
PACCAR

Disclosure Regarding Forward-Looking Statements

This presentation may contain statements that are forward looking. These statements are based on current expectations and assumptions that are subject to risks and uncertainties, which may cause actual results to differ materially. A summary of risks and uncertainties is described in more detail in our periodic reports filed with the Securities and Exchange Commission (SEC).

We undertake no duty to update or revise this presentation, whether as a result of new information, future events or otherwise. For the most recent financial, risk and other information about PACCAR, please see our SEC filings and most recent earnings release available on the Investor Relations page of www.paccar.com.

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PACCAR

A Global Technology Company in Commercial Vehicles

2025 Revenues \$28.4B

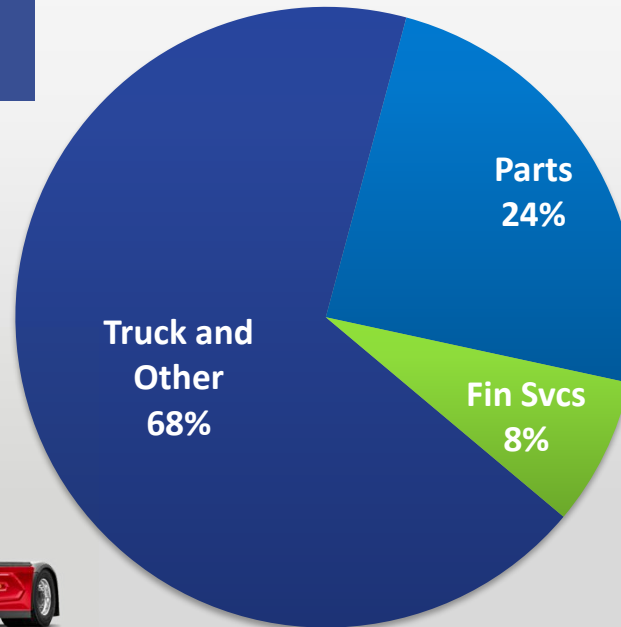
2025 Net Income \$2.4B

2025 Avg Dividend Yield 2.7%

87 Years of Consecutive Profitability; Dividend Paid Every Year Since 1941

Truck and Other \$19.4B Revenues

Premium Quality Light, Medium, and Heavy Commercial Vehicles, Diesel and Alternative Fuel Powertrains



Aftermarket Parts \$6.9B Revenues

Distribute Aftermarket Parts through Global Network of 2,400 Dealerships



Financial Services \$2.2B Revenues

Finance and leasing portfolio of 226,000 trucks and trailers, with assets of \$22.8B



Our Vision

PACCAR is creating trucks and transportation solutions that drive the world's future. Our focus is on doing things in an ethical and disciplined manner. We make decisions utilizing conservative financial principles and common sense for the long-term benefit of our customers, employees, and shareholders.

Quality

Highest
Integrity

Operational
Excellence

Conservative
Financial
Management

Long-Term
Perspective



PACCAR Inc

PACCAR's business segments include Commercial Vehicles, Powertrain, Aftermarket Parts, Financial Services, and Information Technology. PACCAR's premium brands Kenworth, Peterbilt, and DAF are the premier light, medium, and heavy duty commercial trucks in their markets. Other brands include PACCAR Powertrain, PACCAR Parts, PACCAR Financial, and PACCAR Leasing.



PACCAR MEXICO

PACCAR
INFORMATION
TECHNOLOGY

LEYLAND TRUCKS

PACCAR POWERTRAIN

PACCAR
Australia



PACCAR
INNOVATION CENTER

PACCAR PARTS

PACCAR FINANCIAL

DYNACRAFT
A PACCAR COMPANY



Kenworth W990



Kenworth's W990 long-hood blends classic styling with contemporary aerodynamics, electronics, and cab architecture.



New Peterbilt Model 589

Peterbilt's new Model 589 Class 8 truck features a new 2.1-meter-wide cab with advanced driver technology and a new digital display.



Peterbilt and Kenworth Medium Duty



The latest medium duty product line-up features an 8" wider cab with 3-person seating. Powered by the updated PACCAR PX engine and PACCAR TX-8 automatic transmission.



Innovative DAF XB, XD, XF, XG, XG+

DAF is the first truck manufacturer in the industry to have taken full advantage of Europe's new regulations governing truck design. The new trucks feature a new aerodynamic design, 13% greater fuel efficiency, and larger interior space.



DAF XF and XD Electric



DAF XF and XD Electric won International Truck of the Year in 2026. The trucks have a range of 200 to 500 kilometers. The impressive range is due to the highly efficient drivelines, in combination with DAF's smart battery management system, which distributes the energy stored in the battery across the driveline and other components for maximum efficiency.

New DAF Truck Models



DAF Electric Lineup – XF, XG, XG+ and XD



DAF XG+ Interior



XF and XG+



XD Vocational

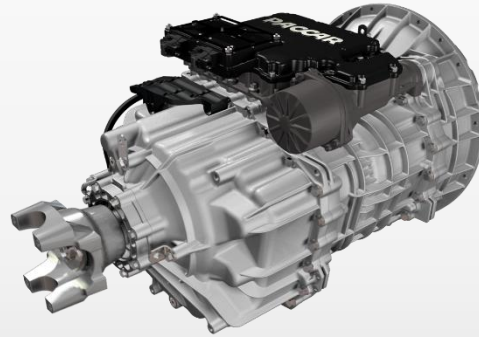
PACCAR POWERTRAIN

The proprietary PACCAR Powertrain is the most advanced heavy-duty powertrain in the market. The PACCAR MX engines are integrated to the PACCAR TX-12 automated transmission and the efficient DX-40 tandem drive axle to achieve exceptional performance and fuel economy.

PACCAR ENGINES



PACCAR engines undergo rigorous validation including one-million mile endurance testing.
MX-13: up to 510 hp and 1,850 lb.-ft. of torque
MX-11: up to 445 hp and 1,700 lb.-ft. of torque



PACCAR TRANSMISSIONS

PACCAR AXLES

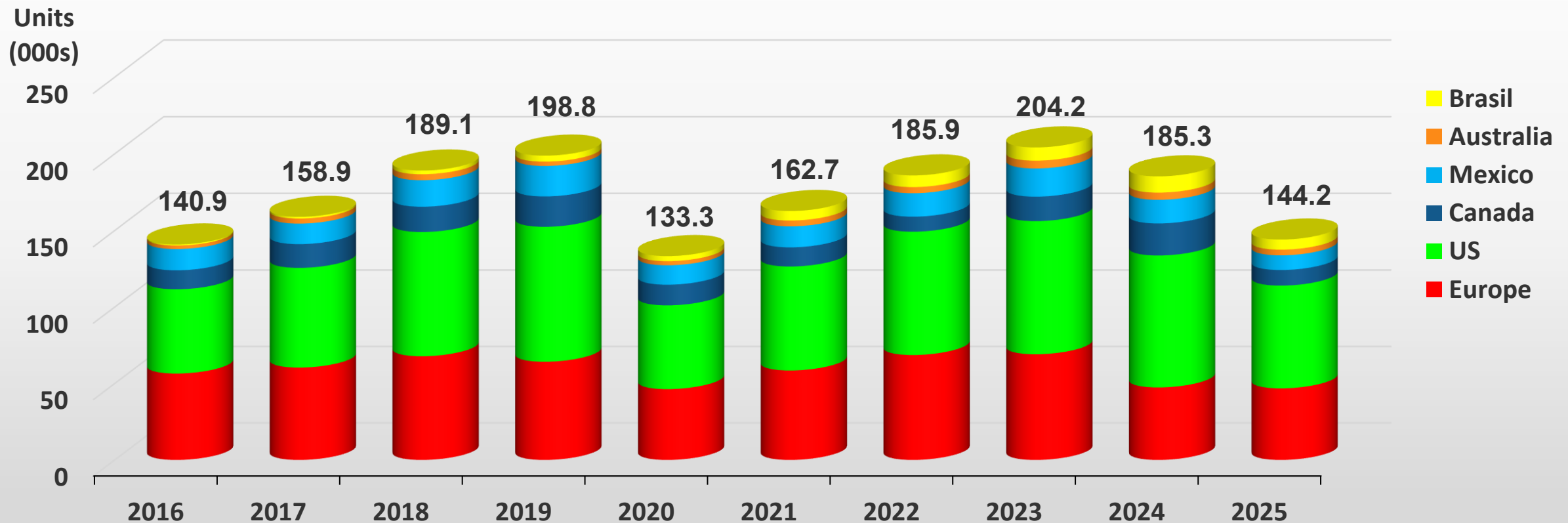


Kenworth and Peterbilt offer the PACCAR FX-20 steer axle in addition to PACCAR DX-40 tandem drive axle. DAF includes a range of lightweight and durable PACCAR front and rear axles.

