

# PIERER MOBILITY AG

**KTM**



**Husqvarna**  
MOTORCYCLES



**GASGAS**



**Husqvarna**  
E-BICYCLES

**R RAYMON**  
GENUINE PERFORMANCE PARTS



**THE LEADING EUROPEAN POWERED TWO-WHEELER COMPANY.**



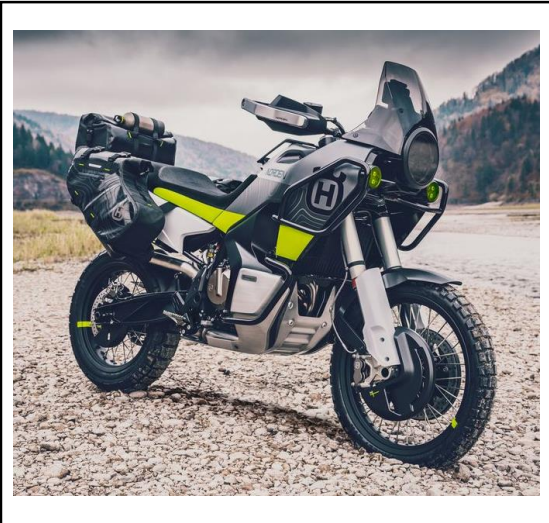
# READY TO RACE



## PURITY PERFORMANCE



# COOL RIDING



## SIMPLE PROGRESSIVE SWEDISH ROOTS

# ***GET ON THE GAS!***



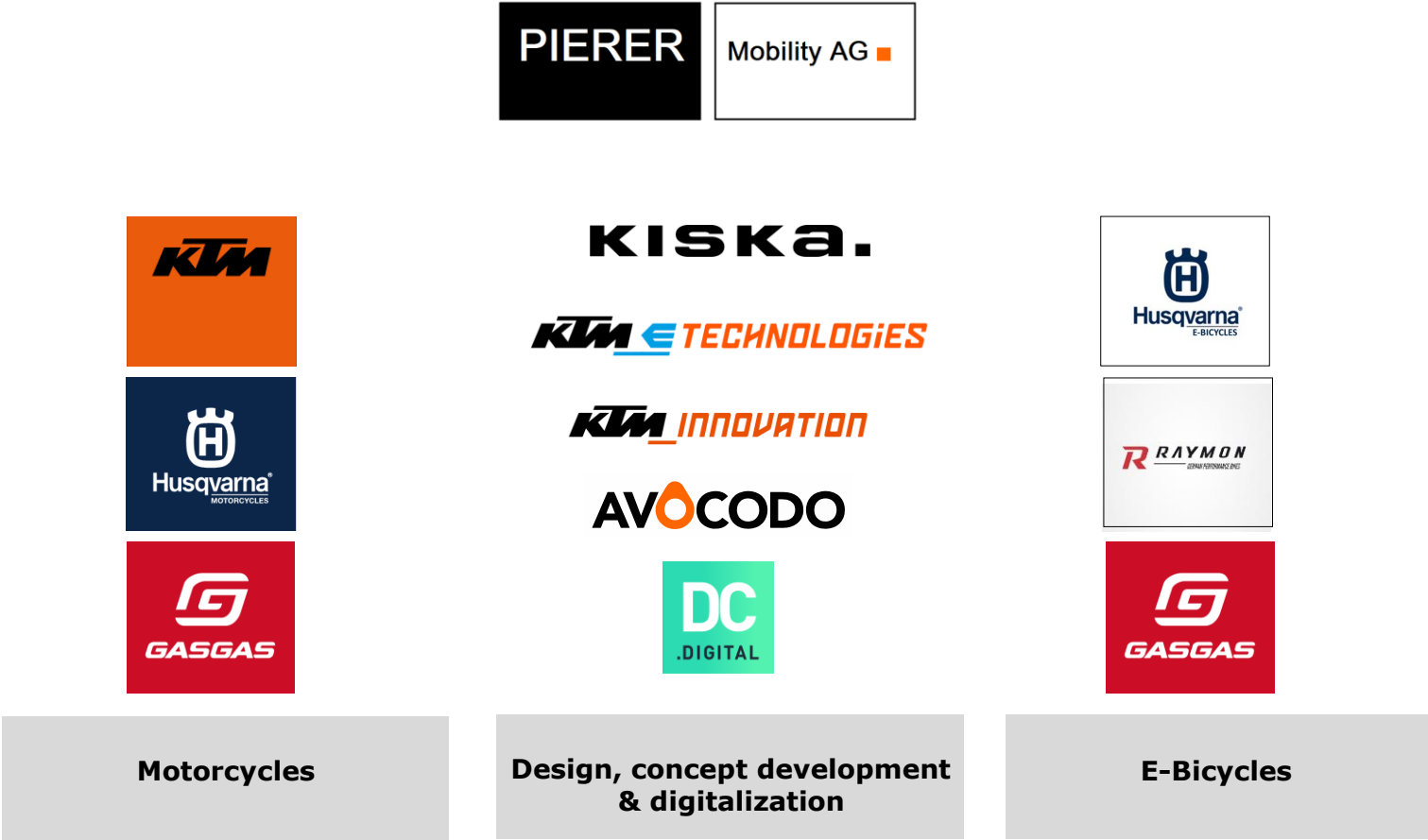
**VIBRANT & INVITING  
SPANISH ROOTS**

# R RAYMON BICYCLES



**GERMAN PERFORMANCE BIKES**

# The Leading European Powered Two-Wheeler Group





## Highlights Half Year 2020

Continuation of strong growth and market share gains

**Positiv result in the first half year despite Corona lock-down**

**124,682 motorcycles and E-Bicycles** (previous year: 135,711)

**COVID crisis** is changing **mobility behavior** towards "Powered Two-Wheelers"

**Strong market share gains globally**

US + 16.5%, Europe + 3.9%,  
Australia + 27.2%  
Globally + 9.3%

**Success in Moto GP strengthens brand awareness**

**100% take over of GASGAS Motorcycles**

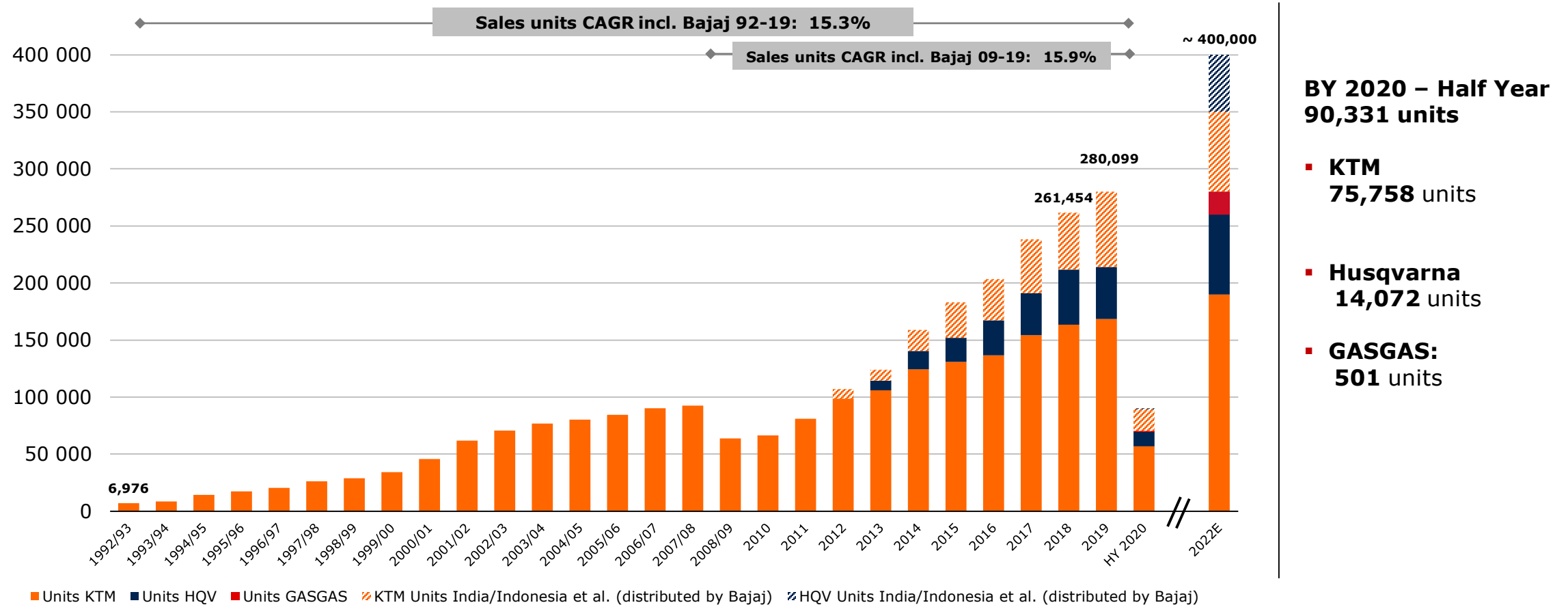
**GASGAS** complements its product portfolio with a sporty range in the **high-end e-mountain bike sector**

