

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



Mike Dozier

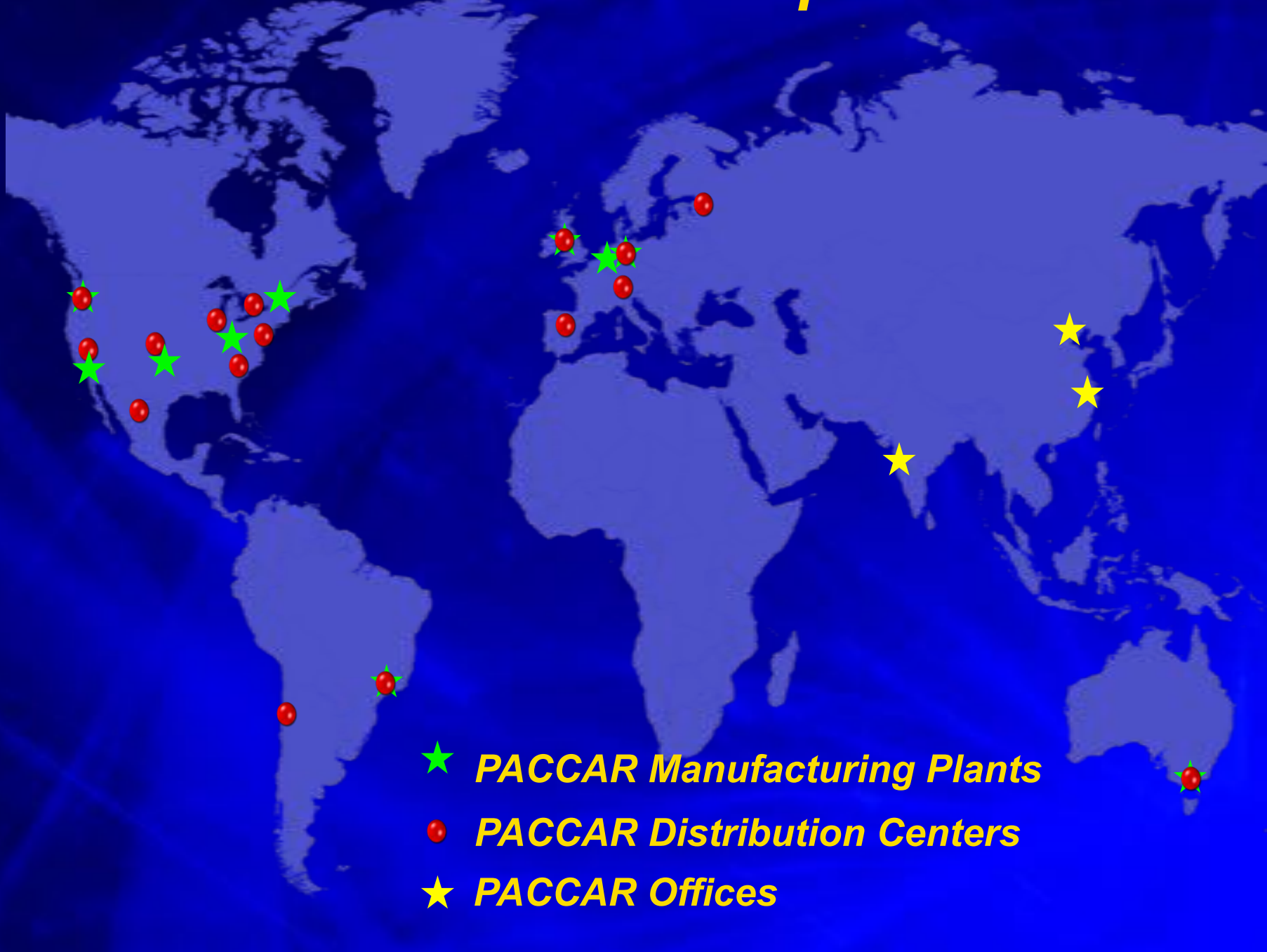
Managing Director
PACCAR Australia



PACCAR Inc



PACCAR Global Operations



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

