



CARAVAN SALON DÜSSELDORF – September 2, 2021

CAPITAL MARKETS DAY 2021

KNAUS TABBERT – 3 halls on around 25,000 square metres and 163 vehicles

KnausTabbert
Wir bewegen



KNAUS TABBERT – A doubling of the business volume until 2025



The right market environment

Future oriented products

Production sites and capacity

Secure supply chain

Trained staff

Financial resources

Key structural growth trends

NEW WORK

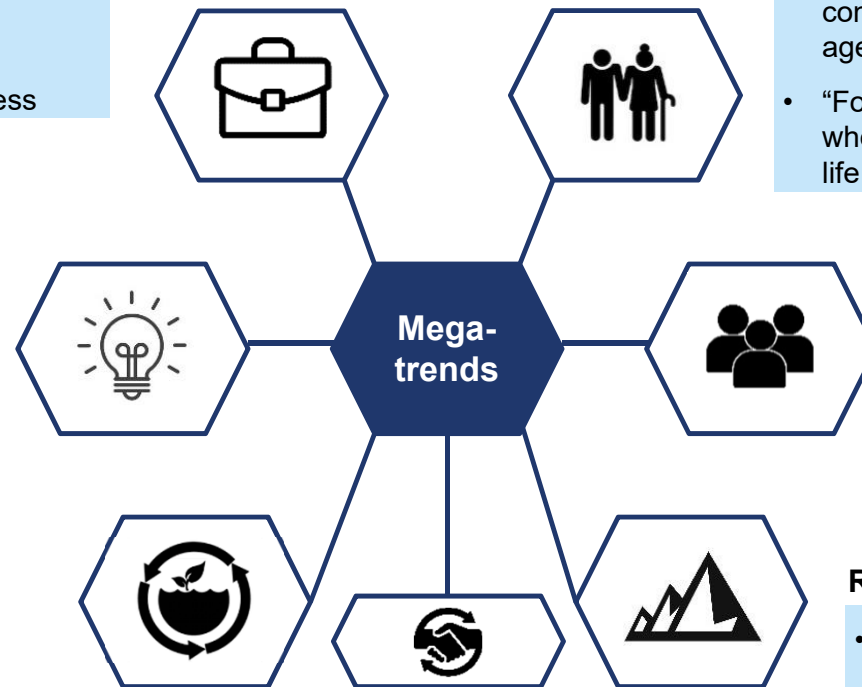
- Freedom in work design with regard to smart location and time
- Blurring of clear separation between private life and business

PRODUCT ENHANCEMENTS, INNOVATION & CONNECTIVITY

- Change in consumer preferences regarding interior layouts and product usage
- Vehicles equipped with latest technology

NEO-ECOLOGY

- Environmental awareness
- Regulatory push to minimise CO2 emission driving demand for e-mobility
- Shift in consumer preferences to “better instead of more”



SHARING ECONOMY / RENTAL

- Access over ownership trend accelerates growth in rental business
- Use of latest and most modern products

AGING POPULATION

- People get older with wealthy consumers moving into key customer age of 45 years and older
- “Forever youngsters” don’t retire when getting old – they start a new life

YOUNGER CONSUMERS

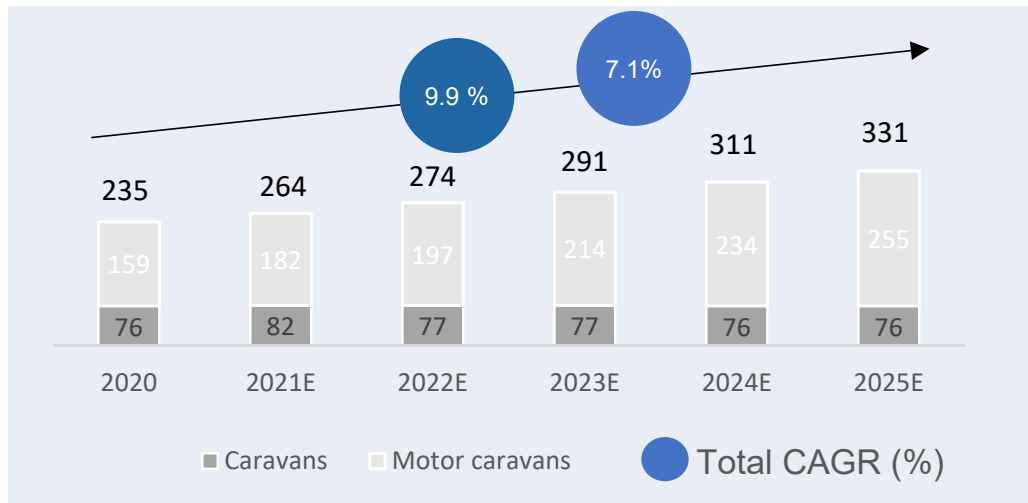
- Growing popularity of motorhomes with younger consumers driven by increasing importance of individualisation & activity
- 31% of motor caravans in 2019 were owned by people under 39 years