**Booming E-Bicycle business with upgraded outlook**



## Twenty-eight years of successful track record

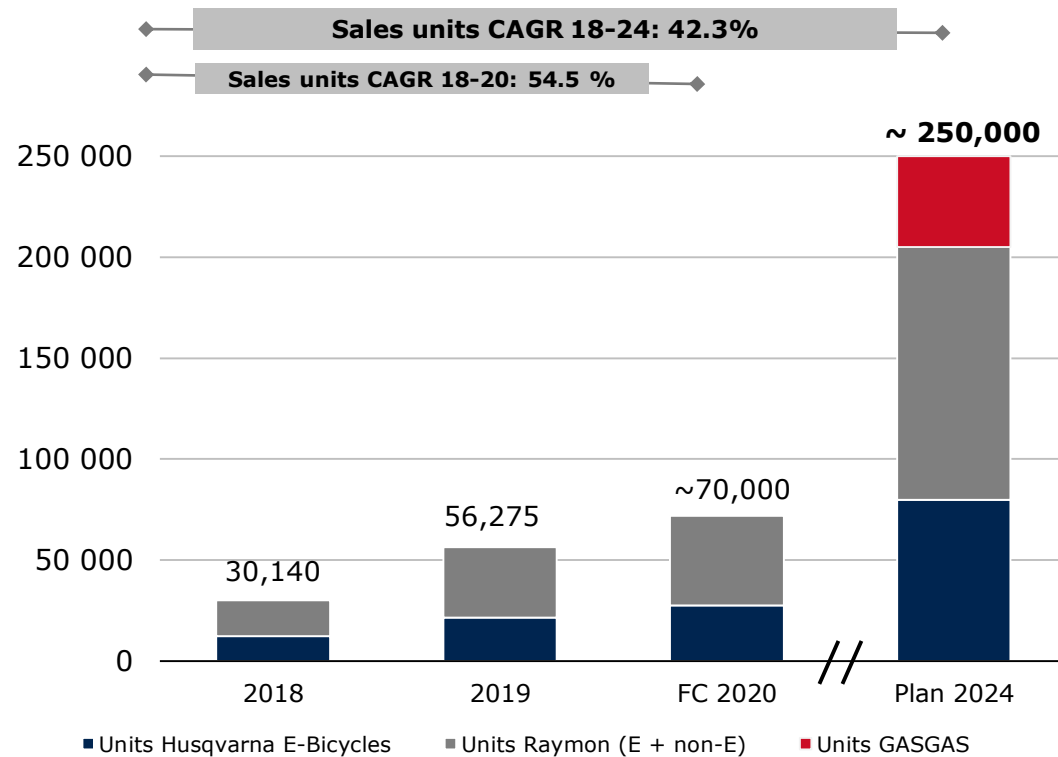
Sales units Motorcycles





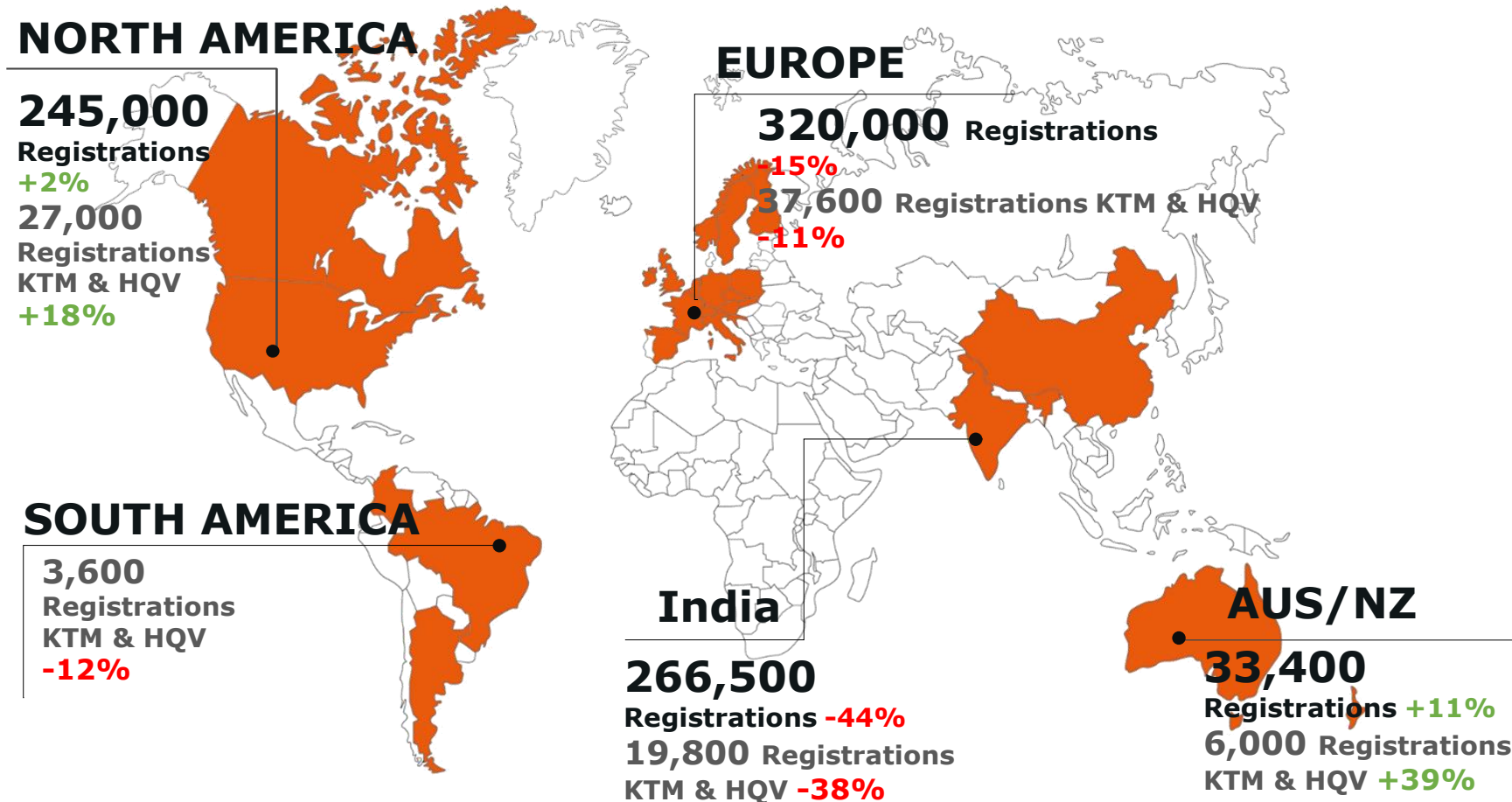
## Husqvarna / R Raymon / GASGAS

Sales units E-Bicycles



