



**RAM**



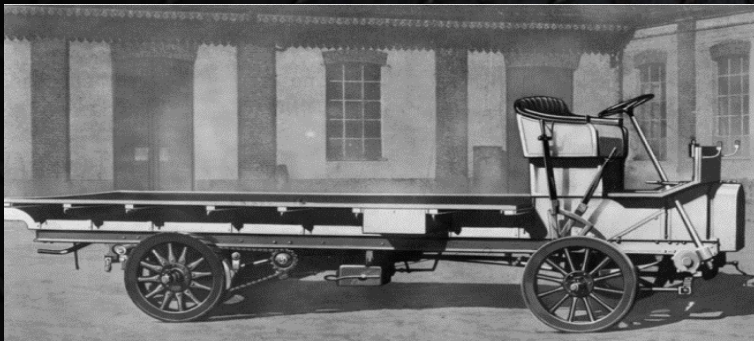
REID BIGLAND



**PROFESSIONAL**



# FIAT Professional: Full-line from the very beginning



Fiat 24hp – 1903



Fiat Tipo1 Post Office Van – 1903



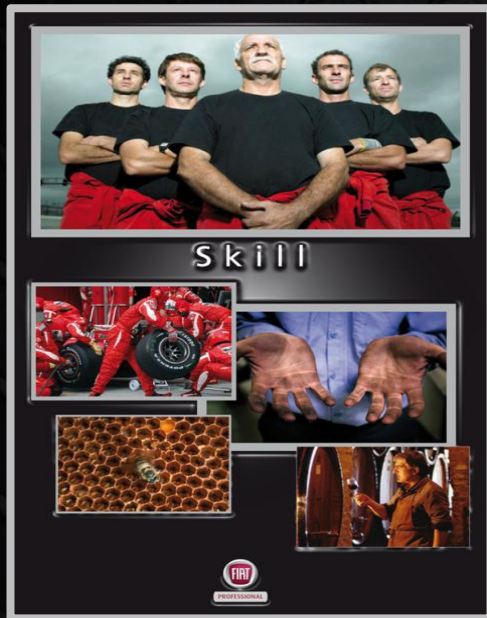
Fiat 18P Bus – 1911



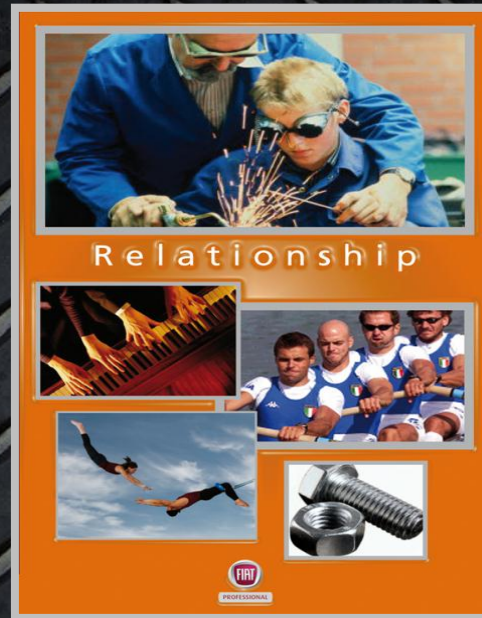
Fiat 18L Tipper – 1914



# FIAT Professional: Brand values



**Dedicated LCV  
organization**



**Consider our  
client as a  
partner**



**New products  
& tailor made  
solutions**





# FIAT Professional: Our Customers

## Goods Transport



## People Mover

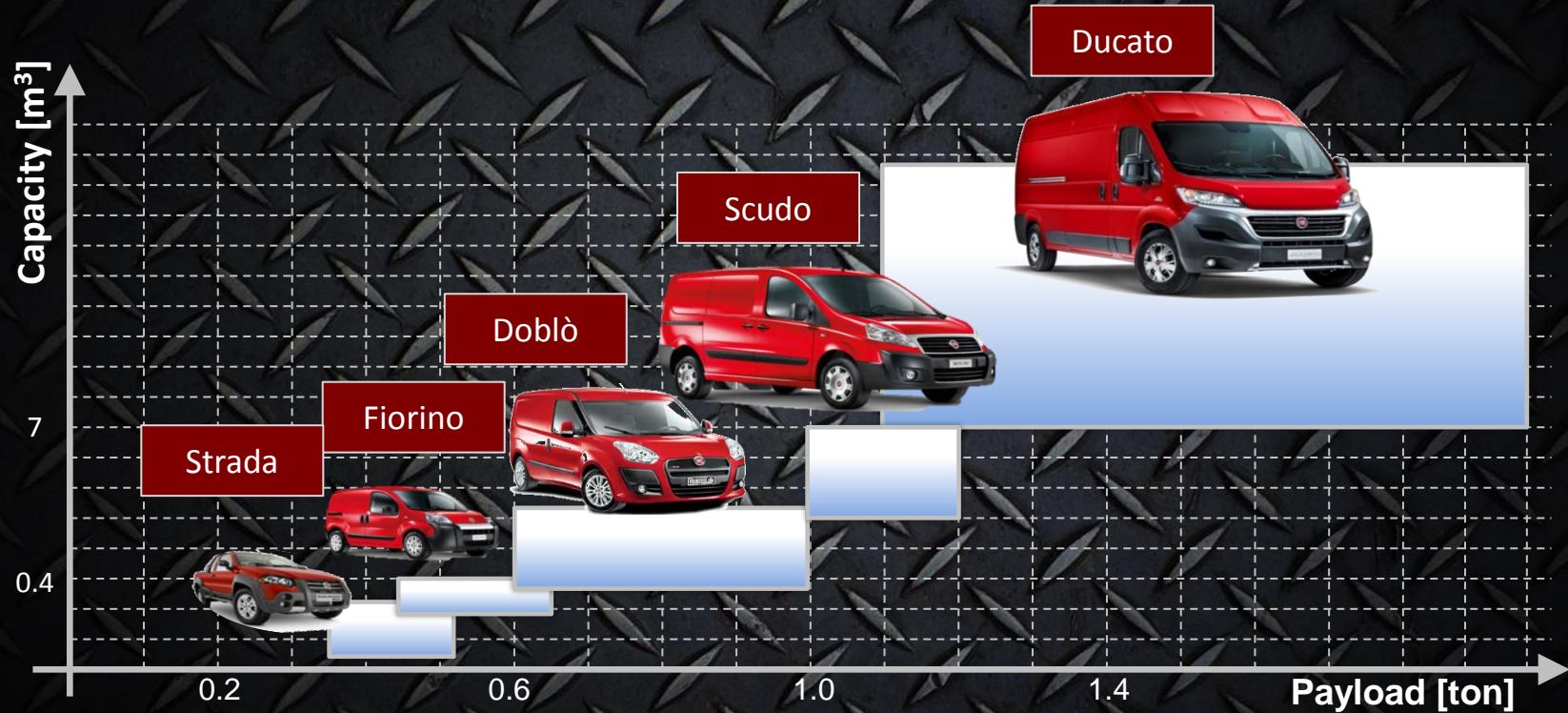


## RV Customer



# FIAT Professional: 2014 Line-up

**A range that answers all lightweight transport needs**





# FIAT Professional: Ducato - Global Product



Manufactured in 3 regions

#2 in Europe

2 Motorhomes out of 3  
are Ducato in Europe

More than 2.6 million  
units sold since 1981



# FIAT Professional: We speak with facts

## 5 “Van of the Year” Awards

**1994**



**2006**



**2008**



**2009**



**2011**





# FIAT Professional: 2013 Global Sales

250 K  
EMEA

179 K  
LATAM

2 K  
APAC



**431 K**  
GLOBAL SALES

134 K  
STRADA

133 K  
DUCATO

76 K  
DOBLO

61 K  
FIORINO

14 K  
SCUDO

13 K  
VAN/PICK UP - OTHER



