



Compressor Technique

Bengt Kvarnbäck



Atlas Copco

Compressor Technique

Market Position

- World leader in compressed air products and solutions
- Global coverage with own resources in sales and after-market support
- Technology and cost leadership
 - High R&D investments
 - High volumes and focus on core activities
- Advanced global logistics
- Growth by strong market penetration and presence, and by continuous introduction of new and innovative products and services, extending the offer and increasing customer value.



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Our Businesses

Compressed Air...

Machines

57%

Solutions

Aftermarket

29%

86%



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Our Businesses

...and a bit of

Gas
Compressors

6%

Generators

4%

Specialty
Rental

4%



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Our Customers

- Industry
- Service Providers
- Distributors

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Our Vision

To be...
First in
Mind...




First in
Choice...




Our Vision

Through...



Interaction Commitment Innovation



Our Vision

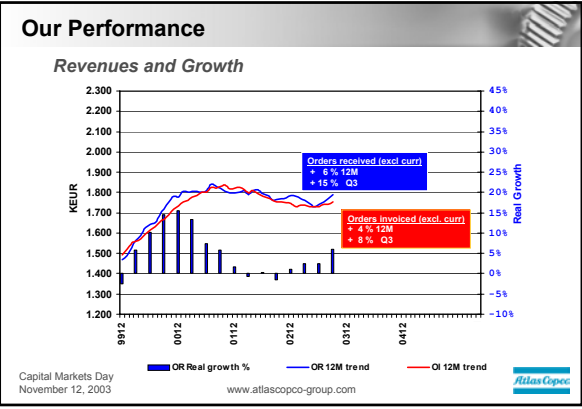
Offering Customers

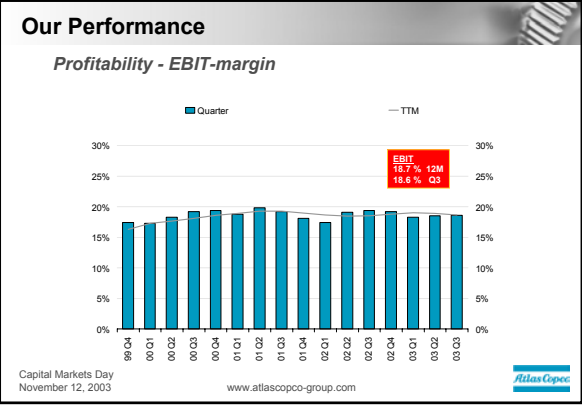
Best Value

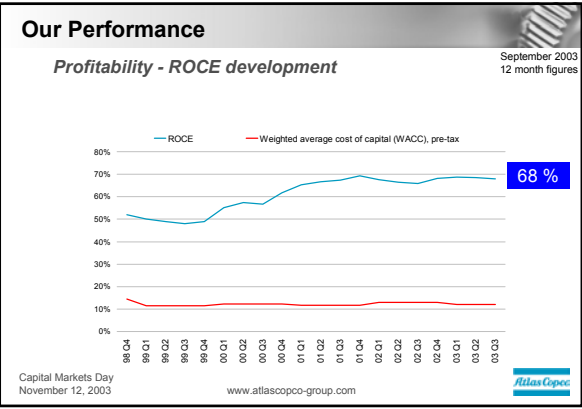
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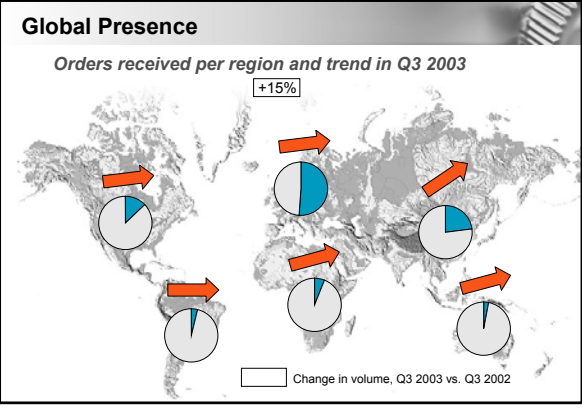
The Foundation

Concept Developments
-
Benchmarking
Is there a Better Way?

