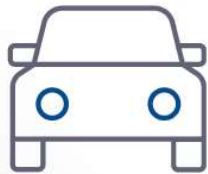
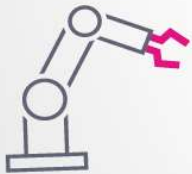




RECA Group Conference 2023

BU-Conference Automotive



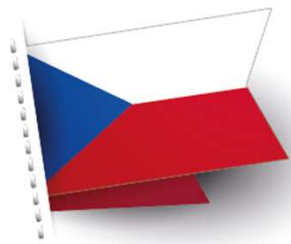
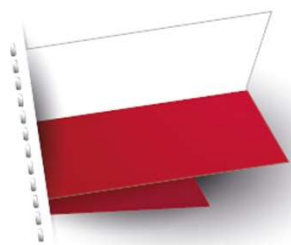
www.reca.com



BU Automotive



RECA Group
Conference 2023





Agenda

- 1. Übersicht BU Automotive / Overview BU Automotive**
- 2. Produktsystem Protect / Protect product system**
- 3. Übersicht Scar / Overview Scar**
- 4. Verkaufsaktion 2023 / Sales campaign 2023**
- 5. Fragen – Anregungen / Questions - Suggestions**
- 6. Zusammenfassung / Summary**

BU Automotive



BU Automotive



BU Automotive

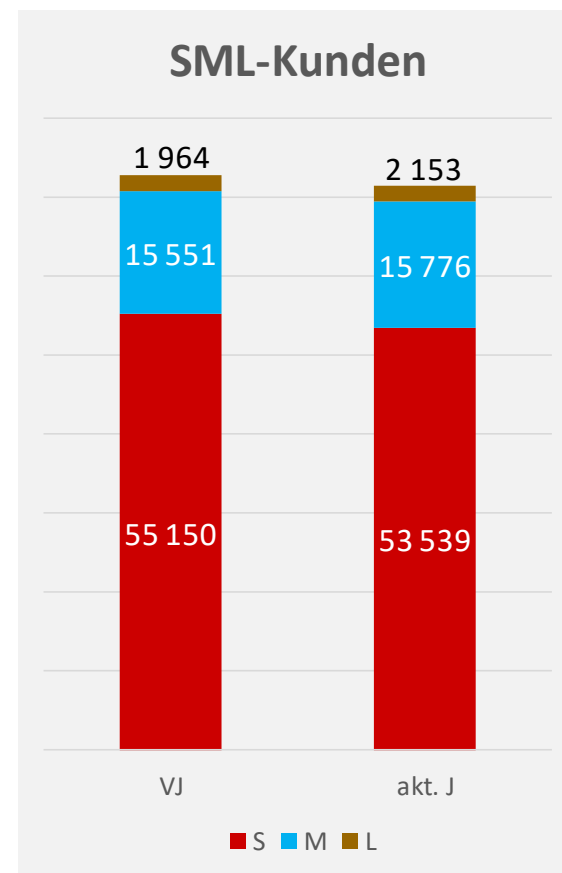
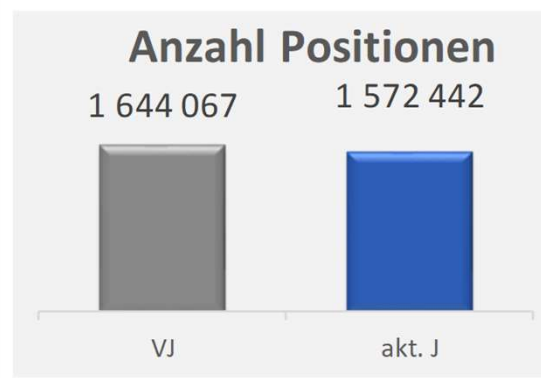
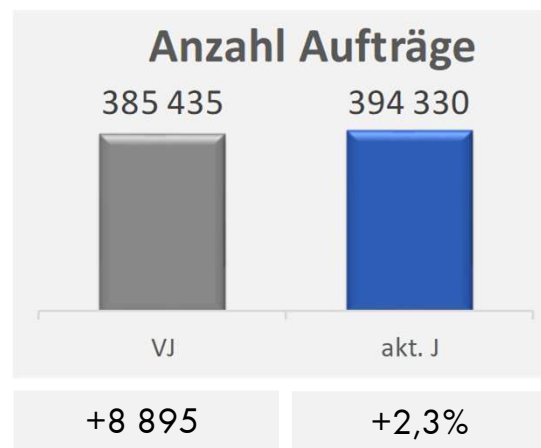
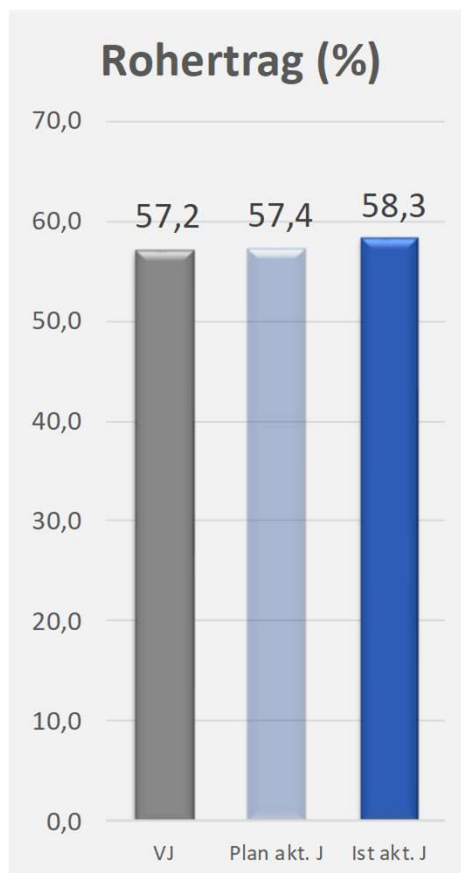
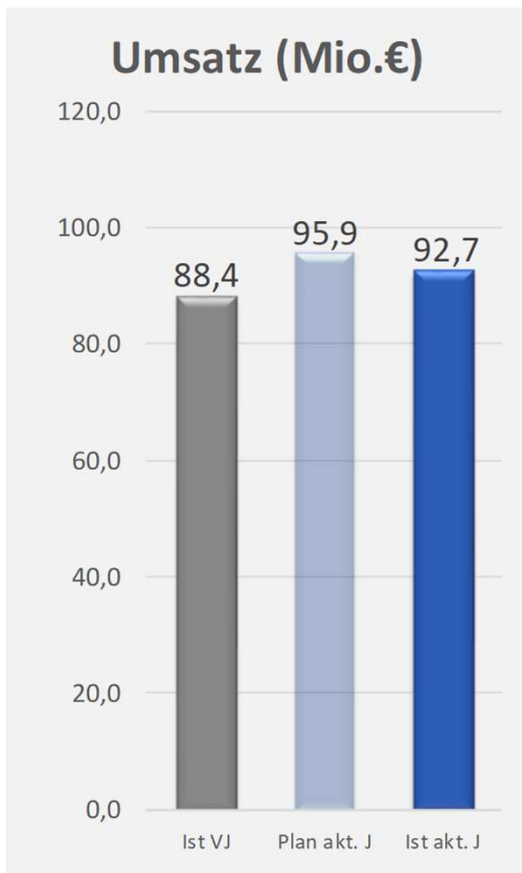


BU Automotive



RECA Group: BU Automotive

YTD September 2023 (Total)