PACCAR Truck Production

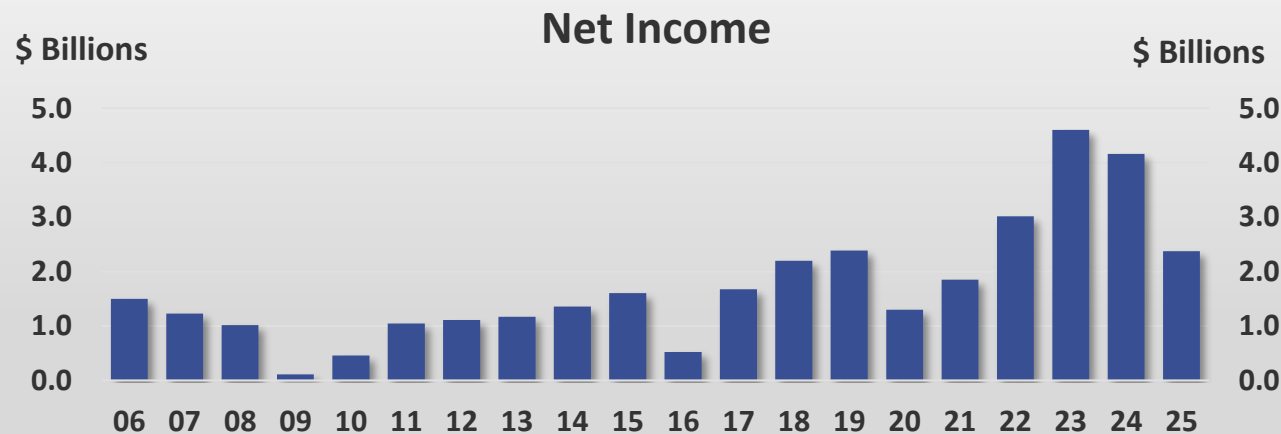
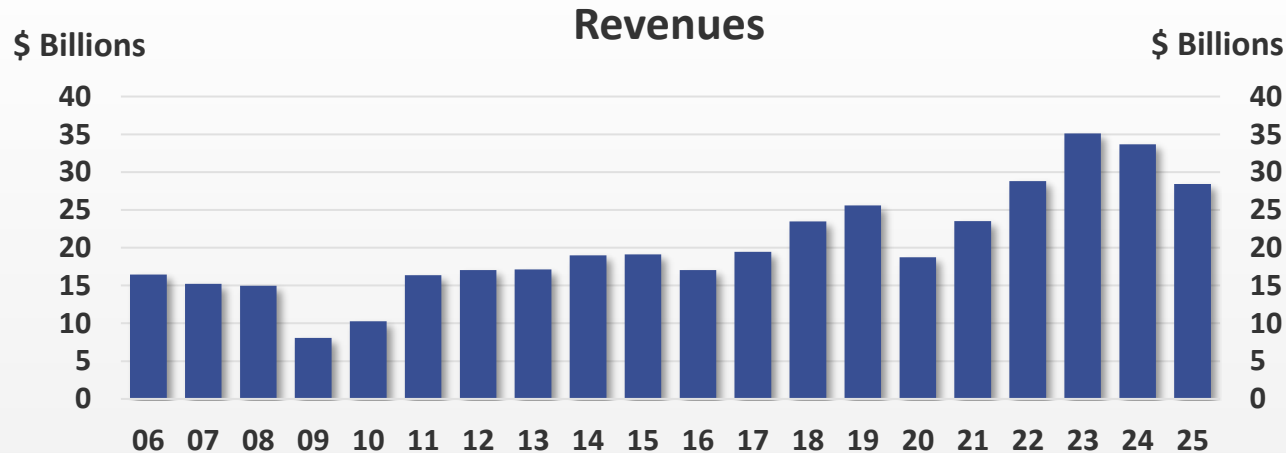
Over 1.7 Million Trucks Produced 2016 - 2025

PACCAR produced 144,200 trucks in 2025



PACCAR

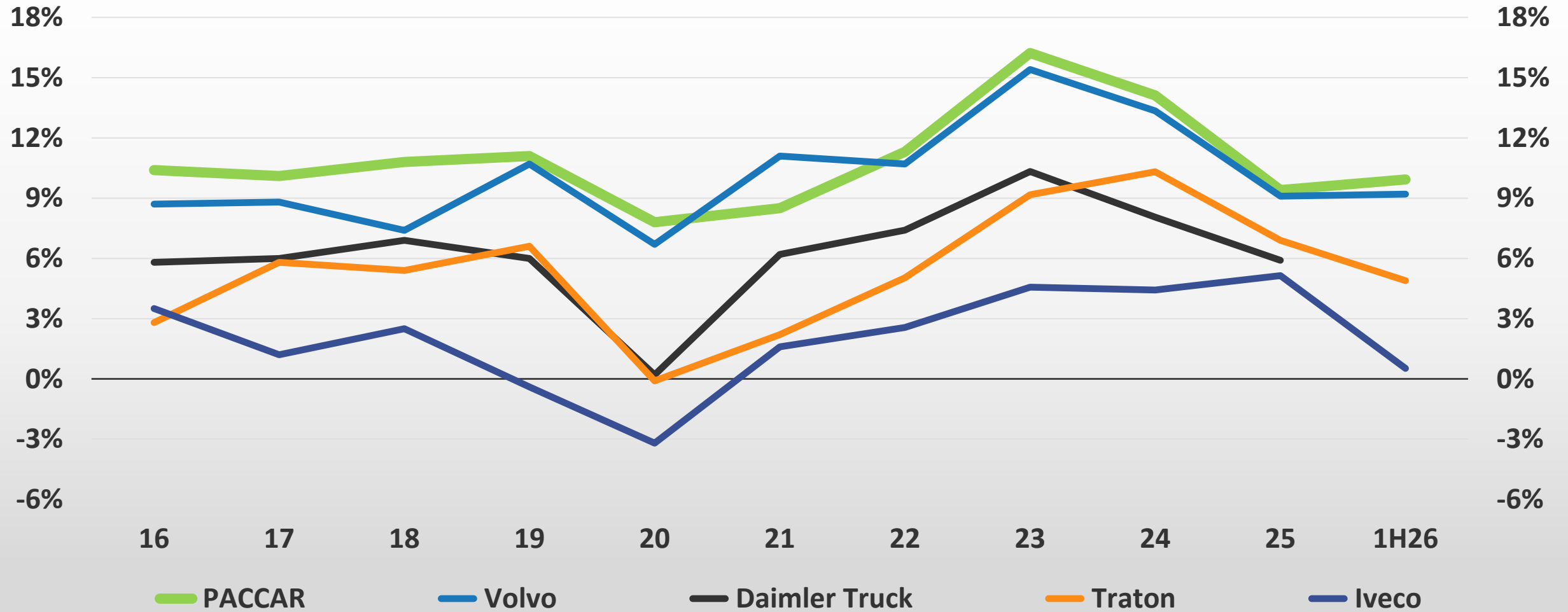
Excellent Financial Performance Throughout the Business Cycle