Extending The Offer

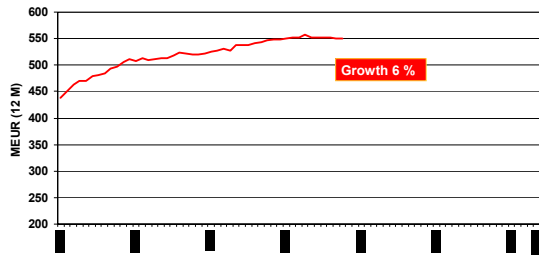
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The Aftermarket

Growth in Aftermarket (orders received)



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The Aftermarket

- Total Recurring: 35%

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The Aftermarket

- Installed Base
- > 800.000 Machines

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The Aftermarket

- Profitability
- Stability
- Presence - Everywhere
- Growth

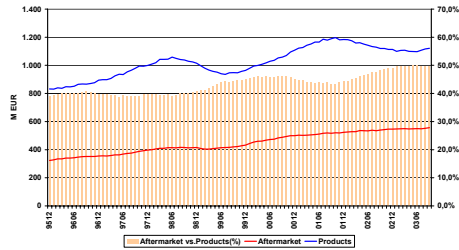
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The Aftermarket

Machines vs. Aftermarket (orders invoiced 12m)



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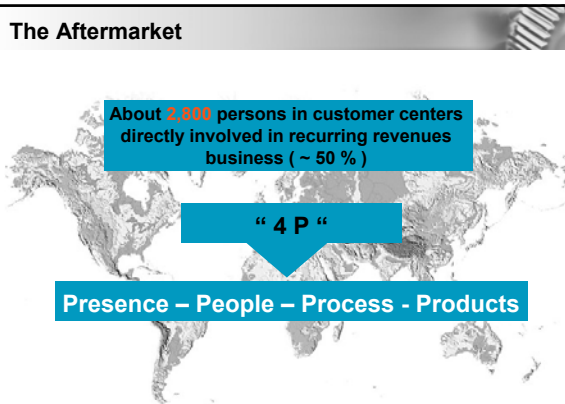
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The Aftermarket

About **3,000** persons in customer centers directly involved in recurring revenues business (~ 50 %)

“ 4 P “

Presence – People – Process - Products



The Aftermarket

- Presence means many thousand direct customer contacts every day.
- Presence means same service and support everywhere.

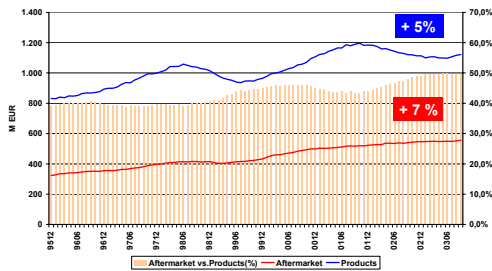
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The Aftermarket

Machines vs. Aftermarket (orders invoiced 12m)

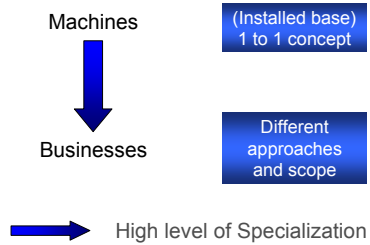


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The Aftermarket



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The Aftermarket

Optimize
↑
Keep Fit
↑
Repair

Lowest Cost –
Optimal running

Peace of Mind –
Problem taken care of
before it happens

Event Driven –
Cost play

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The Aftermarket

Development of Concepts and
Tools for “Various Levels”