STG: +4,9% PE: 96,6%

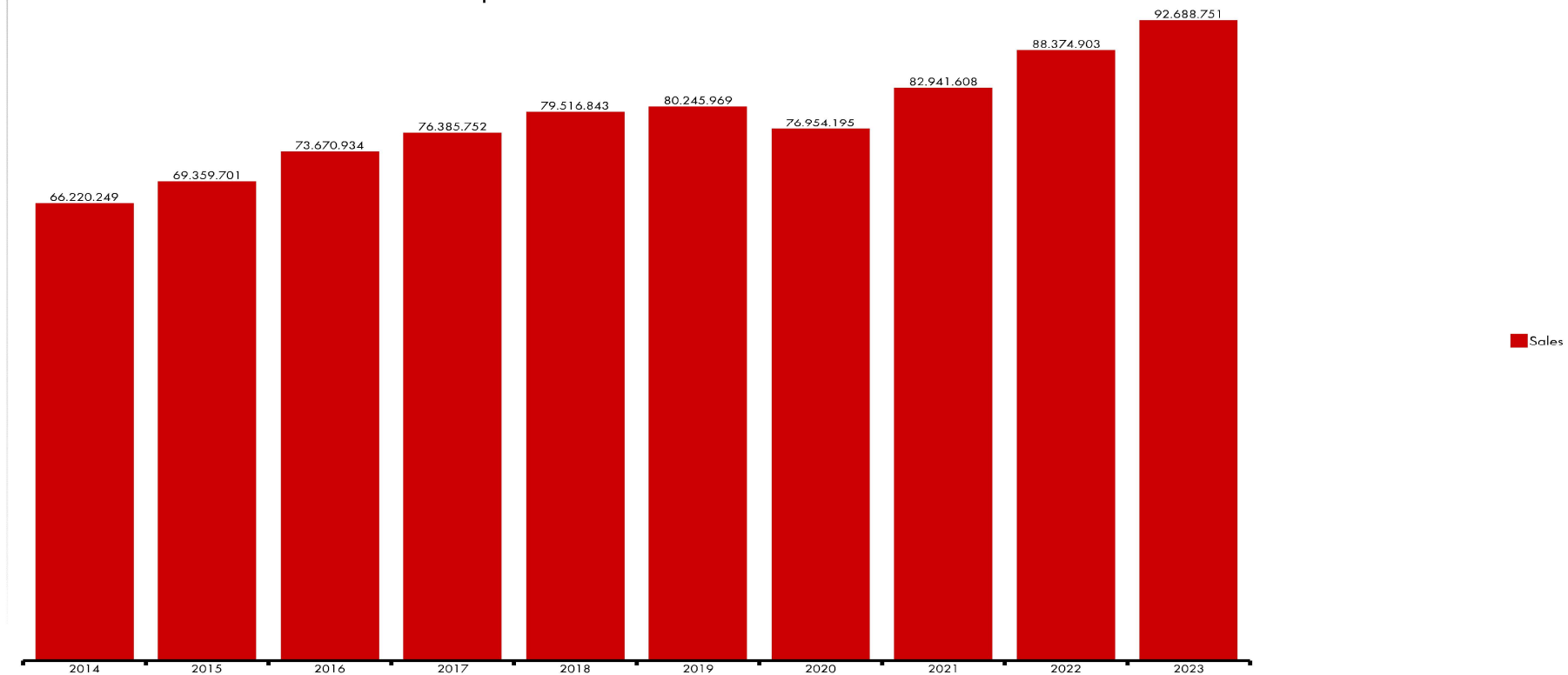
-71 625 -4,4%

AK VJ: 72 665 AK akt. J: 71 468 -1 197

Entwicklung Umsatz BU Automotive

Sales - All Dept. - AC EVP Walter Bostelmann

Actual - Recla AUTO TOTAL - YTD Sep in EUR



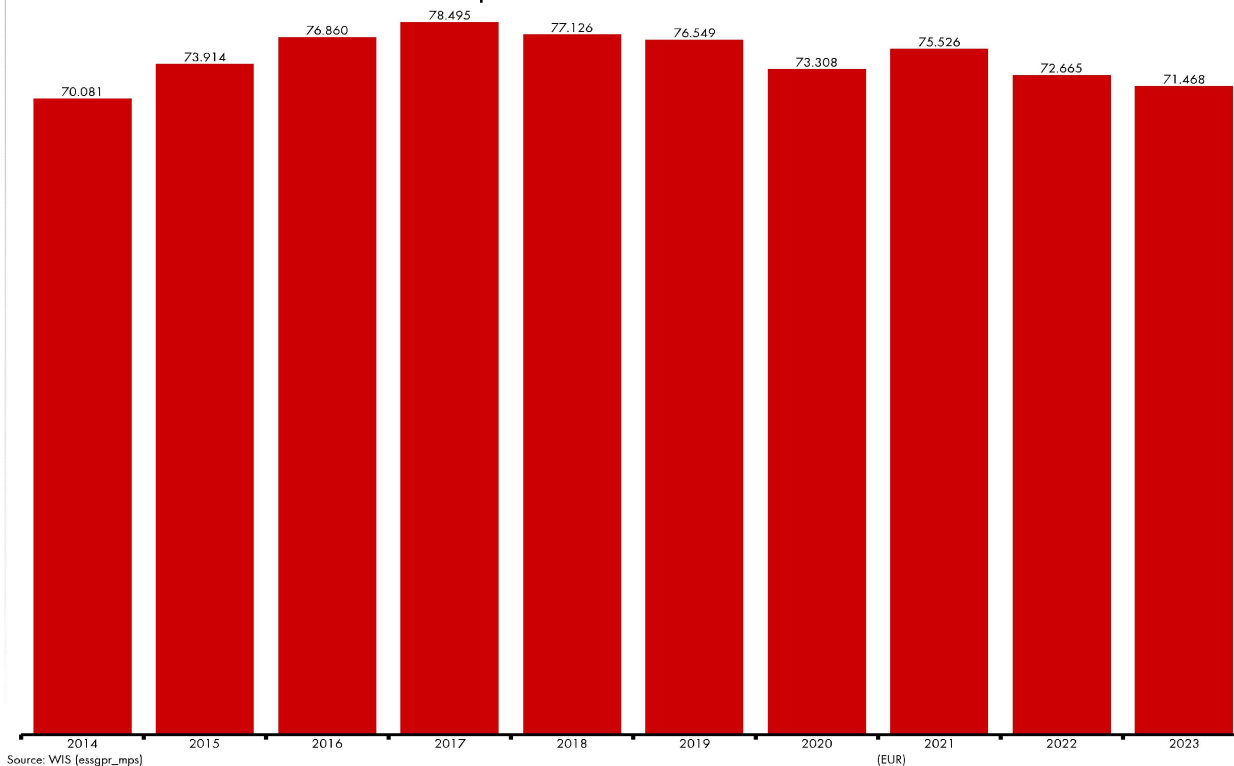
Source: WIS (essgpr_mps)

2023-10-16 09:21:08 AM UTC

Entwicklung Kunden BU Automotive

No. of Active Cust. - All Dept. - AC EVP Walter Bostelmann

Actual - Reca AUTO TOTAL - YTD Sep in #



■ No. of Active Cust.

Source: WIS [essgpr_mps]

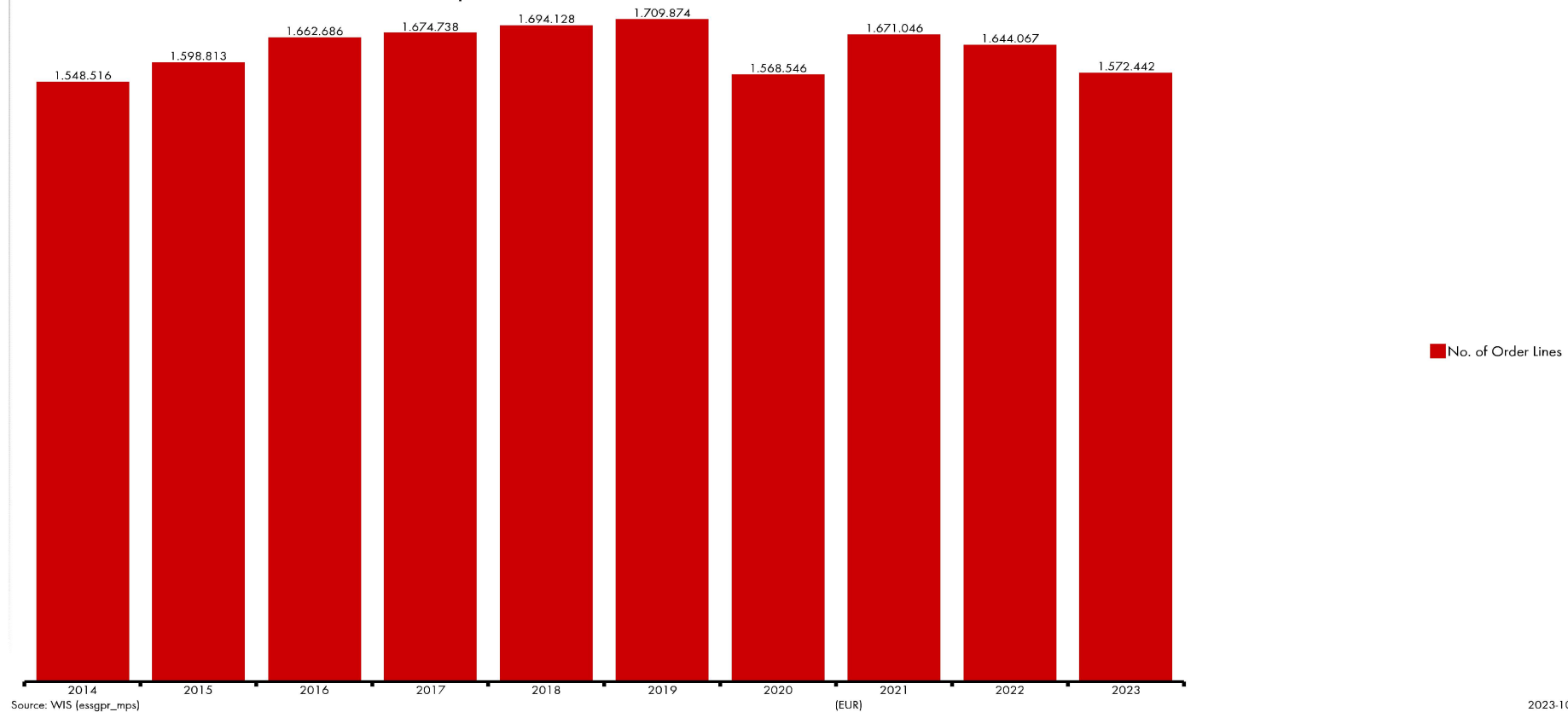
(EUR)