- Superior operational excellence and premium-quality products and services
- Long-term growth in revenues and net income reflect increased market share, excellent aftermarket parts performance, and growth in financial services
- Profitability throughout the cycle due to strong cost control discipline and experienced management team

Best-in-Class Operating Efficiency

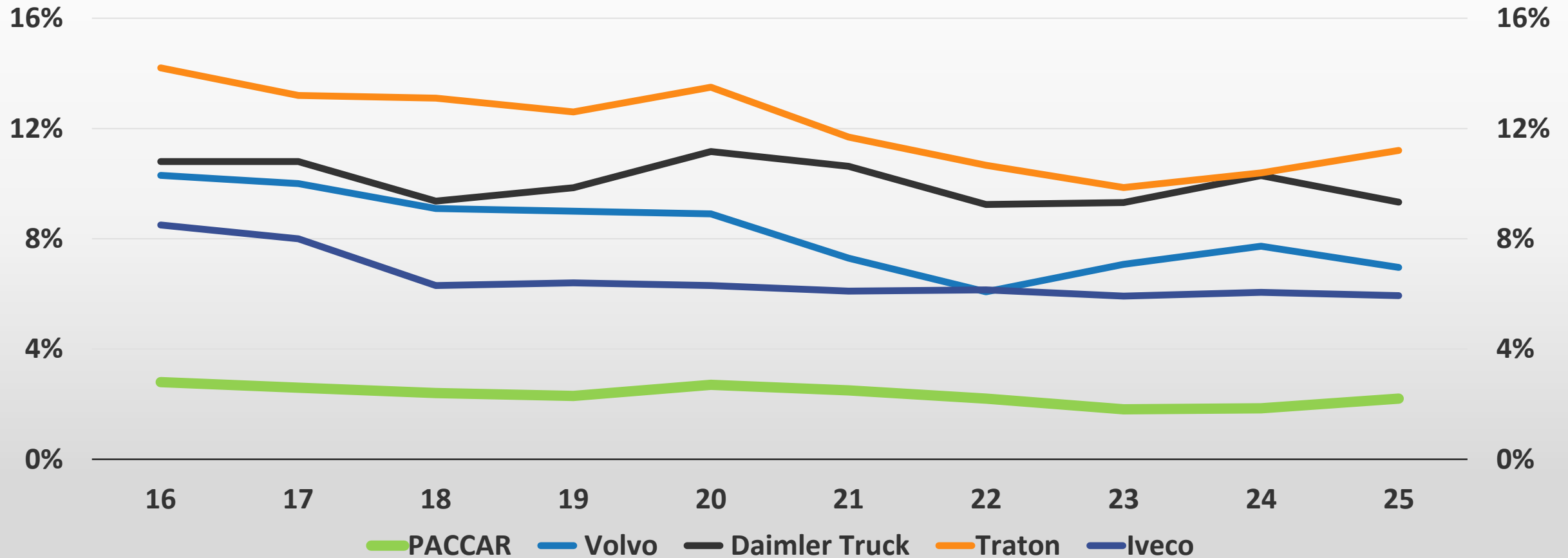
Industry Operating Margin



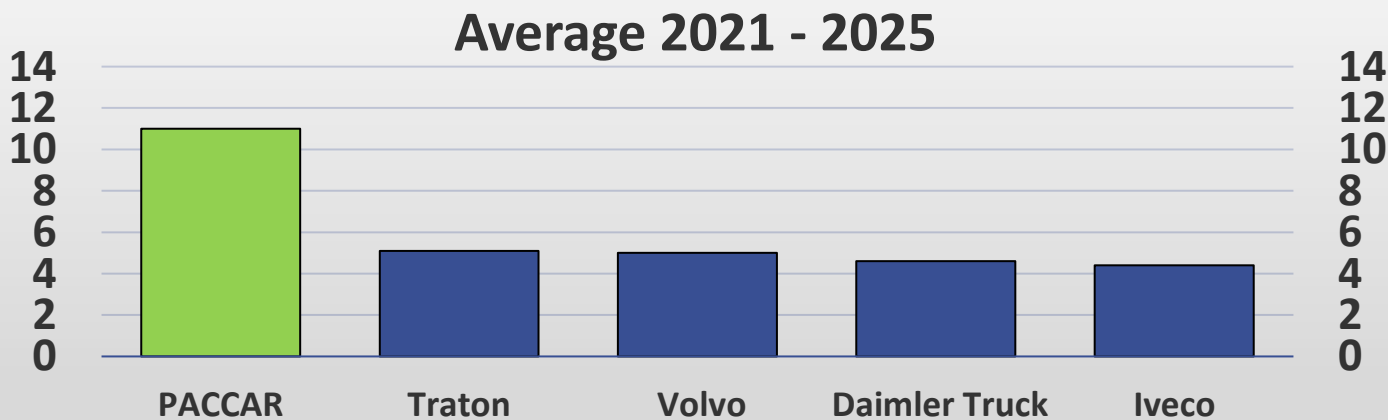
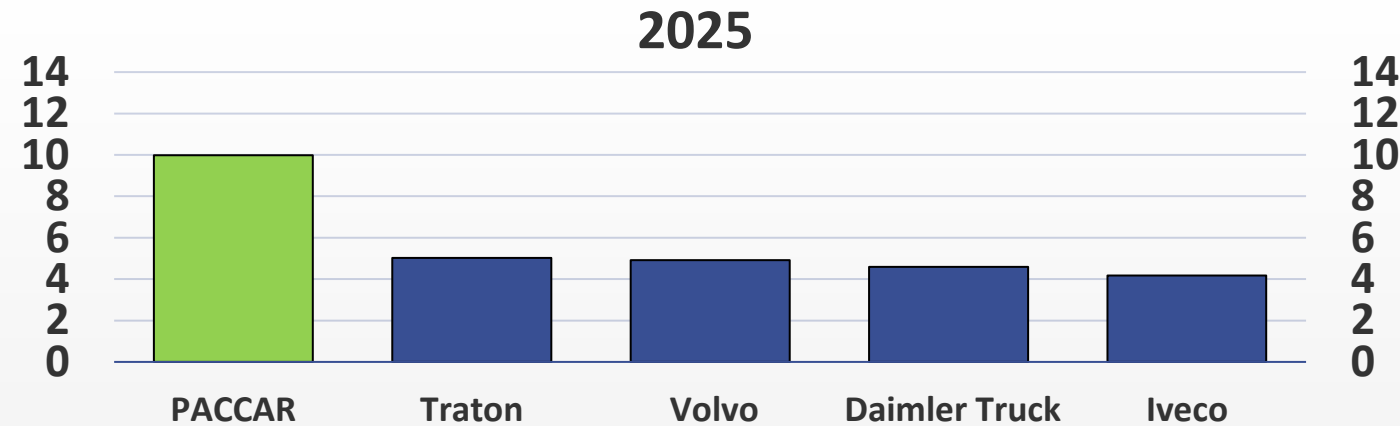
Best-in-Class Operating Efficiency

SG&A % of Sales

PACCAR's SG&A as a percentage of sales is much lower than its peer group, reflecting strong financial discipline and an independent dealer network



