



# MAN TRUCK & BUS SE

**CHANGE MANAGEMENT SINCE 1758.  
FUTURE OF TRUCK DEVELOPMENT  
AND ITS IMPACT ON LOGISTICS**

**Lars Eiermann | VP R&D**

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# AGENDA

**01** WHERE DO WE COME FROM AND WHAT DEFINES US?

**02** HOW DO WE SHAPE TODAY'S TRANSPORT?

**03** WHICH TRANSFORMATION WILL WE FACE  
AS MAN?

**04** Q&A





**WHERE DO WE COME  
FROM AND WHAT  
DEFINES US?**

**01**





MAN TRUCK & BUS SE  
WHERE DO WE COME FROM AND WHAT DEFINES US?

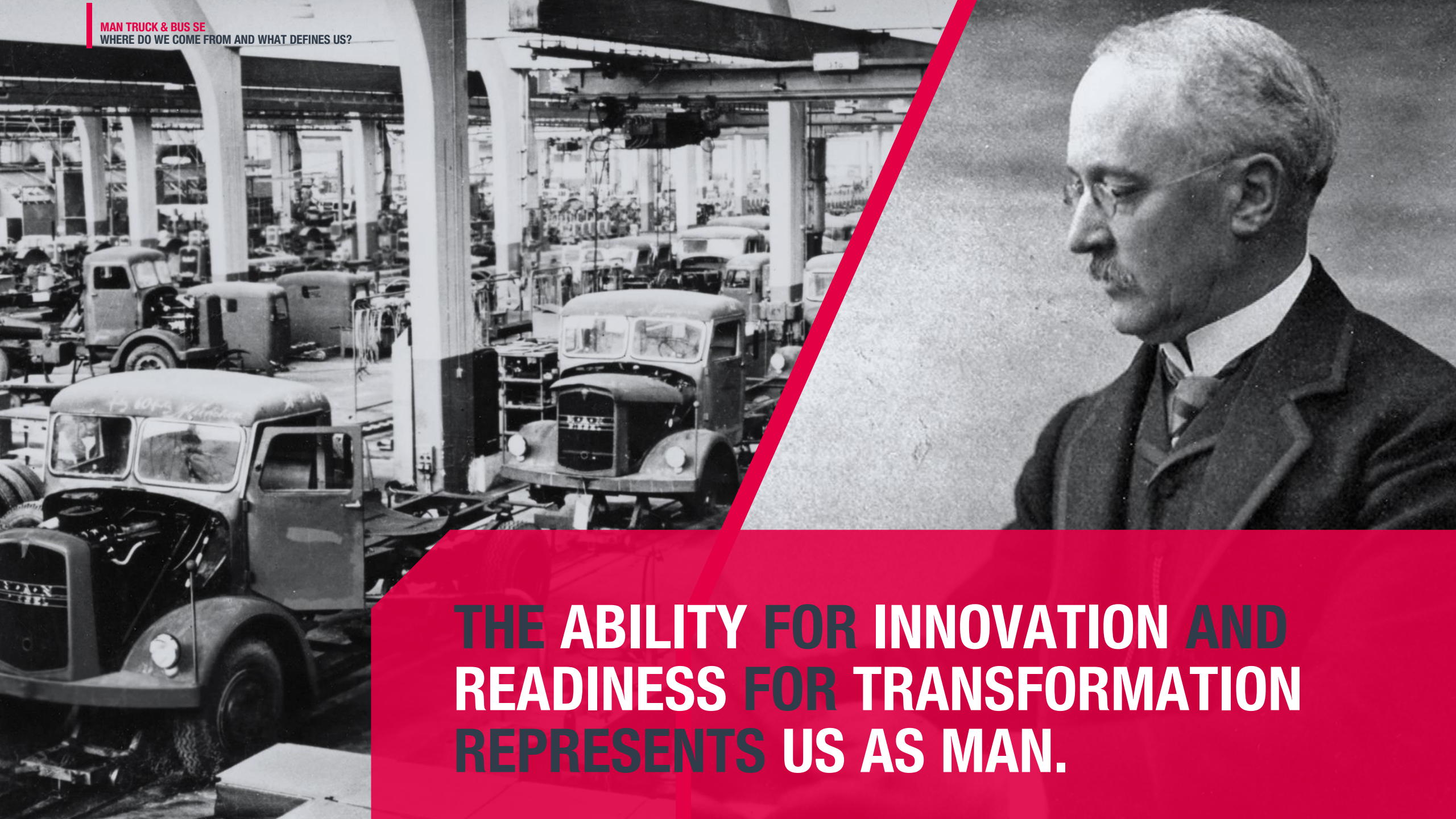


WE **RELY** ON A  
STRONG HISTORY.





MAN TRUCK & BUS SE  
WHERE DO WE COME FROM AND WHAT DEFINES US?



**THE ABILITY FOR INNOVATION AND  
READINESS FOR TRANSFORMATION  
REPRESENTS US AS MAN.**



02

# HOW DO WE SHAPE TODAY'S TRANSPORT?





FEINSTAUB  
ALARM  
— IN —  
STUTTGART

Derzeit!  
Bitte:



**INCREASINGLY STRICT GUIDELINES ARE DRIVING  
INNOVATION. ELECTRIFICATION IS COMING.**





**AUTOMATION IS A CHANCE TO MAKE  
TRANSPORT CLEANER AND MORE  
INTELLIGENT.**





# WHICH TRANSFORMATION WILL WE FACE AS MAN?

03





„ ... THE **CHANGE** HAS  
NEVER BEEN SO **FAST**,  
AND AT THE SAME TIME IT  
**WON'T EVER BE THAT**  
**SLOW** AGAIN ... “





IT WILL BE **TOUGH** FOR THE **ESTABLISHED PLAYERS**.

