

DAF'S VISION ON SUSTAINABLE MOBILITY

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Project manager advanced technology December 9, 2025



DAF IN A NUTSHELL

First Workshop



DAF Today



Revenue



€ 6.8 Bln

Production



47,600

Employees



>8,700 (FTE)

Export



92%

Export to



+70 countries



DAF

NV VANDOORNE'S MACHINEFABRIEK
TELEFON 3900-2222
CONSTRUCTIE-WERKPLAATS

P.C.V.d.GRIEND
DEN HAAG



NV CARTONNAGEFABRIEK
Gelria BAREVELD
NV CARTONNAGEFABRIEK
voor de verspreiden

BOERMAN
BOERMAN TRANSPORT

DAF Trucks

EURO 6

DAF

EURO 5



XF XG XG+

XD

1996 – DAF BECOMES PART OF PACCAR

DAF

A **PACCAR** COMPANY



2024 DAF MARKET PERFORMANCE



**EU HD Market Share:
14.4%**

Market Leadership in:



United Kingdom (27.1%)



The Netherlands (28.9%)



**Largest Import Tractor Brand in
Germany and France**



**Nr. 1 in Heavy Tractors in
Belgium**



> 4,800 Trucks Sold Outside EU



> 3,000 Engines

POWERING YOUR SUCCESS



TRUCKS KEEP EUROPE ON THE MOVE



- **The Most Flexible, Responsive and Economic Mode of Transport**
- **Carrying 80% of All Freight Transported over Land**
- **Necessity for Society**
 - **Store Deliveries**
 - **Industry Activity**
 - **Essential Public Services**
- **7% of EU CO2 Emissions**

TRUCKS



Purchased with Calculator

Drive Around the Clock

World of Different Applications

B2B

PASSENGER CARS



Purchased with the Heart

Drive When Needed

One Application

B2C



Need Business Case

New Charging Infrastructure

Cannot Detour or Wait for Charger

Enabling Conditions are Key



ZEV TRUCKS



Need Your Green Heart

Can be Charged at Home

Take a Coffee Break and Charge

'Supply Push' Facilitates Adoption



ZEV CARS



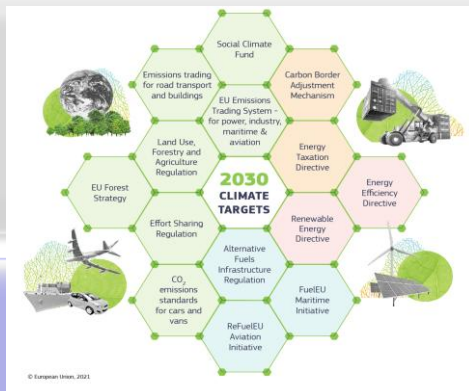
EU CO₂ EMISSIONS TARGET: -45% IN 2030 FOR TRUCKS

EUROPEAN REGULATORY OVERVIEW

GLOBAL WARMING



CO₂ LIMIT
-15% c/w 2019



CO₂ LIMIT
-45% c/w 2019
Additional VECTO classes

CO₂ LIMIT
-65% c/w 2019

PROPOSAL
UK <26T
Zero Emission
Only

CO₂ LIMIT
-90% c/w 2019

ACEA
Fossil-Free
Pledge

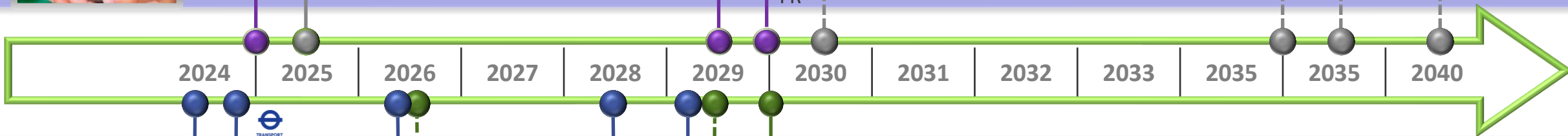
LOCAL AIR QUALITY



Amsterdam
26 Cities
NL

EURO 7

Paris
5 Cities
FR



SAFETY

UN ECE
Cyber Security
GSR1

GSR2

AEB 70/0
AEB-VRU (ped.)

GSR3

ENVIRONMENTAL



BATTERY PACK
Recyclability

BATTERY PACK- PASSPORT
CO₂ Footprint
Place Of Origin



Status: Jan2024

UK Brexit: No GSR1, Euro7?, CO₂ targets

THE GREEN ENERGY CHALLENGES TOWARDS 2030

- 400,000 BEV Trucks on the Road
- 42 TWh per Year
 - 17 mln Households Energy Consumption
- 400,000 Depot Chargers
- 50,000 Public Chargers (35,000 MW Chargers)
- 2,500 Hydrogen Refueling Stations
- Current Pace of Charger Installation Too Low
- 5 to 6 Years of Waiting Time for Grid Connection