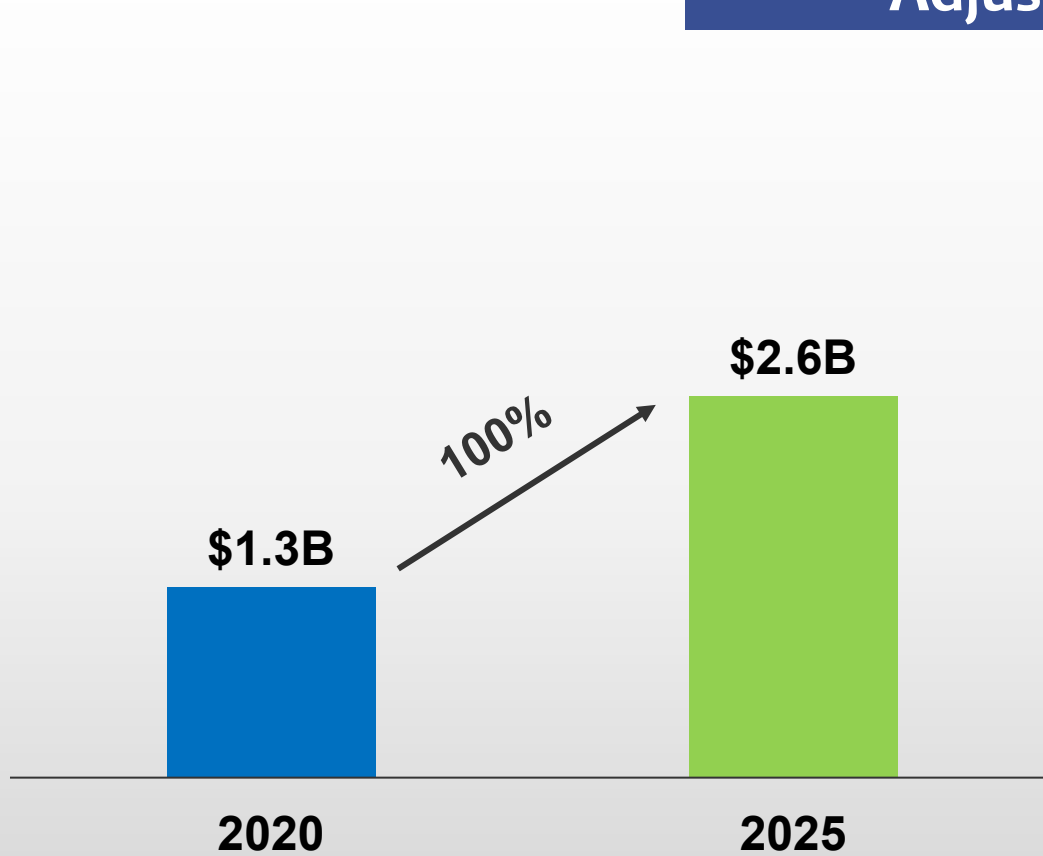
Best-in-Class Inventory Turns



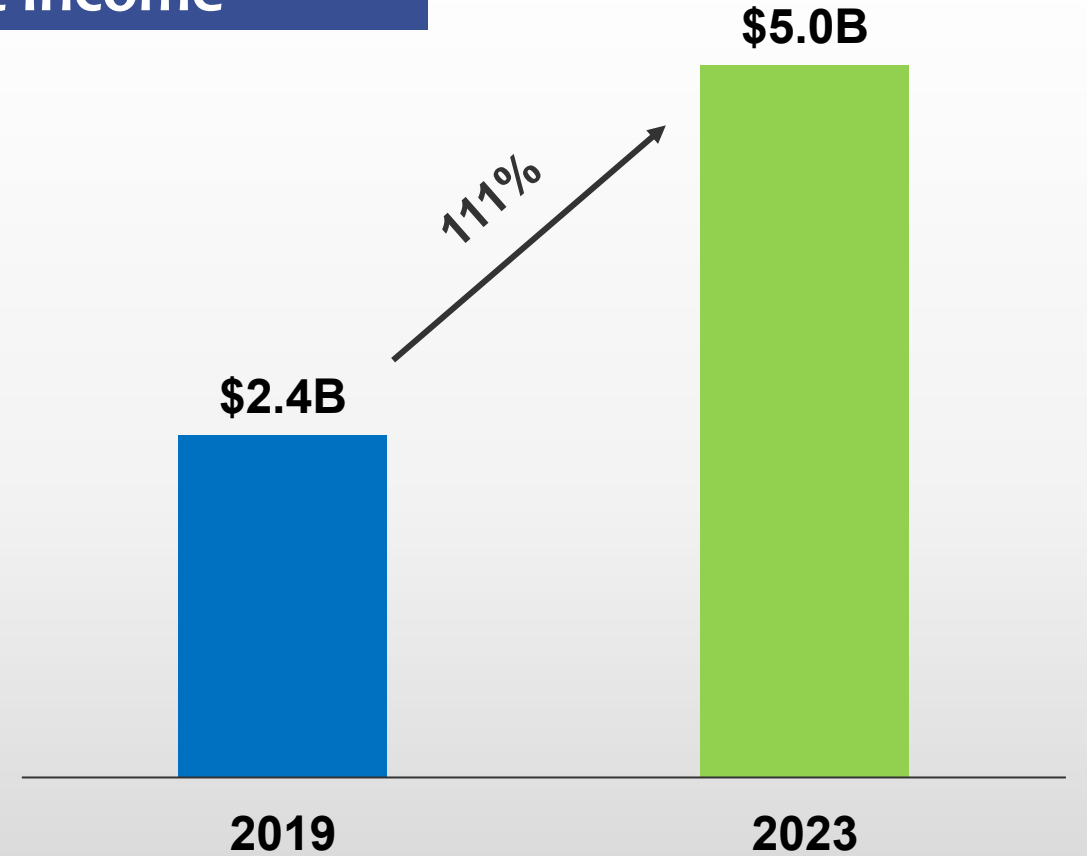
PACCAR's inventory turns are the highest in the industry, a result of the PACCAR Production System, Lean Manufacturing, and Six Sigma.