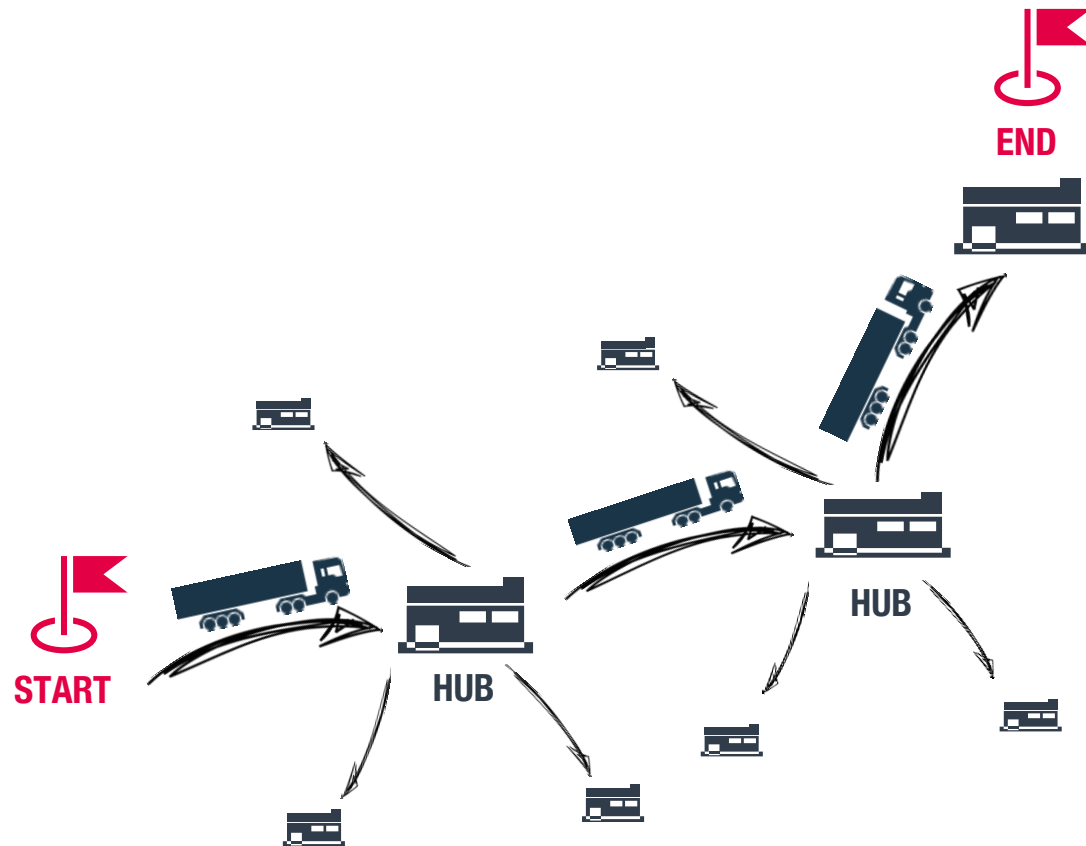
**40%**

OF THE FORTUNE 500 WILL  
HAVE DISAPPEARED WITHIN  
THE NEXT 10 YEARS.

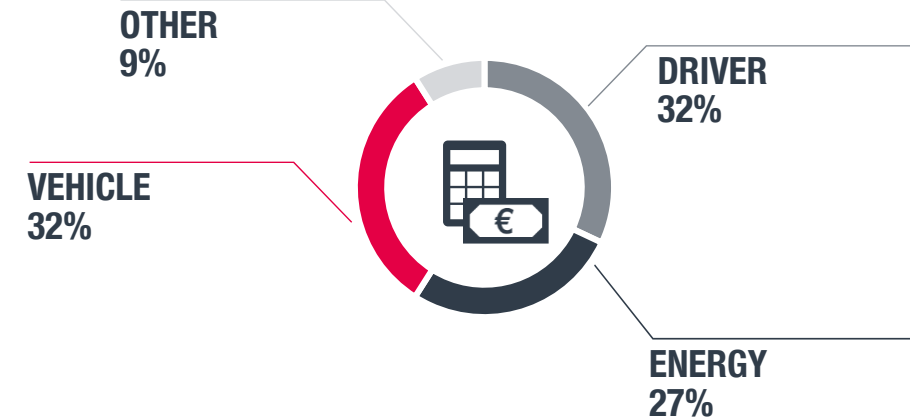




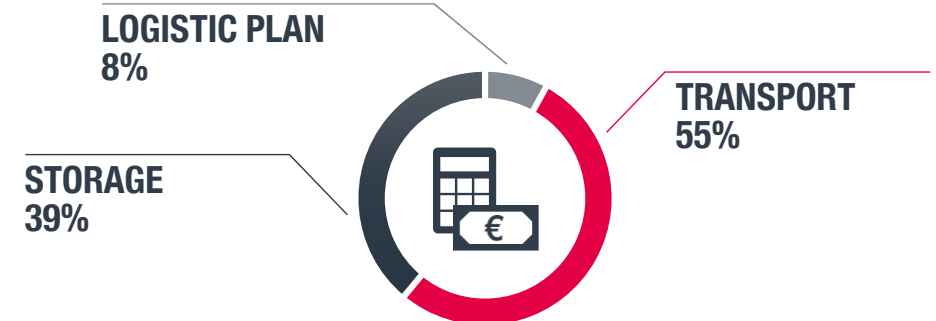
# TODAY'S GOODS TRAFFIC IS ORGANIZED AS A „HUB & SPOKE“ LOGISTIC SYSTEM.



