



# ThyssenKrupp Field Day

## ThyssenKrupp Elevator: BU Escalators/Passenger Boarding Bridges

Ramon Sotomayor, CEO

Hamburg, March 15th, 2006

A company of  
ThyssenKrupp  
Elevator

**ThyssenKrupp Elevator (ES/PBB)**



# Agenda

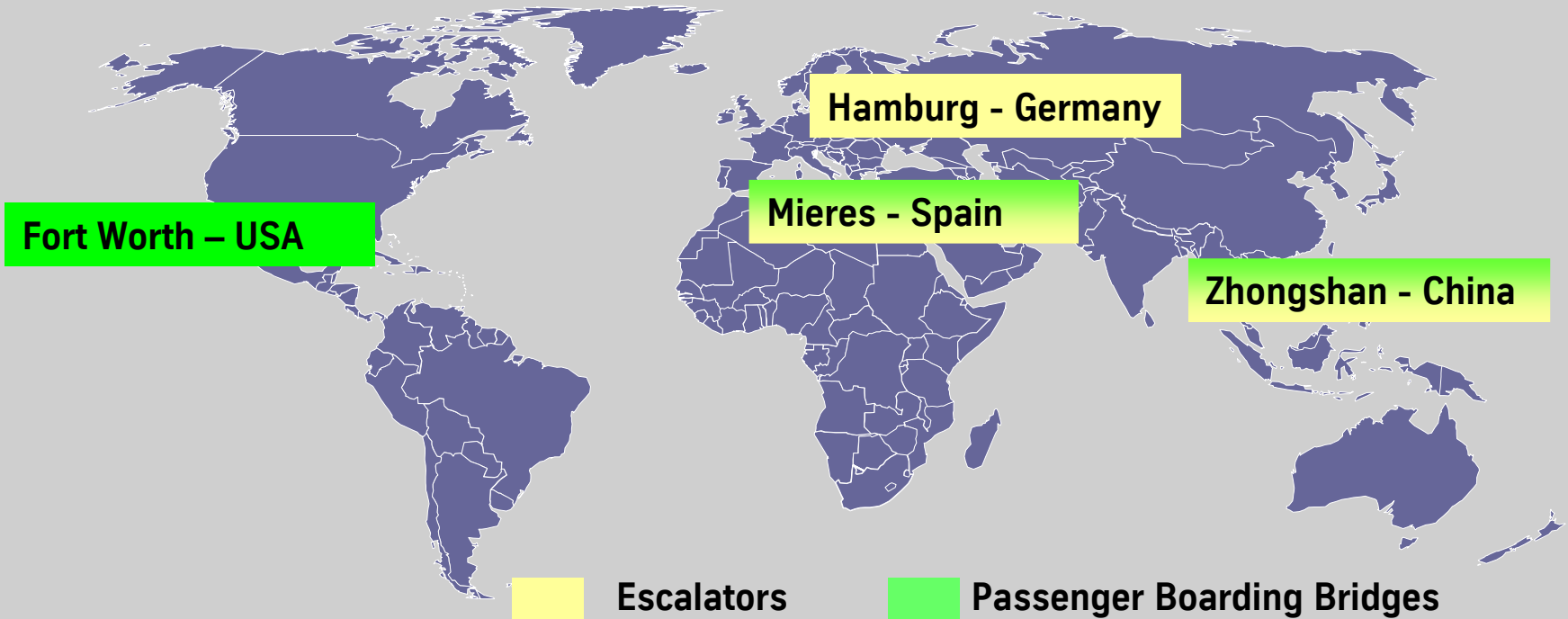
- Business Unit Organization
- Market and Competition
- Growth Strategy



