Maximize Returns on Trailer Fleets
Good Growth Potential for Trailer Market in India

- Trailer industry in India is still evolving and not matured in comparison to Europe, China and US

- Current challenges include infrastructure, lower leverage of the flexibility offered by tractor–trailer model by fleets and availability of skilled drivers

- Strong fundamentals and legislation, favourable for CV industry in the long run

- Improvement of roads and infrastructure to stimulate the trailer market

- Recent mandate allows tractors and trailers to be registered separately

- Evolving hub and spoke model favourable to trailer industry

- Fuel efficiency, driver productivity and TCO key consideration factors

---

Trailer production evolution – India (in '000s)

Past

Future CAGR: 15%

0 10 20 30 40

Source: Internal Market Intelligence

Trailer industry projected to grow at 15% CAGR over the next 5 years
## Indian Trailer Industry - Challenges Today

### SAFETY
- **Only 20% of trailers compliant** with Trailer standards - CMVR 125D (implemented w.e.f from April 2017)
- **Front end collision** - a primary cause of accidents; driver fatigue and loss of control main factors
- **2% of accidents** occur while reversing

### EFFICIENCY
- Inefficient utilization of trailers; **33% utilization as compared to global standards**
- Govt rules now allow single tractor to tow multiple trailers; not leveraged by fleets
- **Low focus on trailer performance**; prime mover given importance

### CONNECTIVITY
- Majority of trailer fleets **do not monitor key parameters** including trailer optimization, driver efficiency, load and fuel efficiency / fuel usage
- **Reactive maintenance model** over predictive maintenance

---

**Strengthen focus on safety compliance (CMVR 125D)**

**Leverage single tractor with multiple trailers rule to bring in greater efficiencies**

**Focus on advanced technology to improve TCO and trailer efficiency**

**Upskilling drivers and mechanics on road safety, technology etc**
Improving Trailer Fleet Efficiency

Current Scenario – Single Tractor with Single Trailer

- Single Tractor with Single Trailer
- Individual Trips
- Port 100 km
- 4 trips
- 4 Drivers
- 4 Tractors
- 4 Trailers
- 20% Utilization
- 80% Idle time

Resources:
- 4 trips
- 4 Drivers
- 4 Tractors
- 4 Trailers

Tractor Utilization:
- 20% Utilization
- 80% Idle time

Improved Scenario – Single Tractor with Multiple Trailers

- Single Tractor with Multiple Trailers
- Combined Trailer
- Port 100 km
- 2 trips
- 1 Driver
- 1 Tractor
- 4 Trailers

Resources:
- 2 trips
- 1 Driver
- 1 Tractor
- 4 Trailers

Tractor Utilization:
- 20% Utilization
- 80% Idle time
Importance of Road Safety in India

- India has 3% of world’s vehicles but **11% of global road deaths**
- In 2018, ~ **4.7 lakh accidents** occurred on India’s roads; **1.4 lakh accidents** were fatal
- BRICS nations contribute to **20% of the world’s road accident** deaths & India is among the top
- Trucks, buses & trailers account for **22% of road accidents**
- Loss of vehicle control accounts for **84% of the accidents**

Source: Road Accidents In India 2018, Ministry Of Road Transport And Highways, Transport Research Wing, Government Of India
# India Legislation – Status and Forecast (June 2020)

Legislation requires installation of products enhancing Efficiency, Safety and Connectivity