PROFESSIONAL

# The Plan: FIAT Professional Product Actions



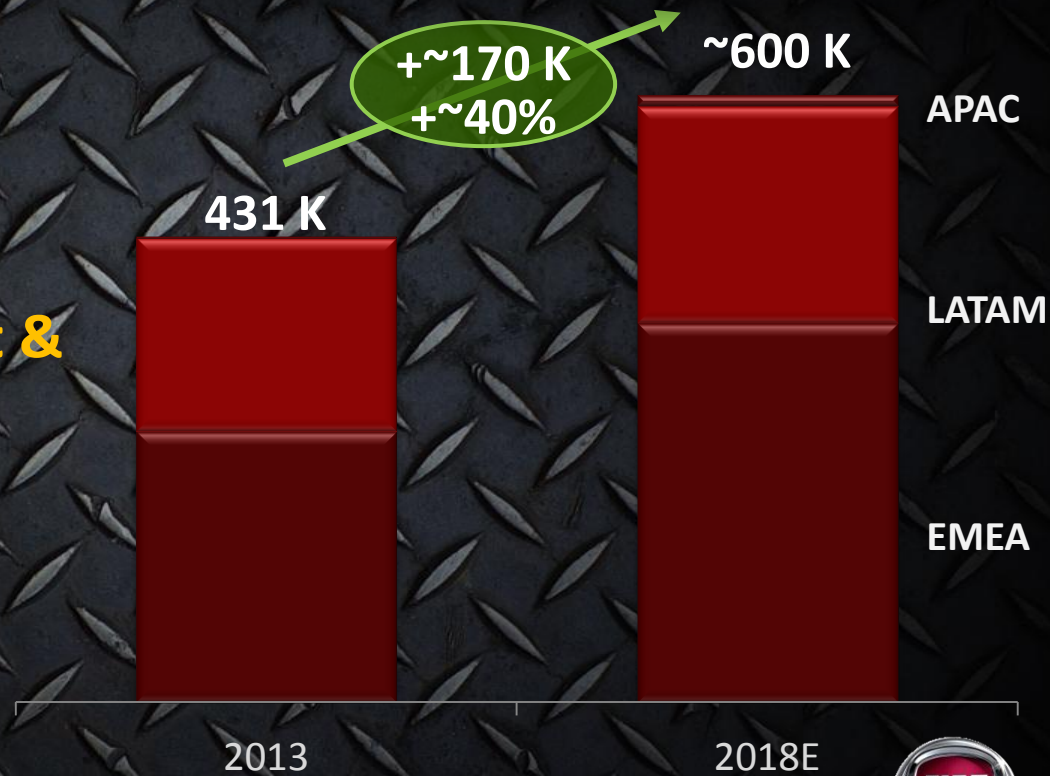


# The Plan: FIAT Professional - Global Sales Plan

## PRIORITIES

- **Keep share in Europe**
- **Grow in Russia**
- **Strengthen Middle East & Africa penetration**
- **Grow LATAM share with new Strada and Mid-size Pickup**

## FIAT PROFESSIONAL VOLUMES



PROFESSIONAL

# ***RAM BRAND VIDEO***



**RAM**





**RAM**

# The Brand: History

## 1<sup>ST</sup> DODGE TRUCK

- 1917 - The first Dodge Screen-side Truck
- 1929 - The Merchants Express is the first Dodge half-ton pickup



## MILITARY USAGE

- The Power Wagon, based on the U.S. Army's 3/4-ton truck chassis, is first introduced to the public



## PERSONAL USE PICKUPS

- 1964 - The industry's first personal-use pickup, the Custom Sports Special, is introduced



## LIFESTYLE PICKUPS

- 1972 - Updated Adventurer pickup is introduced as part of the "Lifestyle" line of trucks
- 1973 - The 1st Club Cab is introduced



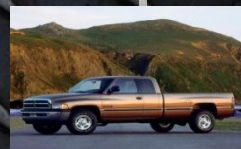
## CUMMINS DIESEL IS INTRODUCED

- 1989 Cummins® Turbo Diesel is first used in Ram full-sized trucks



## NEW BIG RIG DESIGN

- 1994 Dodge Ram is Truck of the Year
- 1998 - Quad Cab becomes the first extended-cab with 4 doors