# Business Unit Organization

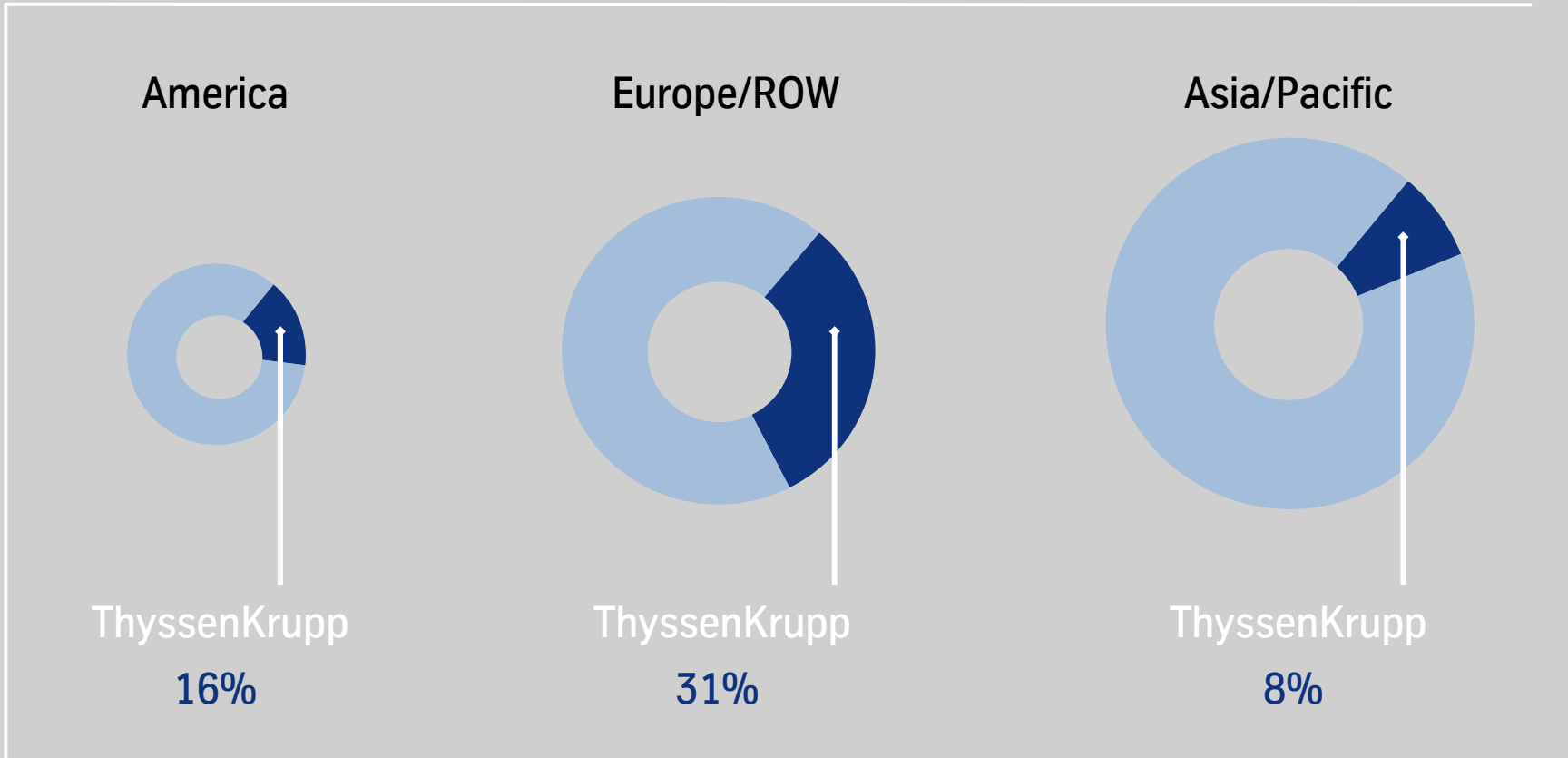
Business Unit ES/PBB  
Headquarters in London, UK