2023-10-16 09:20:47 AM UTC

Entwicklung BU Automotive

No. of Order Lines - All Dept. - AC EVP Walter Bostelmann

Actual - Reca AUTO TOTAL - YTD Sep in #



Elektro Mobilität



Perspektive in Europa /Perspective in Europe

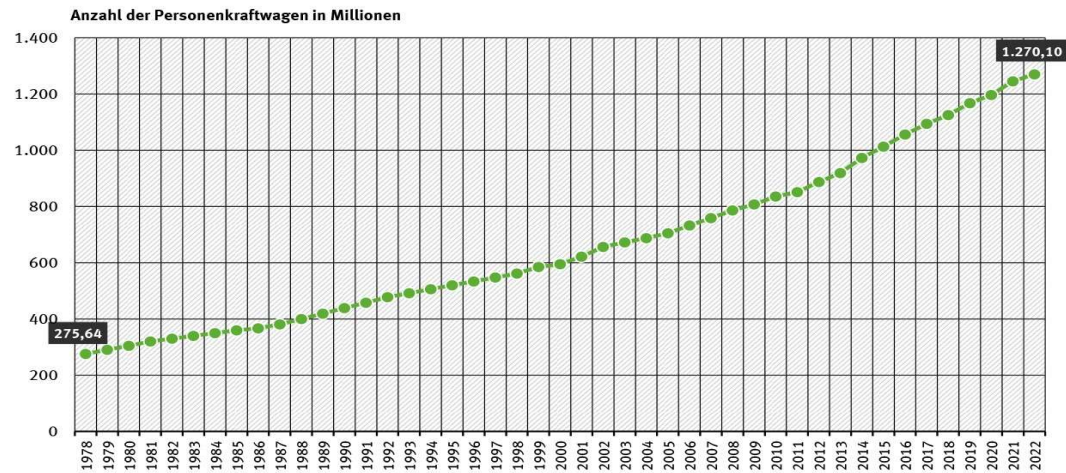


RECA Group
Conference 2023

250 Millionen PKW



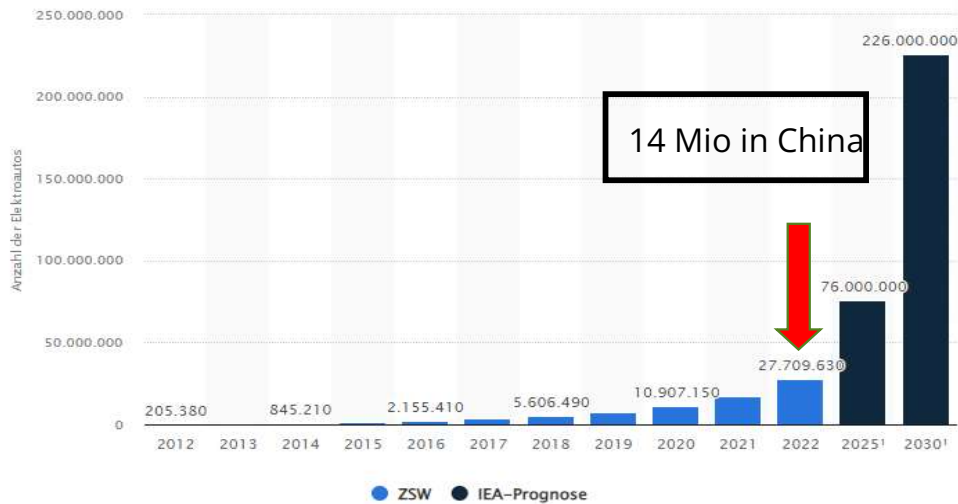
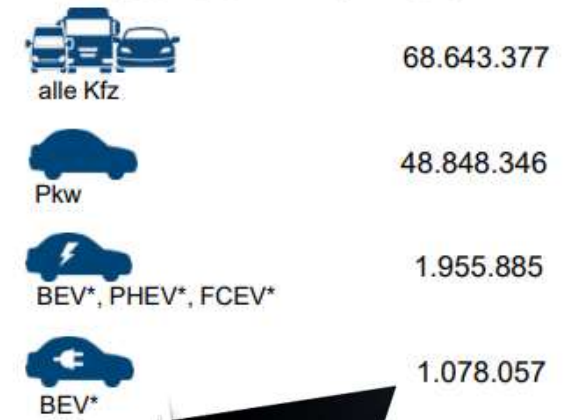
Weltweiter Autobestand*



* ohne Nutzfahrzeuge; jeweils zum 1.1.

Quelle: Verband der Automobilindustrie (VDA), Tatsachen und Zahlen, Jahresberichte

Bestand am 1. April 2023



Bestell Display / Order display

Das Normfest Bestell-Display / The Normfest ordering display

- Schnelle und einfache Nachbestellung
Quick and easy reordering
- Überblick über die Historie mit voreingestellten Mengen und Kostenstellen
History overview with preset quantities and cost centers
- Automatischer Warenkorb-Versand
Automatic shopping cart shipping
- Bestellvorschläge aus der Branche
Order suggestions from the industry
- Anlage von Favoriten
Favorites creation

Entwicklung der Eigenmarke / Development of the private label



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Conference 2023



Chemie



Persönliche Schutzausrüstung



Elektrowerkzeug



Druckluftwerkzeug



Handwerkzeug



Beleuchtung

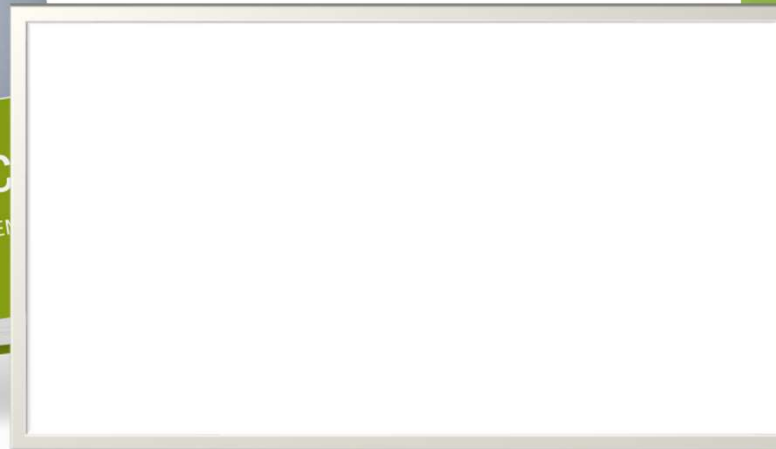
Produktsystem Protect



**UMWELT UND
GESUNDHEIT
SCHÜTZEN.**



**MIT UNSERER
PROTECT-SERIE!**



Produktsystem Protect

Minimierung der Gefährdungsbeurteilung der Betriebsstätte (Thema Zertifizierung)

Minimization of the risk assessment of the operating site (subject of certification).

Minimierung der Gesundheitsgefahr für Mitarbeiter (z.B. Ausfälle durch mögliche Unfälle durch Verätzungen)

Minimization of health hazards for employees (e.g., absenteeism due to possible accidents caused by chemical burns)

Umweltschonende Produkte (Thema Untere Wasserbehörde) - hier ist Bio Star Extrem immer ein interessantes (Beispiel) hoch effektives Produkt - jedoch Kennzeichnungsfrei

Environmentally friendly products (subject of lower water authority - here Bio Star Extrem is always an interesting (example) highly effective product - but label-free)

Säurefreier Felgenreiniger - Minimierung des Unfallrisikos da keine Säuren verwendet werden. Gerade Säuren müssen gesondert gelagert und geschult werden

Acid-free rim cleaner - minimizing the risk of accidents as no acids are used. Acids in particular must be stored and trained separately