## Retail Registrations - Half-Year 2020 (COVID Lock-Down)

Relevant Market Environment Motorcycles > 120cc



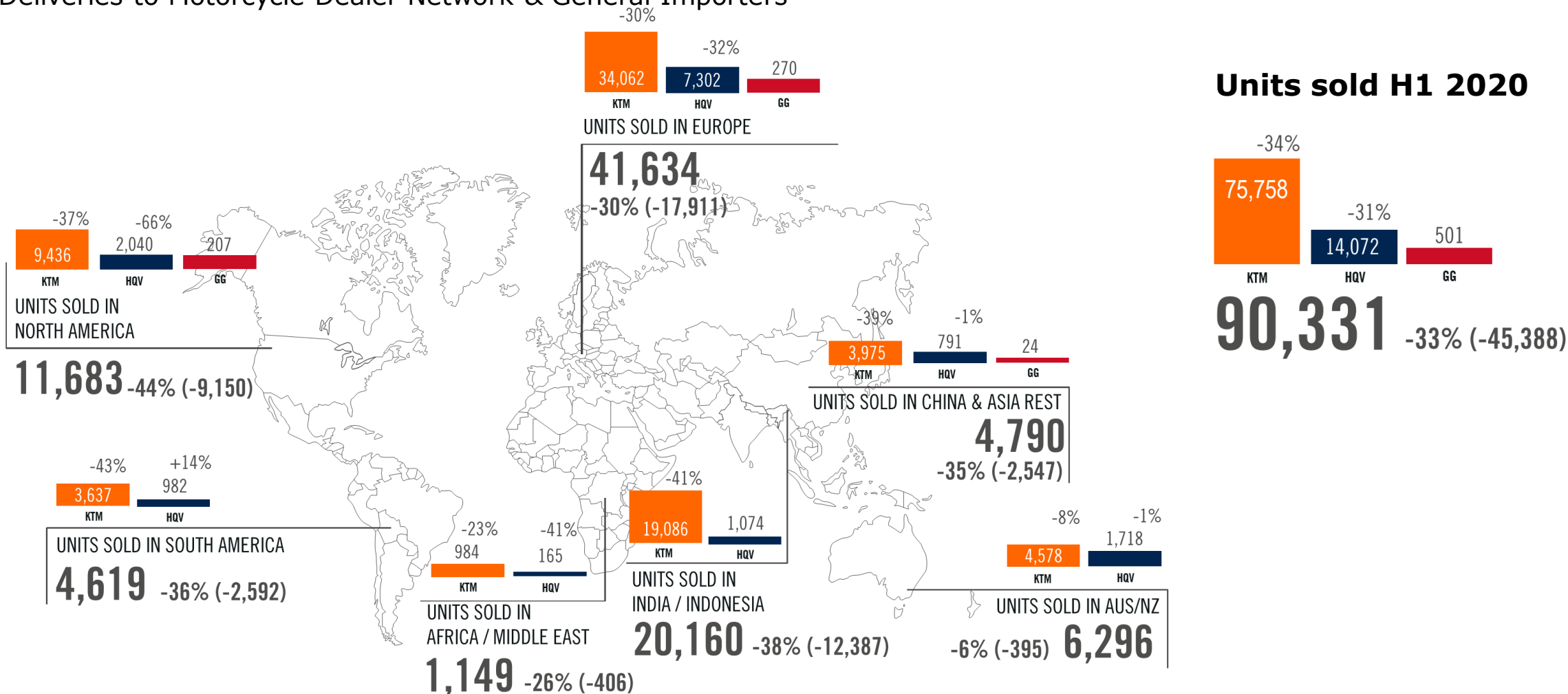
**Retail Registrations**

**Overall Market: -7,4%**  
**KTM & HQV: +1,4%**



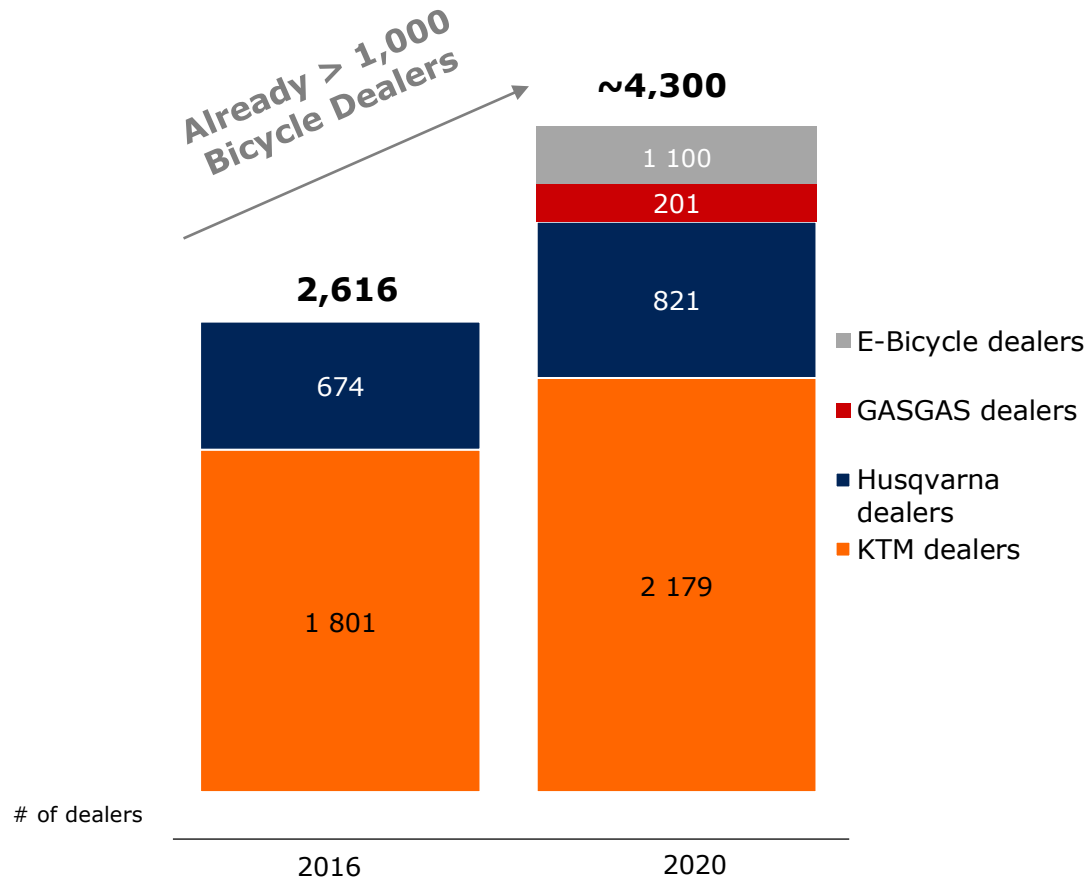
# Motorcycle Wholesales - Half-Year 2020 (COVID Lock-Down)

