



CAPITAL MARKETS DAY

Increased market coverage with new strategy

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TSM EMEA Transformation

Utilizing our full potential



TSM EMEA Transformation

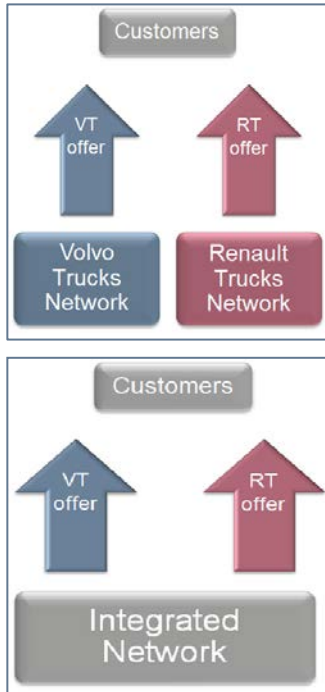
Network restructuring

Utilizing brand assets

Increasing efficiency

Network restructuring

Creating a state of the art distribution network



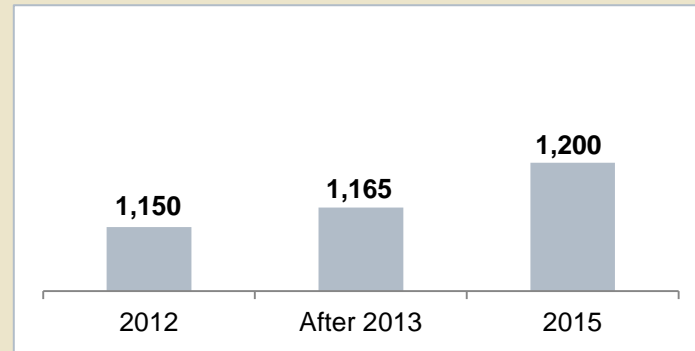
- Increased density through dual-branded workshops
- Increased running population and turnover per dealer and workshop
- Improved retail profitability
- Improved customer service
- Increased sales and market share



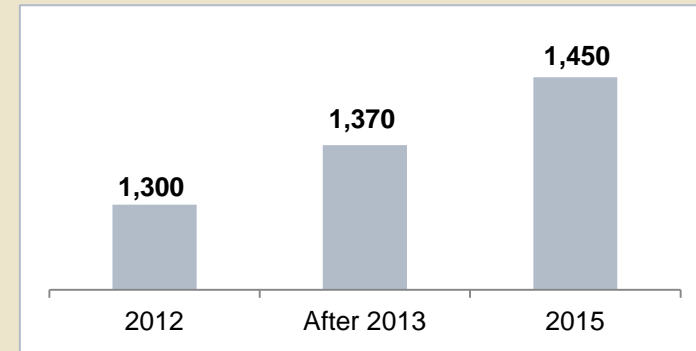
Improved service network coverage and profitability

Increased service density for the customer with 200 additional service points

Volvo Trucks workshops

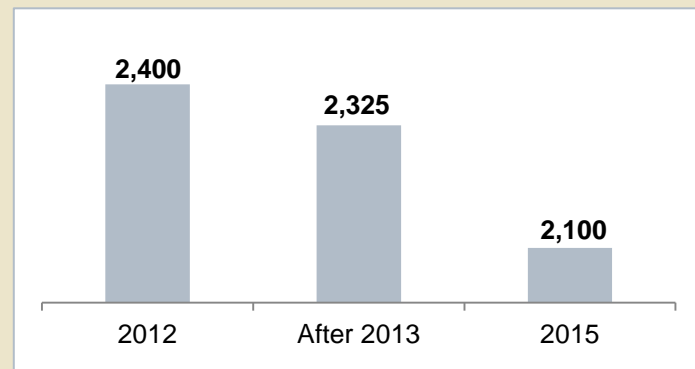


Renault Trucks workshops

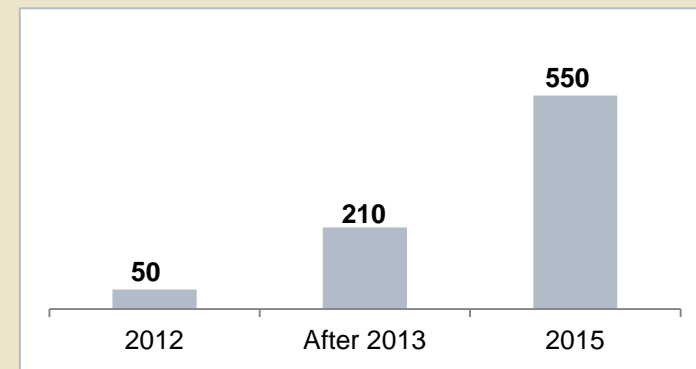


Consolidated network with improved profitability

Total number of workshops



Whereof Dual Brand



Increased efficiency - wholesale

Creating a more lean and agile market organization

Previous Volvo Truck market company structure

Nordic
UK & Ireland
Benelux
Central
France
Spain
Italy
Central East
East

Previous Renault Trucks market company structure

Adrialps
Benelux
Central East
France
Germany
Iberia
Italy
Nordic
UK



Current structure

Nordic
Benelux
Central East
Central
France
Iberic
Italy
UK

- From 18 to 8 market companies in EU 30
- Effective January 2013

EMEA Transformation status

- Implementation dual brand workshops:

		Dual brand workshops
	Starting point 2012	→ 50
	Status after 2013	→ 210
	Target 2015	→ 550
- Increased service coverage in Northern/Central/Eastern Europe 2015
 - + 30-40% for Renault Trucks
 - + 10% for Volvo Trucks
- 300 private workshop agreements terminated. Up to 24 months termination time
- Headcount reduction

› Wholesale	200	(Germany, Netherlands, Poland, Marocco)
› Retail	160	(Germany, Slovenia, Bulgaria, Netherlands)
- Profitability in retail already improved