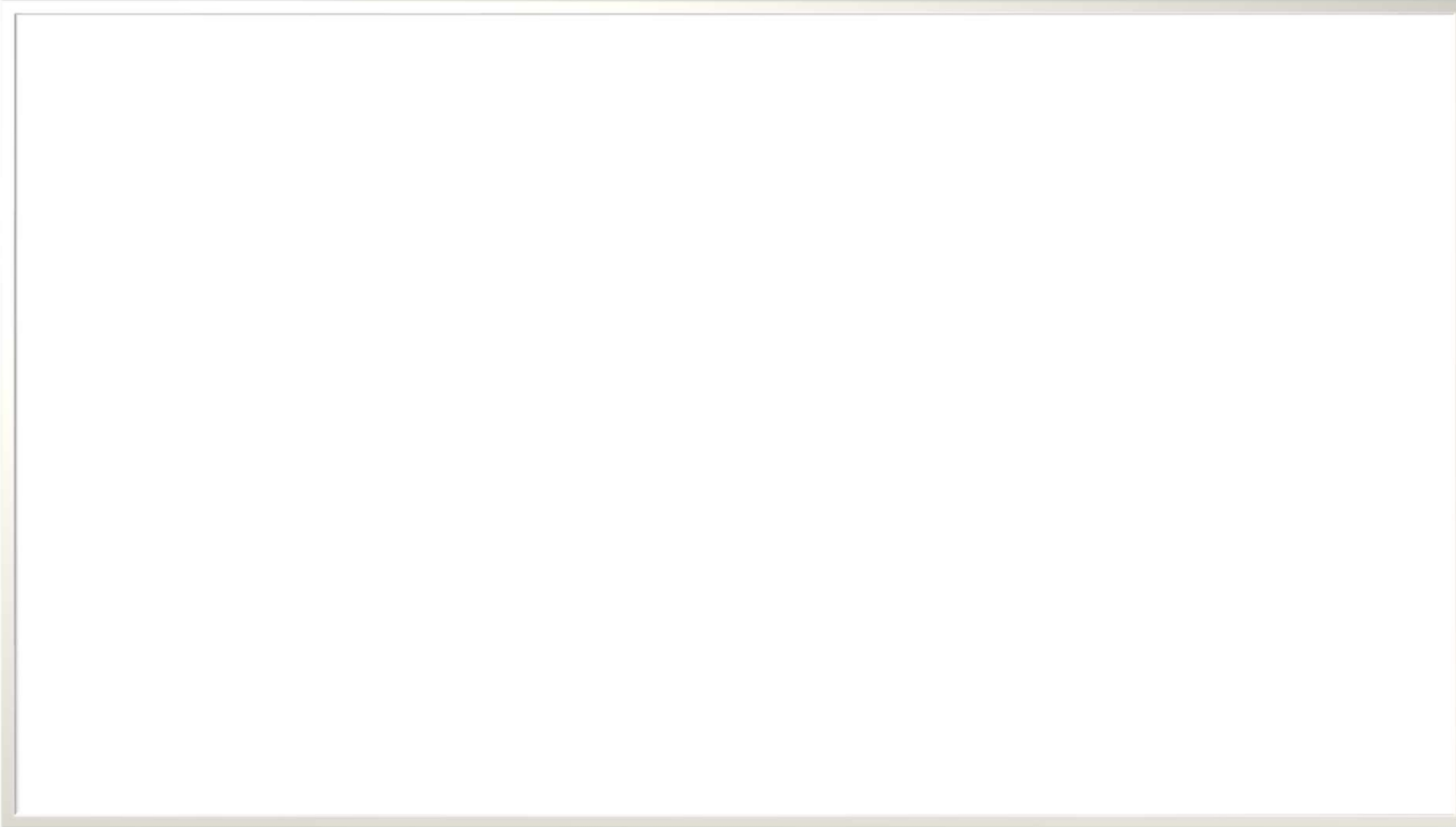
Oilcatcher Premium aus der Protect Serie nimmt kein Wasser auf, ist wiederverwendbar, nimmt die 3 fache Menge des Eigengewichts auf und vor allem Problemlose Entsorgung

Oilcatcher Premium from the Protect series does not absorb water, is reusable, absorbs 3 times the amount of its own weight and above all problem-free disposal.

Video Oil Catcher Premium



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Conference 2023



Entwicklung BU Automotive – SCAR - CARGO

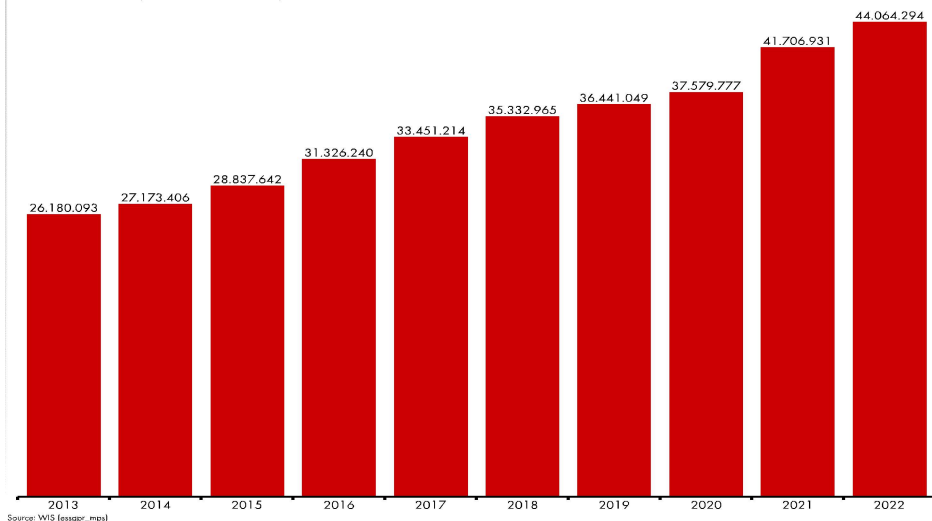


BRAND SCAR
CARGO
SPECIALIST

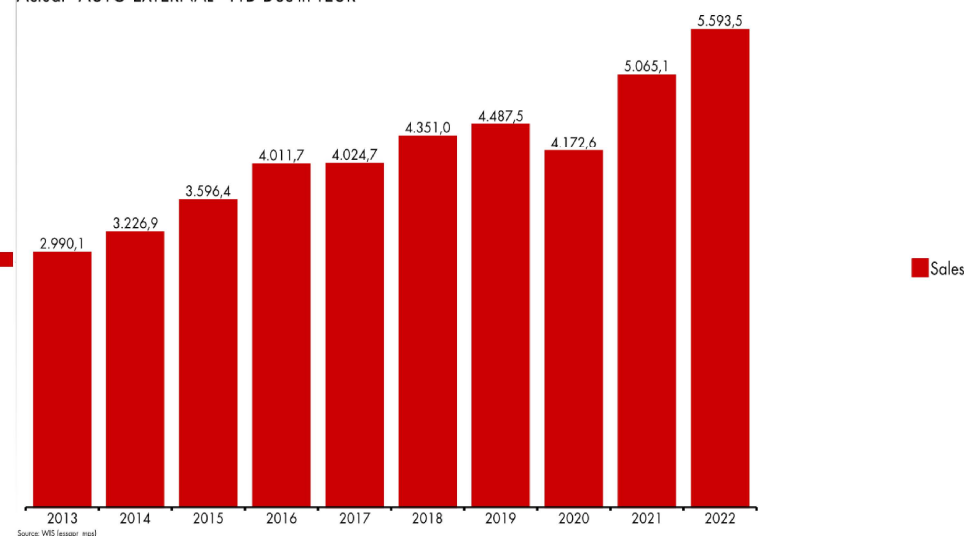
Entwicklung BU Automotive / SCAR - CARGO

Entwicklung Umsatz

Sales - All Dept. - IT-Scar Italy
Actual - All Divisions EXTERNAL - YTD Dec in EUR



Sales - All Dept. - ES-Reca Spain
Actual - AUTO EXTERNAL - YTD Dec in TEUR



SALES TURNOVER CARGO 2022 € 49.650.000

YTD 31.12.2022 EXTERNAL

SALES TURNOVER CARGO 2023 € 52.770.000

YTD 31.12.2023 EXTERNAL (EXTRAPOLATION)

