

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



Global Truck & Trailer
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AUSTRALIAN ROAD TRANSPORT
INDUSTRY ASSOCIATION

Global Trailer Forum North American Market

Dick Giromini, President and CEO
Wabash National Corporation



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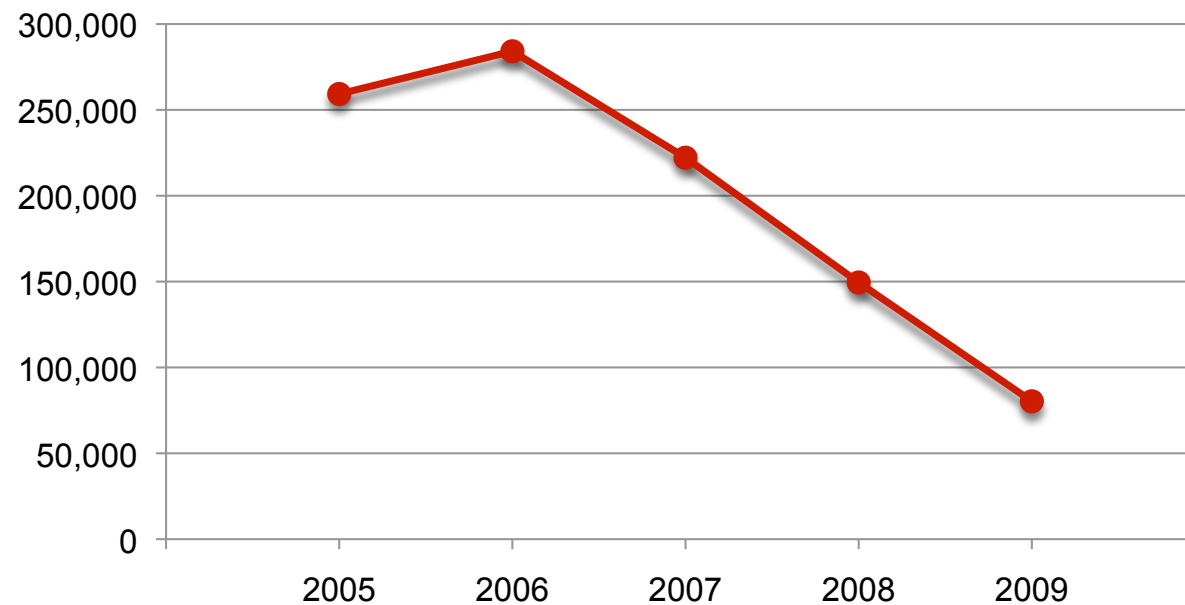
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Managing Through the U.S. Recession

U.S. Trailer Shipments: 2005–2009



Source: Americas Commercial Transportation (ACT) Research



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Key Elements of Change

1. Focus



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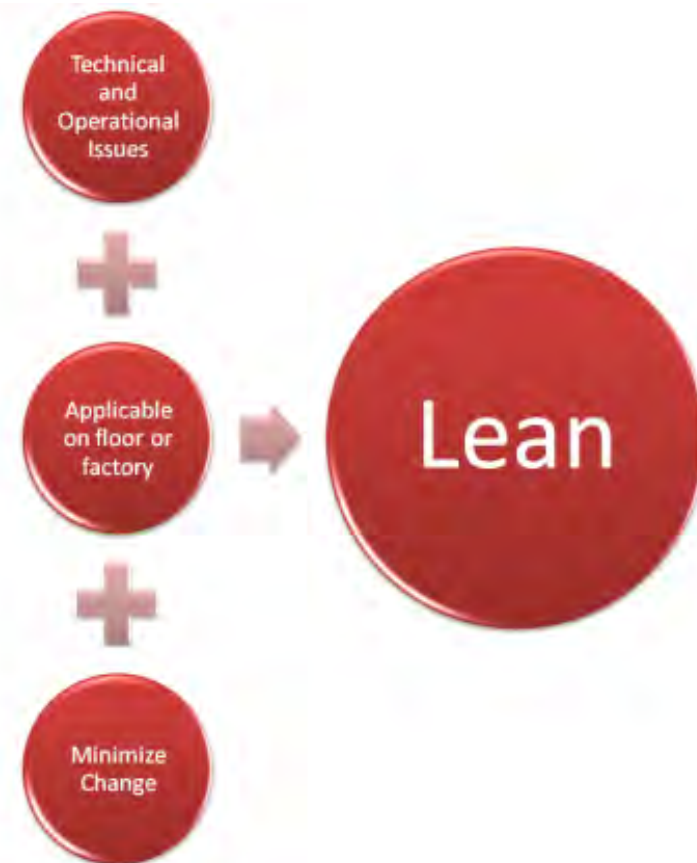
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Key Elements of Change