REGIONAL TOURISM

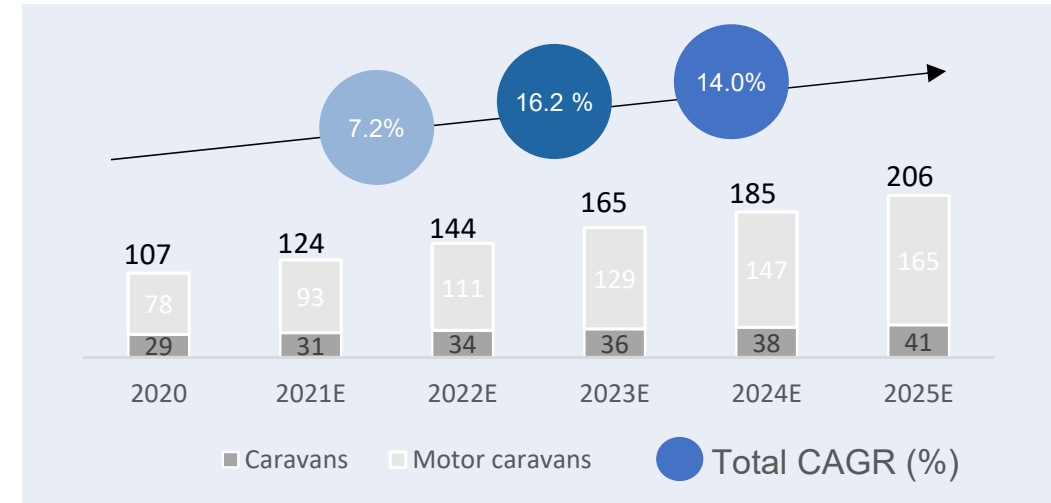
- Increasing popularity of holidays close to home and trend towards regional tourism
- Increasing avoidance of mass tourism
- Trend towards week-end trips instead of one long annual vacation

An accelerated market development - strong growth dynamics estimated

EUROPEAN LEISURE VEHICLES REGISTRATIONS (K UNITS)



NEW GERMAN LEISURE VEHICLES REGISTRATIONS (K UNITS)



The overall market in Europe is now expected to grow with a CAGR of 7.1% (previously 4.0%) - driven by a CAGR of 9.9% for motor caravans (previously 5.7%)

Our German home market constitutes the European growth engine with a CAGR of 14.0%

German motorhomes new registrations are expected to grow with a CAGR of 16.2% (previously 8.7%) - Caravans with a CAGR of 7.2% (previously 5.7%)