PACCAR is Structurally Stronger

Adjusted Net Income



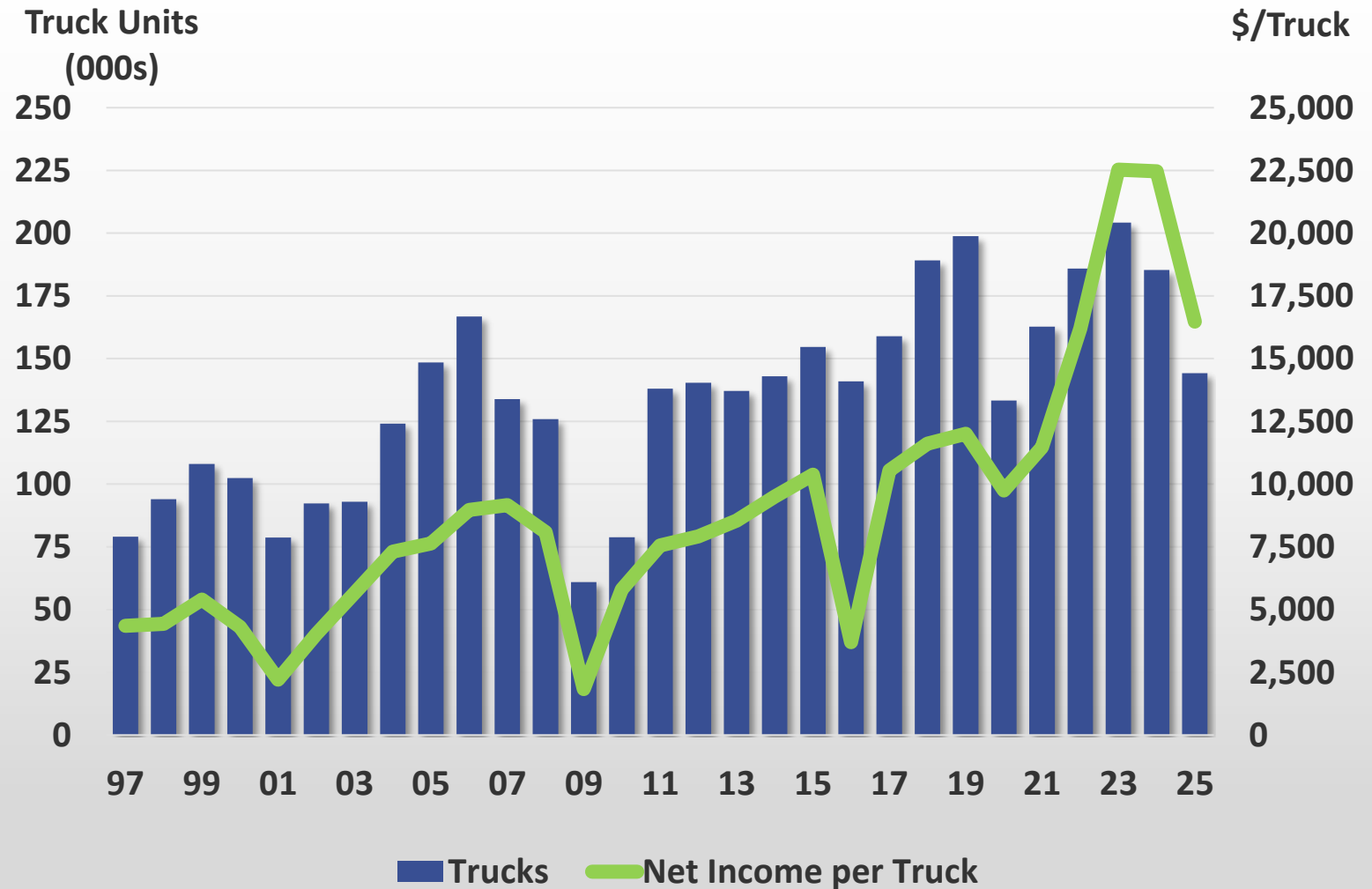
Market Troughs



Market Peaks

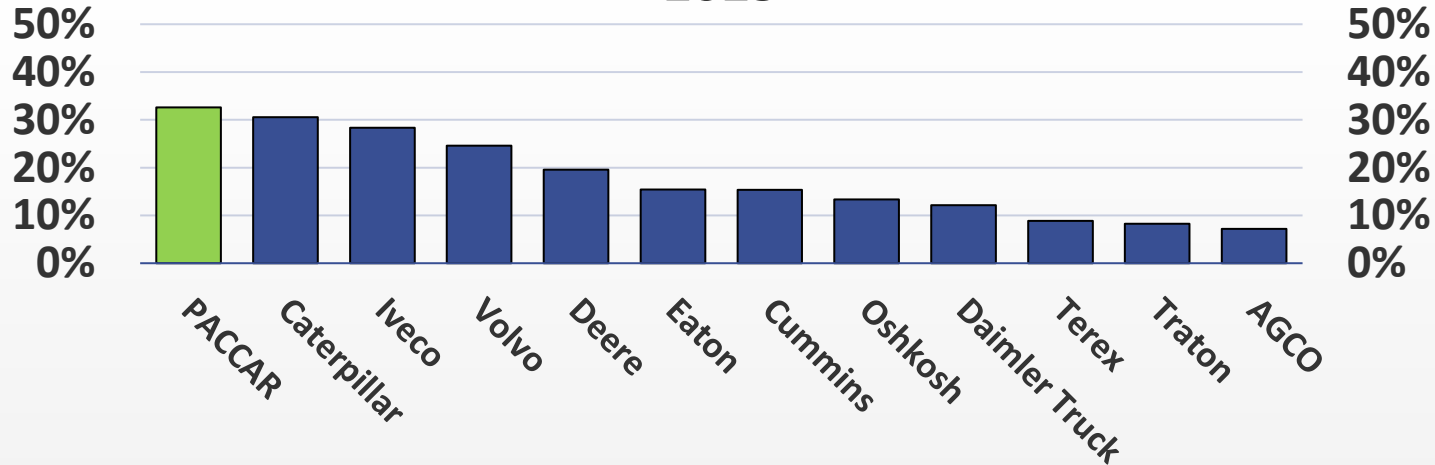
Net Income per Truck

- Net income per truck is PACCAR's net income divided by total truck unit sales.
- Truck sales not only generate profit from the sale, but also parts and finance profit. This illustrates the strength of PACCAR's business model, providing the highest quality trucks, aftermarket support, and financing.
- PACCAR achieved \$16,500 net income per truck in 2025.

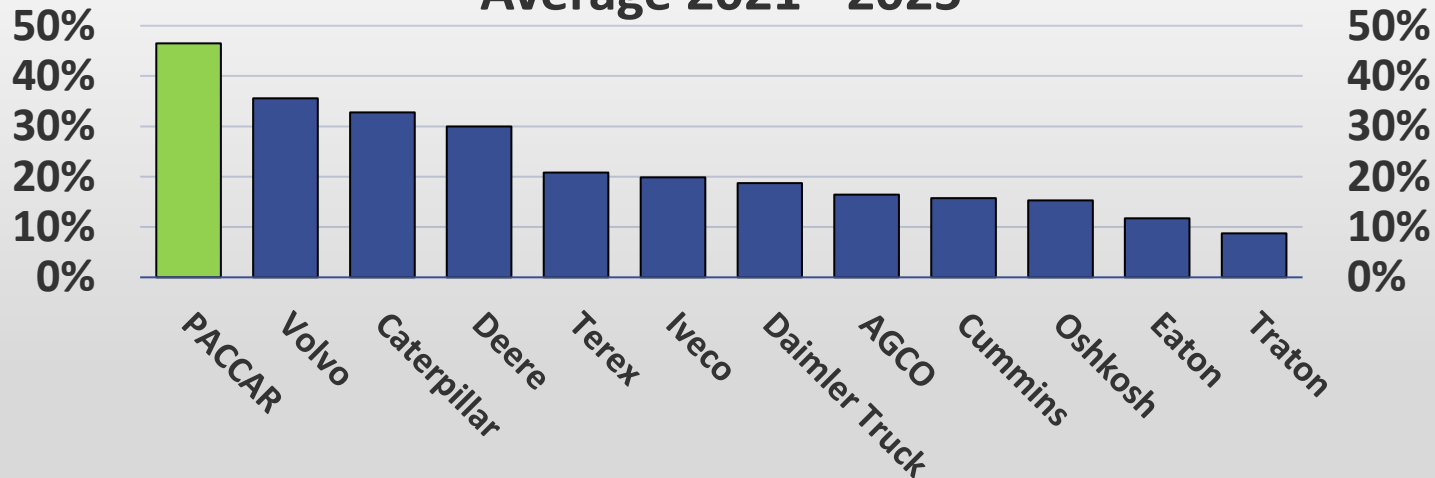


Best-in-Class Return on Invested Capital

2025



Average 2021 - 2025



- 33% ROIC in 2025
- Premium price and strong profitability
- Effective capital allocation process
- Lean operations from PACCAR production system
- Independent dealer network

ROIC = NOPAT/(Equity + Manufacturing Debt + Postemployment Benefit Liabilities- Cash)

Capital Allocation Strategy



- High ROI capital investments
- Pay regular quarterly and annual dividend
 - Dividend paid every year since 1941
 - Total dividends paid approximately 50% of net income for many years
 - Regular quarterly dividend grew 10% year-over-year (as of 4Q25)
- Strategic M&A
 - Disciplined valuation and screening process
 - Clear path to value creation
- No unfunded pension obligation