<table>
<thead>
<tr>
<th>Type</th>
<th>Status (June 2020)</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
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</thead>
<tbody>
<tr>
<td><strong>Emission / Efficiency</strong></td>
<td>BS IV</td>
<td>BS VI</td>
<td>BS IV (Nation wide)</td>
<td>Axle load increase</td>
<td>BS VI (Nation wide)</td>
<td>Fuel Efficiency targets for M3 &amp; N3 BS IV vehicles</td>
<td>CAFE</td>
<td>BS VI (Nation wide)</td>
<td>BS VI (Nation wide)</td>
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<tr>
<td><strong>Safety</strong></td>
<td>100% ABS for TB&amp;C, Trailer &amp; 2 Wheeler</td>
<td>ABS for M3 / M2 &amp; 2 Wheeler ABS (New model 04/2018, existing models 04/19)</td>
<td>Speed Governor</td>
<td>Trailer Code</td>
<td>Truck Code (Phase 1 – 10/2018, Phase 2 – 10 / 2019)</td>
<td>Additional safety requirements / RPAS for M1 (07/19), all other (04/20)</td>
<td>Endurance braking IS 11852</td>
<td>ESC M3</td>
<td>ESC / AEBS for M &amp; N</td>
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<tr>
<td><strong>Connectivity</strong></td>
<td>ITS</td>
<td>VTS</td>
<td>Multiplexing</td>
<td>RPAS</td>
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<td>RPAS</td>
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</tr>
<tr>
<td><strong>Electrification &amp; Others</strong></td>
<td>E Vehicles</td>
<td>End of Life Scapping Policy</td>
<td>FAME – Phase 1</td>
<td></td>
<td>FAME – Phase 2</td>
<td></td>
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</tr>
</tbody>
</table>

Red = in discussion

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Introduction | V Ramanathan, Head - OE Sales and Marketing, ZF Group Commercial Vehicle Control Systems, WABCO India

© ZF Friedrichshafen AG
The Perfect Match: WABCO & ZF
Mobilizing Commercial Vehicle Intelligence
Establishing the New Division: CV Control Systems

WABCO

- Vehicle Dynamics & Control, Automated Driving
- Suspension, Powertrain & Axle Solutions
- Vehicle Energy Management Systems
- Fleet Solutions
- Trailer Systems
- Off-Highway Solutions
- CAR Systems
Commercial Vehicle Technology Expertise Domains

TRUCK/COACH/Bus
- Transmission Automation
- Truck Telematics
- Vehicle Electronic Systems
- Truck ADAS Systems
- Braking, Steering & Stability Control
- Air Compressors
- Foundation Brakes/Braking Actuation

Trailer
- Aerodynamics Solutions
- Trailer Telematics
- Trailer ADAS Systems
- Trailer Air Suspension Control
- Trailer Braking & Stability Control Systems
- Foundation Brakes & Braking Actuation
- Air-Suspension Control
- Air Processing & Dryer Units
ZF in India

Overview (2019)

3
ZF Subsidiaries

8
Engineering Center

5
Joint Venture Partners

37
Manufacturing Units

20,742
Employees (Incl. ZF Wabco)

ZF Subsidiaries –
WOS (ZF India Pune & ZF Wind Power Coimbatore),
Subsidiary (Wabco India 75%)

Introduction | V Ramanathan, Head - OE Sales and Marketing, ZF Group Commercial Vehicle Control Systems, WABCO India
ZF Commercial Vehicle Control Systems – WABCO India
A leading supplier of technologies and services to the Indian Commercial Vehicle industry

Journey of Excellence

- First company to win Deming Prize and Japan Quality Medal in India
- Leading innovator in India for improving safety, efficiency and connectivity of commercial vehicles

• Deming Prize
  - 1988
  - First company in India to win the award

• Japan Quality Medal
  - 2002
  - First company in India to win the award

TATA Motors
“Enduring Relations Excelling Together”
2008

TATA Motors
“Excellence in Quality, Innovation & Technology”
2011

Ashok Leyland
“Co-location Award”
2012

Volvo Eicher
“Best Quality Supplier Award”
2008

Ashok Leyland
“Gold Award for Quality”
2010

Volvo Eicher
“Outstanding contribution to new product development” award
2013

TATA Motors
“Supplier of the year”
2015

SML Isuzu
“Supplier of the year”
2017

Volvo Eicher
“Excellence Award for Technology Innovations”
2018

Volvo Eicher
“Outstanding contribution to new product development” award
2013

TATA Motors
“Supplier of the year”
2015

Ashok Leyland
“Supplier of the year”
2014

Ashok Leyland
“Cost competitiveness Award”
2013

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“Excellence Award for Technology Innovations”
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“Cost competitiveness Award”
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Volvo Eicher
“Excellence Award for Technology Innovations”
2018
Our Continuous Commitment to Improve Trailer safety in India