Knaus DESEO – Frame technology

KnausTabbert
Wir bewegen



E-Mobility - Clearly defined the requirements

KnausTabbert

Wir bewegen



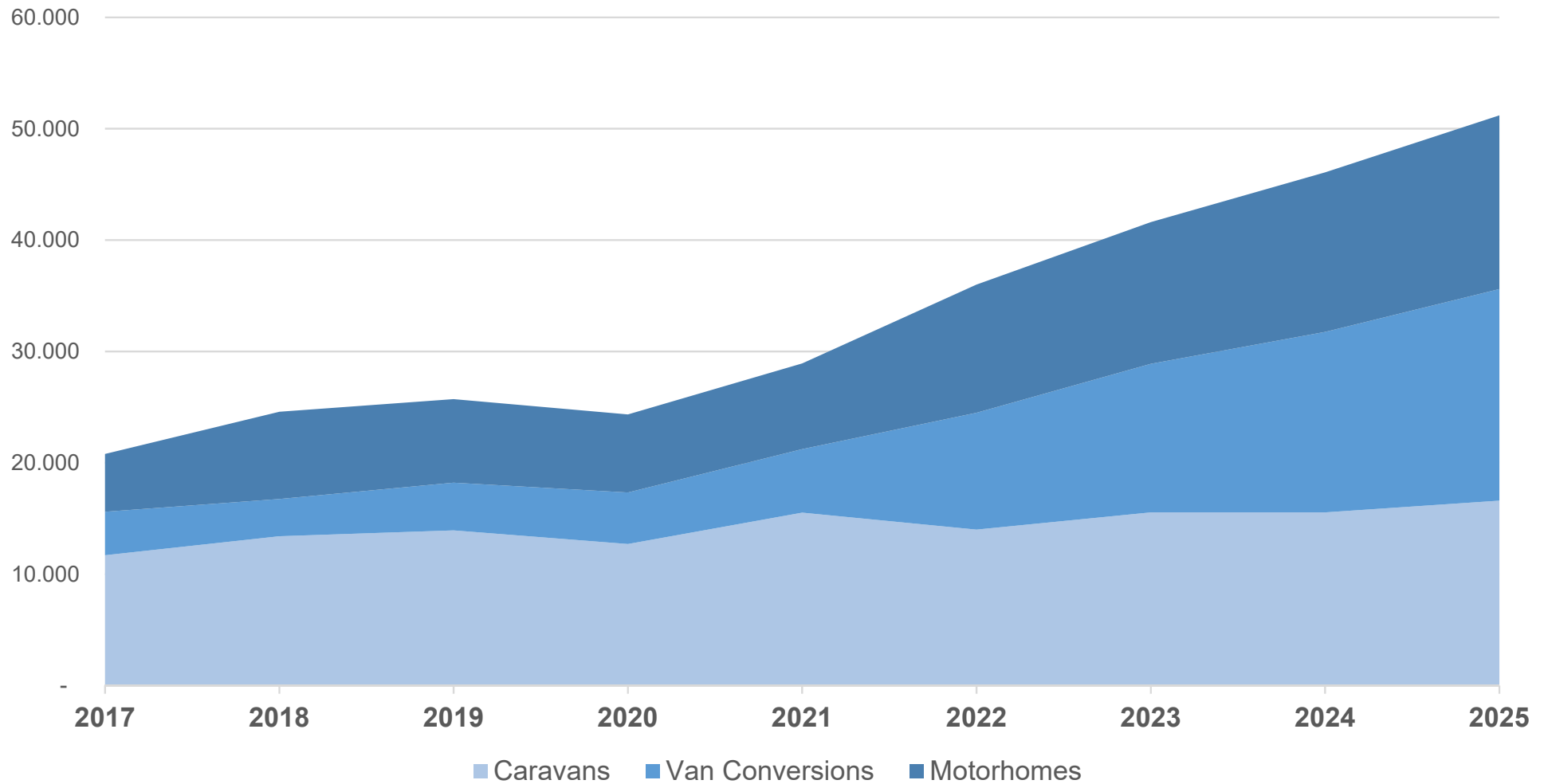
Performance of 18 % since the IPO



- Knaus Tabbert sets strategic course until 2025 with investment program
- Investment volume of more than EUR 220 million in the expansion of production
- Doubling of capacities to 50,000 units
- Increasing profitability through economies of scale and scope



A significant shift towards motorized vehicles is expected until 2025





INNOVATION

Leadership through innovation, technology and quality - an overall view

Already implemented, partly in series



- New frame technology
- Lightweight chassis
- Lightweight interior structures

are the base for new goals, new functions and added value for our customers

New processes



- Reliable robots
- New plant engineering
- Multiple functional integration

are key factors to reduce weight, prepare our products for upcoming necessities

Quality aspects



- Testing technology

Ensuring high standards, customer satisfaction as a permanent priority

Changing a square box into automotive design Frametechnology 2.0



- Flat sandwich parts, screwed and glued together, added with some deep-drawn plastic parts – this is what caravans today represents.
- In the upper class segment you will find some GRP-designed front and rear elements with significant weight problems – not a good base for the future.