## PRODUCT EXPANSION

- 2003 - Ram Heavy Duty wins *Motor Trend's* Truck of the Year
- 2006 - Power Wagon re-introduced
- 2008 - Launched new Ram 1500 with Crew Cab
- RamBox feature introduced



1917-1939

1940-1959

1960's

1970's

1980's

1990's

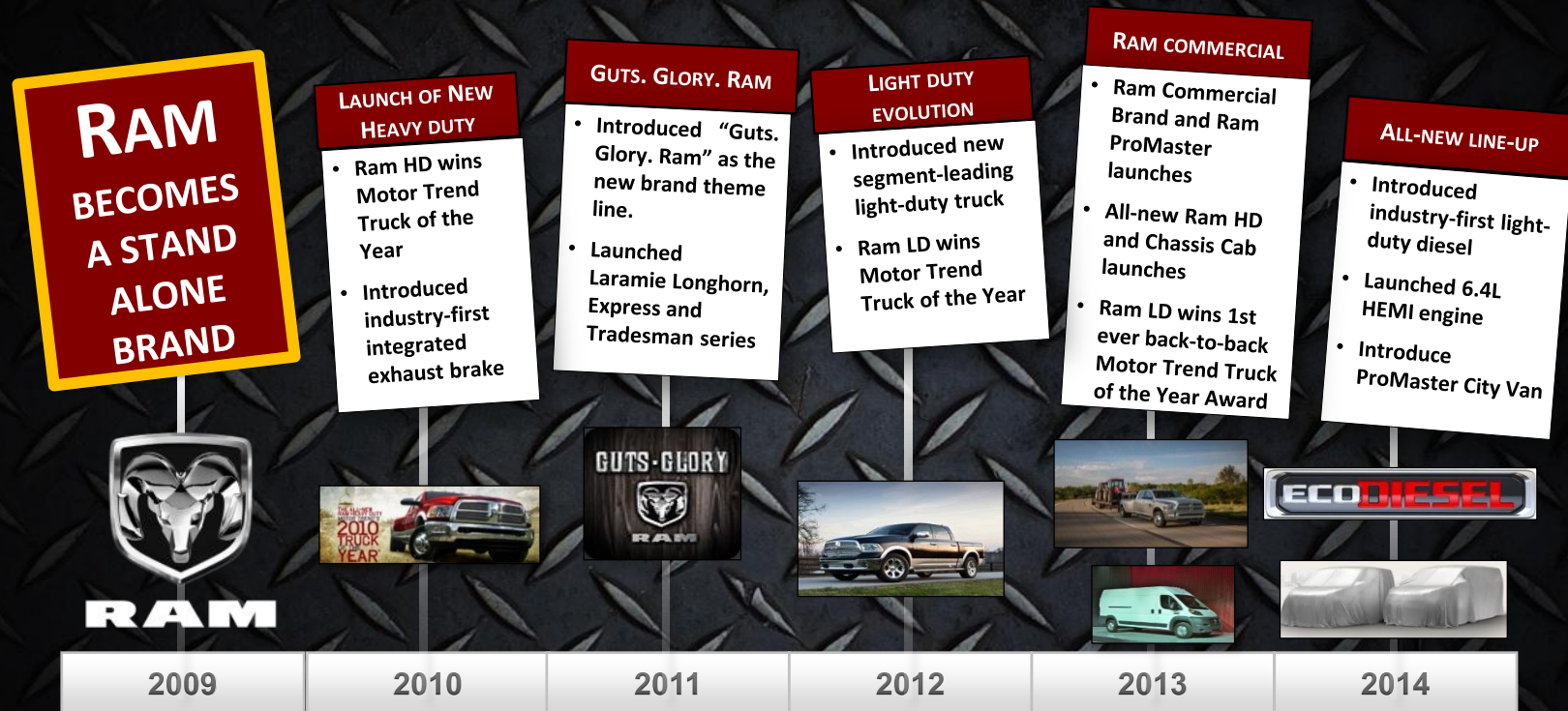
2000-2008



**RAM**



# The Brand: History



Proven Brand Commitment

**\$2.4 Billion Investment in Ram Brand Products & Innovations**



**RAM**

The Brand

RAM BRAND GOAL:

To Build the Best Pickup  
Trucks and Commercial  
Vehicles in the Industry!



**RAM**



# The Brand: Positioning

## Brand Mantra

Doing the right things for the right reasons

## Brand Positioning

Brave, Noble, Confident

## Brand Promise

The proof is in our trucks

- ✓ Innovation
- ✓ Capability
- ✓ Efficiency
- ✓ Durability



**RAM**

# Ram Pickup Trucks: Light Duty (74% of Large Pickup Segment)

## What They Do:

- 75% personal use
- Hunting, fishing, sports and home improvement projects

## Segment Why Buys:

- Fuel Economy
- QRD
- Capability (Towing)
- Styling



## Key Competitors:

- Ford F-150, Chevy Silverado, GMC Sierra



**RAM**



# Ram Pickup Trucks: Heavy Duty (26% of Large Pickup Segment)

## What They Do:

- 75% business use
- Construction, agriculture, landscaping
- Camping, boating

## Segment Why Buys:

- Capability (Towing)
- QRD
- Power/Performance
- Styling



## Key Competitors:

- Ford F-250/350, Chevy Silverado 2500/3500



# Ram Pickup Trucks

## Key Why-Buys

- Fuel Economy

The BEST

14MY Trucks

25 mpg Gas  
28 mpg Diesel

MPG (Highway)					Ram MPG Advantage
V6 Gas	3.7L V6 23	4.3L V6 24	4.0L V6 20	3.6L V6 25	+1-5mpg
Premium	3.5L V6 EcoBoost 22	5.3L V8 23	4.6L V8 19	3.0L EcoDiesel 28	+5-9mpg





# Ram Pickup Trucks

## Key Why-Buys

- Fuel Economy
- Power
- Payload
- Towing

**The BEST**

## 14MY Trucks

25 mpg Gas  
28 mpg Diesel

**The BEST**

850 ft/lb Torque

**The BEST**

7,320 lbs.


**The BEST**

30,000 lbs.