Total Sales 2004/05: 250 Million €  
No. of employees 2004/05: ~ 1,400



# Market and Competition

## Escalators – Market 2004/05

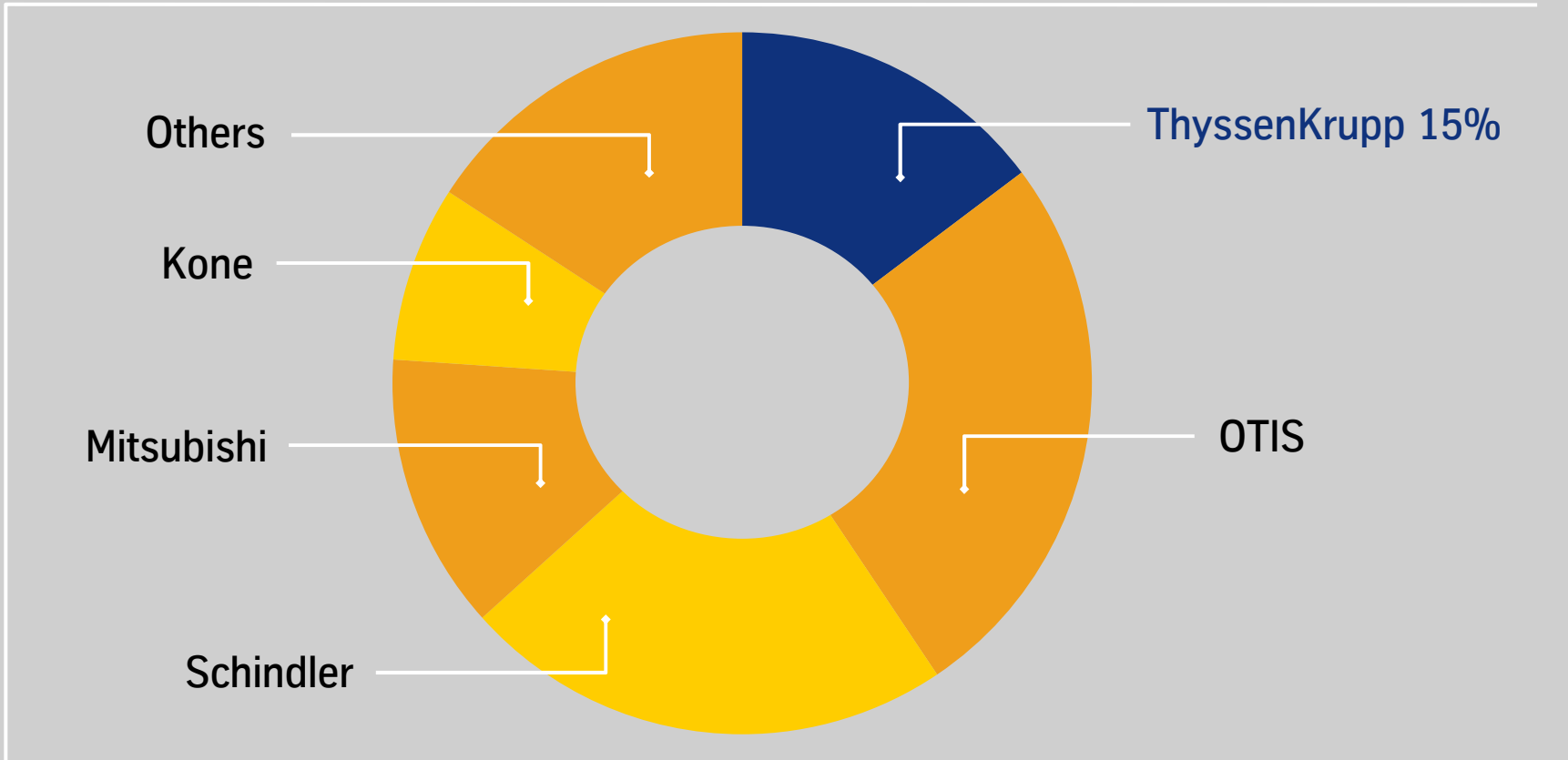


(Market Share in %)



# Market and Competition

## Escalators – Competitor Analysis



(Market Share in %)