CLASS A – SURFACES - DEFINED JOINTS - RELIABLE BONDING WITH ROBOTS

- Plastic, foam and a lot of know-how
- Freedom of design
- lightweight construction
- multidimensional parts
- Flexible use – inside and outside – vanishing borders - better, new opportunities



Crank Support – more security, more durable – less weight (and costs)

**Current status
(branch / business)**



- **Small Parts improved ...**
- **Easy handling**
- **Less than 3 KG**
- **(./ 4,8 to 7,8 KG)**
- **Sustainable through less weight and use of material**

**less turns and the caravan is well supported on a large contact area ...
material optimized
construction more than two words**

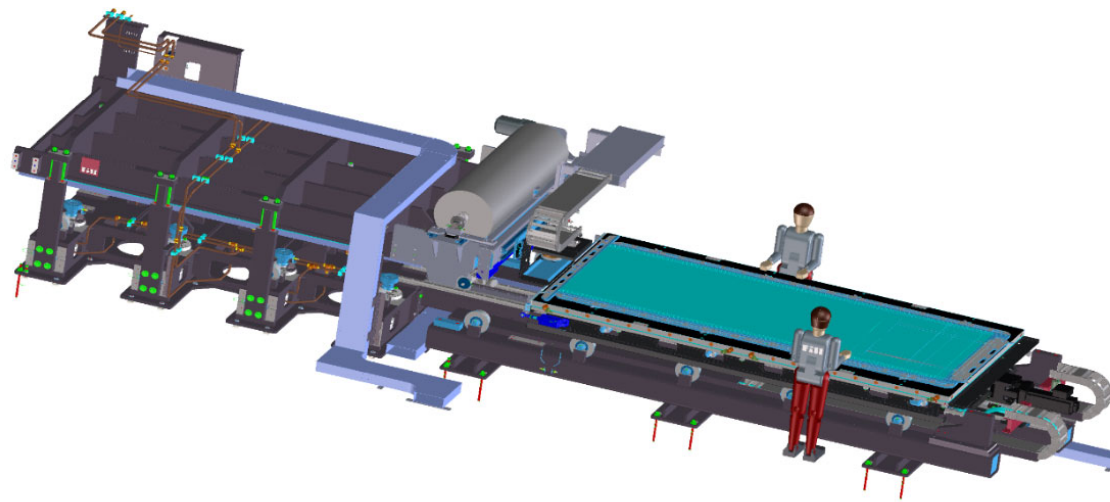
CUV – Insulation next level

One piece multiple layer insulation

Current status (branch / business)



a multi-part puzzle ...



- **Better performance**
- **Passive climate-balancing**
- **Sustainable through less weight and use of material**

A combination of several complementary materials leads to easier assembly and in addition to improved noise- and temperature insulation, also to a qualitatively better surface



E-Mobility - keep the caravan moving, even with an electric-drive

- Current legal regulations do not provide powered caravans in Europe
- The number of electric driven cars increase all over the world.
- Nowadays the battery is the limiting factor, if you want to travel with a caravan, it will even enlarge the challenge



- Electrically-powered caravan
- Reducing emissions
- Greater safety
- More Comfort
- Autarc
- Gasfree environment

A lot of benefits and even more things to implement new functions a huge chance to define future-camping

Presently we are doing the pretesting on proving ground, we will have common tests with german authorities in September 2021

E-Mobility Designed for motorhome use

- E-Mobility for light commercial vehicles – is only of interest for urban target traffic
- A range of 100KM to 150KM, does not go along with distant traveling
- Our study - **E.Power Drive** handles this conflict by combining an electric drive system with a range-extender.



- Full electric drive
- Zero emission in restricted areas (up to 90 KM)
- „unlimited range“ (refuel or reload after 600KM)
- Maxspeed: 140km/h
- Peakpower: 180 KW
- Homologation - 3,5t total mass
- Autarc
- Gasfree environment