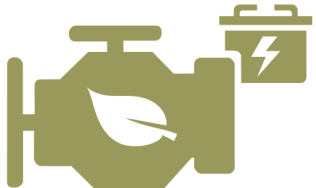
NO 'ONE SIZE FITS ALL' SOLUTION



Battery-Electric



Hydrogen



Hybrid



HVO/
e-Fuels



DAF COMMITMENT TO ZERO EMISSIONS ROAD TRANSPORT

2010 LF Hybrid



2018 Full Range Electric Trucks



2021 Hydrogen ICE Truck



2022 New DAF Electric



ZERO EMISSION ROAD TRANSPORT: THREE KEY FACTORS



**PRODUCT
OFFERING**

X



**GREEN ENERGY +
CHARGING
INFRASTRUCTURE**

X



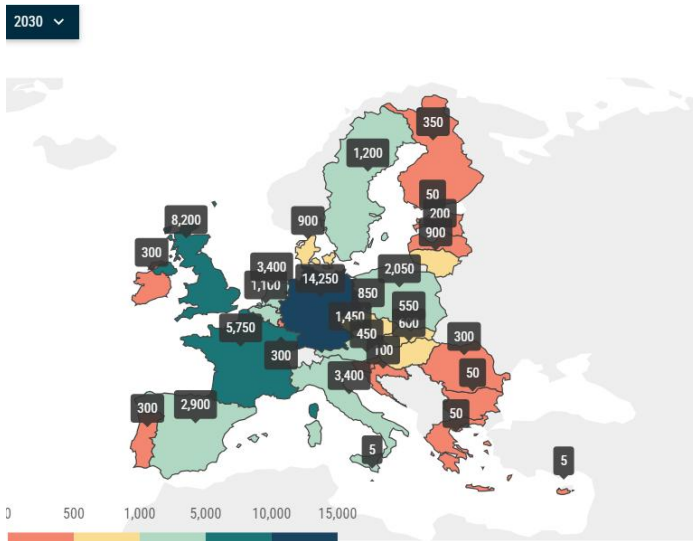
**COST
PARITY**

***ZEV TRUCKS ARE NOT THE LIMITING FACTOR,
IT IS ALL ABOUT THE ENABLING CONDITIONS***

BATTERY ELECTRIC TRUCK

Automotive Industry has invested heavily in Zero Emission Vehicles (ZEV)

- ✓ ZE Trucks are available and for sale.
- Infrastructure is Lagging behind (Trucks)
- Electric Grid congestion in EU
- TCO is still challenging



Electric cars: Half of all chargers in EU concentrated in just two countries

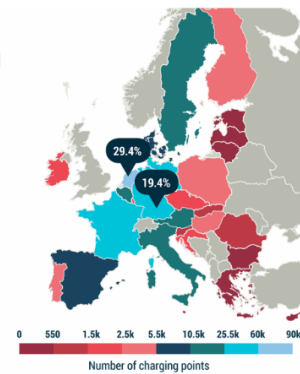
DISTRIBUTION OF ELECTRIC CAR CHARGING POINTS ACROSS THE EU

Some 50% of all charging points:
Concentrated in just 2 EU countries

29.4% Netherlands 19.4% Germany

Top 5: Fewest charging points in 2021

Cyprus	Malta	Lithuania
57	98	207
Estonia	Latvia	
385	420	



22 June 2022



DAF BATTERY ELECTRIC TECHNOLOGY



XD and XF Electric

Heavy Duty, Regional and Long Haul

- eMotors: 170 kW/230 hp – 350 kW/480 hp
- Modular Battery Packaging
- Range up to 500 km

HYDROGEN SOLUTIONS

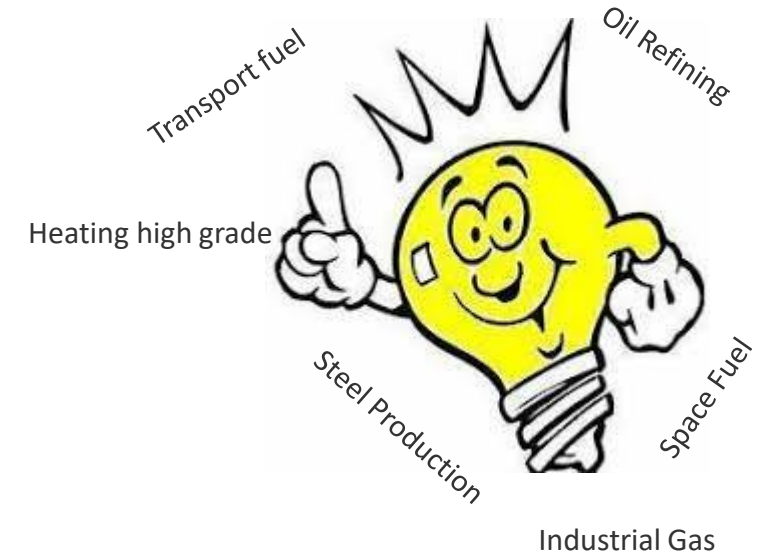
- ✓ Hydrogen solution for almost everything and a big public support.
- Infrastructure developments in the EU are delayed
- Green Hydrogen costs have been underestimated
- TCO is challenging, price green Hydrogen