Deliveries to Motorcycle Dealer Network & General Importers



## Business Growth Driver– Dealers & Showrooms

Already more than 3,000 Motorcycle Dealers



**Flagship Store:**  
Wiesing / Austria



**GASGAS 2020:**  
413 planned dealers

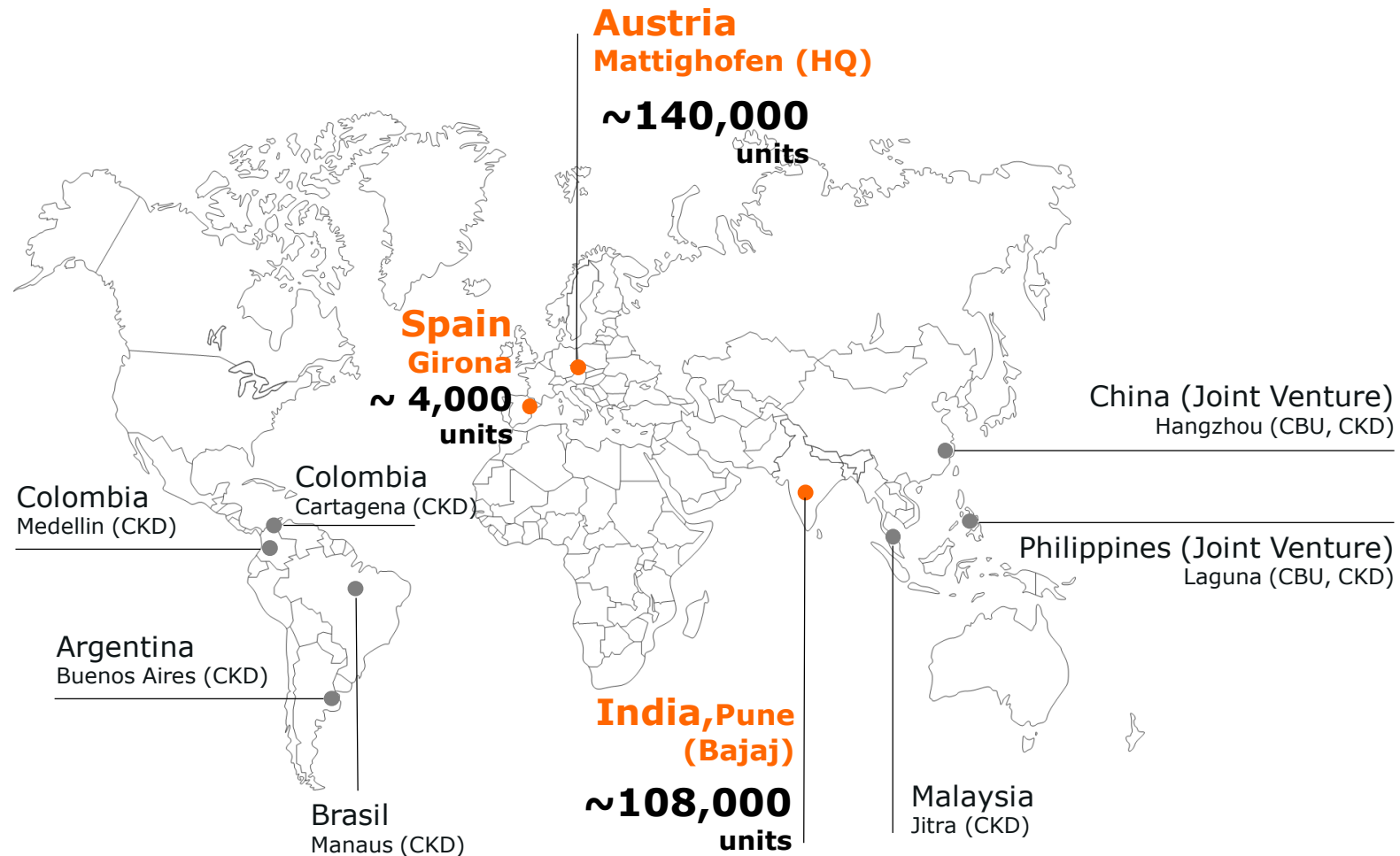


**E-Bicycles Brands:**  
Husqvarna, GASGAS, R Raymon



# Global Production Facilities KTM – Husqvarna – GASGAS

Production 2020



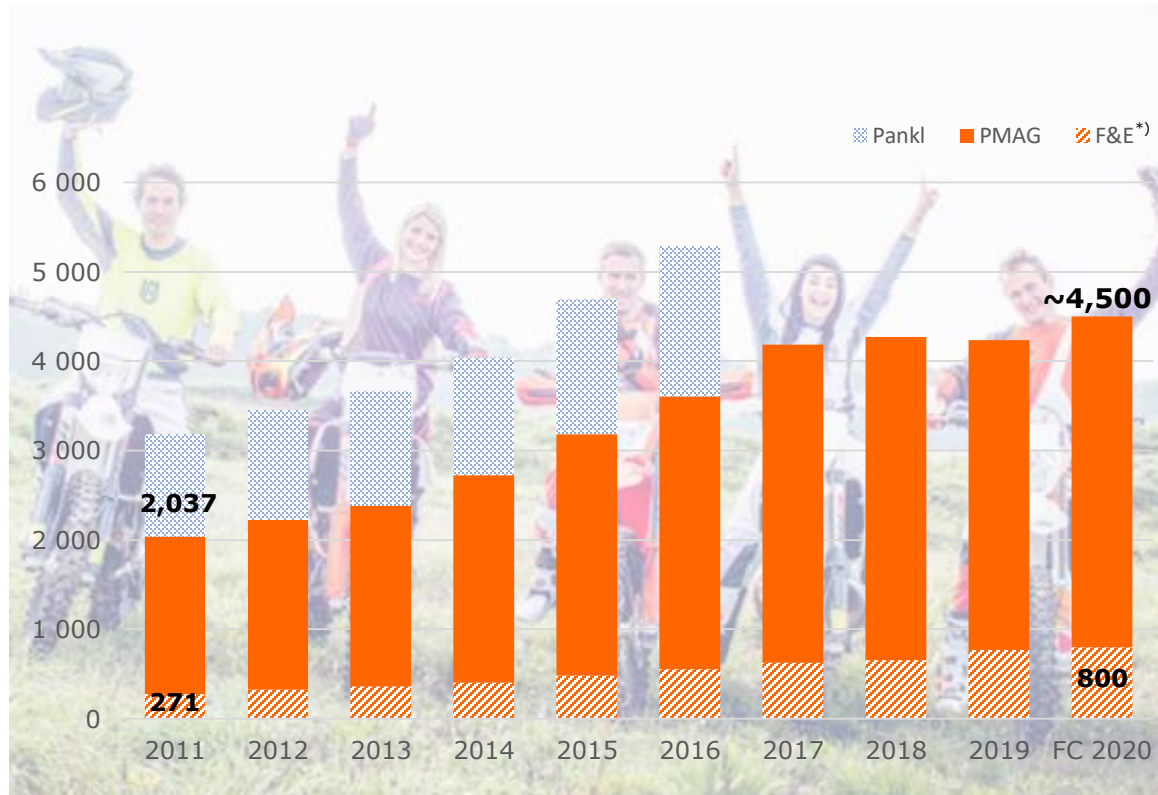
## ■ Production Sites

- 3 production sites & 7 CKD/CBU facilities
- No capacity restriction in Chakan factory/India

## ■ CKD/CBU Production

- 125 DUKE, RC 125
- 200 DUKE, RC 200
- 250 DUKE
- 390 DUKE, RC 390
- SVARTPILEN/VITPILEN 250, 401
- 250 / 390 ADVENTURE

## Development of Employees



### Facts

- HY 2020 4,330 employees
- 170 apprentices
- 37 years average age
- 23% female share
- Staff growth despite COVID-19 (+170)

### Improvement of Employee Benefit Program

#### Flex-time Model

- great flexibility of time and place

### KTM ACADEMY

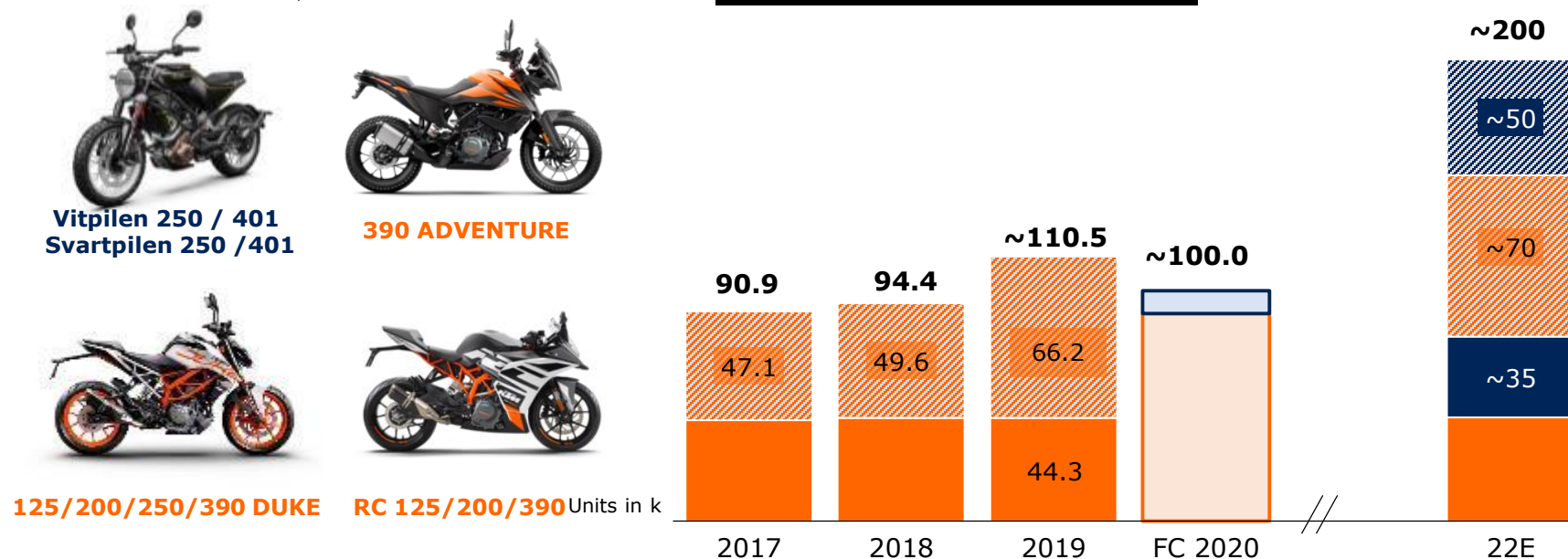
- "KTM Digital Intrapreneurship MBA"
- "KTM Digital Transfer Manager"
- Focus on e-learning
- New high-quality approach in Apprentice Training & increase up to 180 apprentices in 2021

## Cooperation with BAJAJ – stronger increase than planned

Production volume is expected to increase to over 200,000 units over the next years



Unit CAGR 17-22: ~17.1%



- KTM units distributed by KTM (joint products)
- Husqvarna units distributed by KTM (joint products)
- ▨ KTM units distributed by Bajaj (license fee model)
- ▨ Husqvarna units distributed by Bajaj (license fee model)

**License fee model**  
KTM & Husqvarna  
2019: 4-5%

- **Transfer of production of Husqvarna model line 401 to Chakan/ India in Q4/2019 – Launch in India in 2020**
- **Production and Launch of KTM 390 ADVENTURE in 2020**
- **No capacity restriction in Chakan factory/India**
- **US Dollar natural hedge**
- **Development of a common 48 volt electric two-wheeler platform in the power range 3 to 10 kW for planned serial production in India**

## Joint-Venture with CFMOTO

High-end motorcycle market is growing 20% p.a.