# Ram Pickup Trucks

## Commitment to Innovation

- 
- Light Duty Link Coil Suspension Jul 2008
  - **RamBox Storage System** Oct 2008
  - **Light Duty Active-Level 4-Corner Adaptive Air Suspension** Sep 2012
  - Light Duty - Torqueflite 8-speed automatic transmission Sep 2012
  - Light Duty - Rotary Dial, Dash Mounted Transmission Shifter Sep 2012
  - **All-Secure Remote Locking System (Doors, Tailgate, RamBox)** Sep 2012
  - Uconnect 8.4" Radio with Touch Screen and Navigation Sep 2012
  - Heavy Duty 30,000 lb. Trailer Tow Capability Feb 2013
  - Heavy Duty Dual Rear Wheel Electronic Stability Control Feb 2013
  - Chassis Cab with Standard Electronic Stability Control
  - Heavy Duty Cargo View Camera Feb 2013
  - Heavy Duty and Chassis Cab with available Manual Transmission Feb 2013
  - Full Size Cargo Van with Front Wheel Drive Sep 2013
  - Heavy Duty 6.4L V8 Hemi Engine with BIC Power and Torque Oct 2013
  - Heavy Duty Rear Link Coil Suspension Oct 2013
  - Heavy Duty Tire Pressure Display, 4 or 6 Dual Rear Wheel Tires Oct 2013
  - **Light Duty 3.0L EcoDiesel Engine with Best In Class 28 MPG** Feb 2014
  - Heavy Duty Auto-Level Rear Air Suspension Mar 2014
  - Heavy Duty Power Wagon – most capable Off Road Pickup Truck Apr 2014



# Ram Pickup Trucks: Commitment to Innovation

## **CLASS-EXCLUSIVE**

## **RamBox Cargo Management System**

- Offers up to 8.6 cubic feet of incremental dry, lit, and lockable storage
- Perfect for securely storing tools, gear or beverages



**RAM**

# Ram Pickup Trucks: Commitment to Innovation

## **CLASS-EXCLUSIVE**

## **Active-Level 4-Corner Air Suspension**

- Ability to raise/lower vehicle up to 4 inches:
  - Improves aerodynamics and fuel economy
  - Improves ground clearance
  - Assists with loading/unloading
  - Automatically levels vehicle when bed is loaded or trailer attached.





# Ram Pickup Trucks: Commitment to Innovation

## **CLASS-EXCLUSIVE**

## **All-Secure Remote Locking System**

- Keyless Enter 'n Go locks/unlocks the doors, tailgate and RamBox system simultaneously
- Secures all cargo with the touch of a button



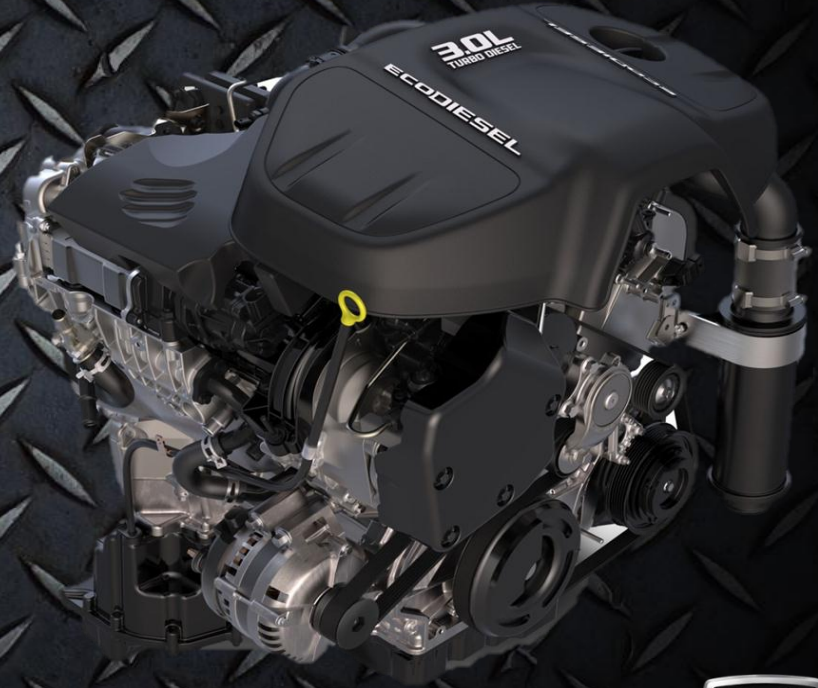
**RAM**

# Ram Pickup Trucks: Commitment to Innovation

**CLASS-EXCLUSIVE**

**Light Duty 3.0L EcoDiesel Engine with BIC 28 MPG**

- 9,200 lbs towing
- 420 ft/lbs torque
- Best fuel economy of any pickup truck EVER
- Proven diesel durability



**RAM**



# Ram Pickup Trucks: Awards

**MOTOR TREND**  
**TRUCK**  
**OF THE**  
**YEAR**  
**2013**



**2013 Motor Trend**  
**"Truck of the Year"**

**MOTOR TREND**  
**TRUCK**  
**OF THE YEAR**  
**2014**



**2014 Motor Trend**  
**"Truck of the Year"**

**Consumer**  
**Reports**

**2014**  
**Recommended**

**2014**  
**Top 4 Best**  
**Vehicles**  
**Overall**

**2014**  
**Best**  
**Pickup Truck**



Texas Auto Writers Association, Inc.