Optimized Research and Development Strategy

Volumes High

Stable Technology Path

Proprietary Opportunity



BUILD

Volumes Uncertain

Expensive Development



PARTNER

Supplier Volume Leverage

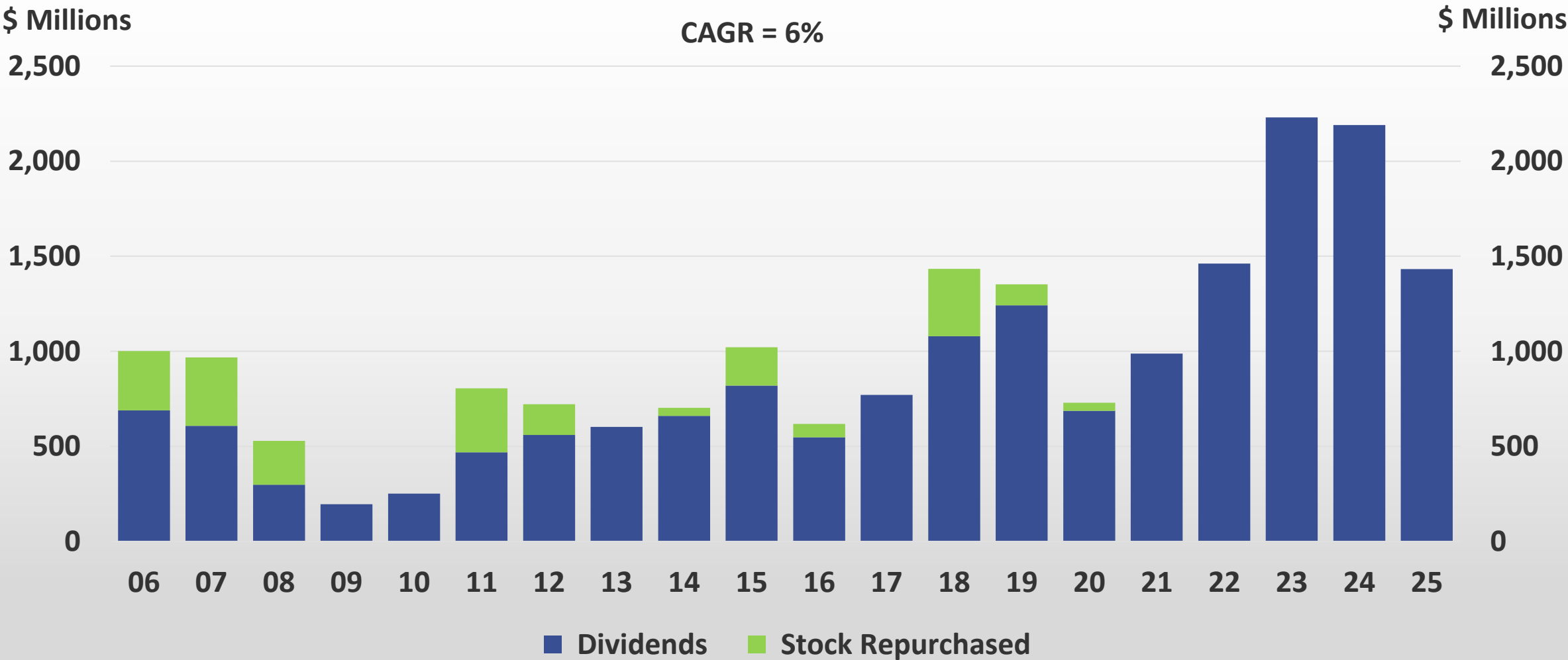
Supplier R&D Expense

Regulatory Uncertainty



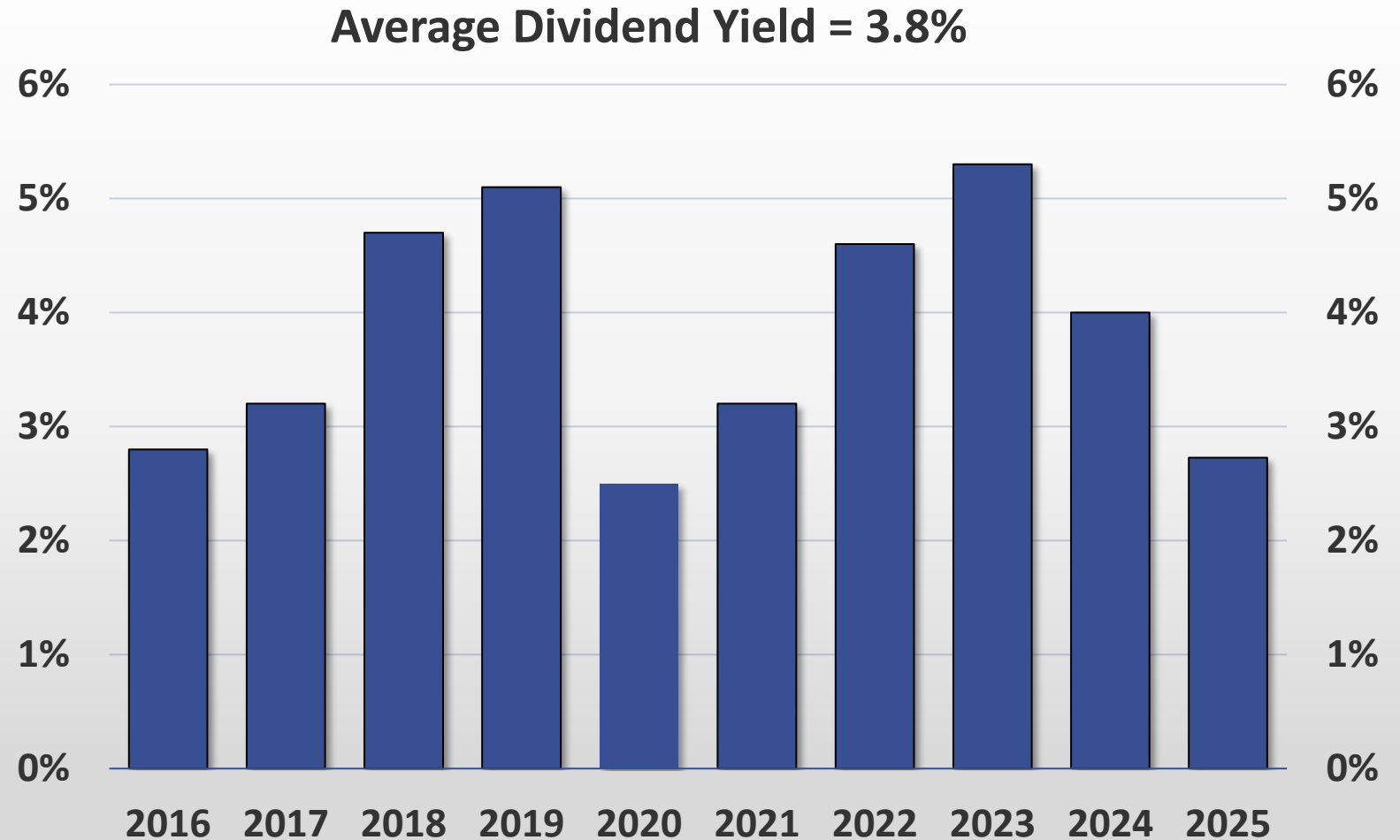
BUY

Dividends Declared and Stock Repurchases



Excellent Dividend Yield

- PACCAR's dividend yield reflects the total quarterly + annual dividends declared in the year, divided by the average stock price for the year
- PACCAR's dividend yield has averaged 3.8% over the last ten years

