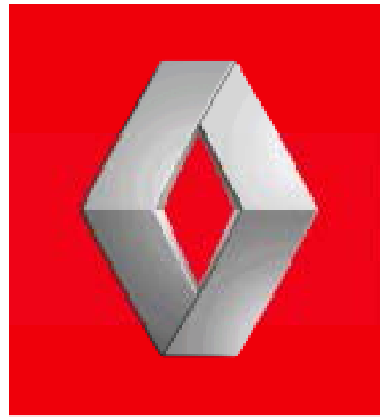


Investors Day



**RENAULT
TRUCKS**

Marketing and economics Vice President

Benoit CARON

January 8th, 2004



Products: Renault Trucks in the future

Renault Trucks Vision:

- **We have to secure that our customers clearly identifies product attributes, values, competitive advantages, culture and personality throughout the Renault Trucks Brand.**

- **Our Vision:**

Multi specialist , close to the customers
based on 3 VALUES :

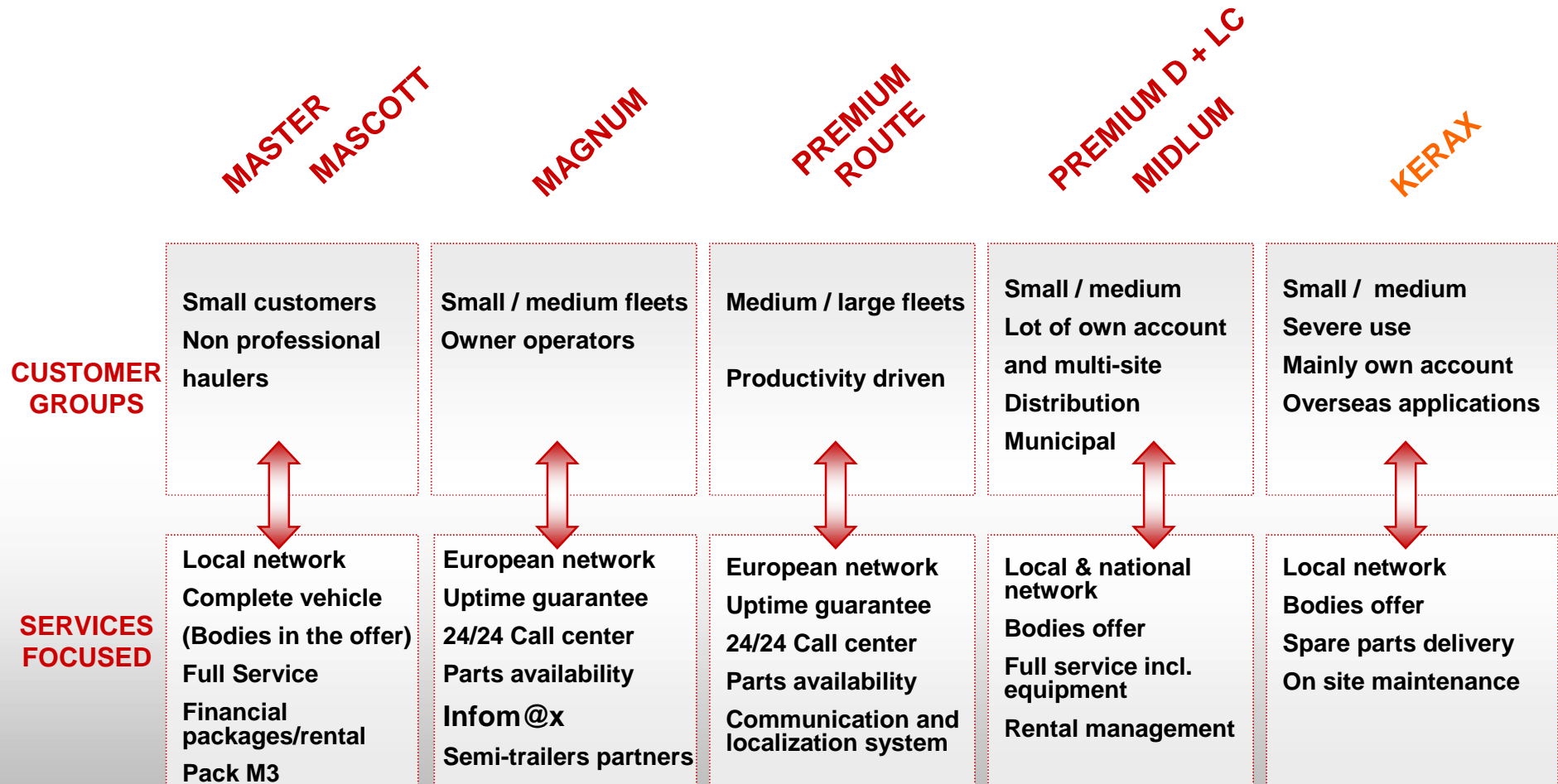
Innovation,
Efficiency,
Caring and Daring

