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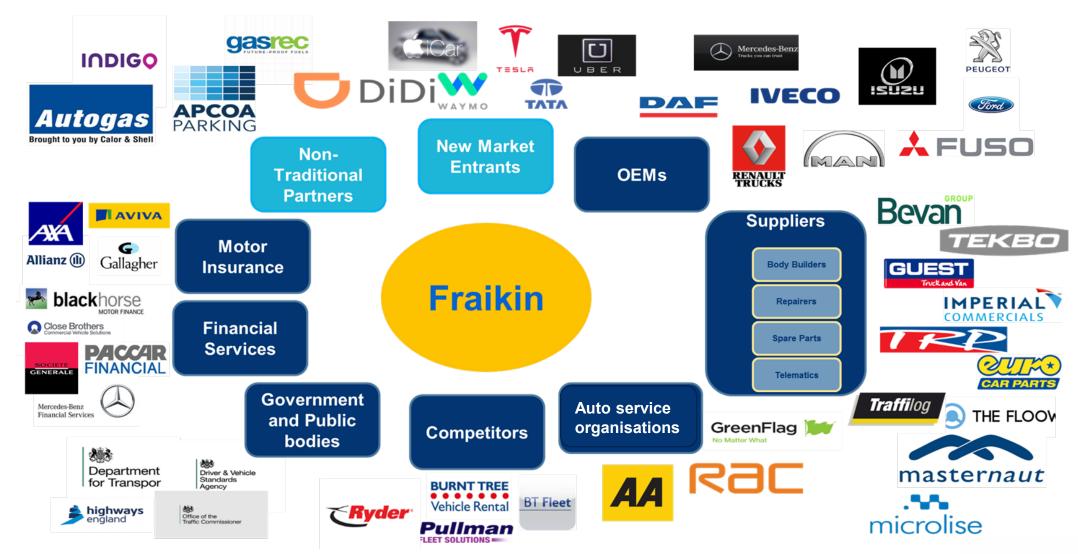






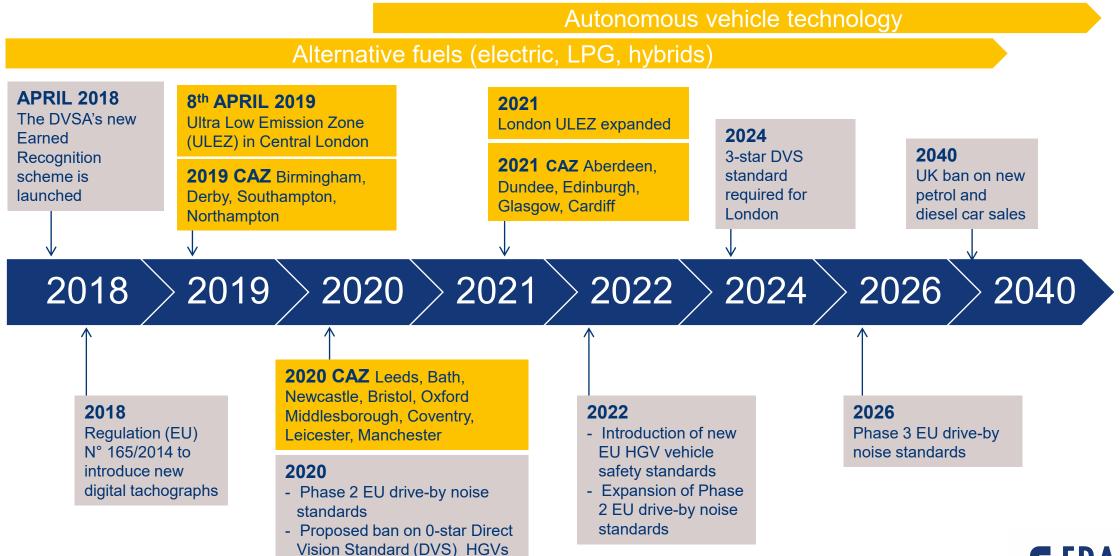


The increasingly complex auto market





Industry challenges and trends





Overview

Bio-fuel

LPG

Petrol

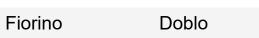
Hybrid

Electric

NGV

Fraikin LUV & 3.5T range - 2018







Ducato 3.5T



Daily 3.5T

Fraikin new vehicle range - 2018



Daily: 6T



D Wide: 19/26T



Eurocargo: 12/16T Stralis: 19/26T



Stralis



The situation today

ENERGY	LCV	HGV	RANGE	ENERGY NETWORK	CLEAN AIR	CAPITAL COST	тсо
Diesel	~	~	++++	+++	CRITAL XXAASSACIX	++	++++
Petrol	~	×		+++	CRITAR 1		
Electric	~	(IN dvpmt)	+	+	CRITAIR TO THE RESIDENCE OF THE PARTY OF THE	++++	+++
Hybrid	~	~	+++	+++	ORITAL WALD-SHELDX	+++	+++
GAS	~	×	++++	++	ORITAL T T T T T T T T T T T T T T	+++	++



To understand the potential of new fuels it is essential to understand the context



TCO



Driving range



Energy network density



Ecological impacts





Flexible commercial model - cost certainty

Stability of cost

Pay as you go

- Access to Fraikin commercial labour rates and parts leverage
- Agreed standard service and repair times
- Management fee
- Cost plus arrangement
- Flat line expenditure model option

Blended option

- National fixed price for scheduled maintenance for vehicle, body and ancillary equipment
- Open book 'pay as you go' for non scheduled maintenance
- Management fee
- Flat line expenditure model option

Full fixed price

- Annual fixed cost maintenance based on the vehicles, age, type, mileage and application
- Inclusive of ancillary equipment
- Management fee
- Gain share option

Contract hire

- Annual fixed cost including all associated vehicle costs including initial capital purchase
- Inclusive of ancillary equipment
- Management fee

Transfer of risk