### Joint venture with long-term Chinese partner CFMOTO



- CFMOTO is sole distributor for KTM in China
- **Sales HY1 2020: ~ 2,300 units**
- **Twin-cylinder platform** will be available for CFMOTO and KTM products
- **SOP** first product 'CFMOTO-MT800' in **Q1 2021**
- **Massive increase of cooperation level:**  
Production of **750 DUKE, 750 ADVENTURE, 750 SUPERMOTO T** for China domestic plus global markets in the **JV factory**
- 750 cc displacement as **additional product range for KTM**



Plant under construction

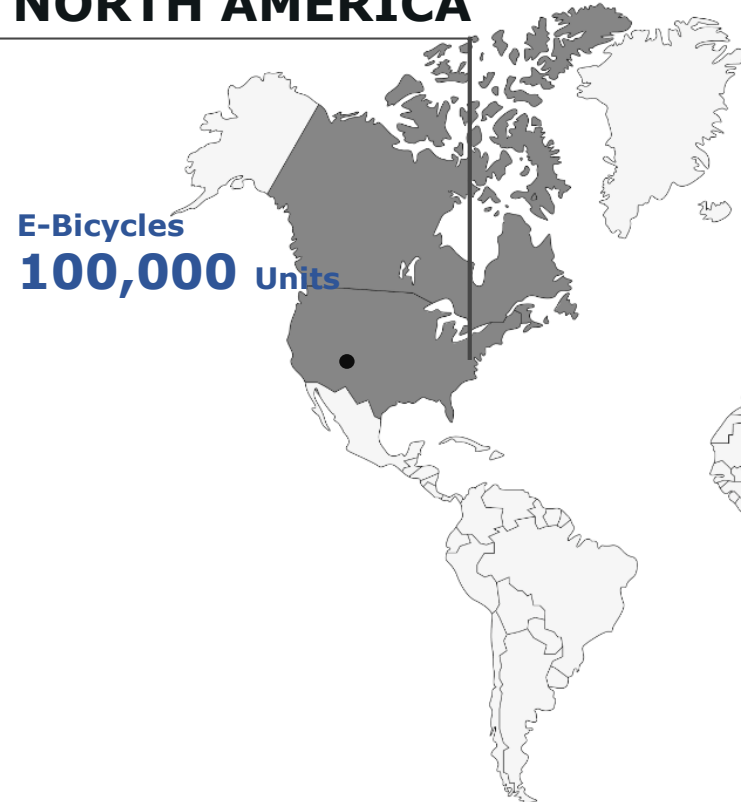
Production capacity of around 50k motorcycles;  
Expansion to around 100k motorcycles possible



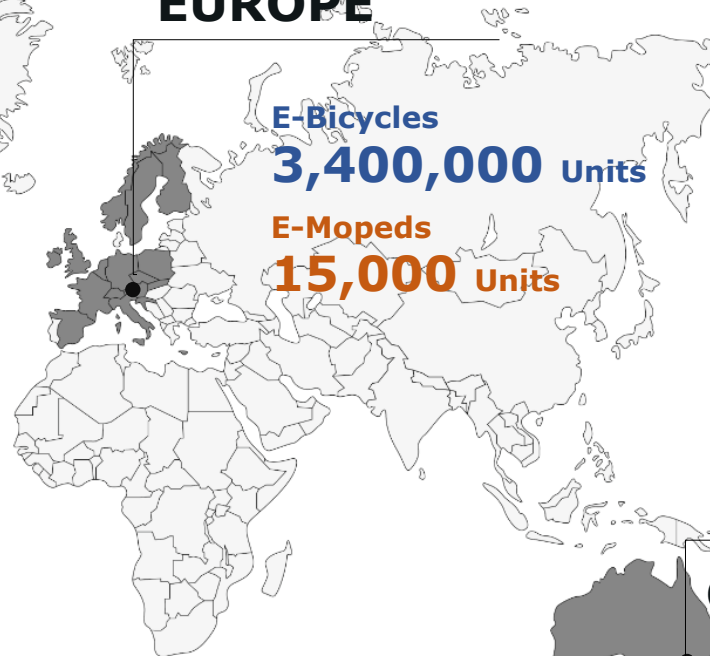
# Estimation Global E-Bicycle / E-Moped Market

Business Year 2019

## NORTH AMERICA



## EUROPE



## OCEANIA



### PIERER E-Bikes

- **Sales 1HJ 2020:**  
**34,351 E-Bikes**  
**8,492 Non E-Bikes**
- **2020:** Focus DACH-region  
dealer acquisition
- **2021:** Roll-out Pan-Europe  
  
Full integration of  
Motorcycle dealer network  
  
Introduction of GasGas as  
third E-Bicycle brand
- **2022:** Global roll-out  
Market penetration

**Target 2024: Sales units ~250,000 / Revenues EUR ~ 500 million**

## Performance and Urban E-Mobility

Zero emission product strategy

### KTM FREERIDE E



- FREERIDE E-XC
- 16 kW
- Retail price: EUR ~11,290 (incl. battery package EUR ~3,600)

▶ On the Market

### KTM SPORT MINI



- SX-E5
- 2 kW (5 kW Top Performance)
- Retail price: EUR ~5,000

▶ On the Market

### HUSQVARNA SPORT MINI



- EE 5
- 2 kW (5 kW Top Performance)
- Retail price: EUR ~5,000

▶ On the Market

### GASGAS TRIAL



- TXE
- 15 kW
- Retail price: EUR ~12,690

▶ Market launch 2020

## Performance and Urban E-Mobility

Zero emission product strategy

### GASGAS E-BIKES



- ENDURO CROSS
- 250 W
- Retail price: EUR 2,000-5,500
- Complete Offroad Portfolio

▶ **Market launch**  
**Q1 - 2021**

### HUSQVARNA E-BIKES



- HARD CROSS 8
- 250 W
- Retail price: EUR ~5,999

▶ **On the Market**

### HUSQVARNA E-SCOOTER



- E-SCOOTER
- Platform Utilization
- 4 kW
- In Development

▶ **Market launch**  
**2021**

### HUSQVARNA E-PILEN



- Modular Battery System
- Platform Utilization
- 4 kW / 10 kW
- In Development

▶ **Market launch**  
**2022**

## Outlook – Strategic Initiatives 2020/2021

- **COVID 19 Crisis** – will impact 2020 considerably but as a result of the crisis PIERER Mobility anticipates that the two-wheeler will become increasingly important for private transport
- **Full Integration of HUSQVARNA E-Bicycle division** – Expansion of sales throughout Europe, North America and Australia through existing dealer structure
- **Market Leadership in Europe** – Focus on B2B Business (Dealer Development)
- **Offensive market strategy in emerging markets** – Market Launch of HUSQVARNA street models
- **Extension of electrical product range (4 – 10 kW) in the low voltage range (48 Volt) by further models**
- **Integration of GASGAS motorcycle product range & expansion of product portfolio into E-Bike sector**
- **Global production capacity**
  - Successful start of production of HUSQVARNA 401 model line in India
  - Development of China Joint-Venture in progress
- **Continuation of sustainable efficiency program**
- **Strong focus on Free Cash Flow generation**