1. Focus
2. Emphasis on Lean Manufacturing



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Key Elements of Change

1. Focus
2. Emphasis on Lean Manufacturing
3. Shift in Company Culture



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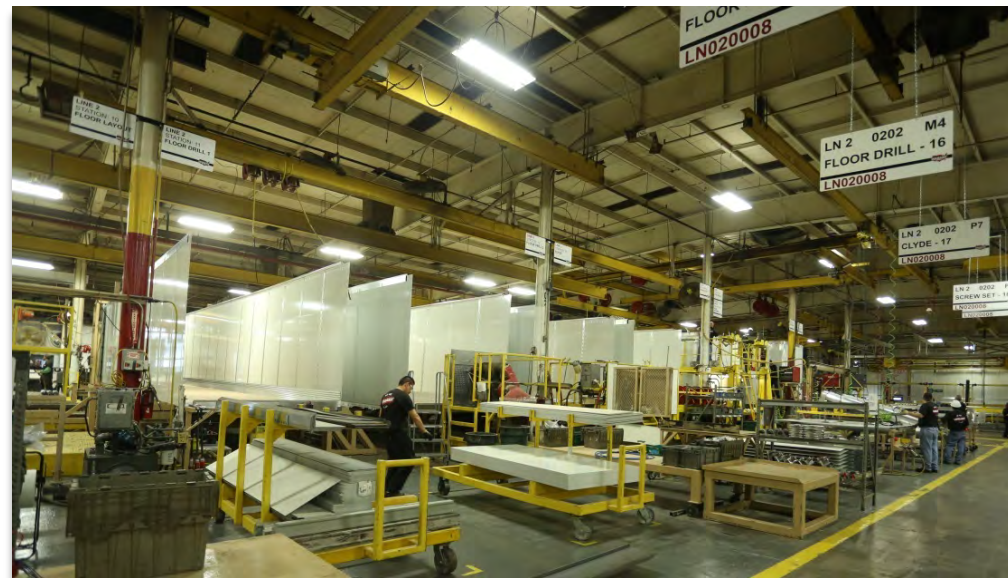
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Key Elements of Change

1. Focus
2. Emphasis on Lean Manufacturing
3. Shift in Company Culture
4. Execution of a Strategic Plan for Growth and Diversification



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Growth & Diversification



2006

2008

2009

2012

2013



Wabash
Composites



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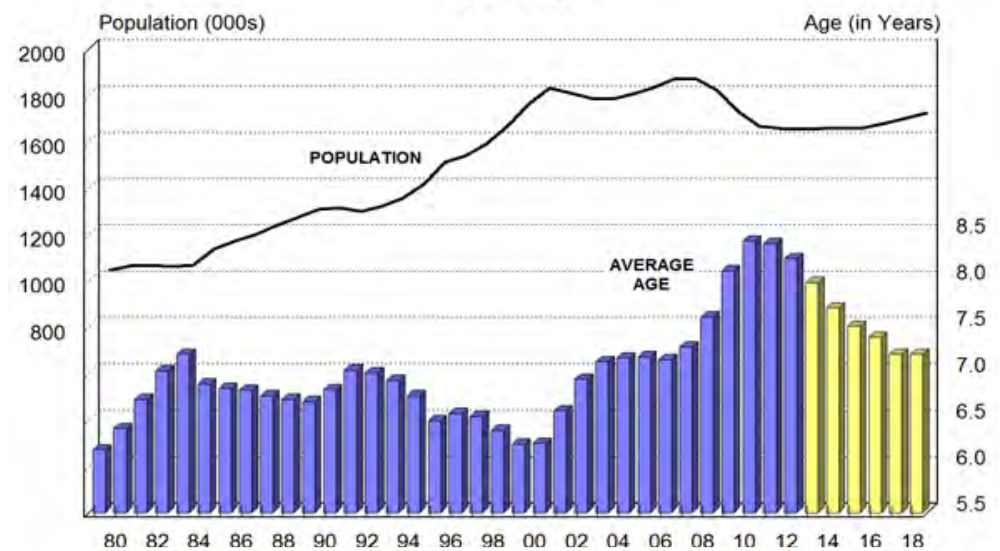
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Demand Drivers