WABCO & BOSCH Safety Drive meet

ABS Homologation: 100 models at WABCO test track within a year

Received FICCI Road Safety Award for Improving Trailer Safety in India

Launch of Intelligent Trailer Program

Homologation support for 100+ trailer builders (200+ models)

2012
2015
2017
2018
Focusing on Road Safety through Safety Training and Awareness

- **8000+** drivers upskilled since 2018
- **PAN India training coverage** spanning six states and expanding
- **Partnering with fleets, RTO’s and STUs** to drive the initiatives
- **Holistic curriculum** covering new technologies, regulations and guidelines

*Introduction | V Ramanathan, Head - OE Sales and Marketing, ZF Group Commercial Vehicle Control Systems, WABCO India*
Safe Driver Training in partnership with Praxair

Specialized driving training for drivers of hazardous Cargo carriers

- Over 500 drivers trained and qualified through this program since inception
- All drivers have reported a “Zero Accident” rate

Scaling up the Safety Chain – Upskilling Mechanics

- Established Centers of Excellence in partnership with leading Universities to offer training with specific focus on commercial vehicles
- Emphasis on hands-on practical training sessions
- Skill upgradation for existing mechanics
- Over 500 students trained / upskilled
Mobilizing Trailer Intelligence
Trailer Markets Continue to Grow Globally

Volume of trailers built in 2019
Applicable content per trailer in $
All Markets are Adopting More Trailer technology

Driving forces
- Legislation
- Connectivity
- TCO & reliability

Intelligent Trailer Program

2020
Understanding Trailer Stakeholders and Their Needs

**FLEETS**
- Reliability
- Operational efficiency
- **Adapted trailers**
- Less dependence on drivers

**TRAILER OEM**
- Quality - Cost - Delivery
- Compliancy
- **Modular systems**
- Smart trailers

**SHIPPER**
- Cost / ton-km
- Cargo Integrity
- **Tracking & monitoring**
... Answering with a Clear Technology Concept
Mobilizing Vehicle Intelligence on the Trailer; Delivering value to OET and Fleets
Braking & Suspension – Foundation for Trailer Intelligence
Mobilizing Vehicle Intelligence on the trailer, delivering value to OEs and fleets

Intelligent Trailer Program

Intelligent Braking Platform
- iEBS
- iABS

Trailer Fleet & Cargo Management Solutions

Trailers Today: Christiaan Verschueren; Vice President Trailer ZF Group Commercial Vehicle Control Systems, WABCO Europe
Trailer ABS & EBS: Towards Intelligent Trailers

**Trailer ABS**
First step towards intelligent trailers...
- Saving lives by optimizing control during emergency maneuvers
- Maximizes the effectiveness of the brakes independent of road and weather conditions
- Provides additional functionality

...supporting Automotive Indian Standard to make roads safer
- Wheel sensors automatically detect when the brakes lock
- Automatically releases locked brakes and keeps the trailer safe
- Assures compliance with legal braking regulations in India

~10,000 systems fitted on trailers in India and growing ...

**Trailer EBS**
Making your trailers even more intelligent...
- Electronic braking and the integration of suspension control allows for enhanced intelligence
- Enables more than 40 ITP functions
- Range of options can be fully customized to fleet needs

...adding value to the fleets
- Lowers operational costs
- Reduces common trailer accidents
- Increases driver comfort and operability
- Supports optimized fleet utilization

1500 systems fitted on trailers in India and growing ...

Trailers Today: Christiaan Verschueren; Vice President Trailer ZF Group Commercial Vehicle Control Systems, WABCO Europe
I am confident that WABCO Trailer-EBS will prevent roll-over accidents and enhance my tire life, lining life and under-chassis components.

I took a decision to retrofit E-EBS in all my vehicles and WABCO T-EBS is really beneficial for every rupee I spend.