**2013**  
**"Truck of Texas"**  
**2014**  
**"Truck of Texas"**

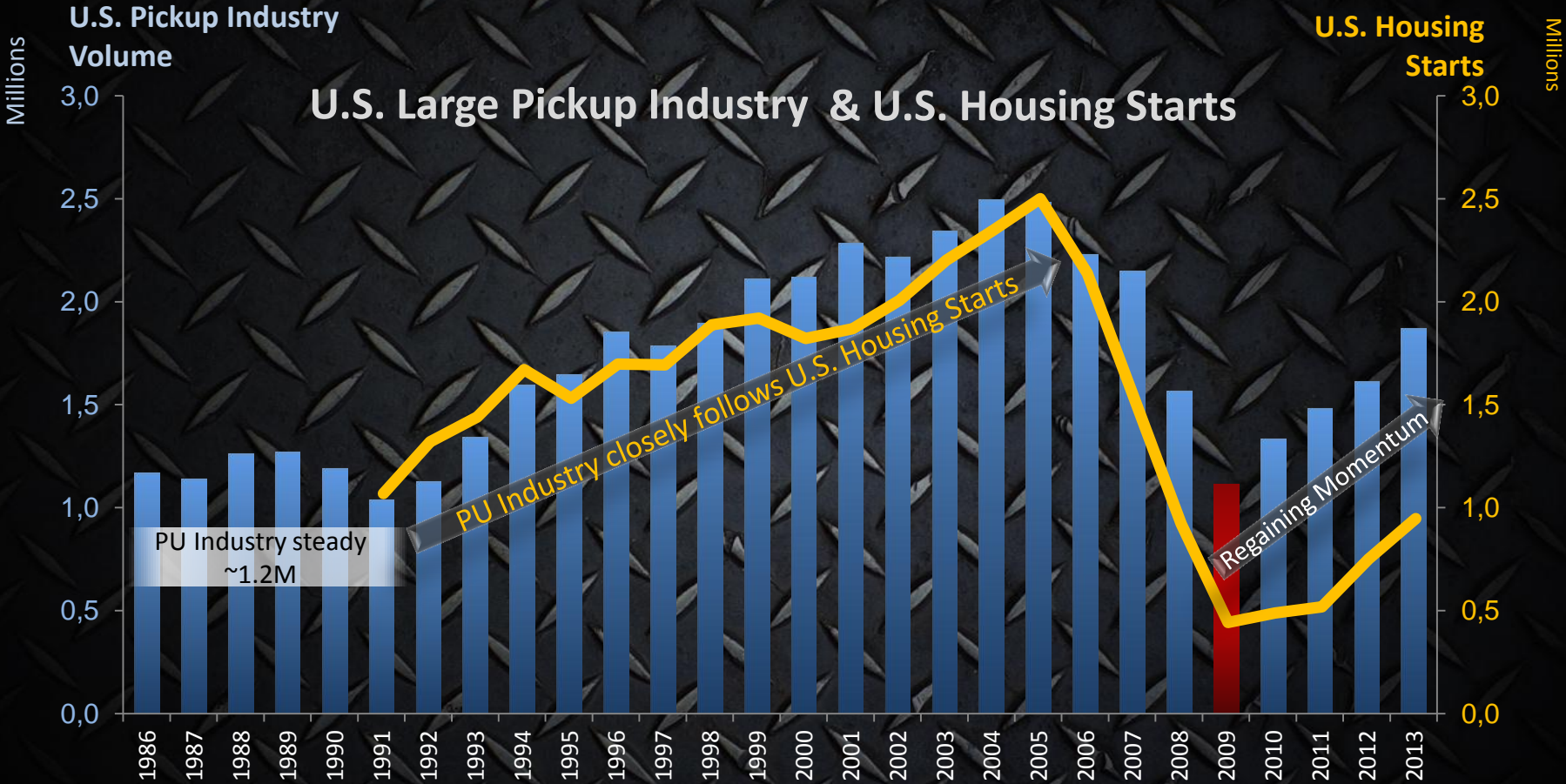


**2014**  
**Canadian**  
**Truck King**  
**Challenge Winner**



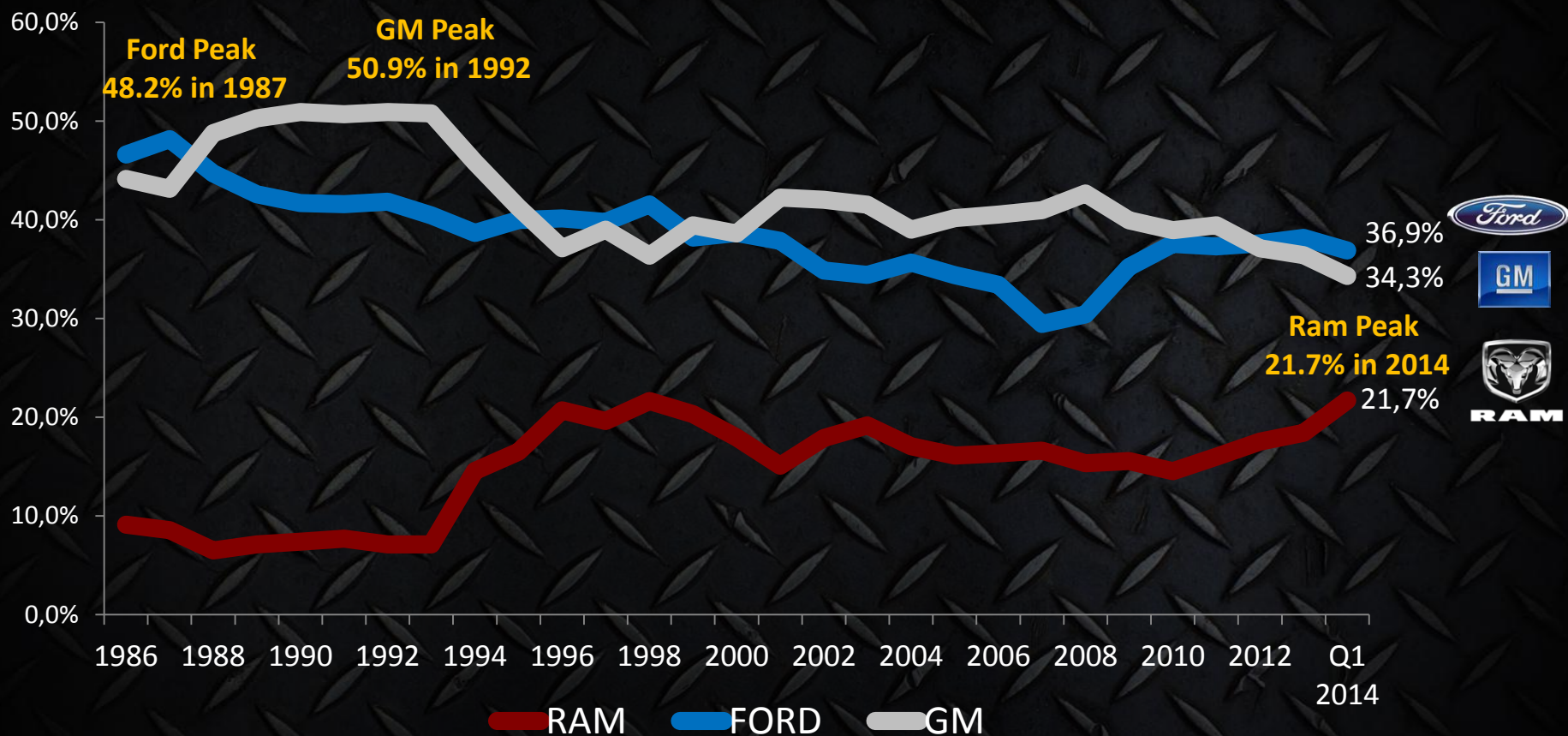
**RAM**

# Pickup Truck Market: U.S. Industry Correlation to