum

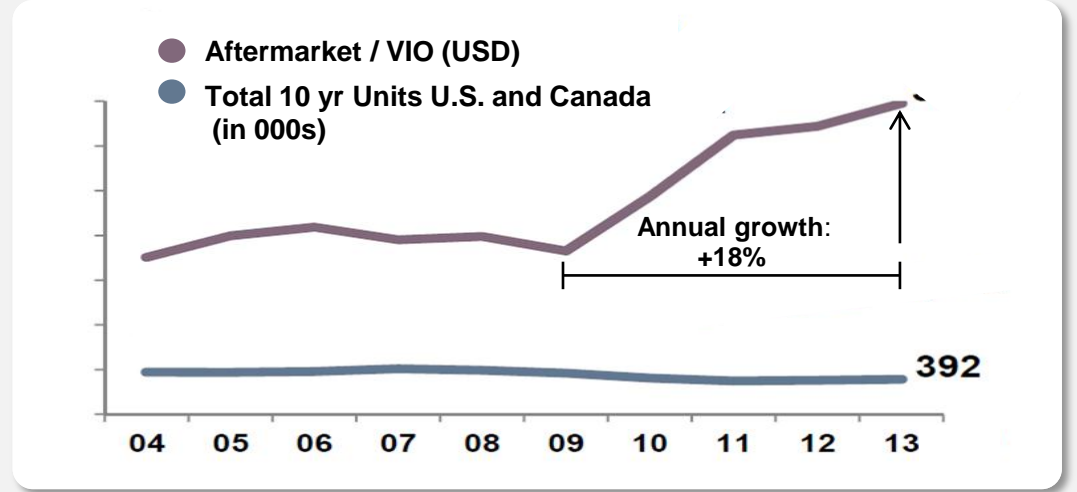
Captive engines for Volvo



Captive transmissions (AMT)



Aftermarket / vehicles in operation (VIO)



# Strong position in nascent natural gas segment



# Mack brand revitalization begins

MACK BRAND PROMISE  
**THE AMERICAN TRUCK  
YOU CAN COUNT ON**

REVITALIZING AN  
**ICONIC**  
AMERICAN BRAND

Drive  
Consistency

Forward  
Looking

Winning  
Hearts and  
Minds



**MACK**®