SHARE CARGO ON BU AUTOMOTIVE 42,8%

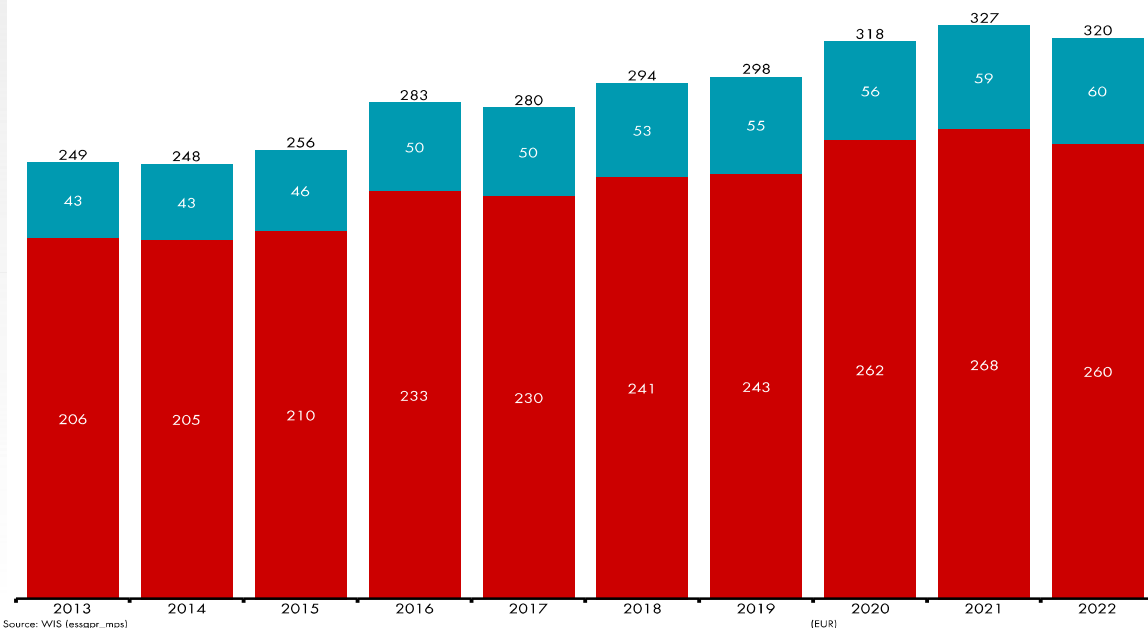
YTD 30.09.2023 EXTERNAL

Entwicklung BU Automotive / SCAR - CARGO

IDM / ADM DEVELOPMENT

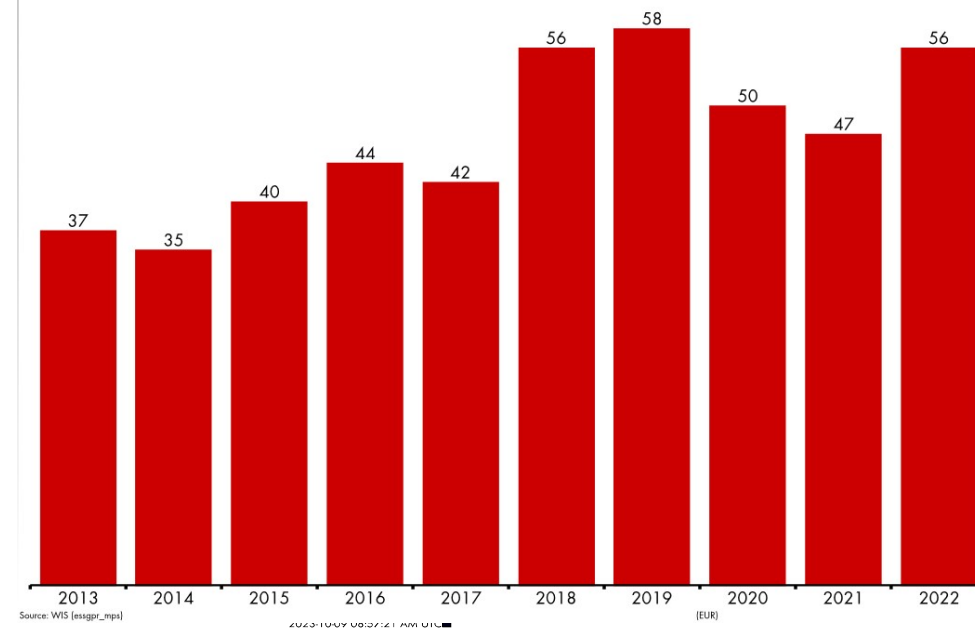
Staff - All Dept. - IT-Scar Italy

Actual - All Divisions EXTERNAL - YTD Dec in #



Staff - All Dept. - ES-Reca Spain

Actual - AUTO EXTERNAL - YTD Dec in #



SALESMEN CARGO 2022

N. 316

YTD 31.12.2022

SALESMEN CARGO 2023

N. 322

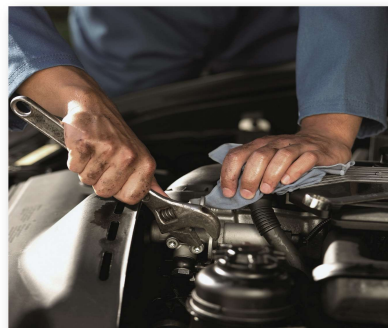
YTD 30.09.2023

Entwicklung BU Automotive – SCAR (YTD 31.12.2022)

Entwicklung Kunden



RECA Group
Conference 2023



FLEET

N° 28,7%

€ 37,4%

GARAGES

N° 31,6%

€ 24,6%

SPECIAL

N° 21,2%

€ 26,0%

AGRICULTURE

N° 18,4%

€ 12,0%

TOTAL CUSTOMERS

N° 22.271

€ 44.064.294
(External)

SCAR PRODUCT RANGE SPECIALIST FOR TRUCK

OVER 30.000 ARTICLES TO MEET THE DAILY NEEDS OF OUR CUSTOMERS



RECA Group
Conference 2023



SCAR PRODUCT RANGE SPECIALIST FOR TRUCK

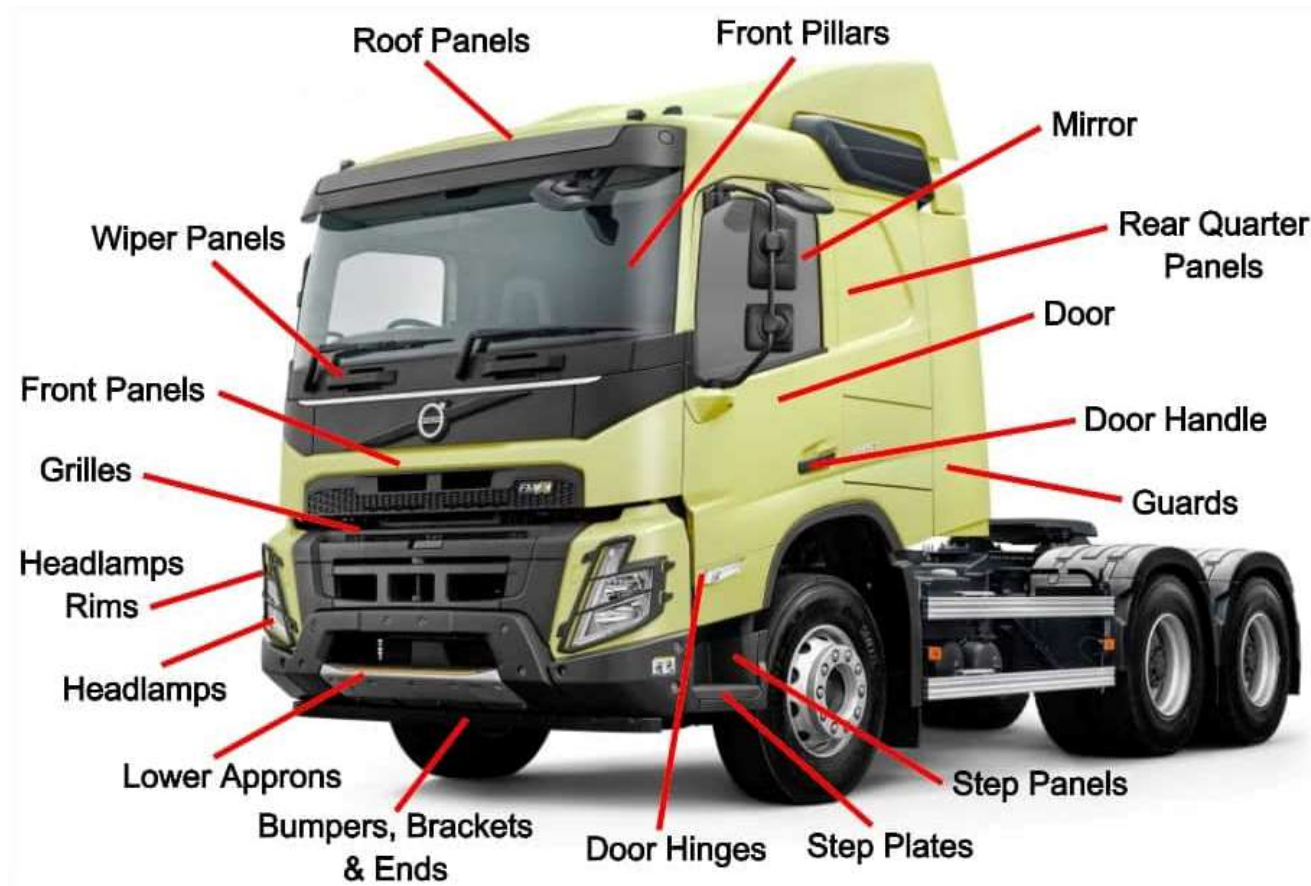
WHAT STANDS FOR CARGO?

COMPONENTI PER AUTOCARRI (rimorchi) COMPONENTS FOR TRUCKS (trailers)



SCAR PRODUCT RANGE SPECIALIST FOR TRUCK

WHAT STANDS FOR CARGO?



SCAR BRAND - INNOVATION & DEVELOPMENT



RECA Group
Conference 2023



Chemicals

TURNOVER
FORECAST
2023
% FORECAST
SHARE OF
TURNOVER

5.824.706,79 €
13,04%
Gp 65,9%



Spare parts and accessories for Trucks & Trailers

4.582.561,55 €
10,26%
Gp 61,45%



Lightings and Bulbs

4.416.870,06 €
9,89%
Gp 68,30%



Hand Tools and Trolleys

TURNOVER
FORECAST 2023
% FORECAST
SHARE OF
TURNOVER

2.530.368,24 €
5,70%
Gp 59,70%



Slings and Lashing Systems

1.392.270,59 €
3,10%
Gp 50,10%



Truck and roads Signs

1.358.298,09 €
3,00%
Gp 61,40%

45% SHARE ON OUR PRODUCT RANGE

24.10.2023

BRAND SCAR – INNOVATION FOR ENVIROMENT

RECA Group
Conference 2023



SCAR GREEN PRODUCTS ---- 21 articles

TOTAL TURNOVER FROM JANUARY 2021 UNTIL SEPTEMBER 2023:

165.000 euro

SCAR – INNOVATION FOR ENVIROMENT FUTURE PROJECTS

- **100% BIODEGRADABLE DETERGENTS FOR VEHICLES AND SURFACES- NEW RANGE OF PRODUCTS (JANUARY 2024)**
- **SCAR ECOLABEL HANDWASH PRODUCTS (MARCH 2024)**