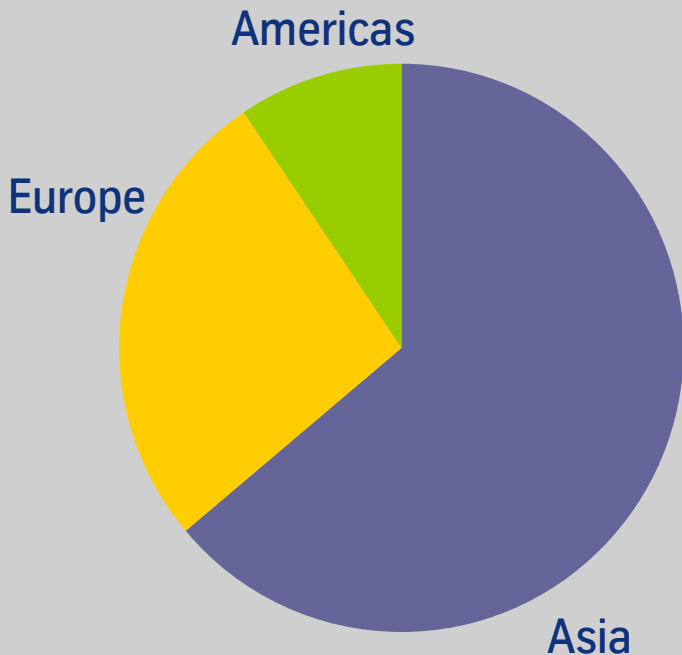


# Market and Competition

## Escalators – Market Outlook

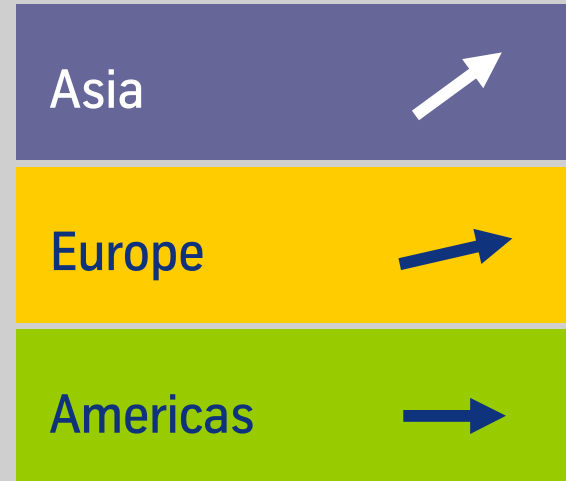
Current Market

~ 24,300 units