Renault Trucks : The truck Multi specialist

- **Renault Trucks is offering one of the widest range of product today, From Renault Master to Renault Magnum, completely renewed since 1996**
- **Renault Trucks becomes an expert on the needs of each customer's business.**
- **A business oriented product offering and associated services.**



From Generalist Truck Maker to **Multispecialist** Transport Solution Provider



Renault Trucks : Close to its customers

- **Build a win-win relationship with the customers through an attentive listening and a warm and caring environment.**
- **Renault Trucks, through its products, services and design, becomes a partner in the customer's profitability**



Renault Trucks: Focused around 3 values: INNOVATION

- Renault Trucks provides innovative products and designs which anticipate market expectations.
- Using the most advanced and innovative designs
- Through The "French Touch" Ensure and secure that a
- Renault truck is and will always be a RENAULT vehicle.

YESTERDAY



January 8th, 2004

TODAY



TOMORROW

New Trucks

Renault Trucks: Focused around 3 values : EFFICIENCY

- **We can serve our customers, wherever they operate, anywhere in the world.**
- **Be recognized as a "value for money" brand.**
 - ❖ Dedicated to driver comfort and customization
- **Enable our customers to meet their performance challenges using:**
 - ❖ Optimized Payload,
 - ❖ Fuel consumption,
 - ❖ Uptime (through Product and Services offer),
 - ❖ Reliability (ensuring the mobility of their vehicles)



Renault Trucks: Focused around 3 values : CARING and DARING

- **Close to our customers, We are committed to listening, understanding and anticipating their needs .**
- **Develop a relationship based on trust and mutual confidence**
- **Be proud of the Renault Trucks brand, and send the message out!**



Key strategic issues for Renault Trucks:

Renault Trucks

Key strategic issues:

- **Meeting customer's explicit and non-explicit demands through customer segmentation and product feature focused in a "multi-specialist" mode.**
- Corresponding distribution and product range.
- Continuous efforts in the field of price and capital management.

Our Targets

Business:

To improve:

- **Our market share**
- **Our gross profit,**

To secure our future.

Build and make the most of a singular positioning

Our Singularity, create added value
for the people in their businesses:

**Capitalize on our culture,
develop our expertise,
modify our behavior**

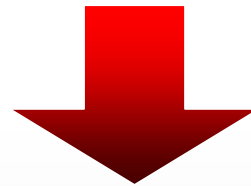
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**"Focus on our customer's businesses
instead of speaking about ours"**

Our Positioning

Renault Trucks

"Multi specialist"



Businesses that are **carefully selected**,
because we must answer explicit and non-
explicit demand in an efficient way

Our 12 Prioritized Businesses

Market	Transport	Construction	Services & Environment	Local Businesses
Priority	<p>General Cargo</p> <p>Liquid Bulk</p> <p>Car Transport</p> <p>Controlled Temperature</p>	<p>Construction and Building</p> <p>Concrete Mixer businesses</p>	<p>Municipals</p> <p>Public services (Refuse)</p> <p>Fire Fighters</p>	<p>Express freight</p> <p>Construction</p> <p>Proximity / Handcraft businesses</p>

Prioritization process

In terms of:

● **Business volume:**

Ex: General cargo is representing 37% of new trucks registration > 6 T
Controlled temperature in long haulage is representing 10% of new trucks registration > 6 T.
Product advantages (ex: Magnum cab)

● **Gross margin of these businesses:**

● **Renault Trucks market share in these businesses:**

Ex: Hazardous material bulk transport business is representing for Renault Trucks 35% market share in France.
Ex: In France, the refuse business is representing 66% Market share for Renault Trucks.

Example of non-focused segments:

❖ **Money Transport** → **No armored product**

❖ **Timber Businesses** → **No overbuilt product**

❖ **Max power businesses** → **No MD 16**



Renault Trucks Product Strategy:

- **Our Product Strategy is settled based on a very aggressive plan, allowing the renewal of our range up to Euro 4.**
- **Capitalize on an efficient offering through a more modern truck, based on today recognized qualities of weight, cost and efficiency.**
- **Contribute to features and quality levels for a long haul truck in its competitive environment.**
- **Support product price policies**

CONCLUSION

- **THE VISION, is our Foundation, our Keystone:**
Be a Multi specialist brand close to its customers.
- **To get it, today we have:**
 - **A strong Brand : Renault Trucks,**
 - **Specific Renault Trucks Design,**
 - **Motivated employees,**
Through the Renault Trucks Attitude
 - **The support of VOLVO Group.**