**KTM**



**Husqvarna**  
MOTORCYCLES



**GASGAS**



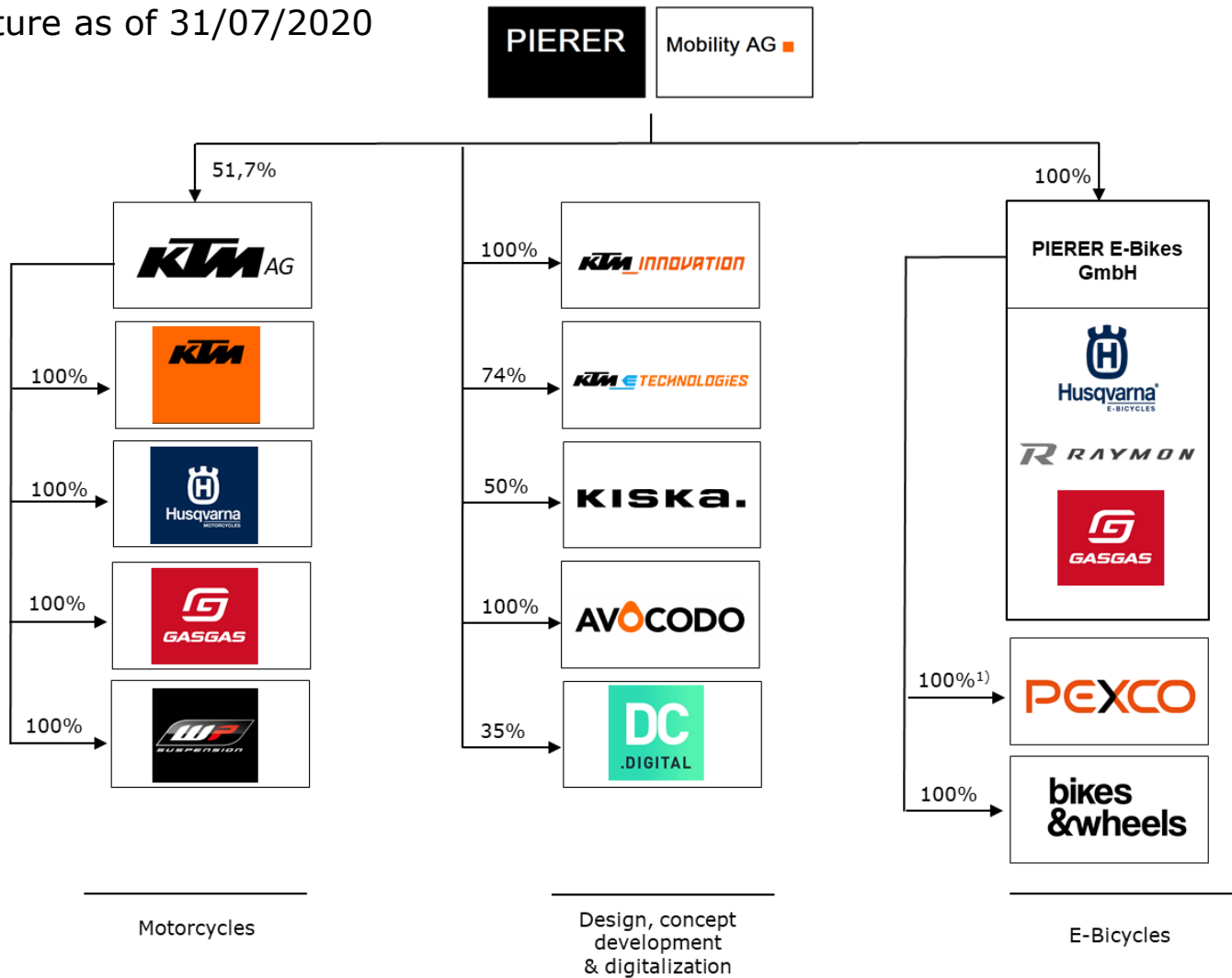
**Husqvarna**  
E-BICYCLES

# FINANCIALS



# The Leading European Powered Two-Wheeler Group

Simplified Group structure as of 31/07/2020



Other shareholdings: Acstyria Mobilitätscluster GmbH 12.3%; Platin 1483. GmbH 100%  
 1) thereof 40% via Platin 1483. GmbH

# Financials

Consolidated profit & loss figures under IFRS

in EURm	H1 2019	H1 2020	Δ H1	
Revenues	754.9	600.0	-21%	1
EBITDA	98.5	64.2	-35%	
EBIT	46.6	1.7	-96%	2
Earnings	29.3	-9.6	<100%	
Earnings after minorities	14.8	-4.8	<100%	
EBITDA margin	13.1%	10.7%	-2.4ppts	
EBIT margin	6.2%	0.3%	-5.9ppts	
Employees (Headcount)	4,427	4,329	-2%	3

1

- Sales of 124,682 motorcycles and e-bikes
- Decline in revenue is due to the impact of the global COVID-19 pandemic
- Interruption to production at the Mattighofen site of KTM AG from mid-March to mid-May
- Market share gains in the USA and Australia; stable market share in Europe

2

- EBIT already positive for the first half of 2020 despite the COVID-19 lockdown
- Various measures, such as the hiring of additional employees and the introduction of additional shifts, are intended to compensate significantly for the loss of production by the end of the year.

3

- About 3% of the workforce are leased employees
- Around 800 of the total employees work in Research & Development
- Important focus on apprentice training

# Financials

Consolidated profit & loss figures by business segments under IFRS

	H1 2020			
in EURm	GROUP	MOTORCYCLES	E-BICYCLES	OTHERS
Revenues	600.0	530.2	68.3	1.5
EBITDA	64.2	57.1	5.6	1.5
EBIT	1.7	-2.5	3.5	0.7
Earnings	-9.6	-10.1	1.0	-0.5
EBITDA margin	10.7%	10.8%	8.2%	-
EBIT margin	0.3%	-0.5%	5.1%	-

1

- Sales of 90,331 KTM, HUSQVARNA and GASGAS motorcycles and 34,351 HUSQVARNA and R Raymon e-bikes
- The COVID-19-related production downtime at KTM AG resulted in a decrease in sales of EUR 220 million compared to the same period of the previous year in the motorcycles business segment
- Positive revenue development in the e-bicycle segment

2

- Only slightly negative EBIT in motorcycles segment. A change in consumer behavior have led to an increased demand for powered two-wheelers. As a result, in May and June there was a significant catch-up effect in retail revenue and a significant reduction in dealer inventories in the motorcycles business segment
- Operating figures of the e-bicycle segment is above the budgeted expectations



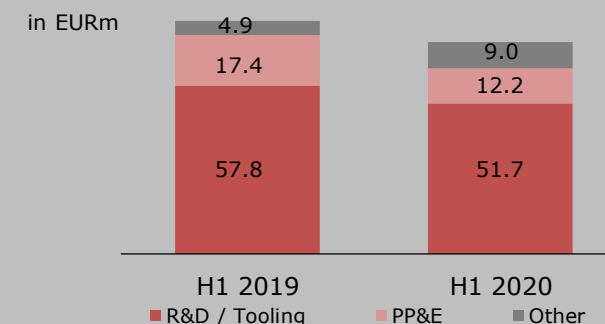
## Financials

### Consolidated balance sheet and cash flow figures under IFRS

in EURm	FY 2019	H1 2020	Δ 2019/20	
Balance sheet total	1,613.9	1,666.0	+3%	1
Equity	618.6	589.8	-5%	2
Total interest bearing debt	556.7	629.4	+13%	3
Net working capital (NWC)	274.2	285.9	+4%	
Net debt	395.8	489.4	+24%	3
Net working capital as % of sales	18.0%	20.9% <sup>1)</sup>	+2.9ppts	
Equity ratio	38.3%	35.4%	-2.9ppts	2
Gearing	64.0%	83.0%	+19.0ppts	
Net debt / EBITDA	1.6x	2.4x <sup>1)</sup>	+0.8x	3

in EURm	H1 2019	H1 2020	Δ 2019/20	
Cash flow from operating activities	46.3	41.5	-10%	
Capex <sup>1)</sup>	-80.1	-72.9	-9%	4
Cash flow from investing activities	-77.5	-68.2	-12%	
Depreciation	51.9	62.5	20%	