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Market Presence

Products

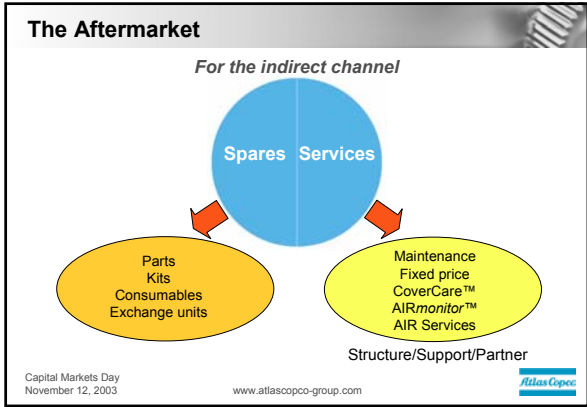
After Market

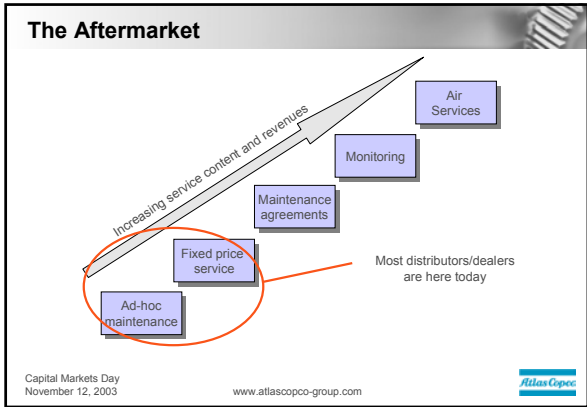
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The Aftermarket

Offering and Marketing more Service Products

Atlas Copco Service Products

Service Plans - CUSTOMER CARE

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The Aftermarket

AirScan™

- Product / tool for auditing installations
- Data collected in a structured way
- Check performance
 - Atlas Copco units
 - Competitor units
- **Output** : Present improvement/savings potential to customers

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The Aftermarket

AirScan™ provides tools for:

- Configuration
- Simulation
- Reporting
 - on solutions, savings, recommendations

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The Aftermarket

AirConnect™

- Remote monitoring of contracted installation
- Service Level Agreement (SLA)

New Product, being rolled out

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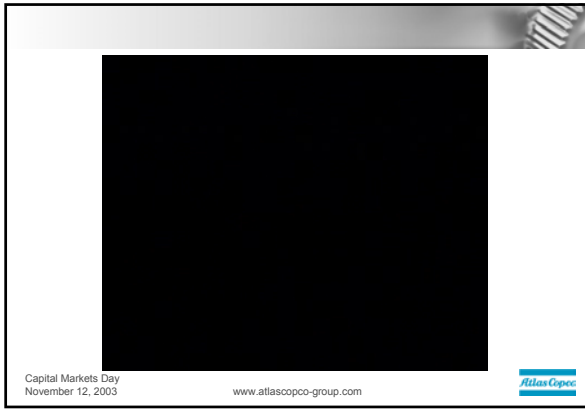
The Aftermarket



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ES Systems



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The Aftermarket

AirOptimizer™

- Software for optimized energy use
- Linked with service plan
- Subscription base
 - Pricing based on tangible savings

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The Aftermarket

AirOptimizer™

- New concept
- Requires a lot of training and new skills



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The Aftermarket

Summary

- Forceful business development
- A lot of new products
- Actions in all Aftermarket areas



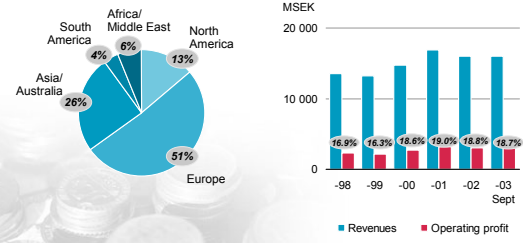
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September 2003
12 month figures



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Summary

- Stable- /improving business trend
- Currency an issue - more added value in low-currency markets
- A lot of new products
 - Aftermarket
 - Machines
- Strong growth in China continues

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