



***Michelin N. America Government & Defense***

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# ***Michelin Topics for Discussion or Questions***

- Who we are...
- Budget Issues for the Industry
- Economic and Industrial Challenges to the Industry
- Covid Impacts on Production and Costs + Our Initiatives to Mitigate
- Surge and Sustainment Considerations for Contingency Operations





## MICHELIN: an overview

Michelin, the leading mobility company, is dedicated to: enhancing its customers' mobility and sustainably; designing and distributing the most innovative tires, services and solutions for its customers' needs; providing digital services, maps and guides to help enrich trips and travels and make them unique experiences; and developing high-technology materials that serve a variety of industries.

### MICHELIN GROUP

<b>123,600</b> <i>EMPLOYEES</i> in 170 countries	<b>71 PRODUCTION</b> <i>FACILITIES</i> in 26 countries
<b>€ 20 BILLION</b> net sales in 2020	
<b>170 MILLION</b> tires produced in 2020	<b>7,600</b> strategic retailers
<b>€ 646 MILLION INVESTED IN 2020</b> in research and development with seven R&D centers in Europe, China, Japan, Thailand, India, Brazil and the United States	

### MICHELIN NORTH AMERICA



**MICHELIN**

**BFGoodrich**

**UNIROYAL**  
FOR EVERYTHING YOU VALUE™

1 R&D center  
39 production sites  
2,300 distribution centers  
23,000 employees



# Michelin Government Team: Who We Are

## ...WITH Tires



Pneumatic, radial tires for Ground Combat Systems and Heavy, Medium, and Light Tactical Vehicles



Pneumatic, radial tires for LTVs, ULTVs, UTVs, ATVs, and Light Trucks



Airless, radial tires for LTVs, ULTVs, UTVs, ATVs, and Light Trucks



Solid and Bias Tires, and Composite Rubber Tracks for Construction vehicles and robotics



## ...AROUND Tires



Designs / Manufactures Central Tire Inflation Systems (CTIS). Enables a vehicle operator to change air pressure while driving – critical for moving back-and-forth from soft soil to hard surfaces (avoids getting stuck).



A full service 'vehicle & fleet tracking' company. Examples: We help you understand fuel usage, maintenance needs, operator tendencies, allowing for dispatching, scheduling a widespread fleet.

DRIVER SAFETY

FLEET VISIBILITY & PRODUCTIVITY

MOBILE WORKFORCE

MAINTENANCE & ELD COMPLIANCE

## ...BEYOND Tires



3-D metal printing (additive printing). Capable of "on-demand" production of spare parts in the field (even in hostile conditions). AddUp can print parts for you or provide machines so you can print where parts are needed (in the field).



Designs / Manufactures Precision-engineered elastomeric solutions for a wide range of uses

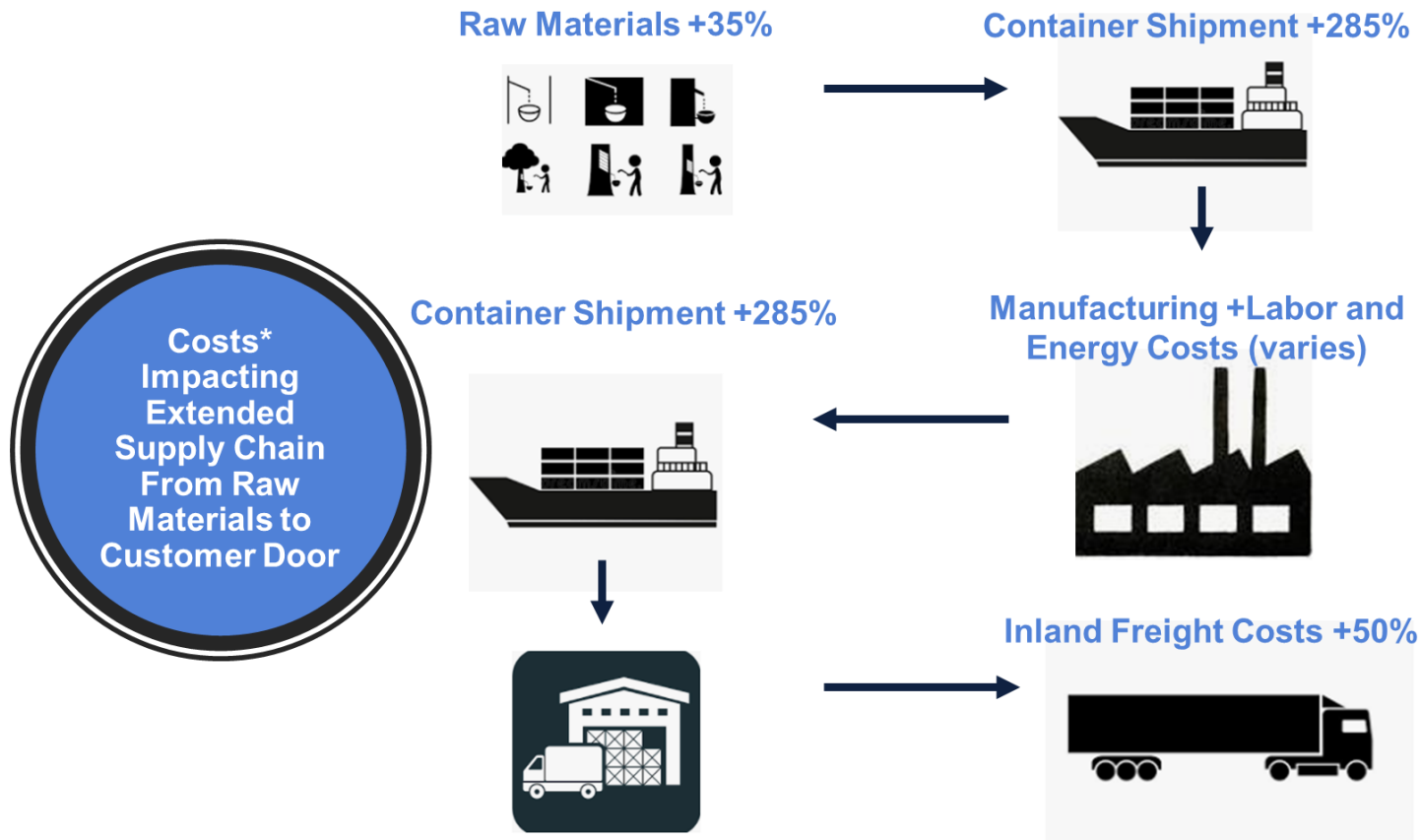
- Flat Belts
- Precision Timing Belts
- Industrial Conveyor Belts
- Silicone Calibration Belts
- Technical and Silicone Textiles



Zero Emission Mobility Solutions

Designs / Manufactures vehicle engine systems. These are stacks of Fuel Cells, combining Hydrogen with Oxygen from the air to create electricity that it uses to power a vehicle.

# Industrial Economic Challenges



\*2 year approx. global increase vs Jan 2020 Index 100

# Michelin and Contingency Operations



Tactical Wheel Vehicle (TWV) Fleet



Construction & Earth Moving Equipment



Light & Ultra-Light Vehicles



Hauling, Shipping & Logistics Equipment



Military Personnel Support Functions

90% of ground tire business: US Army and US Marine Corps



Distribution Statement A – Distribution Unlimited



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