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## TRATON GROUP sells 338,200 vehicles for the first time in 2023 and starts 2024 with a good order book

- ▶ The TRATON GROUP's unit sales grew 11% year-on-year in 2023 to 338,200 vehicles
- ▶ Truck unit sales also rose by 11% to 281,300 vehicles
- ▶ Unit sales of buses worldwide were 2% higher at 30,300 vehicles
- ▶ The Group's incoming orders declined by 21% to 264,800 vehicles
- ▶ The Group's order backlog extends into the second half of 2024

**Munich, January 22, 2024** – The TRATON GROUP hit a new **record in unit sales** and sold 338,200 (2022: 305,500) vehicles for the first time in 2023, 11% more than in the previous year. The increase in the Group's unit sales was the result of the very high order backlog, increasingly stable supply chains, and a higher production volume.

The TRATON GROUP's truck business contributed to this increase with an 11% growth in unit sales to 281,300 (2022: 254,300) vehicles. Bus unit sales were up 2% at 30,300 (2022: 29,600) vehicles. Unit sales of MAN TGE vans came in at 26,600 (2022: 21,600) vehicles, a year-on-year increase of 23%.

Following very high incoming orders in the previous year, the TRATON GROUP recorded a 21% decrease in its **incoming orders** to 264,800 (2022: 334,600) vehicles in 2023. This is a reflection of demand continuing to return to normal after accumulating as a result of factors like the COVID-19 pandemic and the war in Ukraine. At the same time, demand was impacted by uncertainty with regard to economic development and by a more difficult financing environment. Order acceptance was restrictive in North America due to the persistently high order backlog. Incoming orders in South America were impacted by pull-forward effects resulting from a stricter emissions standard effective from the beginning of 2023. The book-to-bill ratio, or the ratio of incoming orders to unit sales, declined from 1.1 to 0.8, which will allow us to reduce our delivery times in 2024 to our customers' benefit.

Incoming orders of trucks fell by 23% to 210,600 (2022: 274,300) units. An 8% decrease to 29,800 (2022: 32,300) vehicles was recorded in the bus business. Incoming orders of MAN TGE vans were down 13% at 24,400 (2022: 28,000) vehicles.

**Christian Levin, CEO of the TRATON GROUP:** "Our brands were able to continue stabilizing and increasing production in 2023 and to gradually reduce the high order backlog. This allowed us to lift our unit sales by an impressive 11% year-on-year and hit a new record. Although supply chains had not completely regained their stability, we managed to deliver vehicles to our customers with shorter lead times. Demand in Europe is continuing to return to normal, and our order books are well filled, with enough orders to last us into the second half of the year. This is making me confident that 2024 will be another successful year for TRATON and our customers."

## The TRATON GROUP brands

**Scania** saw its unit sales rise by 14% to 96,700 (2022: 85,200) vehicles in 2023. Truck unit sales were up 14% at 91,700 (2022: 80,200) vehicles, and unit sales of buses improved 2% year-on-year to 5,100 (2022: 5,000) vehicles. As of year-end, Scania's incoming orders stood at 84,100 (2022: 82,100) vehicles, an increase of 2%.

**MAN Truck & Bus** lifted its total unit sales by 37% to 116,000 (2022: 84,500) vehicles. Unit sales in the prior-year period had been strongly impaired by a six-week production stop at some plants. The strongest growth was reported in the unit sales of trucks with an increase of 44% to 83,700 (2022: 58,100) vehicles. Bus unit sales were 19% higher than in the previous year at 5,700 (2022: 4,800) vehicles. Unit sales of MAN TGE vans came in at 26,600 (2022: 21,600) vehicles, an increase of 23%. MAN Truck & Bus's incoming orders were down 21% year-on-year at 86,800 (2022: 109,700) vehicles. The decrease was due primarily to the economic uncertainty in the European market.

**Navistar** recorded unit sales of 88,900 (2022: 81,900) vehicles in 2023, 9% higher than in the previous year. Unit sales of trucks rose by 9% to 75,500 (2022: 69,100) vehicles, whereas bus unit sales were 4% higher at 13,400 (2022: 12,800) vehicles. Incoming orders decreased by 29% to 60,900 (2022: 86,000) vehicles because most of the orders for 2023 had already been commissioned in 2022. Navistar remained restrictive in its acceptance of new orders for 2024 due to the high order backlog.

**Volkswagen Truck & Bus** saw its unit sales decline by 31% to 37,200 (2022: 54,100) vehicles in 2023. Truck unit sales were down 34% at 31,000 (2022: 47,100) vehicles as a result of the newly introduced emissions regulation. 12% fewer buses were sold at 6,300 (2022: 7,100) vehicles. Incoming orders fell by 41% to 33,700 (2022: 57,000) vehicles.

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With its brands Scania, MAN, Navistar, and Volkswagen Truck & Bus, TRATON SE is the parent and holding company of the TRATON GROUP and one of the world's leading commercial vehicle manufacturers. The Group's product portfolio comprises trucks, buses, and light-duty commercial vehicles. "Transforming Transportation Together. For a sustainable world.": this intention underlines the Company's ambition to have a lasting and sustainable impact on the commercial vehicle business and on the Group's commercial growth.