1. Fleet Age

DRY VANS: U.S. Population & Average Age 1979-2018



Source: Americas Commercial Transportation (ACT) Research



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Demand Drivers

1. Fleet Age
2. Regulatory Environment



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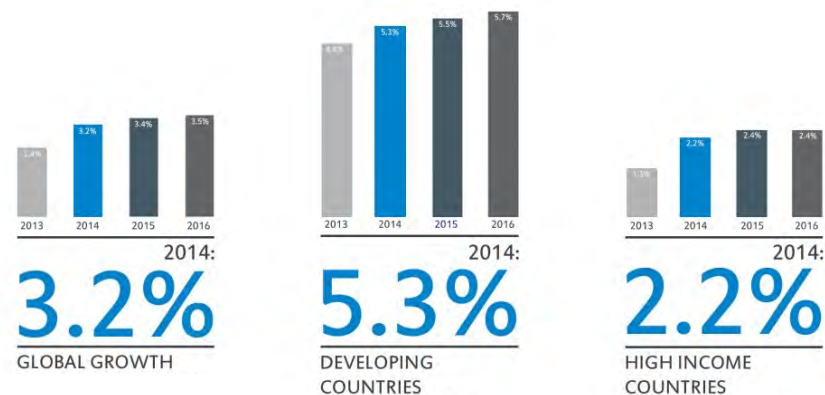
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Demand Drivers

1. Fleet Age
2. Regulatory Environment
3. Health of the Global Economy

The World Economy to Strengthen in 2014



Source: The World Bank, Global Economic Prospects January 2014



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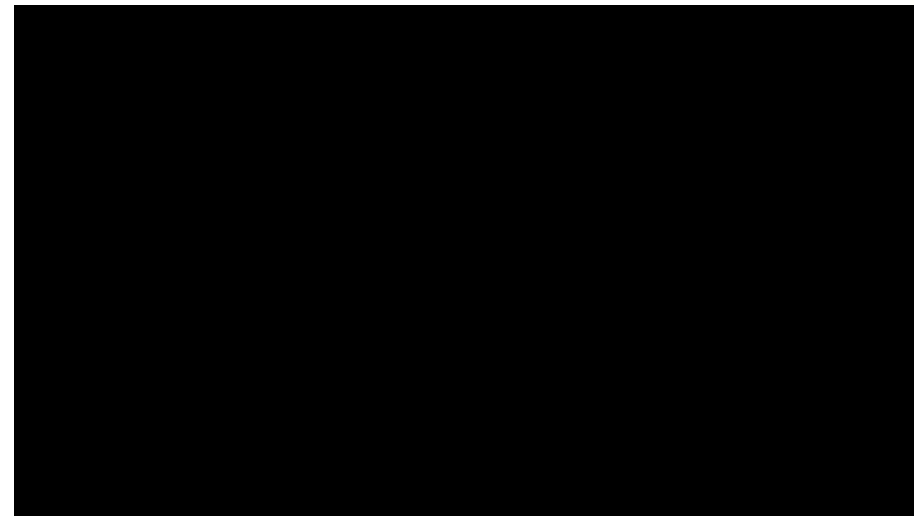
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Equipment Technology / Business Trends

1. Fuel Economy / Aerodynamics



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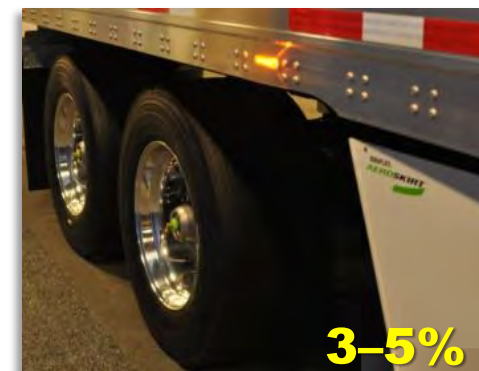
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Equipment Technology / Business Trends

1. Fuel Economy / Aerodynamics



DuraPlate AeroSkirt



Low rolling resistance tires

Data from U.S. Environmental Protection Agency's SmartWay Transport Partnership



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Equipment Technology / Business Trends

1. Fuel Economy / Aerodynamics
2. Freight Efficiency

Lightweight Options	Weight Reduction
1-1/8" Composite Floor	120 kg
DuraPlate Composite Nose	45 kg
Aluminum Crossmembers in Bay	111 kg
Wide Base Tires with aluminum rims	215 kg
Lightweight Hub and Drum	76 kg
Lightweight Landing Gear	13 kg
6 mm DuraPlate Composite Sidewalls	197 kg
Aluminum Floor	299 kg
Aluminum Rims with duals (22.5)	83 kg
<u>Items in red are proprietary to Wabash National.</u>	