**Bharat Varanasi**  
Partner, VK Patel Translines

The WABCO T-EBS is a trouble free product which brings a lot of benefits to us.

We are planning to install this product across all our fleets to enhance safety and protect our LPG trailers from the capsizing accidents.

**Managing Partner**  
Annai Bulk Carriers
Intelligent Braking Platforms for Trailers

Global intelligent braking platform for trailers - one platform delivers new iABS and iEBS

- Single global platform for trailer ABS and EBS
- Simplified interchangeability of ABS and EBS in production lines
- Enhanced performance, more integrated, scalable and robust
- Extends access to Intelligent Trailer Program for ABS applications
- Available in Basic, Standard or Premium configuration
- Further intégration of electronic units
- Delivers valuable data to FMS to further optimize fleet operations
PAN™ – Air Disc Brakes for Trailer

Product features

• Lightweight design for light, medium and heavy CVs
  • PAN™16/17 for light trucks, trailers and buses
  • PAN™22 for trailers as well as trucks and buses
    (with brake torques up to 23,000Nm / 17,000 ft lbs)
• Patented single-piston technology
• Available with end-of-life wear sensor
• Compact design based on finite element method (FEM) calculations
• Very robust brakes with strong quality performance in all kind of applications

Key benefits

• Significant improvement on braking distance vs. drum brake application
• Compact design for easy axle adaptation
• Excellent braking performance even on poor road conditions
• Flexible service concept
• Robust and proven design ensures extraordinary product life

WABCO Difference

• Best in class performance for over 20 years
Intelligent Trailer Program (ITP)
40+ Intelligent Trailer Functions based on Trailer EBS Modulators

Intelligent Trailer Program

SafeStart

OptiLoad

SmartBoard

Intelligent Braking Platform

Trailer Fleet & Cargo Management Solutions

Trailer Electrification Concept

Trailers Today: Christiaan Verschueren; Vice President Trailer ZF Group Commercial Vehicle Control Systems, WABCO Europe
Intelligent Trailer Platform
The trailer is more than the platform that carries the load!

Advanced Safety
- Anti-Lock Braking Function
- Rollover Stability Support
- Emergency Brake Alert
- Router & Repeater
- Bounce Control
- Electronic Park Brake

Driver Comfort & Effectiveness
- Trailer Remote Control
- New SmartBoard
- Return-to-Ride Level
- Traction Help
- Trailer Length
- Steering Axle Lock

Operator Comfort & Effectiveness
- Intelligent Trailer Program…
- …It’s What’s Inside That Counts

Operational Efficiency
- OptiLevel™
- Return-to-Load Level
- Memory Level
- Brake Pad Wear Indicator
- TX-TRAILER GUARD™
- TX-TRAILER PULSE™
- Advanced MultiVoltage
- Operating Data Recorder
- Notebook Memory
- Extension Control
- Battery Control

Load Optimization
- OptiLevel™
- Overload Indicator
- OptiLoad™
- Air Bellows Protector
- Forklift Control
- OptiFlow™ SideWings
- OptiFlow™ Tail

OptiFlow™ AutoTail

Fuel & CO₂ Reduction
- OptiLevel™
- Fuel-Saving Suspension
- Tire Pressure Monitoring
- Lift Axle Control

OptiLink™

OptiTurn™

OptiLock™

Notebook Memory

OptiLink™

ServiceMind

OptiLevel™

OptiLevel™ 2-Point

OptiLoad™

Nosebox

Overload Indicator

Fuel-Saving Suspension

Tire Pressure Monitoring

Lift Axle Control

© ZF Friedrichshafen AG
Advanced Safety

- TiltAlert
- Bounce Control
- Anti-Lock Braking Function
- Rollover Stability Support
- TailGUARD™
- Electronic Park Brake
- SafeStart
- OptiTurn™
- Emergency Brake Alert
- Router & Repeater