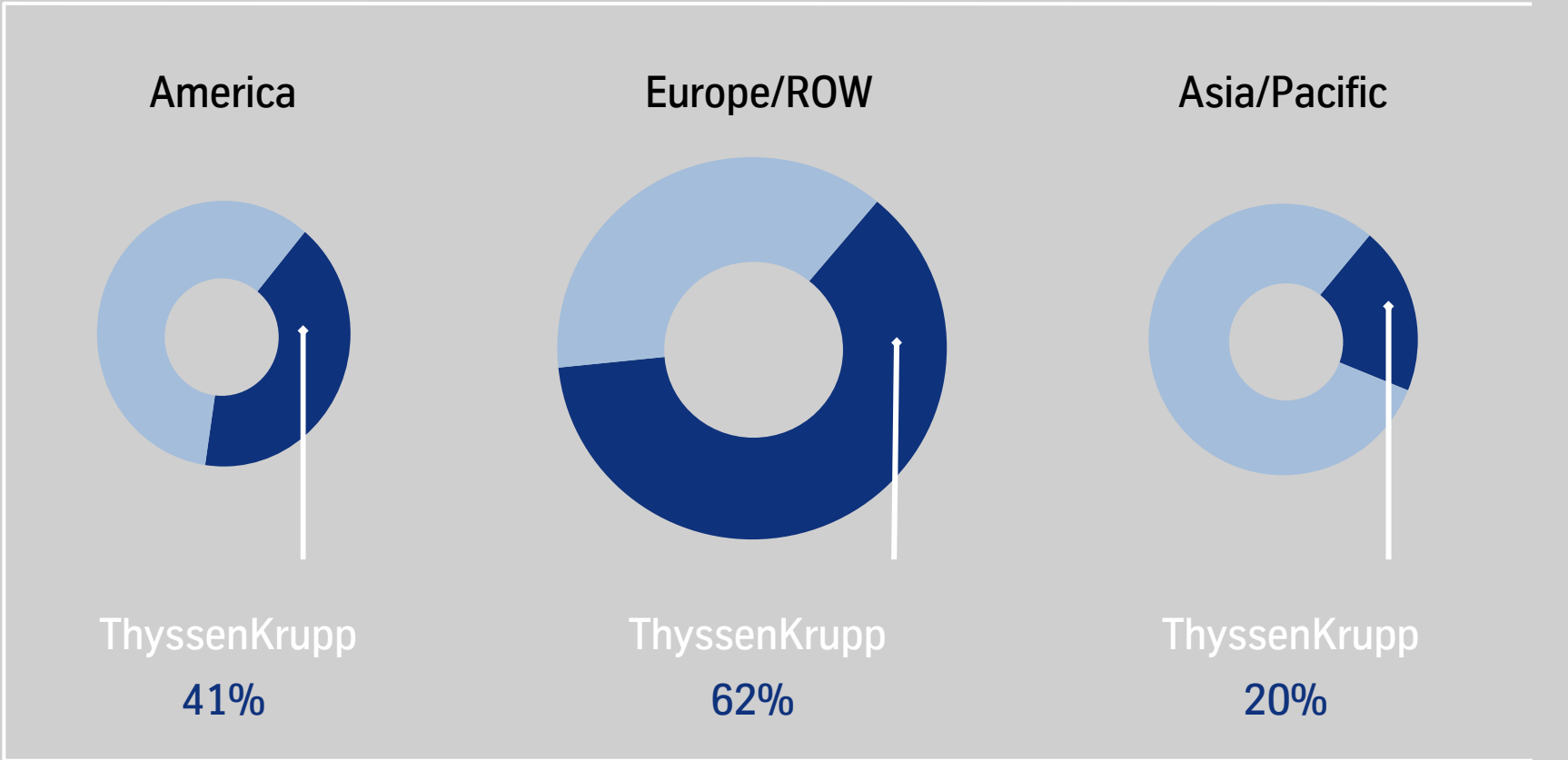
Market expectations

mid-term



# Market and Competition

## Passenger Boarding Bridges – Market 2004/05

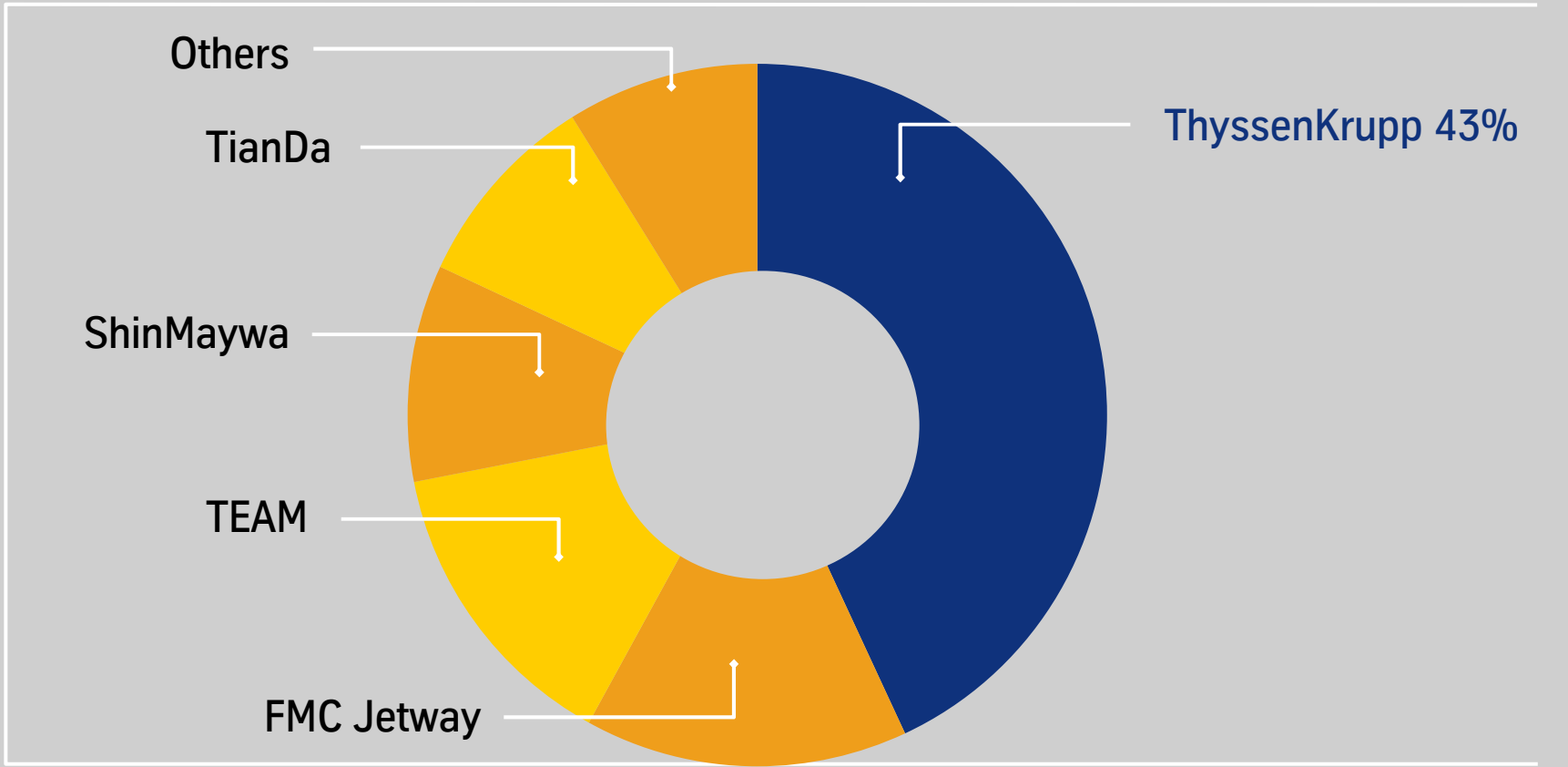


(Market Share in %)