BRAND SCAR – TOP 20 SELLING ITEMS OTT 22 – SET 23 TURNOVER AND % GP



RECA Group
Conference 2023

891100150	BRAKE CLEAN SPRAY 500 ml	266.311,44 €	60,79
------------------	---------------------------------	---------------------	--------------



080105000	STANDARD LASHING SYSTEM SINGLE HOOK 2.000 DAN	245.495,18 €	38,82
------------------	--	---------------------	--------------



891100101	SCAR SBLOCK ANTIRUST SPRAY 400 ml	203.556,77 €	70,39
------------------	--	---------------------	--------------



890501025	BICOMPONENT DETERGENG SCAR CLEAR 25 kg	188.820,82 €	65,18
------------------	---	---------------------	--------------



080100036	ERGONOMIC LASHING SYSTEM SINGLE HOOK 2.500 DAN	156.020,04 €	37,94
------------------	---	---------------------	--------------



BRAND SCAR – TOP 20 SELLING ITEMS OTT 22 – SET 23 TURNOVER AND % GP



RECA Group
Conference 2023

080076110	CLAMPING BAR 1880-2850 mm	135.197,80 €	36,93
------------------	----------------------------------	---------------------	--------------



720000170	KIT 2 PCS BULB SCARLED 24V H7	132.993,06 €	49,55
------------------	--------------------------------------	---------------------	--------------



891100145	SCAR UNLOCKING ALL IN ONE MULTI 10 SPRAY 400 ml	124.090,53 €	69,34
------------------	--	---------------------	--------------



720000160	KIT 2 PCS BULB SCARLED 12V H7	112.280,50 €	55,25
------------------	--------------------------------------	---------------------	--------------



890502025	BICOMPONENT DETERGENT SCARCLEAR LIGHT 25 kg	111.454,38 €	69,81
------------------	--	---------------------	--------------



BRAND SCAR – TOP 20 SELLING ITEMS OTT 22 – SET 23 TURNOVER AND % GP



RECA Group
Conference 2023

720001007 SCARBULB PREMIUM H7 24V - 70W	105.330,69 €	74,70
--	---------------------	--------------



890504025 BICOMPONENT DETERGENT SCAR SHINE 25 kg	104.785,50 €	64,12
---	---------------------	--------------



013640014 DOUBLE SPIRAL ADAPTER 15/7 POLES 24 V	95.551,80 €	56,49
--	--------------------	--------------



891120101 SCAR LUBRICANT LUBRY SPRAY 400 ml	84.328,87 €	68,34
--	--------------------	--------------



890907000 SCAR BRAKE CLEAN 20 l	74.194,46 €	51,10
--	--------------------	--------------



BRAND SCAR – TOP 20 SELLING ITEMS OTT 22 – SET 23 TURNOVER AND % GP



RECA Group
Conference 2023

890990005 MONOCOMPONENT DETERGENT SCAR TRUCK SHAMPOO 25 kg	70.365,52 €	69,63
---	--------------------	--------------



890525303 SCAR WINTER WINDSCREEN WASHER FLUID NEW DE FROST 25 l	66.632,87 €	67,14
--	--------------------	--------------



025011051 MANUAL ASSORTMENT KIT SCARTOOLS	64.178,67 €	47,52
--	--------------------	--------------



008849000 TACHOGRAPHS DISC 125 FBM	63.296,50 €	59,67
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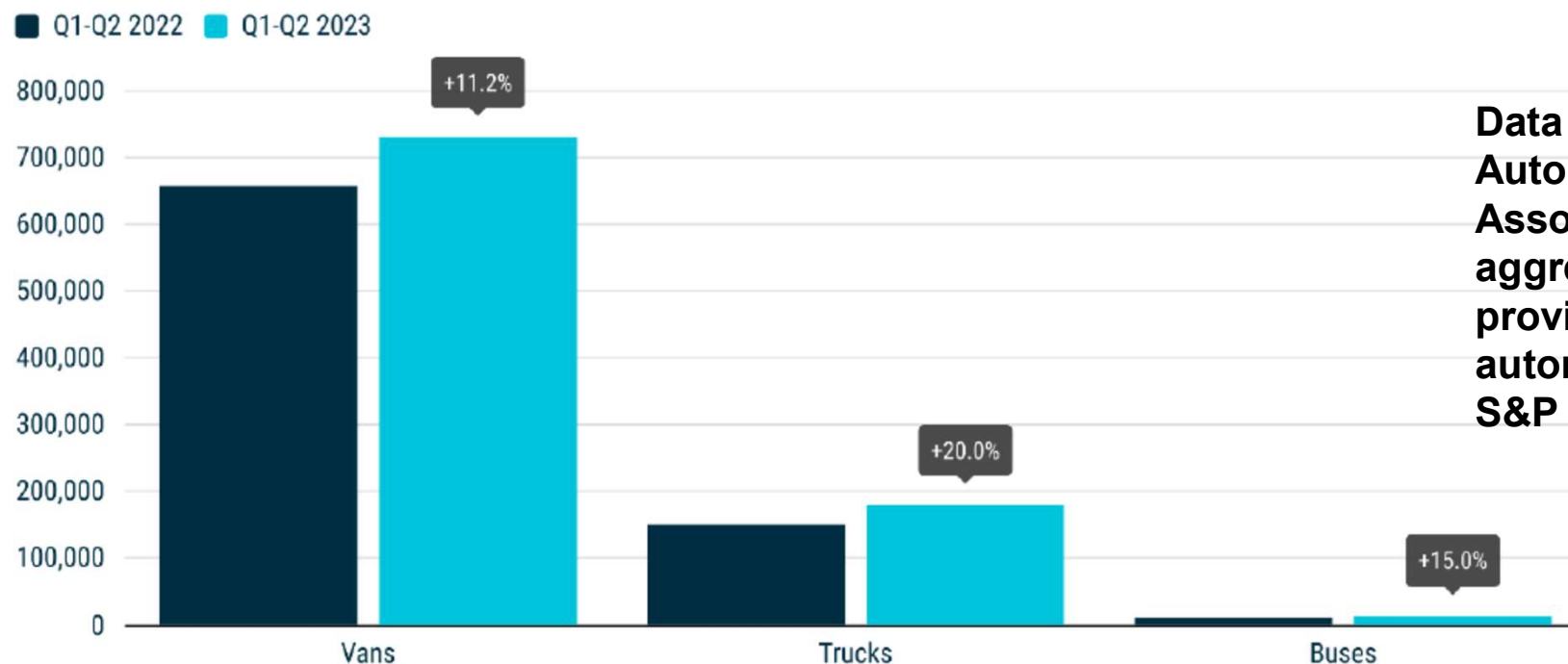
721110028 OSRAM BULB H7 24V - 70W	62.157,25 €	62,59
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Entwicklung BU Automotive – CARGO MARKET

1ST HALF 2023 - EU

New commercial vehicle registrations: vans +11.2%, trucks +20%, buses +15% in the first half of 2023



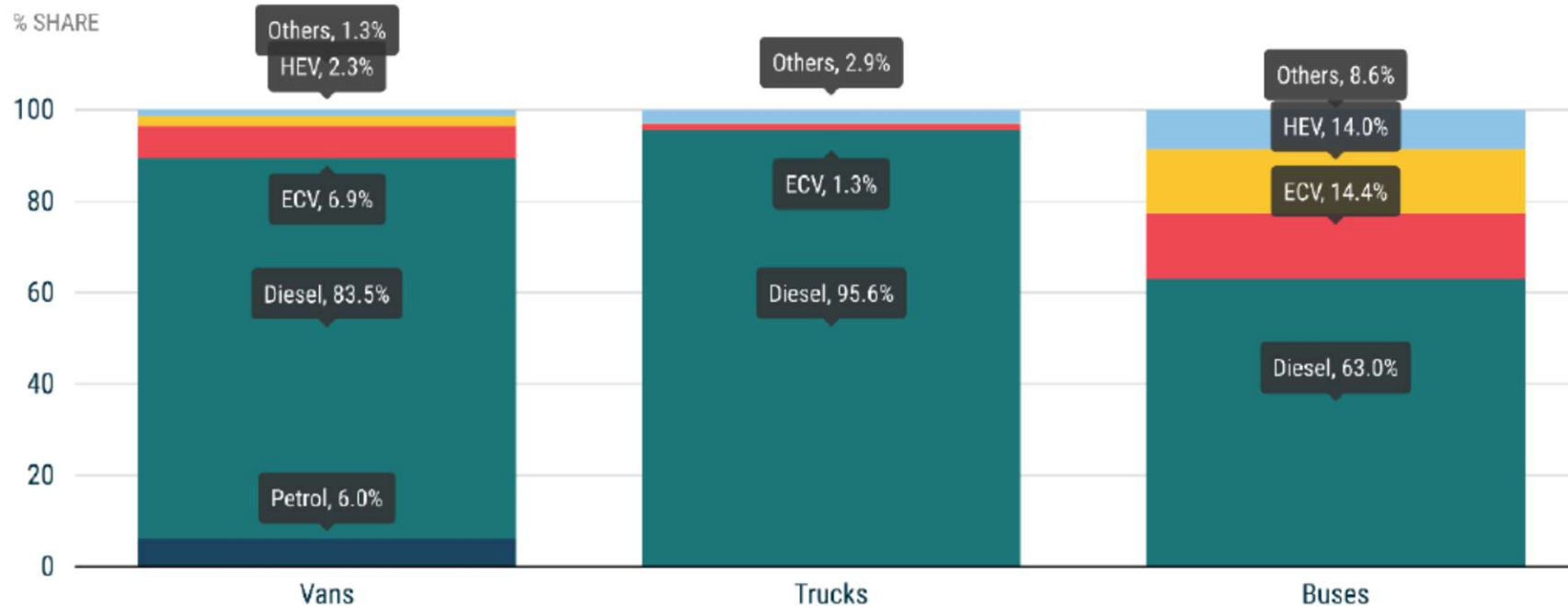
Data source: the European Automobile Manufacturers' Association (ACEA), based on aggregated data provided by the national automobile associations and S&P Global Mobility.