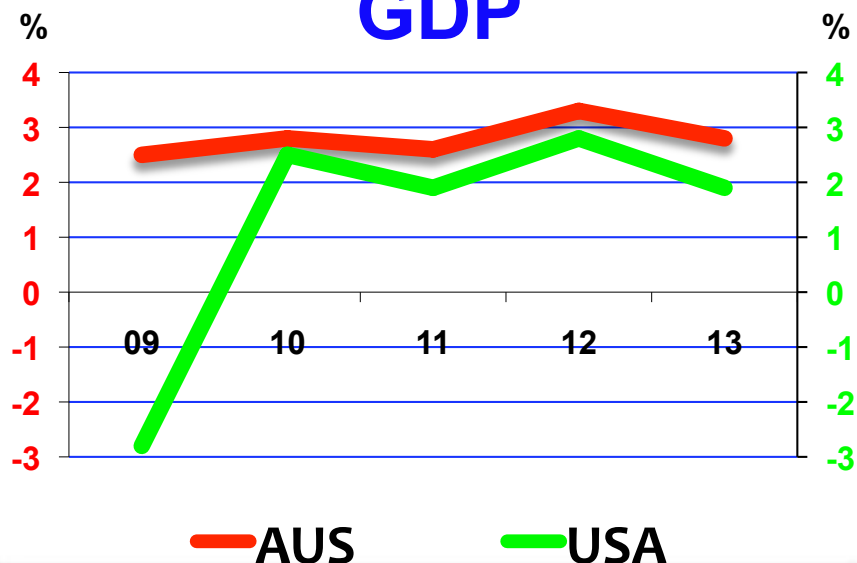
Record \$6.63B Stockholders' Equity

PACCAR Australia

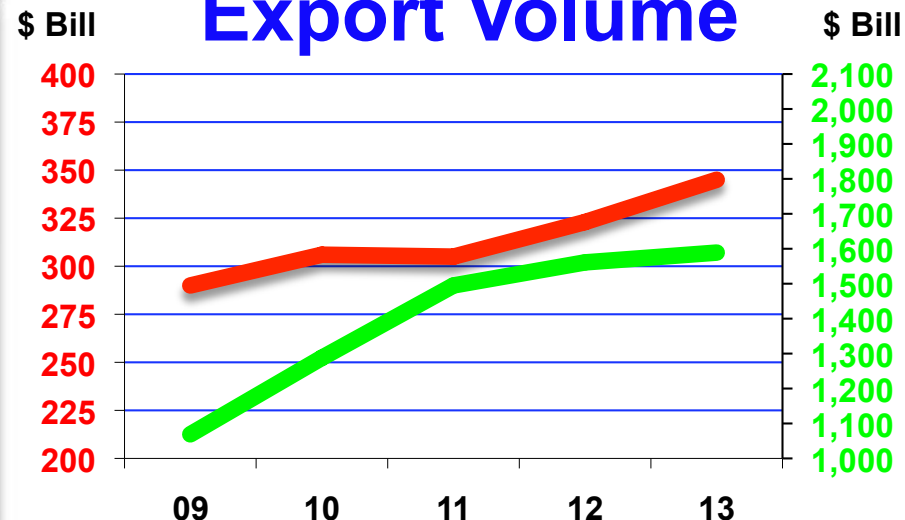


Key Indicators - Economy

GDP



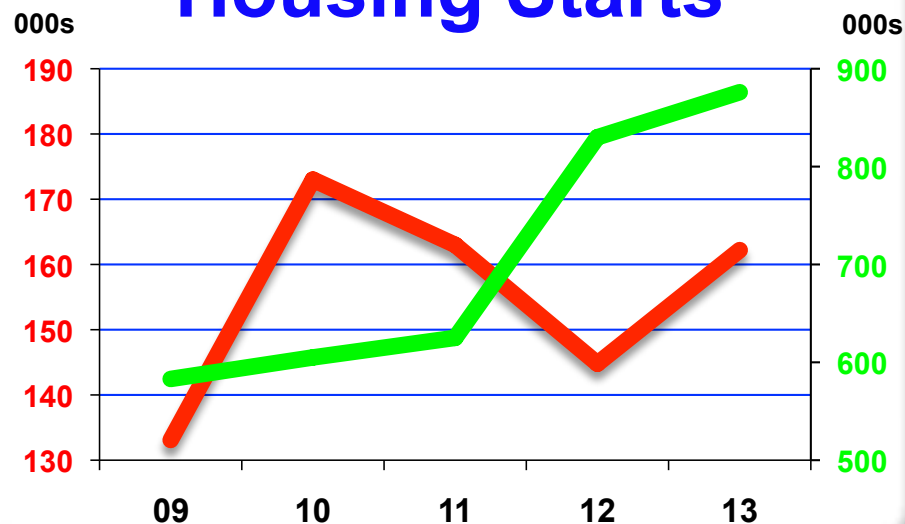
Export Volume