# Market and Competition

## Passenger Boarding Bridges – Competitor Analysis



(Market Share in %)



# Market and Competition

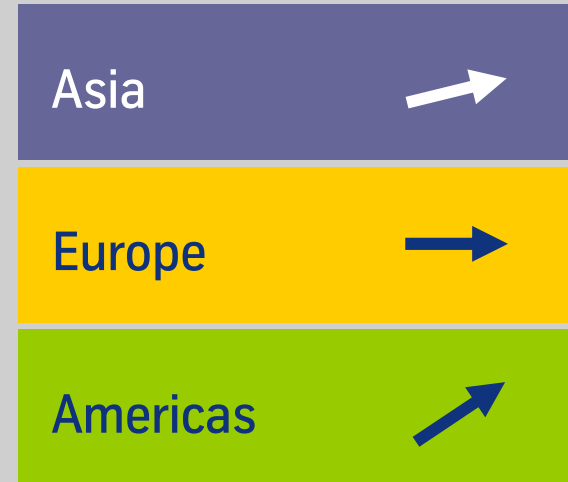
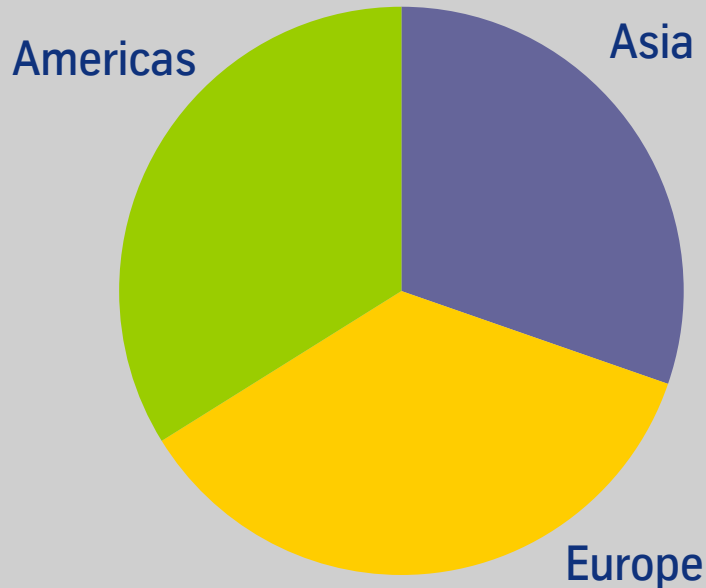
## Passenger Boarding Bridges – Market Outlook

Current Market

~ 550 units

Market expectations

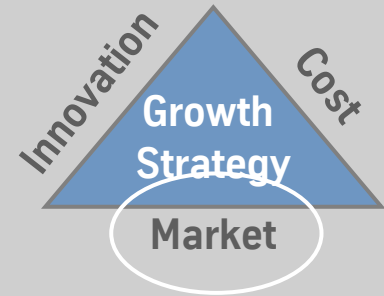
mid-term



## Growth Strategy



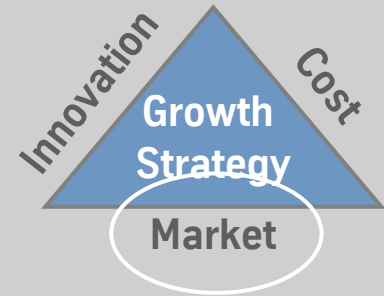
# Growth Strategy Market



## Objectives:

1. Escalators: Increasing market shares especially in Asia
2. PBBs: Aim for market leadership in Asia

# Growth Strategy Market



## Strategic Guidelines:

- Turn potentials of new markets into profits
- Increase production capacity in Asia
- Global Strategy for TK excellence in traffic segment for Escalators
- Airports: Cross-selling



◆ New plant at Zhongshan opens August 2006 with combined capacity for Escalators and PBBs