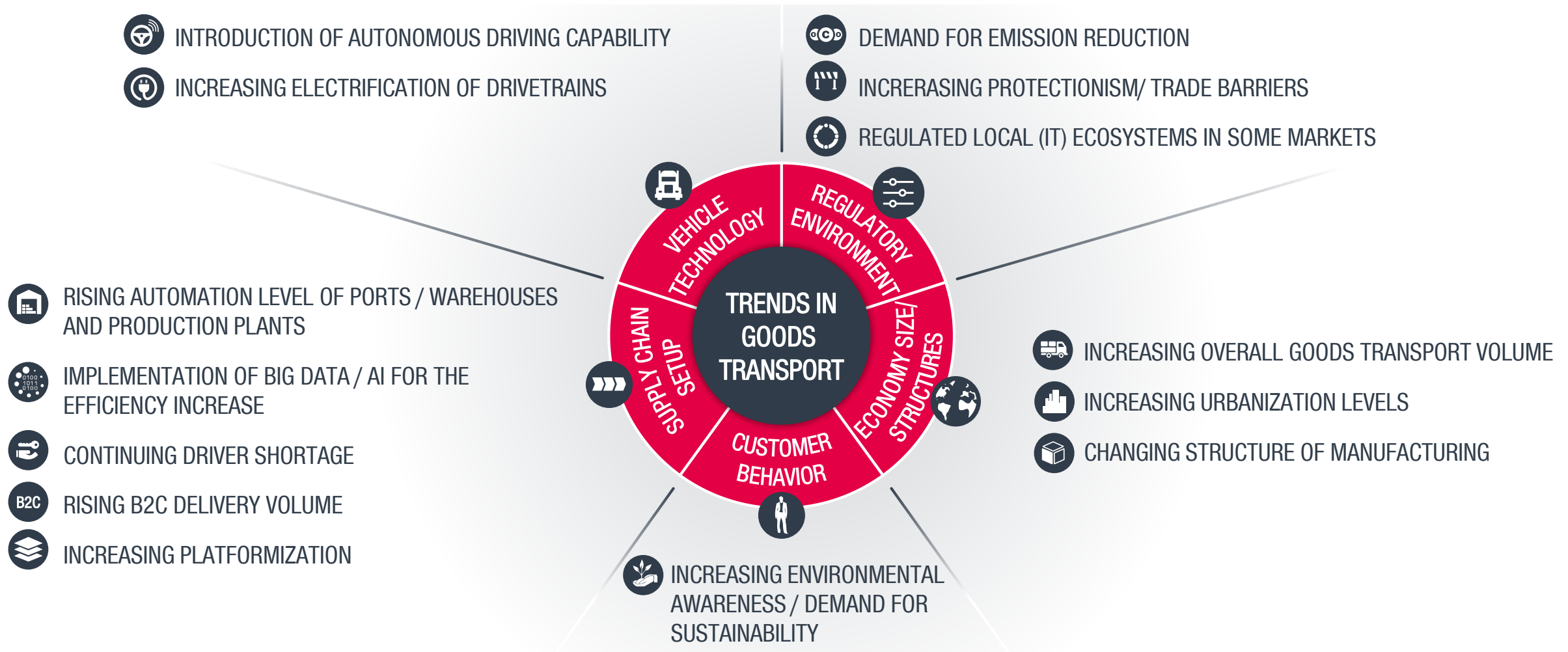
## DISTRIBUTION OF THE TRANSPORT COSTS



## DISTRIBUTION OF LOGISTIC COSTS



# SEVERAL MAJOR TRENDS WILL IMPACT THE GOODS TRANSPORT AND THE CREATION OF VALUE.





TODAY, WE SEE THAT A LOT OF **TRENDS** ARE ALREADY  
**IMPLEMENTED** – ONLY **ROAD TRAFFIC** IS NOT CONCERNED.

AUTONOMOUS GUIDED VEHICLES AT THE  
HARBOUR OF ROTTERDAM



FULLY AUTOMATED  
DEPARTMENT STORES (J.D.COM)