Housing Starts





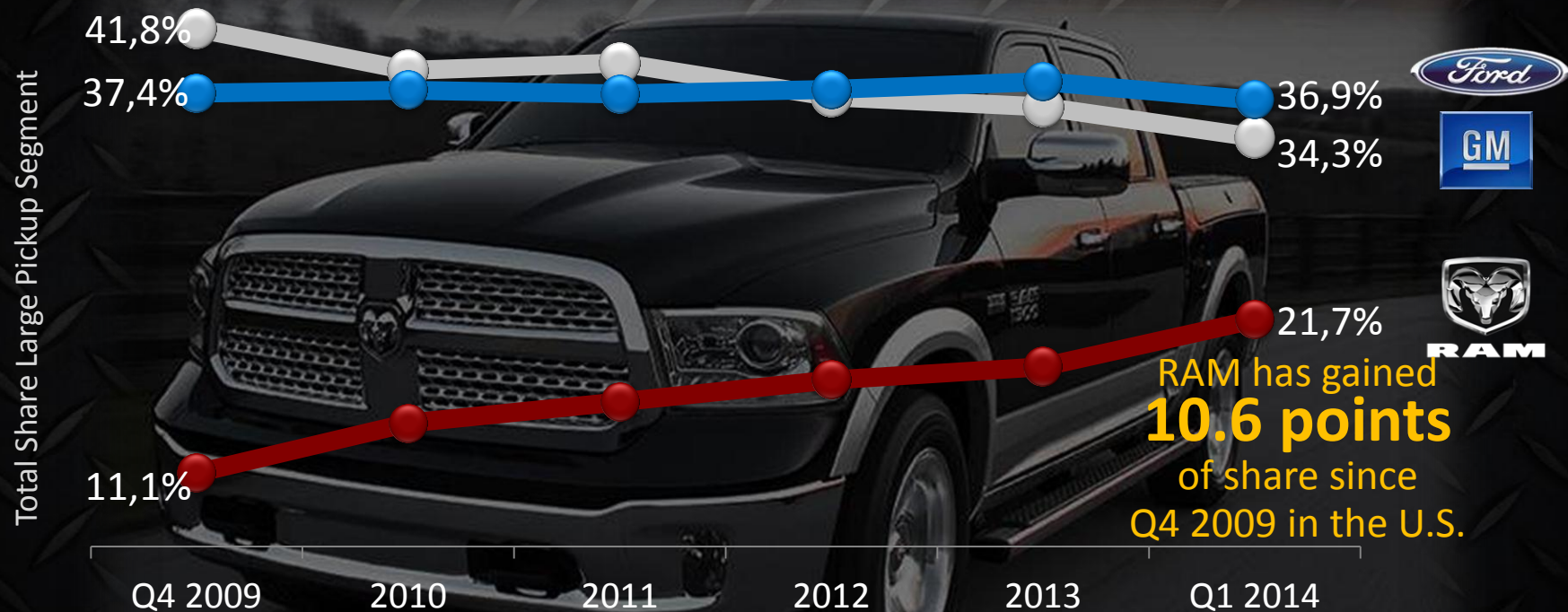
# Pickup Truck Market: U.S. Large Pickup Total Share



# Pickup Truck Market: Ram Large Pickup Share



## Drilling a Little Deeper ... The Last 5 Years



Ram is the **FASTEST** growing Truck Brand in the U.S. ...