- Initial consolidation of KTM MOTOHALL GmbH and the related acquisition of property, plant, and equipment  
CAPEX level (particularly in development projects) over amortizations
- Due to balance sheet extension and the COVID-19-related negative earnings in the first half-year the equity ratio reduced to 35.4%
- Factoring and supplier finance program between group companies  
Initial consolidation of KTM MOTOHALL GmbH and the associated assumption of bank liabilities
- CAPEX driven by R&D to support high innovation rate  
Lower PP&E investments in 2020 after intensive investment program at the sites in last years  
Increase in Other due in part to the acquisition of the GASGAS brand rights



Source: PIERER Mobility AG

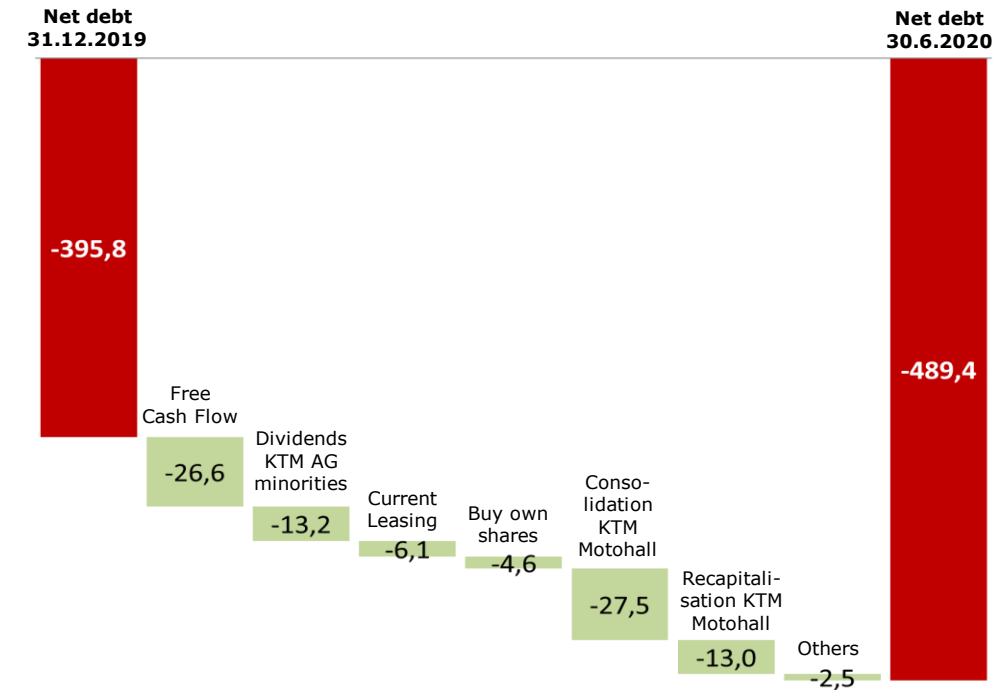
1) Calculated dynamically for the last 12 month

2) Additions of property, plant & equipment (PP&E) and intangible assets according to the fixed assets schedule; excl. right-of-use additions from initial application of IFRS 16 of EUR 39 million in previous year

# Financials

## Free Cash Flow and Net Debt

in EURm	H1 2019	H1 2020	Chg.
<b>EBITDA</b> (continued)	<b>98.5</b>	<b>64.2</b>	-34.3
+ / - Interest receipts and payments	-7.2	-8.3	-1.1
- Taxes	-1.7	0.0	-1.7
+ / - Non cash expenses (income)	-5.4	-30.8	-25.4
<b>Gross Cash Flow</b>	<b>84.2</b>	<b>25.1</b>	-59.1
+ / - Change Working Capital employed	-26.5	-6.3	20.2
+ / - Change Non-Working Capital	-11.4	22.7	34.1
<b>Cash Flow operating activity</b>	<b>46.3</b>	<b>41.5</b>	-4.8
<b>Cash Flow investing activity</b>	<b>-77.5</b>	<b>-68.2</b>	9.3
<b>Free Cash Flow</b>	<b>-31.3</b>	<b>-26.6</b>	4.7
in % of revenue	-4,2%	-4.4%	



**KTM**



**Husqvarna**  
MOTORCYCLES



**GASGAS**



**Husqvarna**  
E-BICYCLES

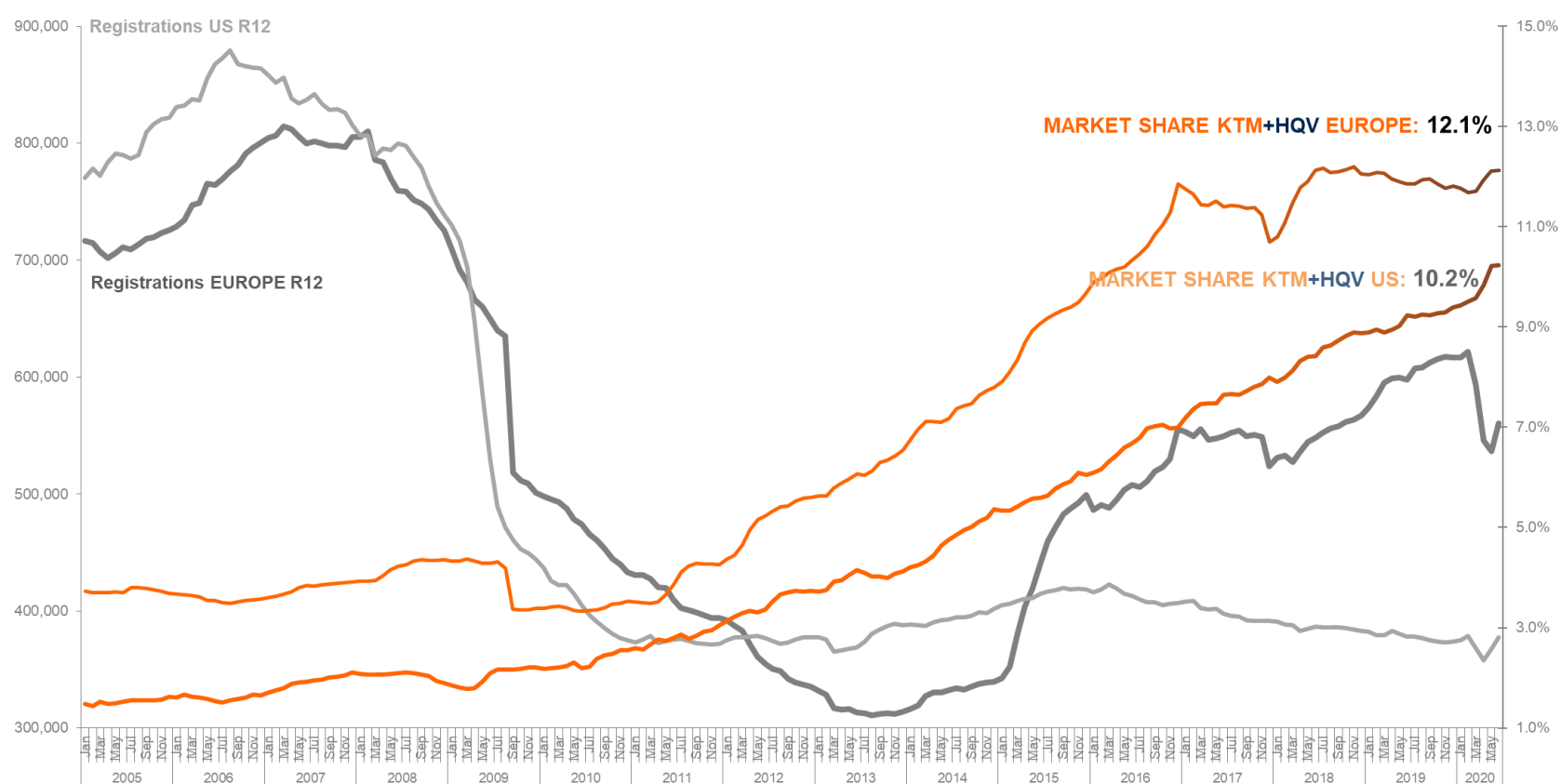
# APPENDIX



# Market and Competitive Environment

Overall trends in market size and share

## Motorcycle registrations and market shares as of 30/06/2019 (12 months rolling)



- KTM Industries continues to gain market share in the US.
- Despite the ongoing decline of the US market – driven by Harley-Davidson - KTM and Husqvarna are able to gain market shares
- Increase in market share despite market reductions due to COVID-19