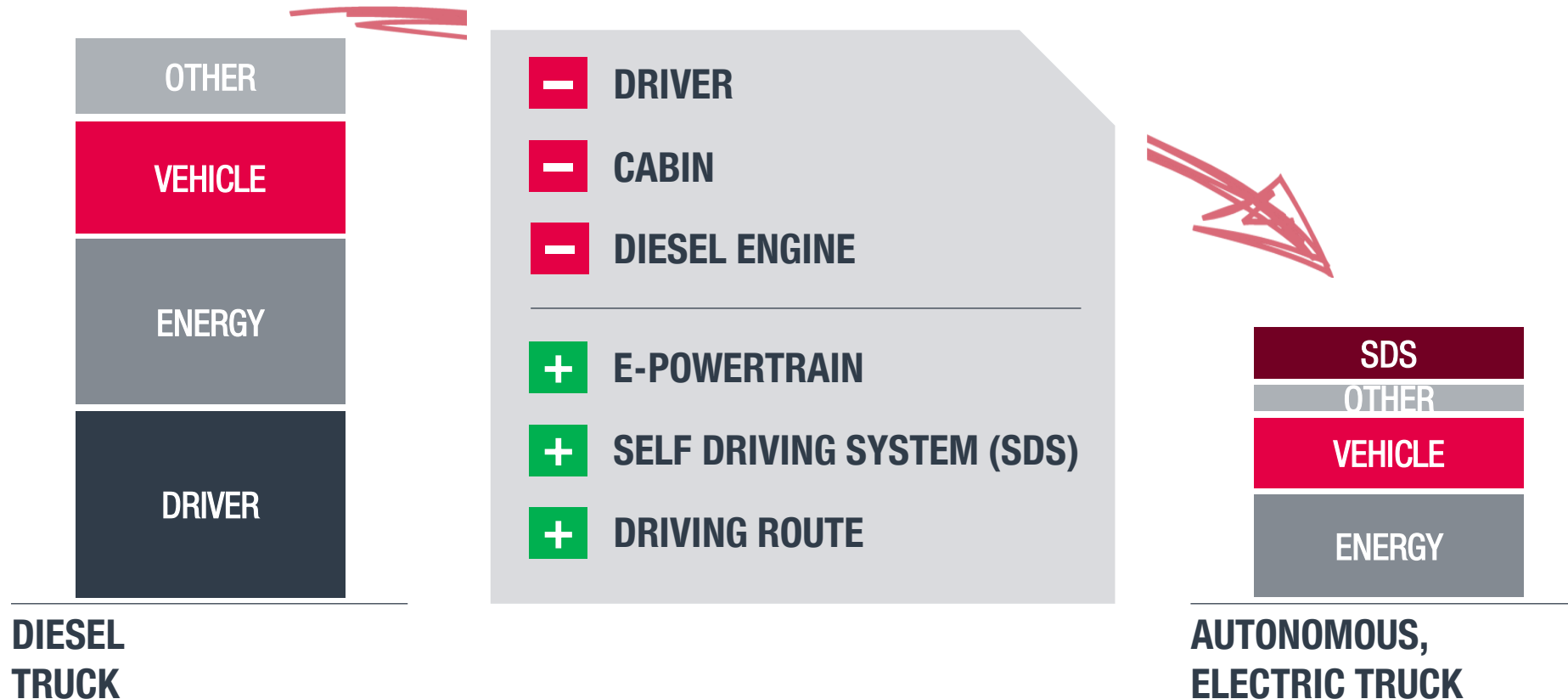


# THE GOODS TRAFFIC OF THE FUTURE WILL CHANGE SIGNIFICANTLY. WE ARE GETTING PREPARED.

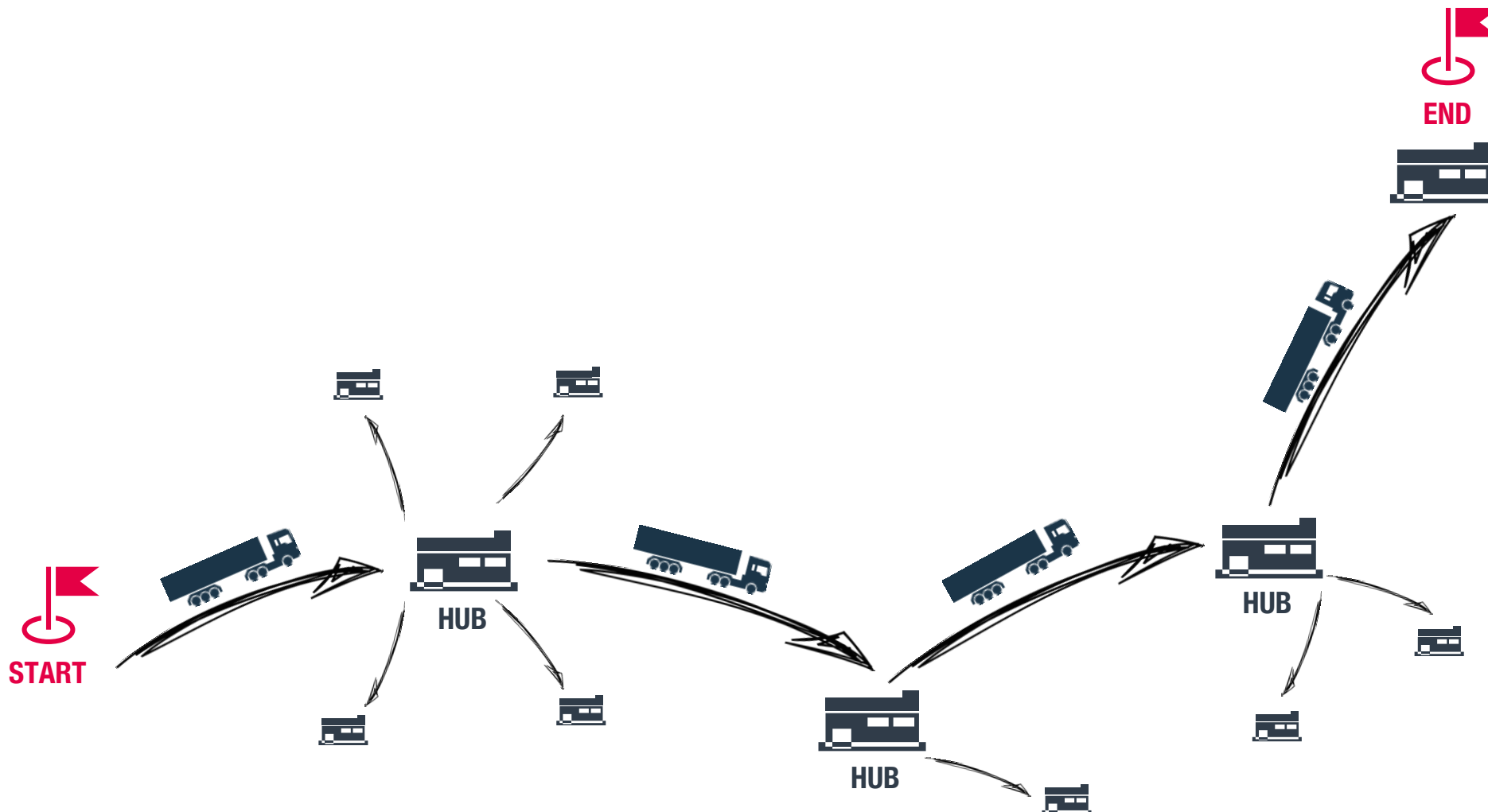




# THE VEHICLE „TCO“ WILL BE CHANGED THROUGH AUTONOMOUS DRIVING AND ELECTRIFICATION.

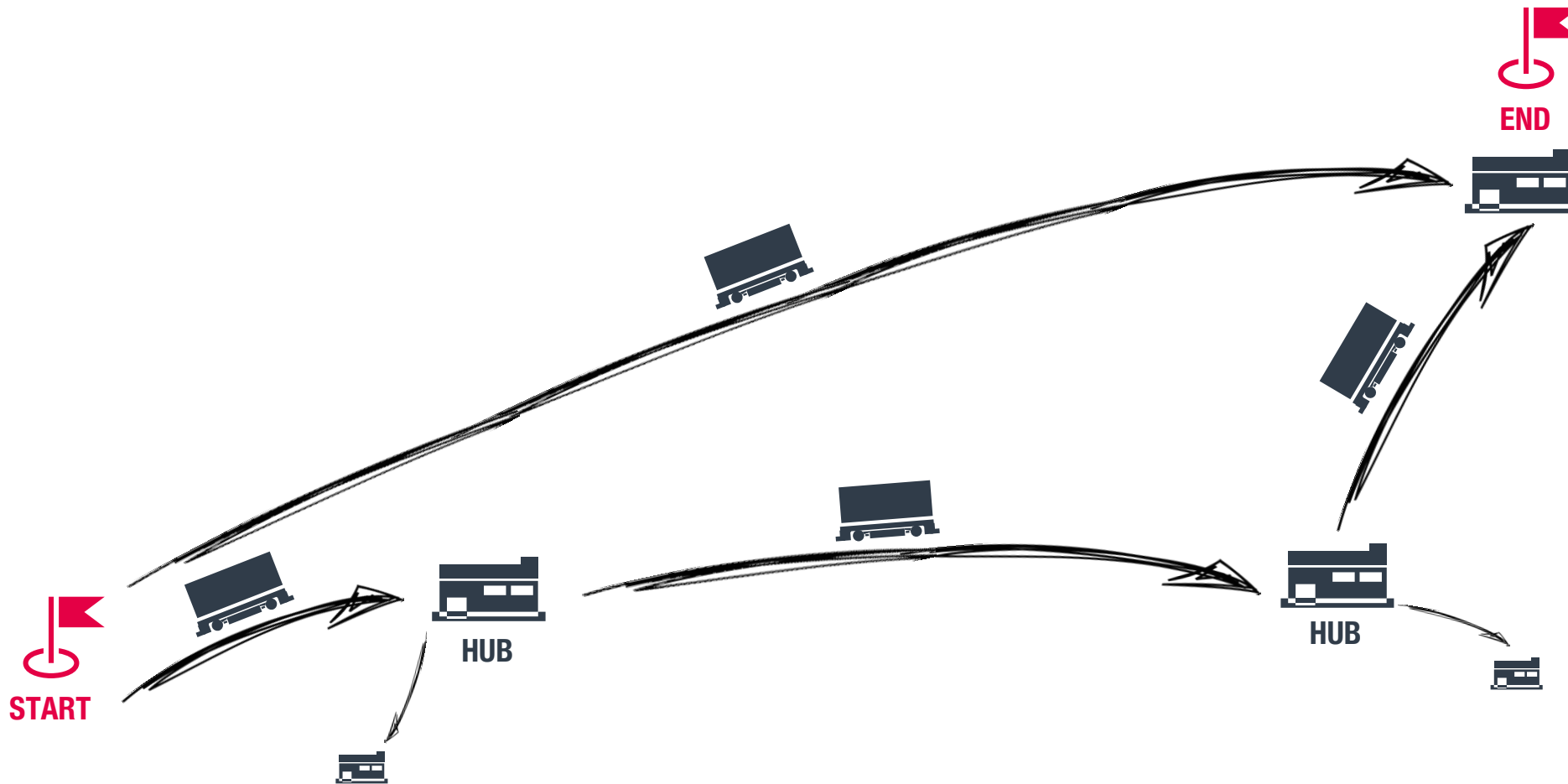


# HOW WILL THE „HUB & SPOKE“ LOGISTIC SYSTEM CHANGE?





# AUTOMATION WILL MOST LIKELY DISRUPT THE LOGISTIC SYSTEM:







# WHAT DO WE **LEARN** AS **MAN**?

**FULL  
AUTONOMOUS,  
ELECTRIC GOODS  
TRAFFIC WILL  
HAPPEN**

**WE NEED TO GET  
PREPARED FOR  
CHANGES**

**WE COUNT ON  
ALREADY STARTED  
ACTIVITIES**

**WE WILL MASTER  
THE CHANGES  
ONLY IN  
COLLABORATION  
WITH OUR  
PARTNERS**



04

Q&A

**WHICH QUESTIONS DO  
YOU HAVE?**





**SUCCESSFUL CHANGE  
MANAGEMENT SINCE  
1758.**