# Pickup Truck Market: Ram Large Pickup Share



## Drilling a Little Deeper ... The Last 5 Years

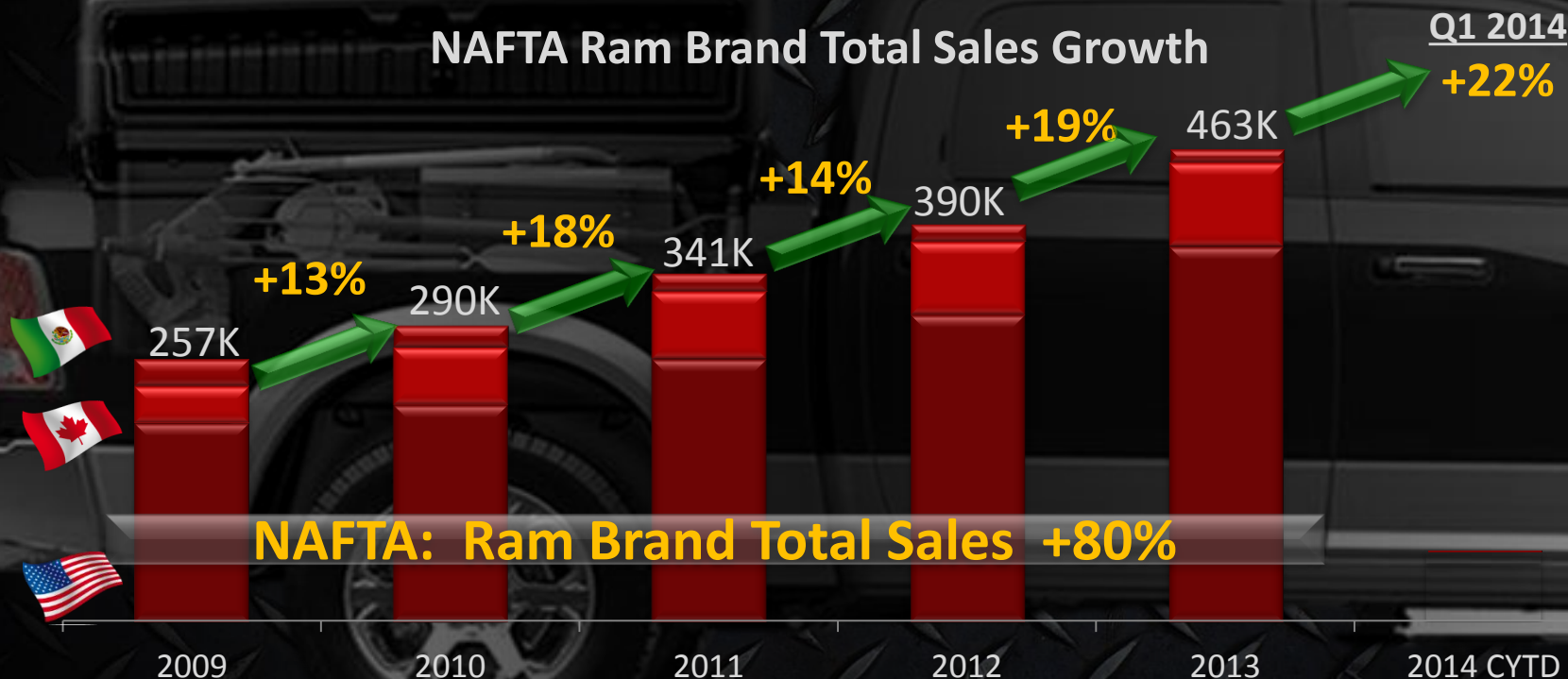


# NAFTA Ram Brand Sales

## Drilling a Little Deeper ... The Last 5 Years



### NAFTA Ram Brand Total Sales Growth



**RAM**



# Pickup Truck Market: Ram Customers



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Average Age

52

58

59

---

HH Income

\$91K

\$85K

\$77K

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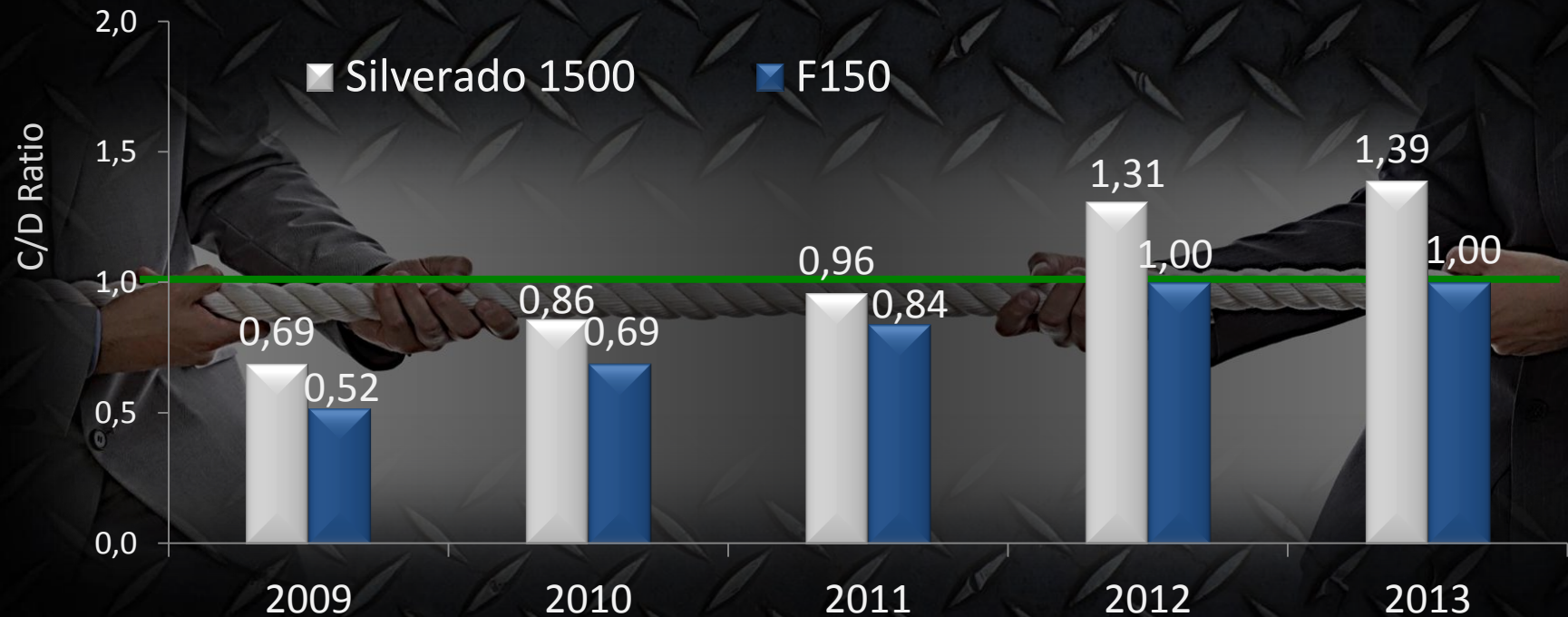


Ram customers are  
**YOUNGER** and  
more **AFFLUENT**  
than Ford and GM



# Pickup Truck Market: Competitive Conquest/Defection

## Ram 1500 Conquest/Defection Ratio vs. Competition





# Ram Commercial



# Ram Commercial

## RAM Commercial ... What are we doing?

1. **ENHANCING** the capabilities of our Tradesman series of trucks from half-ton to 5500
2. **ESTABLISHING** ~900 commercially focused dealers (Business Link / Ram Commercial)
3. **EXPANDING** our commercial/vocational marketing efforts
4. **LEVERAGING** FIAT Professional to bring proven commercial vans to the U.S.