Trailers Today: Christiaan Verschueren; Vice President Trailer ZF Group Commercial Vehicle Control Systems, WABCO Europe
TailGuard™
Reversing collision avoidance system with autonomous active braking function

Product features
- Autonomously brakes the reversing trailer at a programmable distance from detected objects in the rear blind spot
- Programmable stopping distance between 20"-78" / 50-200cm
- Up to six ultrasonic sensors to measure distance to moving or stationary objects within 3,5m / 137” behind the trailer
- Forced slowdown by pulsing the brakes when reversing speed is higher than 6mph / 9km/h
- Optical and acoustical warning signals to alert driver and traffic participants

Key benefits
- Helps the driver to safely reverse in limited visibility conditions
- Helps to avoid accidents while reversing
- Helps to avoid trailer damage, repair costs and trailer downtime
- Prevents damage on cargo, unloading facilities and infrastructure

WABCO Difference
- Industry’s first reversing collision avoidance system with autonomous active braking
- Detection performance customizable with up to six ultrasonic sensors
Driver Comfort & Effectiveness

- Trailer Remote Control
- Trailer Length
- Finisher Brake
- Return-to-Ride Level
- Steering Axle Lock
- SmartBoard
- Traction Help

Trailers Today: Christiaan Verschueren; Vice President Trailer ZF Group Commercial Vehicle Control Systems, WABCO Europe
SmartBoard
Access key trailer information and operate trailer suspension functions without the need for diagnostic tools

Product features
- Monitoring and operation panel for trailer safety and suspension functions
- Mounted on the side of the trailer and linked directly to the Trailer EBS
- Simple control pad allows the driver to operate Trailer EBS and suspension functions

Key benefits
- Driver can access key trailer information, e.g. axle load, mileage status, tire pressure and temperature, brake pad wear, Trailer EBS failure codes,…
- Activates Trailer EBS and suspension functions, such as WABCO’s OptiLevel™, OptiTurn™ and Immobilizer
- Receives Trailer EBS-error codes when truck is not connected to the trailer, helping to optimize maintenance schedules
- Provides first insight on the trailer status even when uncoupled

WABCO Difference
- User-friendly monitoring and control of the Intelligent Trailer Program functions
- More than 180,000 systems in operation
- 18 pre-programmed languages available
Operational Efficiency

- OptiLevel™
- Battery Control
- Operating Data Recorder
- Immobilizer
- Trailer Extension Control
- Trailer Telematics
- OptiLink™
- Memory Level
- Brake Pad Wear Indicator
- Notebook Memory
- Advanced MultiVoltage
- Return-to-Load Level
- ServiceMind
- OptiLock™

Trailers Today: Christiaan Verschueren; Vice President Trailer ZF Group Commercial Vehicle Control Systems, WABCO Europe
OptiLevel™ - eTASC
Advanced air suspension system for trailers

Product features
• Integrates six suspension functions:
  • Fuel Saving Suspension
  • Memory Level
  • Return-to-Load Level
  • Return-to-Ride
  • Lift & Lower
  • 2-point ECAS

Key benefits
• Automatically adjusts trailer height during loading and unloading, allowing the driver to stay in the cabin
• Reduces loading and unloading time by up to 1.5 minutes per turnaround
• Intelligent trailer height control lowers trailer drag, reducing fuel consumption by up to 100l and CO₂ emissions by around 275kg (per trailer per year) compared to conventional air suspension
• Allows lifting and lowering the trailer without power from truck when used in combination with eTASC

WABCO Difference
• Pioneer in electronic air suspension for trailers
• Automatic and manual level control with single device
• More than 25 years experience
# OptiLevel™ - eTASC Functionality

<table>
<thead>
<tr>
<th>OptiLevel DEVICE</th>
<th>Rotary Slide Valve</th>
<th>TASC™ (Trailer EBS E Premium)</th>
<th>ECAS 1-Point (Trailer EBS E Premium)</th>
<th>ECAS 2-Point (Trailer EBS E Premium)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual Activation (via available control modes)</td>
<td>Lift and Lower without Power Supply from Truck</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Memory Level (power required)</td>
<td></td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>2-Point Control (power required)</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Automatic Activation (power required)</td>
<td>Return-to-Ride Level</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td></td>
<td>Return-to-Load Level</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td></td>
<td>Fuel-Saving Suspension</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
</tbody>
</table>