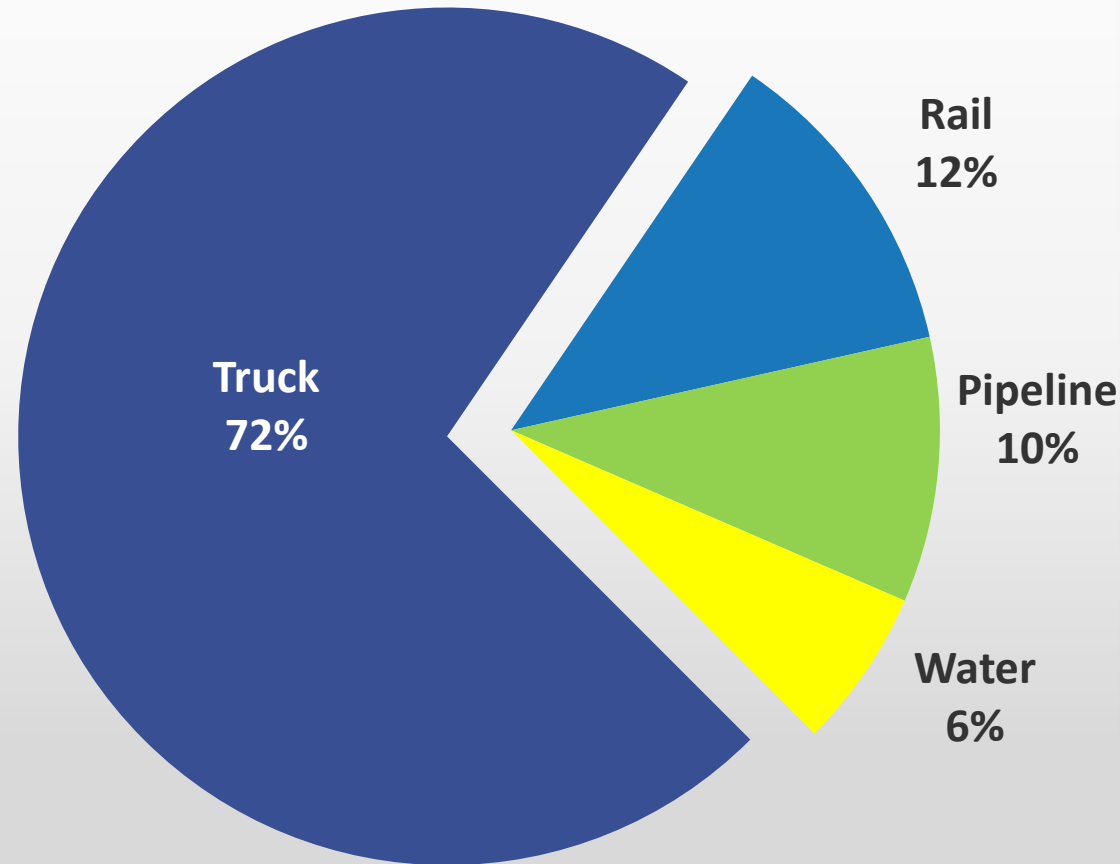


Trucking Moves the Economy

72% of U.S. Freight is Moved by Truck

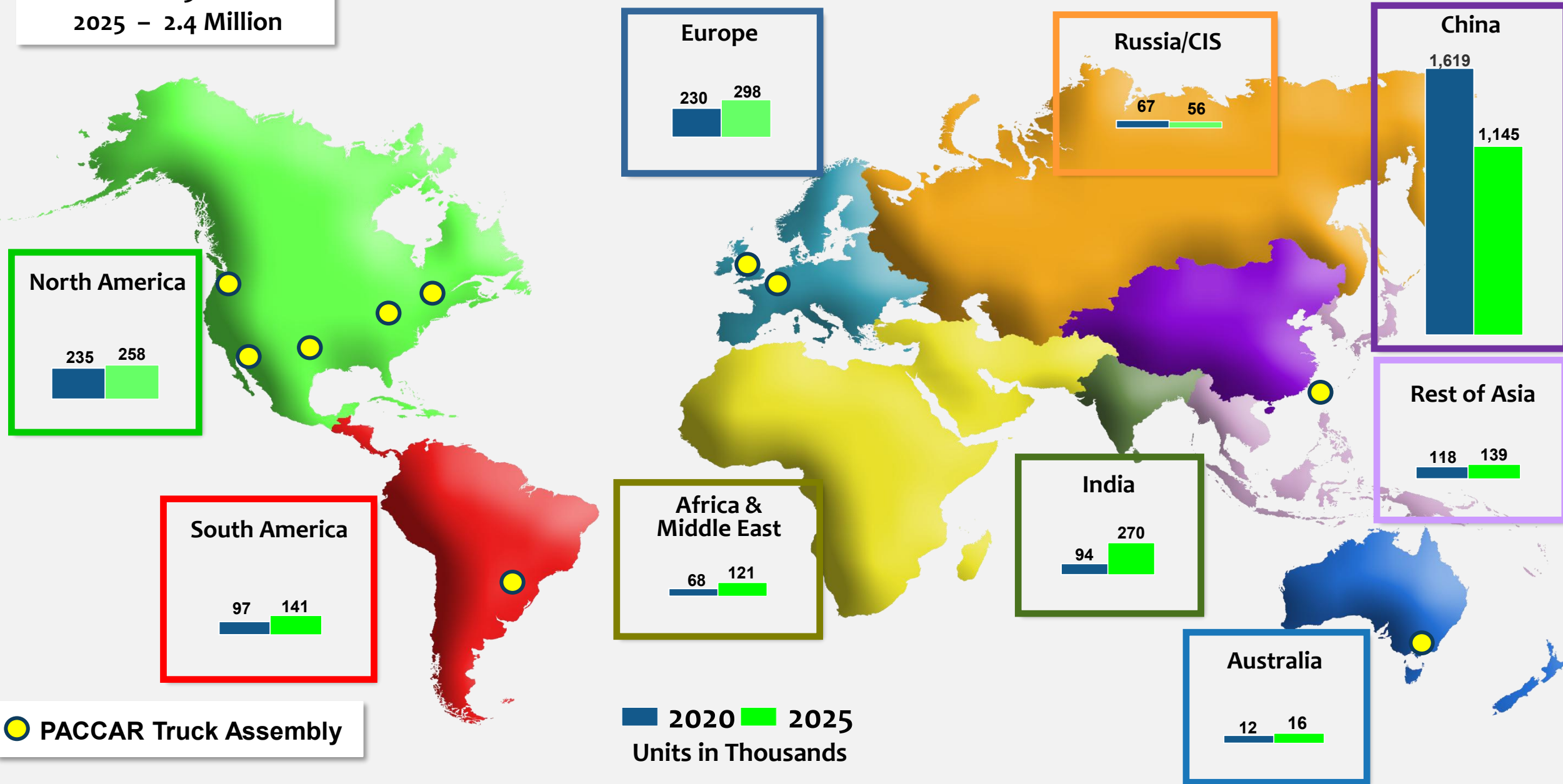
Trucking is the lifeblood of the economy. In the U.S., the economy depends on trucks to deliver ten billion tons of virtually every commodity consumed - 72% of all the freight transported.

38.9 million commercial trucks, including 4.3 million heavy-duty trucks, move that freight. The percentage of tonnage by mode is stable over time.