Entwicklung BU Automotive – CARGO MARKET

1ST HALF 2023 - EU

FUEL TYPES OF NEW COMMERCIAL VEHICLES

■ Petrol ■ Diesel ■ Electrically chargeable ■ Hybrid electric ■ Others



Country	2020	2021	% change 21/17	Average age (in years)	Average market potential (1.500€ x vehicle)
Austria	541.695	577.996	19,2%	6,6	866.994.000
Belgium	984.143	1.016.561	14,0%	13,1	1.524.841.500
Croatia	206.371	218.852	28,9%	14,3	328.278.000
Czech Republic	801.744	817.799	6,5%	17,9	1.226.698.500
Denmark	427.048	425.178	-4,9%	7,5	637.767.000
France	6.958.207	6.990.128	1,1%	9,2	10.485.192.000
Germany	4.027.249	4.186.564	15,7%	9,7	6.279.846.000
Greece	1.175.188	1.197.913	7,0%	22,7	1.796.869.500
Hungary	596.846	615.240	14,9%	12,8	922.860.000
Ireland	451.379	459.437	6,8%	10,5	689.155.500
Italy	5.310.460	5.379.323	5,9%	19,0	8.068.984.500
Netherlands	1.198.422	1.224.508	9,2%	9,9	1.836.762.000
Poland	4.123.693	4.266.352	13,6%	13,1	6.399.528.000
Portugal	1.291.000	1.302.300	4,9%	15,6	1.953.450.000
Romania	1.252.079	1.242.369	21,2%	18,6	1.863.553.500
Slovakia	354.824	377.483	9,3%	15,6	566.224.500
Slovenia	131.387	135.303	17,6%	9,7	202.954.500
Spain	4.455.776	4.531.120	8,6%	14,3	6.796.680.000
Sweden	693.402	704.816	8,0%		1.057.224.000
EU	35.966.336	36.678.769	8,5%	14,2	55.018.153.500
Norway	632.430	639.149	5,3%	12,0	958.723.500
Switzerland	487.327	496.924	11,6%	9,8	745.386.000
UK	5.949.323	6.145.475	23,2%	11,0	9.218.212.500



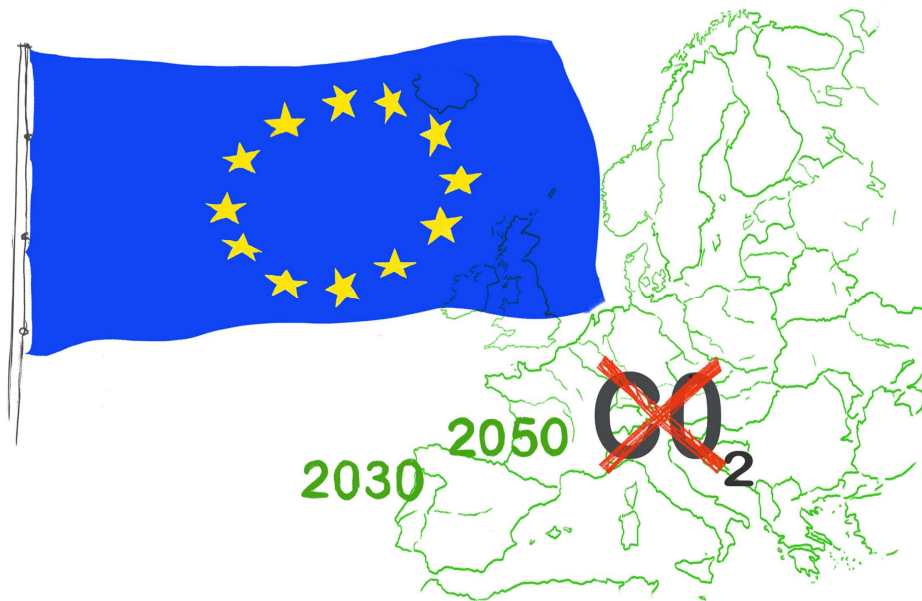
EU MARKET: commercial vehicles in use / circulation

=> 96,4% run on Diesel

ACEA
European Automobile Manufacturers' Association

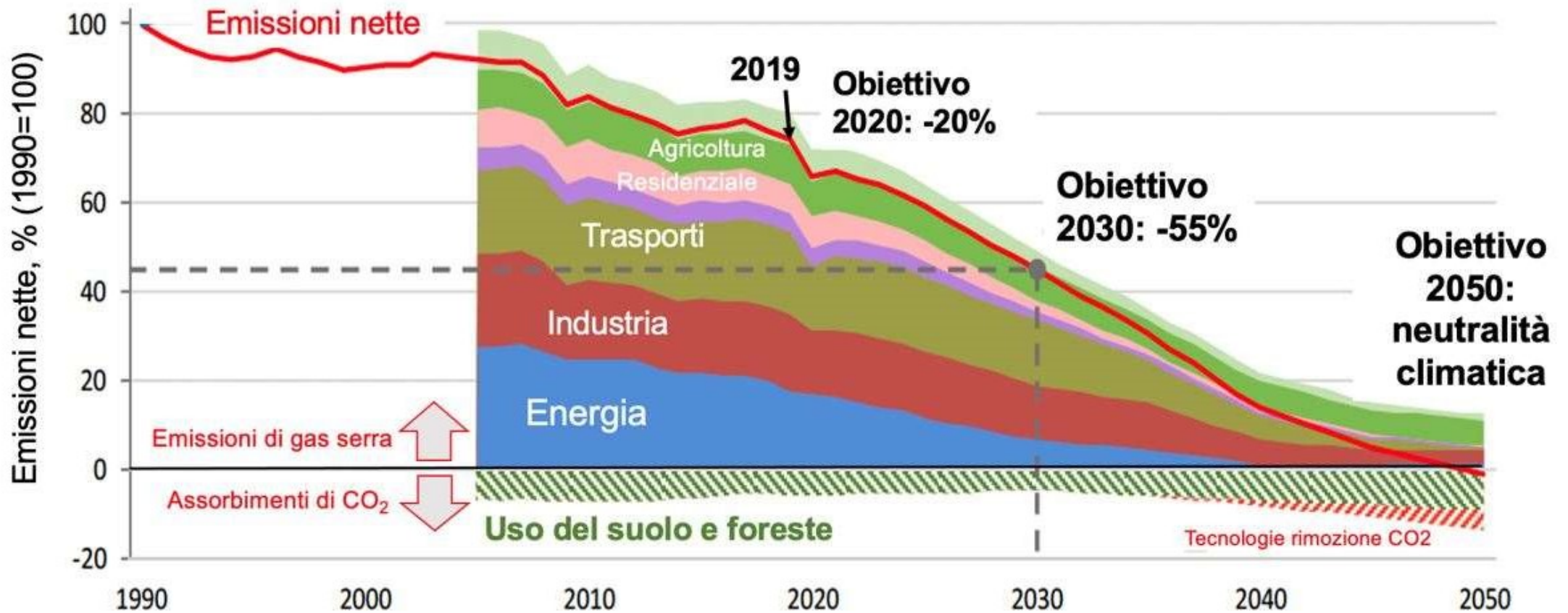
Entwicklung BU Automotive – CARGO MARKET