# Market and Competitive Environment 06/2020 (cumulated)

Overall trends in market size and share

## Motorcycle registrations and market shares by region 2020 June C

	Total registrations			KTM + Husqvarna registrations			KTM + Husqvarna market share		
	2019	2020	Diff. to PY	2019	2020	Diff. to PY	2019	2020	Diff. to PY
DE	80,500	82,879	3.0%	12,189	12,544	2.9%	15.1%	15.1%	+/-0 bps
FR	80,814	62,620	-22.5%	6,118	5,224	-14.6%	7.6%	8.3%	+ 70 bps
IT	65,109	47,933	-26.4%	5,557	4,181	-24.8%	8.5%	8.7%	+ 20 bps
UK	45,561	32,763	-28.1%	5,242	3,473	-33.7%	11.5%	10.6%	- 90 bps
ES	39,198	29,386	-25.0%	3,934	3,267	-17.0%	10.0%	11.1%	+ 110 bps
SE	6,584	7,094	7.7%	1,147	1,184	3.2%	17.4%	16.7%	- 70 bps
BE	11,019	9,921	-10.0%	1,218	1,103	-9.4%	11.1%	11.1%	+/-0 bps
NL	7,873	7,719	-2.0%	856	780	-8.9%	10.9%	10.1%	- 80 bps
AT	11,550	10,534	-8.8%	3,345	2,801	-16.3%	29.0%	26.6%	- 240 bps
CH	15,937	18,134	13.8%	1,295	1,451	12.0%	8.1%	8.0%	- 10 bps
FI	2,129	2,290	7.6%	363	397	9.4%	17.1%	17.3%	+ 20 bps
NO	5,351	5,604	4.7%	983	989	0.6%	18.4%	17.6%	- 80 bps
GR	2,906	2,601	-10.5%	165	196	18.8%	5.7%	7.5%	+ 200 bps
<b>EUROPE</b>	<b>374,531</b>	<b>319,478</b>	<b>-14.7%</b>	<b>42,412</b>	<b>37,590</b>	<b>-11.4%</b>	<b>11.3%</b>	<b>11.8%</b>	<b>+ 50 bps</b>
US	211,205	214,830	1.7%	18,989	22,507	18.5%	9.0%	10.5%	+ 150 bps
CA	29,647	30,227	2.0%	3,569	4,170	16.8%	12.0%	13.8%	+ 180 bps
<b>North America</b>	<b>240,852</b>	<b>245,057</b>	<b>1.7%</b>	<b>22,558</b>	<b>26,677</b>	<b>18.3%</b>	<b>9.4%</b>	<b>10.9%</b>	<b>+ 150 bps</b>
<b>AUS/NZ</b>	<b>30,090</b>	<b>33,447</b>	<b>11.2%</b>	<b>4,253</b>	<b>5,926</b>	<b>39.3%</b>	<b>14.1%</b>	<b>17.7%</b>	<b>+ 360 bps</b>
<b>TOTAL</b>	<b>645,473</b>	<b>597,982</b>	<b>-7.4%</b>	<b>69,223</b>	<b>70,193</b>	<b>+1.4%</b>	<b>10.8%</b>	<b>11.8%</b>	<b>+ 100 bps</b>
<b>India</b>	<b>470,637</b>	<b>265,545</b>	<b>-43.6%</b>	<b>32,001</b>	<b>19,807</b>	<b>-38.1%</b>	<b>6.8%</b>	<b>7.5%</b>	<b>+ 70 bps</b>

Source: PIERER Mobility AG | Europe DE, FR, IT, UK, ES, SE, BE, NL, AT, CH, FI, DN, NO): national data providers (w/o MX) | US: MIC (incl. MX) | CA: MMIC (incl. MX) AU, NZ: ERG (incl. MX)

IN: Bajaj Market Intelligence (S2 + S3 segment)

Note: Calculations are Registrations Jan - Jun cumulated | Motorcycles >120cc (excl. ATVs, electric motorcycles and scooters), **no P&L impact**

## Market and Competitive Environment 06/2020 (cumulated)

Positioning (MC >= 120 cc without ATVs and Scooters)

### Brand performance

	Performance ranking by brand			
	2019	2020	Diff. to PY	Change
KAWASAKI	71,747	78,514	6,767	9.4%
<b>HUSQVARNA</b>	<b>14,449</b>	<b>15,177</b>	<b>728</b>	<b>5.0%</b>
BETA	2,962	2,846	-116	-3.9%
MOTO GUZZI	5,342	4,681	-661	-12.4%
<b>GAS GAS</b>	<b>922</b>	<b>243</b>	<b>-679</b>	<b>-73.6%</b>
APRILIA	6,334	5,344	-990	-15.6%
BENELLI	7,318	6,301	-1,017	-13.9%
TRIUMPH	27,445	24,114	-3,331	-12.1%
SUZUKI	36,886	33,286	-3,600	-9.8%
HONDA	102,754	94,995	-7,759	-7.6%
DUCATI	25,173	17,371	-7,802	-31.0%
BMW	64,777	53,408	-11,369	-17.6%
<b>KTM AG</b>	<b>102,146</b>	<b>90,243</b>	<b>-11,903</b>	<b>-11.7%</b>
<b>KTM</b>	<b>86,775</b>	<b>74,823</b>	<b>-11,952</b>	<b>-13.8%</b>
HARLEY-DAVIDSON	98,716	74,657	-24,059	-24.4%
YAMAHA	138,013	107,413	-30,600	-22.2%
ROYAL ENFIELD	370,239	217,150	-153,089	-41.3%

Husqvarna: 2<sup>nd</sup> strongest absolute growth





### Relative market position and momentum

	Units ranking by brand			
	2019	2020	Diff. to PY	Change
ROYAL ENFIELD	370,239	217,150	-153,089	-41.3%
YAMAHA	138,013	107,413	-30,600	-22.2%
HONDA	102,754	94,995	-7,759	-7.6%
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<b>GAS GAS</b>	<b>922</b>	<b>243</b>	<b>-679</b>	<b>-73.6%</b>

KTM / HUSQVARNA 4<sup>th</sup> rank

## Electric Powered Two-Wheelers

### Legal Classification

	LOW VOLTAGE (48 Volt)			HIGH VOLTAGE
Category (Technical & Performance)	Electric Bicycle 	L1e-B Moped up to 50cc 	L3e-A1 Motorcycle/Scooter up to 125cc 	L3e-A2, L3e-A3 Motorcycle/Scooter 
Maximum Performance ( <i>rated</i> )	250 W	2-4 kW	4-11 kW	>10 - 35 kW
Maximum Speed	25 km/h (15.5 mph)	45 km/h (28mph)	Not Specified	Not Specified
Required Licence	No Licence Required	Moped (AM)	A1 Motorcycle	A2, A

KTM Product Portfolio

75,758 Units in Half Year 2020



MOTOCROSS / ENDURO



ADVENTURE / TRAVEL



SUPERMOTO / DUAL PURPOSE



NAKED



SUPERSPORT



PERFORMANCE E-MOBILITY



# HUSQVARNA Product Portfolio

14,072 Units in Half Year 2020

**URBAN  
E-MOBILITY**



**MOTOCROSS / ENDURO**



**EXPLORER**



**SUPERMOTO / DUAL PURPOSE**



**NAKED**



**OFFROAD E-MOBILITY**



**E-SCOOTER / E-BICYCLE**

GASGAS Product Portfolio

501 Units in Half Year 2020

OFFROAD

E-MOBILITY



KIDS/JUNIOR



TRIAL



MOTOCROSS



ENDURO



## Appendix

### Data sources for motorcycles market information and intelligence

#### Sources by market

Europe	Reported countries: Data source: Motorcycles:	AT, BE, CH, DE, DK, ES, FI, FR, IT, NO, SE, UK National data providers >120cc & electric, no MX available
North America	Data source: Motorcycles:	MIC (US), MMIC (CA) >120cc, incl. MX
South Africa	Data source: Motorcycles:	eNaTis >120cc, incl. MX
Australia	Data source: Motorcycles:	ERG >120cc, incl. MX
India	Data source: Premium motorcycles:	Bajaj Market Intelligence >120cc, MSRP >~EUR 2,500 Market share partly extrapolated due to data availability

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