Unemployment



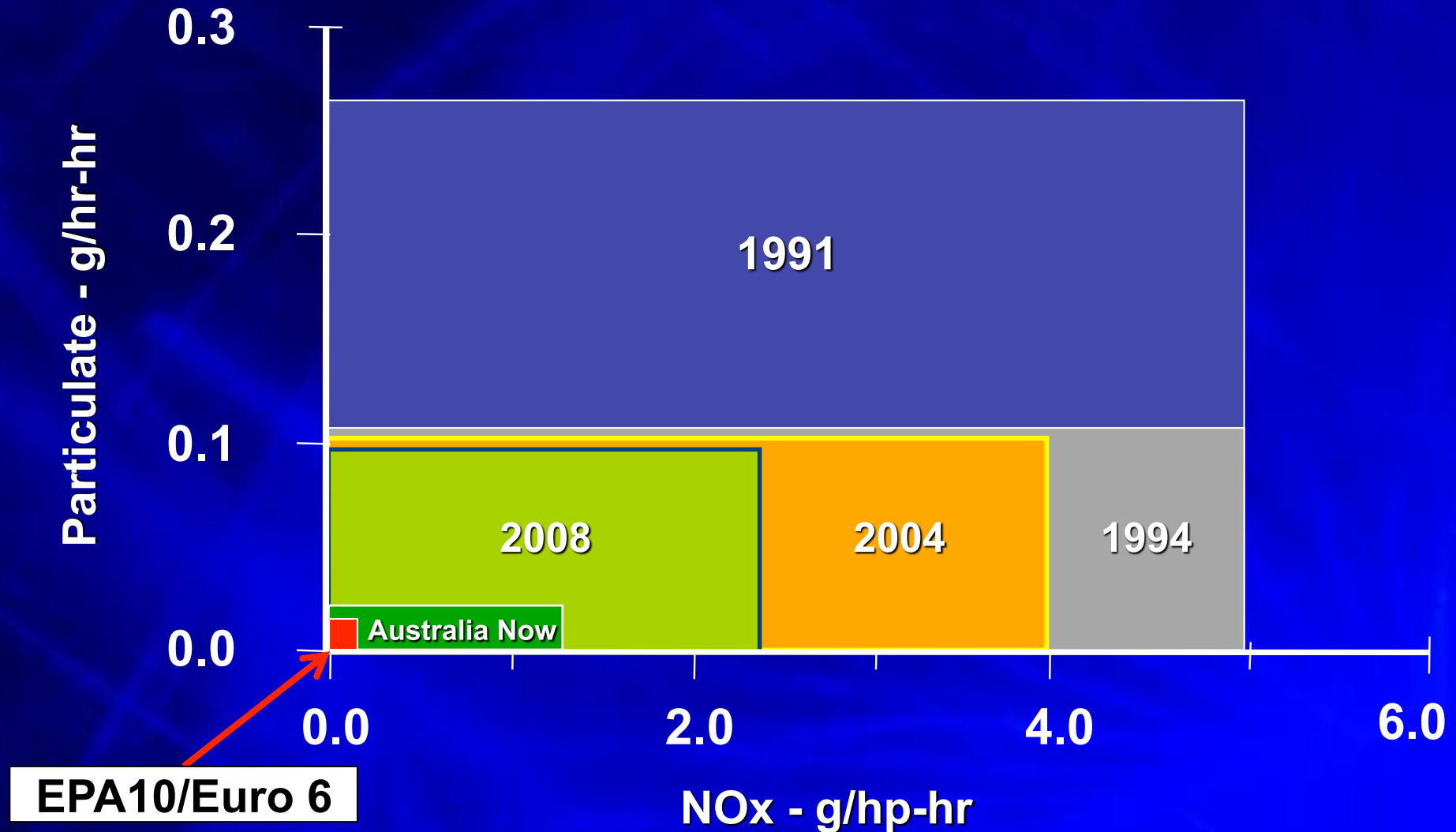
Housing Starts



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 Stds

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



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