*ECAS 2-point Control with eTASC works with EBS E version 4 onwards only.*

Trailer EBS E: Trailer Electronic Braking System Generation E
ECAS: Electronically Controlled Air Suspension

Activation via handle
Activation via electronic control device
Automatic activation
Load and Fuel Efficiency

- ECAS 2-Point
- Forklift Control
- Air Bellow Protector
- Tire Pressure Monitoring
- OptiFlow™ Tail
- Overload Indicator
- OptiLoad™
- Load and Efficiency
- Lift Axle Control
- OptiFlow™ SideWings
- OptiFlow™ AutoTail
OptiTire™: Next Gen TPMS
Next generation of tire pressure monitoring, including strap-mounted sensors covering all rim sizes and applications

Product features
- Measures tire pressures and temperatures with up to 10 years of sensor life
- Warns in case values exceed defined levels
- Sensor options: internal valve mounted, internal strap-mounted and external wheel module
- Tire pressure & temperature information and alerts available for the driver (on the dashboard, via OptiLink app and SmartBoard)
- Monitors up to 20 rolling wheels plus two spare wheels with a central unit

Key benefits
- Tire pressure monitoring and warning helps to increase vehicle safety
- Early leakage detection reduces downtime due to tire blowouts
- Helps to extended tire life by maintaining recommended tire pressure
- Helps to decrease fuel consumption by avoiding under-inflation
- Internal sensor measures air temperature, enabling a more precise pressure monitoring
- Internal strap-mounted sensors offer simple, universal installation
- Telematics connectivity enables real-time fleet notification

WABCO Difference
- First system for commercial vehicles with either external or internal wheel sensors
- Sensor range covers all types of rims
- Applicable to the widest range of commercial vehicles

Trailers Today: Christiaan Verschueren; Vice President Trailer ZF Group Commercial Vehicle Control Systems, WABCO Europe
Connecting the Global Trailer Market

Trailer Telematics - Connectivity and Health Data by Hardware and IoT Cloud Infrastructure: Trailer Data Analytics for OETs, fleets & shippers

Intelligent Trailer Program

TX-TrailerGuard

TX-TrailerPulse

OptiLock

Trailer Fleet & Cargo Management Solutions

Intelligent Braking Platform

Trailer Electrification Concept

Trailers Today: Christiaan Verschueren; Vice President Trailer ZF Group Commercial Vehicle Control Systems, WABCO Europe
TX – Trailer Pulse
EBS connected trailer telematics enabling over-the-air assessment of the technical health of the trailer

Product features

- Mid-range telematic system to track & trace trailers and EBS information for technical trailer health status monitoring
- Advanced remote diagnostics capability via a dedicated web portal
- Extended WABCO trailer EBS data input including “fault code-to-plain language” translation, root cause indication and repair hints

Key benefits

- Reliable economically-priced and easy-to-use solution to track & trace trailers and analyze Trailer-EBS-data
- Role-based web portal available for data sharing to fleets, leasing and rental companies, trailer builders, workshops,...
- Availability of real-time information on the technical health of the trailer designed to improve maintenance and reduce downtime

WABCO Difference

- Telematics solution which offers 'track & trace' functions along with trailer health and diagnostic information
- Delivering value to multiple stakeholders, including trailer builders, rental companies and fleets at an economical price
Proven partner for the trailer industry in India
Support in application engineering, homologation, production process optimization
Globally proven program to make trailers more efficient and safe
Trained service and application engineers
Pan-India service and support network
Training on WABCO systems and solutions

Partnering with Trailer OEMs and Fleets

A touch point every 100 km

Value Proposition: Christiaan Verschueren; Vice President Trailer ZF Group Commercial Vehicle Control Systems, WABCO Europe
Thank You