

NEW STRATEGIES FOR SUSTAINABLE GROWTH 1-2 APRIL 2014 MELBOURNE, AUSTRALIA



Mike Dozier

Managing Director
PACCAR Australia



PACCAR Inc



PACCAR ENGINES

PACCAR PARTS

PACCAR
FINANCIAL

LEYLAND TRUCKS

PACCAR WINCH DIVISION
BRADEN CARCO Gearmatic

PACCAR Global Operations

A world map with a blue background and white landmasses. The map is overlaid with a grid of latitude and longitude lines. Various locations are marked with green stars, red circles, and yellow stars. A legend in the bottom right corner identifies these symbols: a green star for 'PACCAR Manufacturing Plants', a red circle for 'PACCAR Distribution Centers', and a yellow star for 'PACCAR Offices'.

- ★ PACCAR Manufacturing Plants
- PACCAR Distribution Centers
- ★ PACCAR Offices

★ PACCAR Manufacturing Plants

PACCAR Distribution Centers

★ PACCAR Offices

PACCAR 2013 Results

108 Years of Superior Performance
75 Consecutive Years of Net Profit



Consolidated Sales & Revenues of \$17.12B

Net Income of \$1.17B

PACCAR Financial Sales & Revenues of \$4.6B

PACCAR Parts Sales & Revenues of \$2.82B

A1/A+ Credit Rating

Capital Investments of \$409.5M

R & D Expenses of \$251.4M

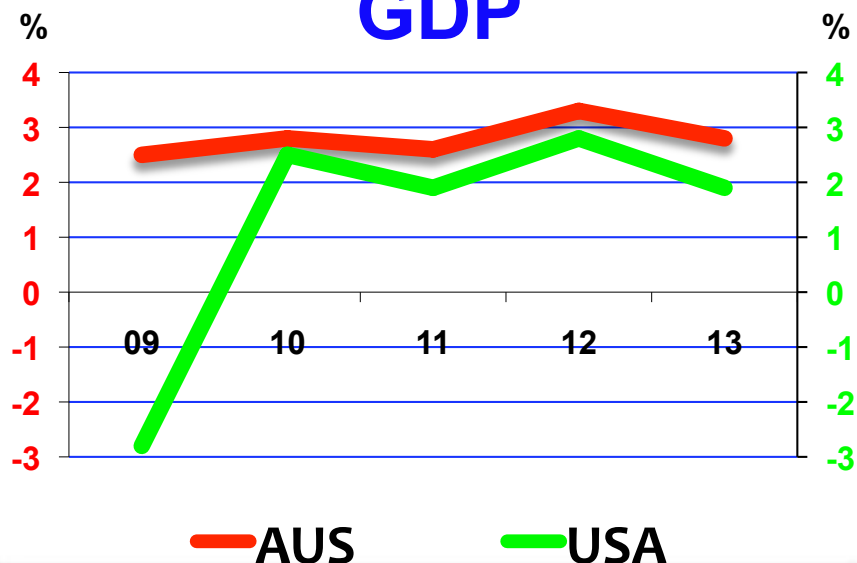
Record \$6.63B Stockholders' Equity

PACCAR Australia

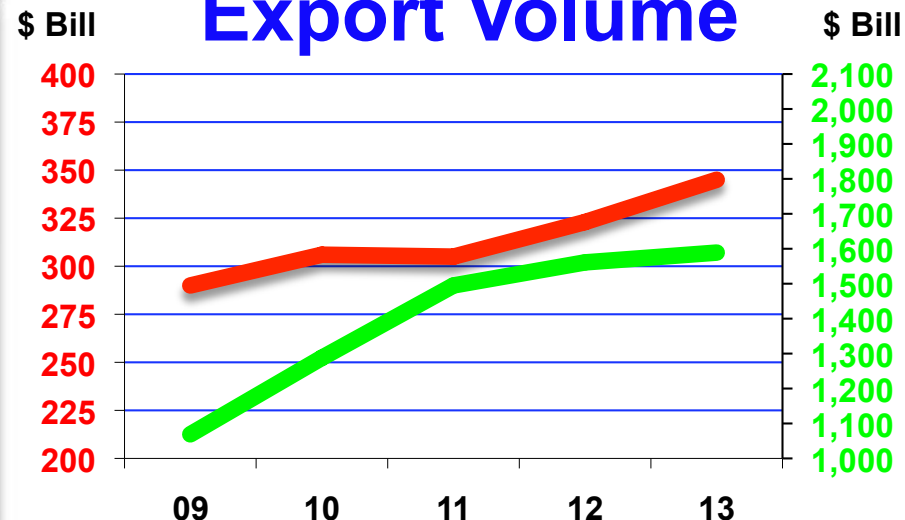


Key Indicators - Economy

GDP



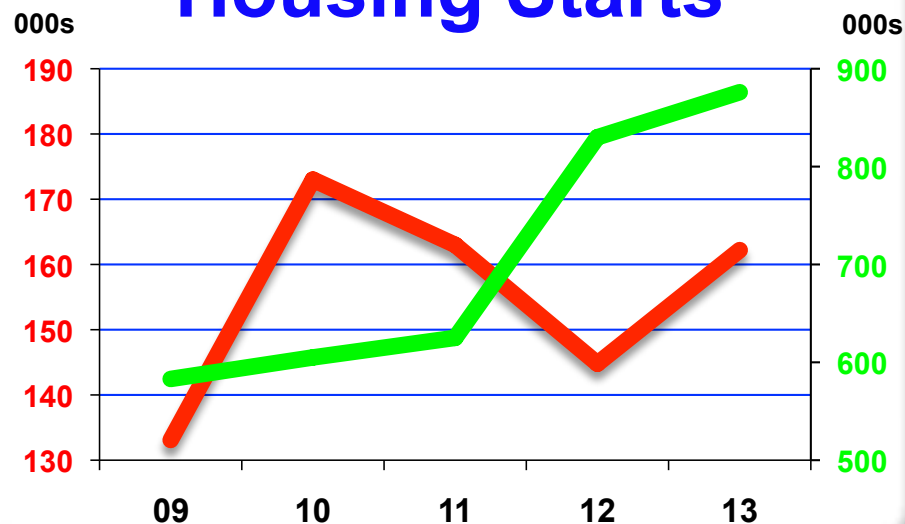
Export Volume



Unemployment



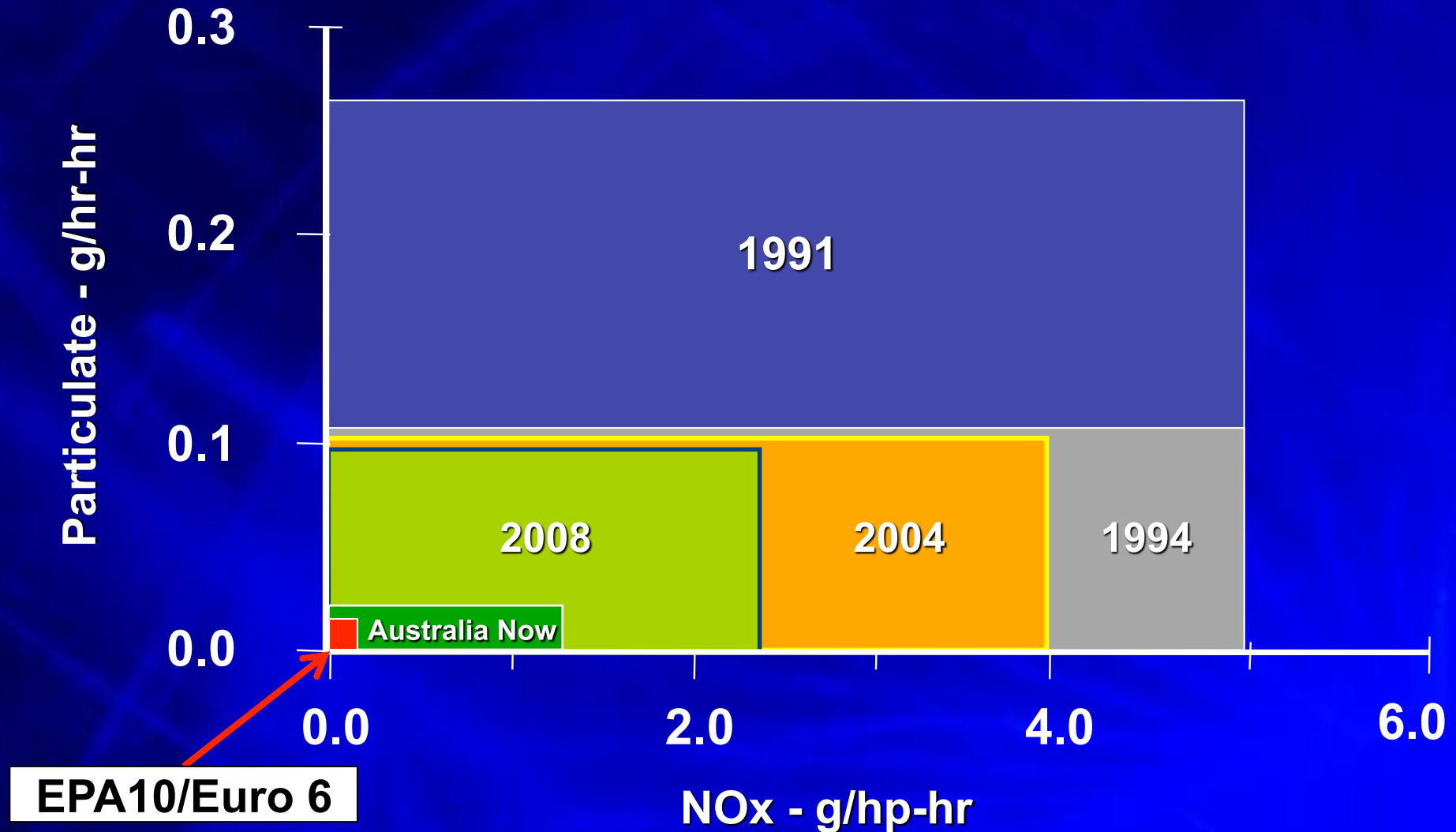
Housing Starts



Safety Legislation

USA	Australia
<ul style="list-style-type: none">• CSA	<ul style="list-style-type: none">• NHVR
<ul style="list-style-type: none">• FMVSS	<ul style="list-style-type: none">• ADR
<ul style="list-style-type: none">• Roll Over / Collision	<ul style="list-style-type: none">• Lane Departure / Fatigue
<ul style="list-style-type: none">• California	<ul style="list-style-type: none">• National Level

Emissions Legislation



Freight Task

USA	Australia
<ul style="list-style-type: none">• Maintain GCM	<ul style="list-style-type: none">• Increase GCM
<ul style="list-style-type: none">• Productivity Focus<ul style="list-style-type: none">– Powertrain Efficiency– Aerodynamic Performance– Weight Reduction	<ul style="list-style-type: none">• Productivity Focus<ul style="list-style-type: none">– Higher Capacity Vehicles– Durability
<ul style="list-style-type: none">• Prescriptive Rules	<ul style="list-style-type: none">• Performance Based Std

Manufacturing

USA	Australia
Medium/High Volume	Low Volume
Tariffs @ 25%	Tariffs @ 0%
Focused Competition	Crowded Market

- **Cost Competitiveness**
 - Supply Base Efficiency
 - Component Cost Control
 - Manufacturing Efficiency

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Thank You



FOUNDATION
SPONSOR