CO2 EMISSION REDUCTION EUROPEAN COMMISSION => „FIT FOR 55%“



Entwicklung BU Automotive – CARGO MARKET

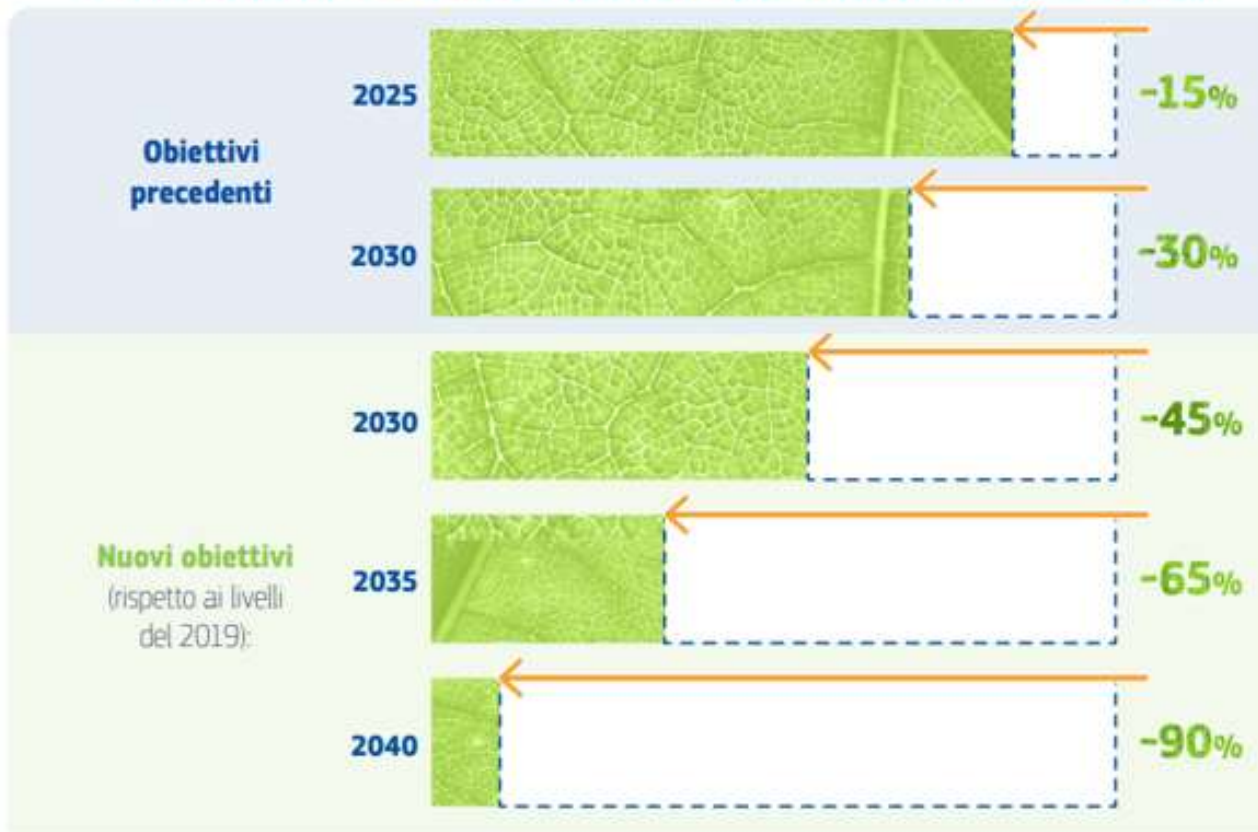
CO2 EMISSION REDUCTION EUROPEAN COMMISSION => „FIT FOR 55%“



Entwicklung BU Automotive – CARGO MARKET

CO2 EMISSION REDUCTION EUROPEAN COMMISSION => „FIT FOR 55%“

Obiettivi di riduzione delle emissioni di CO2 dei veicoli pesanti secondo la normativa attuale e secondo la proposta della Commissione europea



CO₂

Entwicklung BU Automotive – CARGO MARKET





RECA Group
Conference 2023

CO2 EMISSION REDUCTION EUROPEAN COMMISSION => „FIT FOR 55%“

Focus Italia mercato veicoli commerciali e industriali - H1 2023

Normativa europea

Riduzione delle emissioni di CO2: i target proposti per i veicoli pesanti

	2020	2025	2030	2035	2040
			urbani 100% elettrici		
		- 15% sui livelli 2019	- 45% sui livelli 2019	- 65% sui livelli 2019	- 90% sui livelli 2019

Proposta di regolamento del Parlamento europeo e del Consiglio che modifica il regolamento (UE) 2019/1242 per rafforzare i livelli di prestazione in materia di emissioni di CO₂ dei veicoli pesanti nuovi e integrare gli obblighi di comunicazione, e abroga il regolamento (UE) 2018/956

Proposte ANFIA per l'iter di codecisione tra la Commissione, il Parlamento europeo e il Consiglio Ambiente:

- Valorizzare il contributo dei carburanti rinnovabili (CO₂ Neutral Fuels) e il loro contributo al raggiungimento degli obiettivi di riduzione attraverso l'introduzione nella normativa del CCF- carbon correction factor
- Rivedere gli obiettivi di riduzione → -30% al 2030, -50% al 2035, -70% al 2040 per gli HDV e 80% per i bus urbani elettrici
- Differenziare gli obiettivi di riduzione per le nuove classi inserite nella regolamentazione con baseline al 2025

Entwicklung BU Automotive – CARGO MARKET

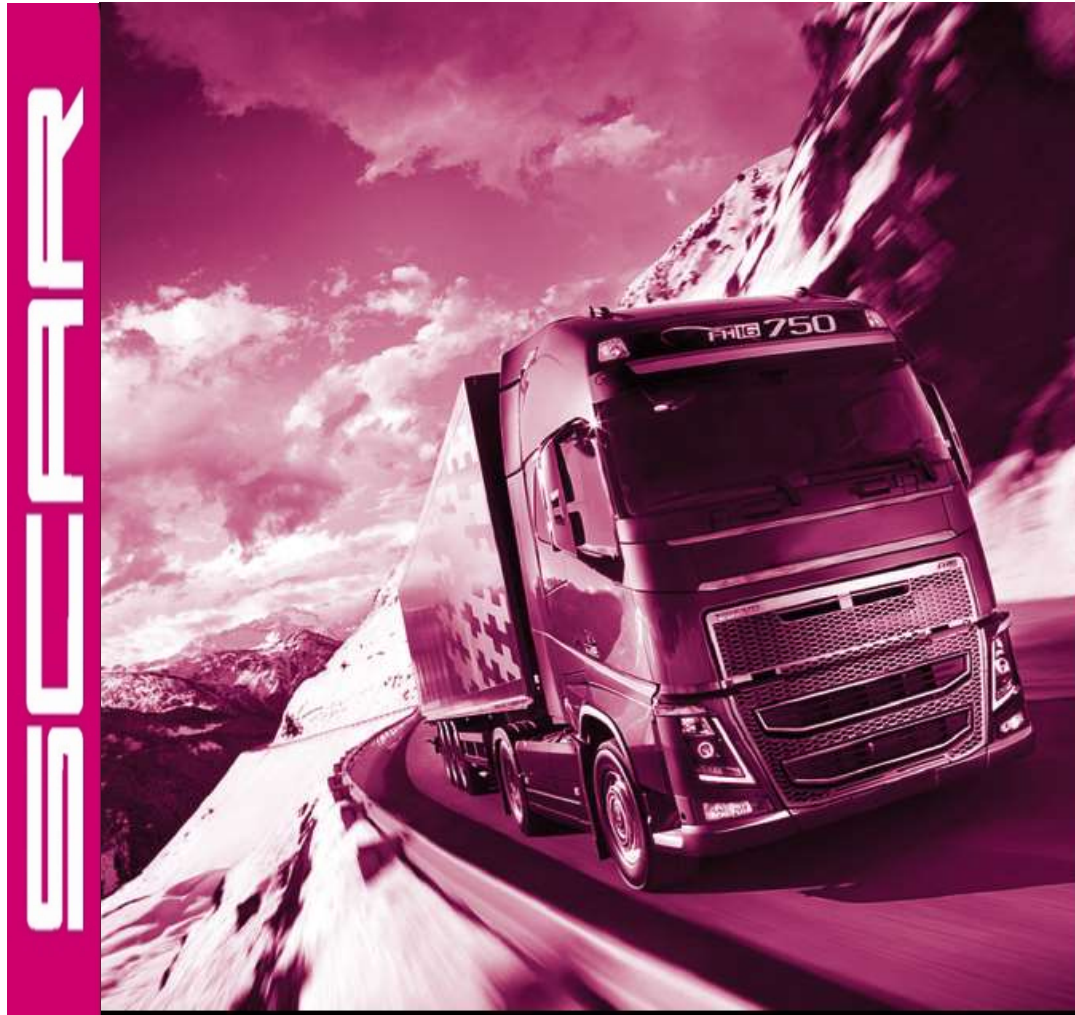
OUR CHALLENGE: WHAT FUTURE?

The future of the automotive market will be challenging....
but it will also be a great opportunity! 😊

POSSIBLE SOLUTIONS?

- **Innovation of products and services**
- **Maintenance of electric/hybrids vehicles (products / strategy)**
- **Agreement with Brands and Associations**
- **Key Account structure / strategy**
- **Digital services & systems to customers
(customers warehouse management, e-Commerce, Systems, etc.)**

Entwicklung BU Automotive – CARGO MARKET



THANK YOU

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Verkaufsaktion 2023 / Sales campaign



RECA Group
Conference 2023

1. Muster Starter Set Protect / Sample Starter Set Protect
2. Sonderaktion Protect / Special action Protect
3. Protect Broschüre als offene Datei / Protect brochure as file
4. Protect Broschüre / Protect brochure

Fragen – Anregungen / Questions - Suggestions



SUMMARY

Kunden / Customers

Positionen / Positions

Systeme / Systems

Potential / Potential

Produkte / Products



THANK YOU!