# Ram Commercial: Leveraging FIAT Professional Offerings

**FIAT  
DUCATO**



**RAM  
PROMASTER**



**PROMASTER**

**FIAT  
DOBLO**



**RAM  
PROMASTER CITY**



**PROMASTER  
CITY**

Two **PROVEN PERFORMERS** bringing innovative solutions to the North American Market



# ***RAM PROMASTER VIDEO***





# Ram Commercial: 2014 Ram ProMaster

## What it offers:

- BEST IN CLASS  
**PAYLOAD (4,430 lbs.)**
- BEST IN CLASS  
**INTERIOR HEIGHT (65 in.)**  
(Standard Roof)
- BEST IN CLASS  
**CARGO CAPACITY (353 cu. ft.)**  
(1500 series,)
- BEST IN CLASS  
**TURNING RADIUS (36 ft.)**



# Ram Commercial: Ram Chassis Cabs

## What it offers:

- BEST IN CLASS  
**GCWR (37,500 lbs.)**
- BEST IN CLASS  
**TOWING (29,600 lbs.)**
- BEST IN CLASS  
**REAR FRAME STRENGTH (50,000 psi)**
- BEST IN CLASS  
**DUAL TANK FUEL CAPACITY (74 gal.)**





# The Plan: Ram Brand Product Actions



2014

Light Duty  
3.0L  
Eco Diesel

2015

Light Duty  
minor  
update

2016

Heavy Duty  
minor  
update

2017

Light Duty  
major  
update

2018

Heavy Duty  
major  
update



ProMaster  
Diesel  
Introduction

ProMaster  
City  
Introduction

Commercial  
Light Duty  
major  
update

Chassis Cab  
minor  
update

Commercial  
Heavy Duty  
major  
update

Chassis Cab  
major  
update

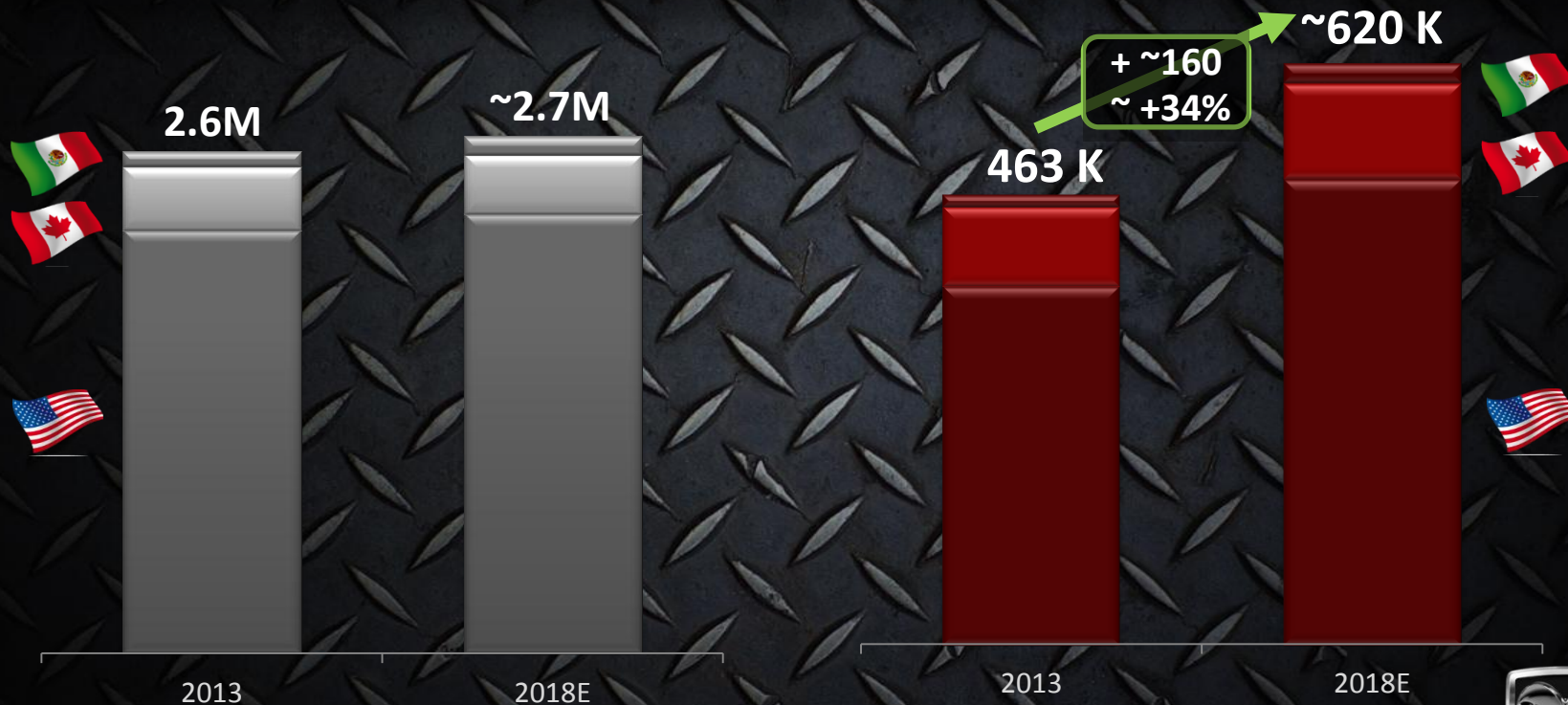


# The Plan: Ram Brand – NAFTA Sales Plan



2013-2018 Large PU & Van Industry

2013-2018 RAM Brand Volumes



**RAM**



# The Plan: Ram Brand Priorities

- **Build** the Brand
  - ✓ Ram and Ram Commercial
- **Lead** in Truck Innovation
  - ✓ 3.0L Diesel
  - ✓ Air Suspension
  - ✓ Ram Box Storage
  - ✓ Coil Spring Suspension
  - ✓ 8-Speed Transmission
- **Expand** Product Portfolio
- **Capitalize** on Commercial Opportunities
- **Grow** Sales and Share





**PROFESSIONAL**



**RAM**





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