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Equipment Technology / Business Trends

1. Fuel Economy / Aerodynamics
2. Freight Efficiency
3. **Fleet Productivity**



DuraPlate XD-35 hauls steel coils



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Equipment Technology / Business Trends

1. Fuel Economy / Aerodynamics
2. Freight Efficiency
3. **Fleet Productivity**



MaxClearance™ Overhead Door System
(U.S. Patent Nos. 8,016,527 and 8,506,221)



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Equipment Technology / Business Trends

1. Fuel Economy / Aerodynamics
2. Freight Efficiency
3. **Fleet Productivity**



DuraPlate Composite Trailer Roof



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Equipment Technology / Business Trends

1. Fuel Economy / Aerodynamics
2. Freight Efficiency
3. Fleet Productivity



DuraPlate Bonded Sidewalls



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Our Responsibilities to Customers

1. Lower operating costs and enhance productivity
2. Optimize weight, cube and payload capacity
3. Extend the life of equipment



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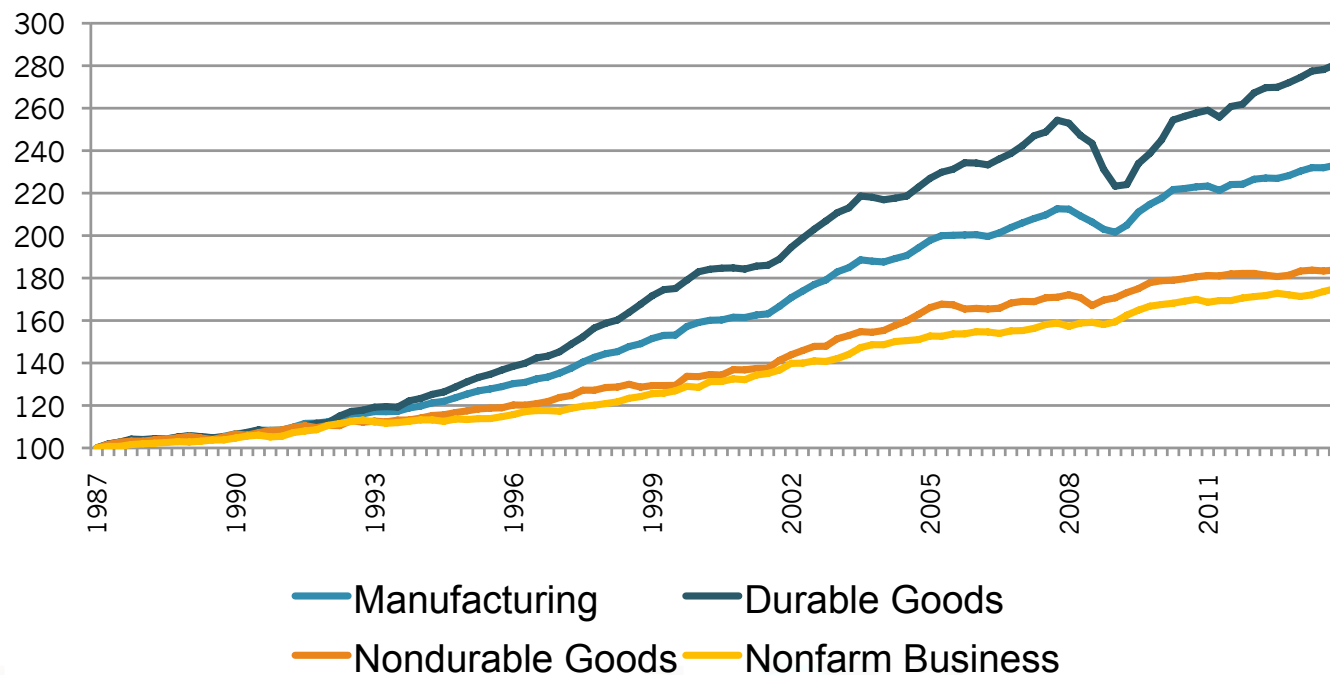
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Manufacturing in the U.S.

Growth in Output per Hour for Manufacturing & Nonfarm Businesses
(1987=100)



Source: U.S. Bureau of Labor Statistics

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Challenges & Opportunities in Manufacturing

1. Global Commodity Constraints
2. Complex Supply Chains
3. Volatile Regulatory Environment
4. Environmental Responsibilities



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Challenges & Opportunities in Manufacturing

1. Global Commodity Constraints
2. Complex Supply Chains
3. Volatile Regulatory Environment
4. Environmental Responsibilities
5. **Workforce Development**



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Leading in a Global Economy



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