Fuel Cell Electric Vehicle (FCEV)



Hydrogen Engine (H2-ICE)



HYDROGEN TECHNOLOGY

H₂ Fuel Cell
Range 1,000 km



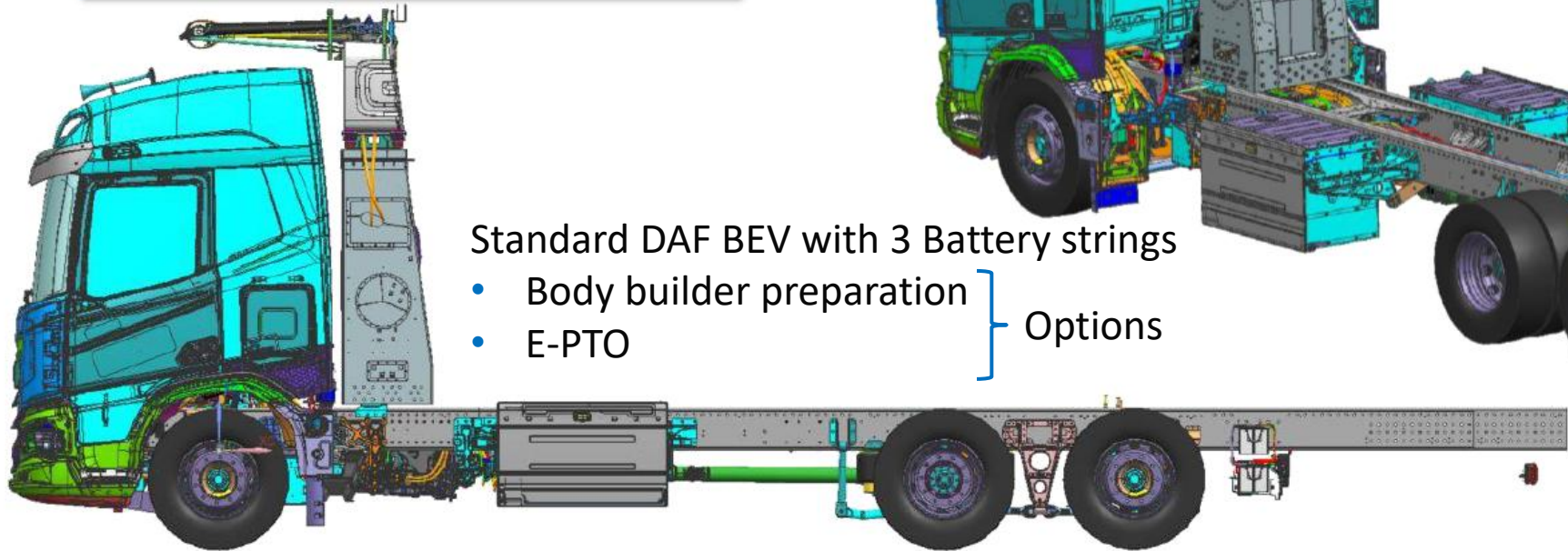
H₂ Engine
Range 800 km



The BEE Project

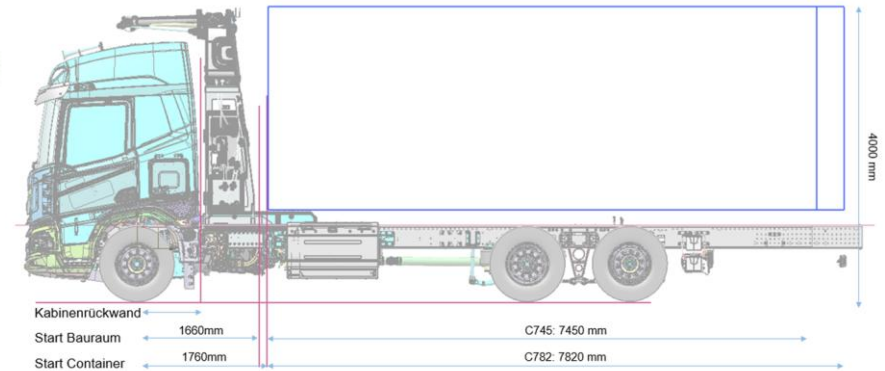
First Design for DAF XD FAN

➤ *Development of pantograph system for series production BEV*



Standard DAF BEV with 3 Battery strings

- Body builder preparation
 - E-PTO
- } Options



VALIDATION OF THE CATENARY VEHICLES



TO CONCLUDE:

- DAF is committed to Zero emission road transport
- Full suite of technologies in Portfolio
- Biggest technical challenge was to align the DAF BEV project with the BEE project.
- “Add On” Catenary system / dynamic charging is not a technical bottleneck for DAF.
- Infrastructure and Cost parity are the pacing factors

Thank you for your attention.