## Growth Strategy

### Market – Cross Selling

**Contract Value 96 Million €**

- 81 PBBs
- 54 Escalators
- 87 Moving walks
- 76 Elevators



**Contract Value 66 Million €**

- 74 PBBs
- 27 Escalators
- 130 Elevators



## Growth Strategy

### Market – Cross Selling

**Contract Value 120 Million €**

- 123 PBBs  
includes a dedicated terminal for Airbus A380  
with 23 three-bridge gate solutions
- 165 Escalators
- 125 Moving walks
- 350 Elevators



## References

### Market – Cross Selling

#### Contract Value 6.5 Million €

- 27 PBBs
- 17 Escalators
- 11 Moving walks
- 37 Elevators



#### Contract Value 11 Million €

- 19 PBBs
- 38 Escalators
- 8 Moving Walks
- 33 Elevators



## References

### Market – Cross Selling

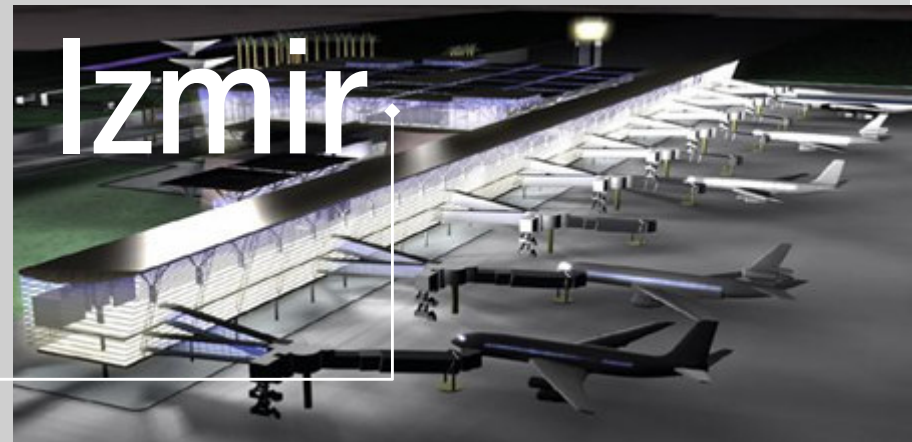
**Contract Value 13.7 Million €**

- 23 PBBs
- 50 Escalators
- 46 Moving walks
- 60 Elevators



**Contract Value 6.3 Million €**

- 10 PBBs
- 25 Escalators
- 26 Moving Walks
- 23 Elevators



# Growth Strategy

## Cost



## Manufacturing

- Increase capacity in Asia
- One global product line
- New investments to improve efficiency

## Purchasing

- Global sourcing
- Volume effects due to global products

## Design

- Design to cost strategy (observing highest quality standards)

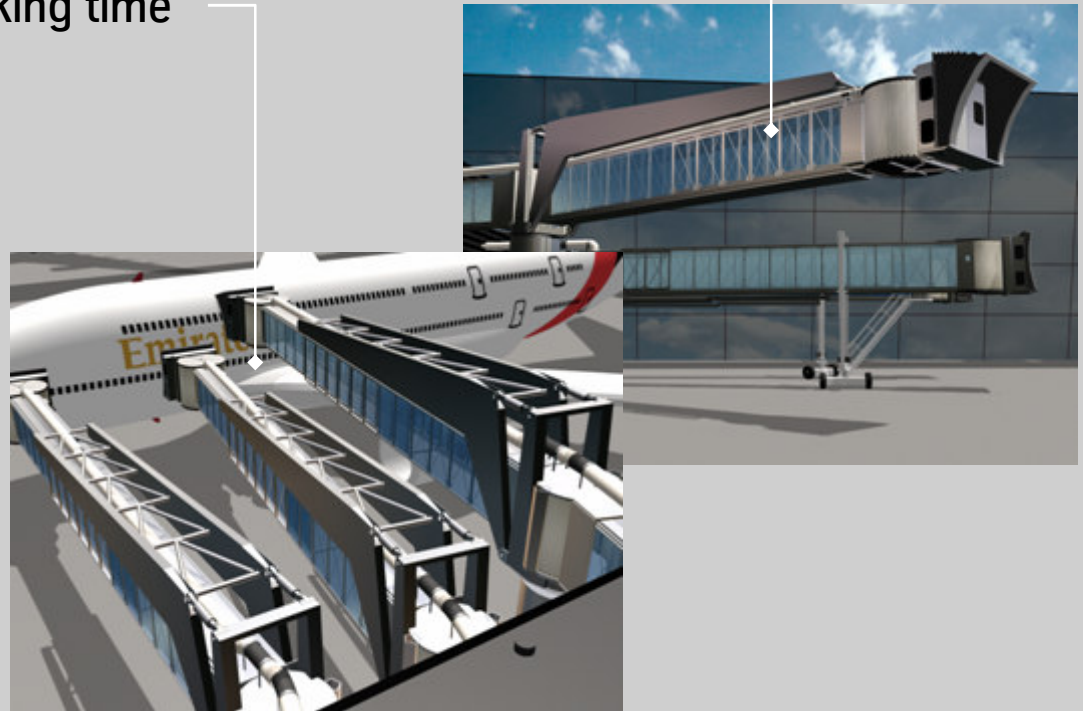
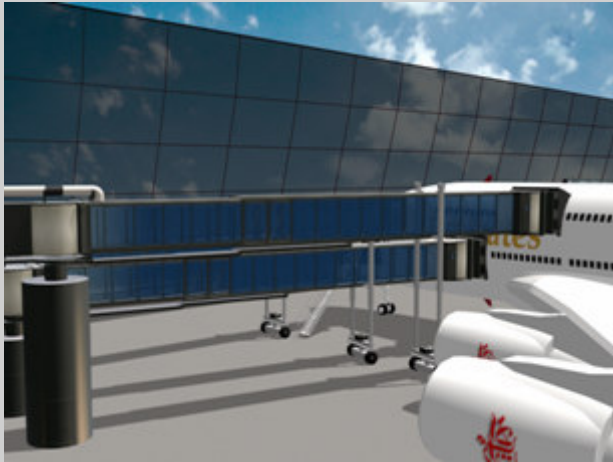


# Growth Strategy Innovation



## A380 Solutions

- Over the wing – apron free solution
- reduce embarking-disembarking time

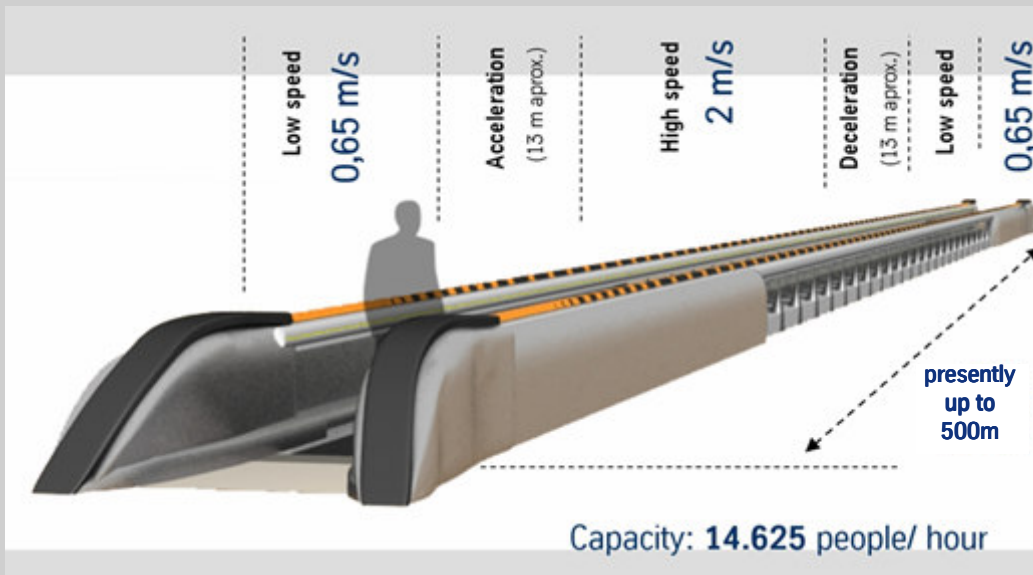


# Growth Strategy Innovation



## New transportation concept – Turbo Track

- Continuous transportation at 2-2.5 m/s
- Substitute to people movers
- Increases mobility potentials within underground stations and airports



## Growth Strategy - Summary

Innovations lead  
to competitive  
advantages

**Innovation**

**Growth  
Strategy**

**Cost**

Improve  
profitability by  
consequent cost  
management

**Market**

Systematic development of  
new and existing markets



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