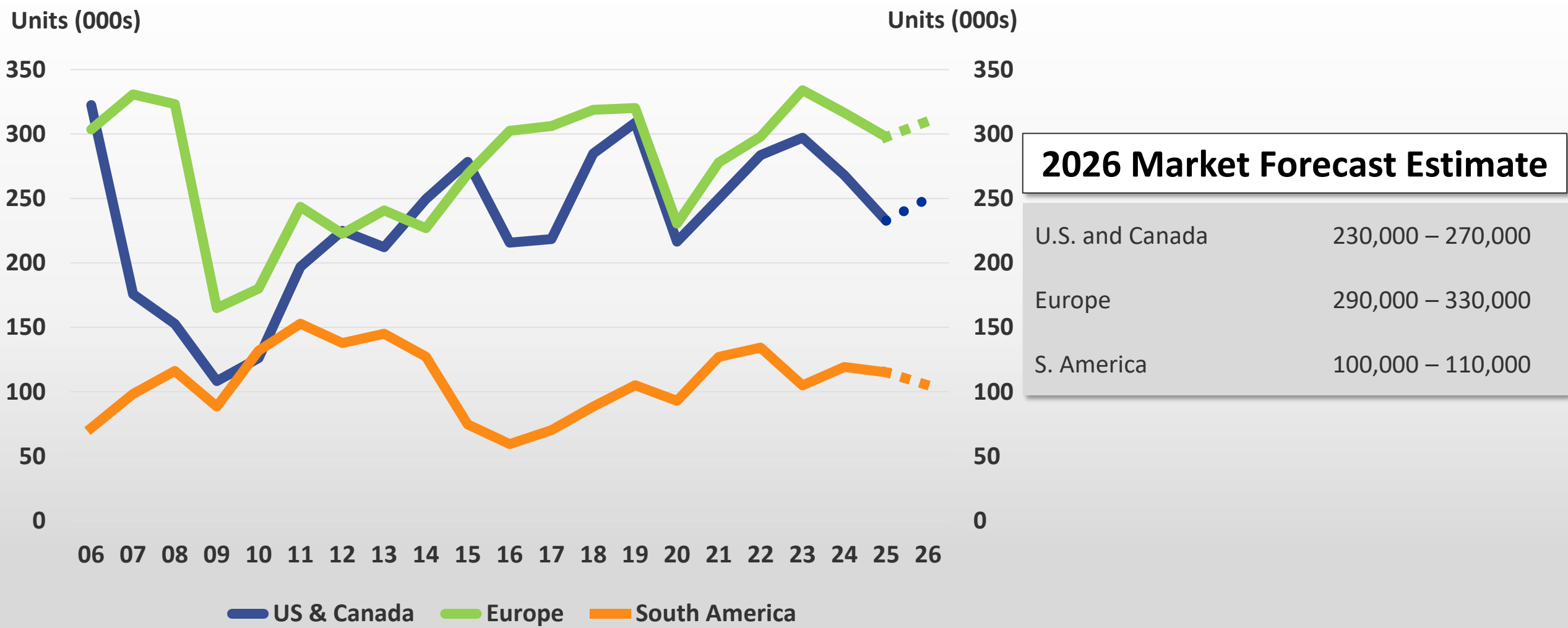


>16t Truck Market
2020 – 2.5 Million
2025 – 2.4 Million

>16t Global Truck Market



>16t Truck Market Size





PACCAR

The PACCAR logo is displayed in a bold, dark gray, sans-serif typeface. The letters are closely spaced, and the 'P' and 'A' are slightly taller than the other characters. The logo is centered within a white rectangular box that has a subtle drop shadow, giving it a three-dimensional appearance against the light gray background.

Strategy

A Culture of Excellence

Profitable Growth

Premium Trucks

Transportation Solutions

Market Expansion

Advanced Manufacturing

Foundation

Quality



Technology



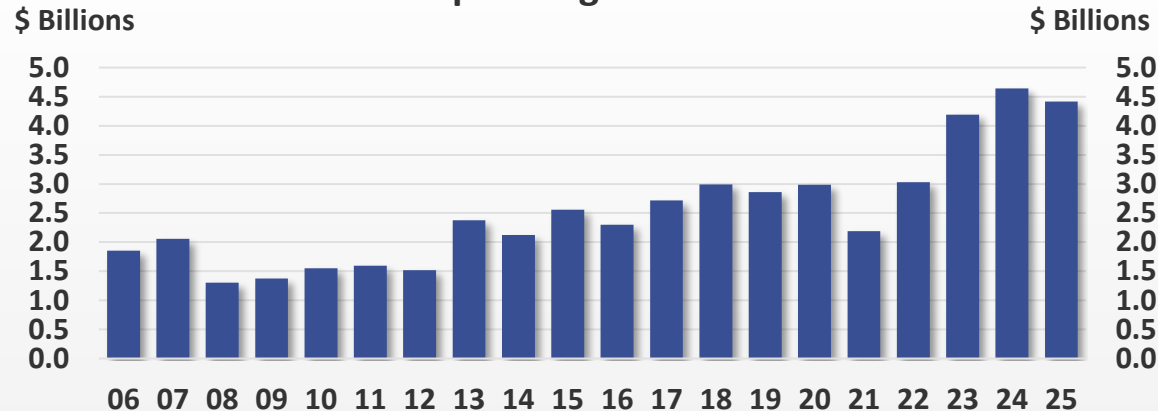
Innovation



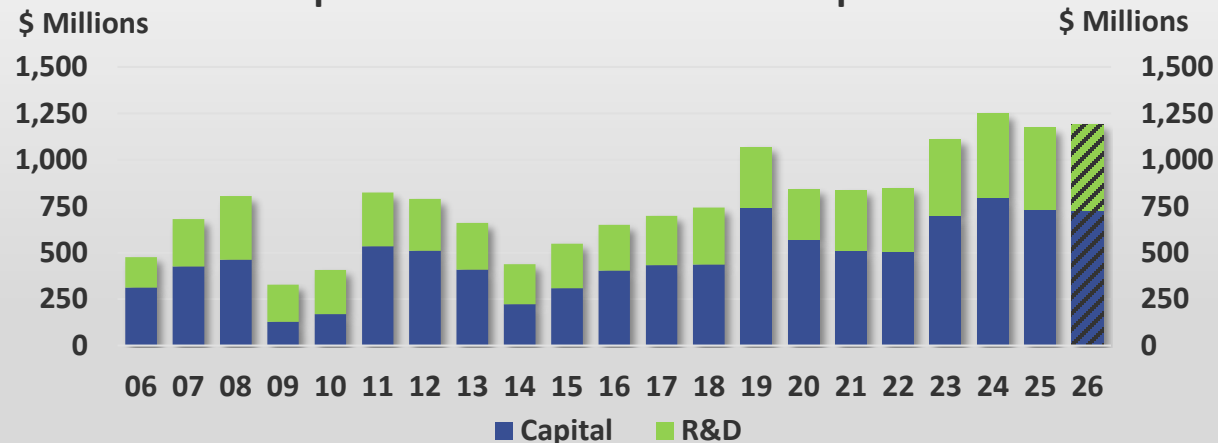
PACCAR

Investing Throughout the Business Cycle

Operating Cash Flow



Capital Investments and R&D Expenses



- Operating cash flow has averaged \$3.7 billion for the last five years and has grown 8% CAGR over the last 20 years
- PACCAR has invested \$9.2 billion in capital projects, new products, and technologies in the last decade ended 2025
- PACCAR partners with suppliers and technology providers to reduce initial investments in speculative technologies
- Key investments:
 - Next generation Kenworth and Peterbilt Class 8 trucks
 - Next generation Kenworth and Peterbilt Class 5-7 trucks
 - Next generation DAF XB, XD, XF, XG and XG+ trucks
 - Integrated powertrains including diesel, battery electric, and hybrid technologies
 - PACCAR MX-13 and MX-11 engine factory in North America
 - Engine remanufacturing facility in Columbus, MS
 - DAF Brasil factory
 - Global factory expansions and enhancements
 - PACCAR Parts distribution centers

Cumulative PACCAR MX Engines Produced

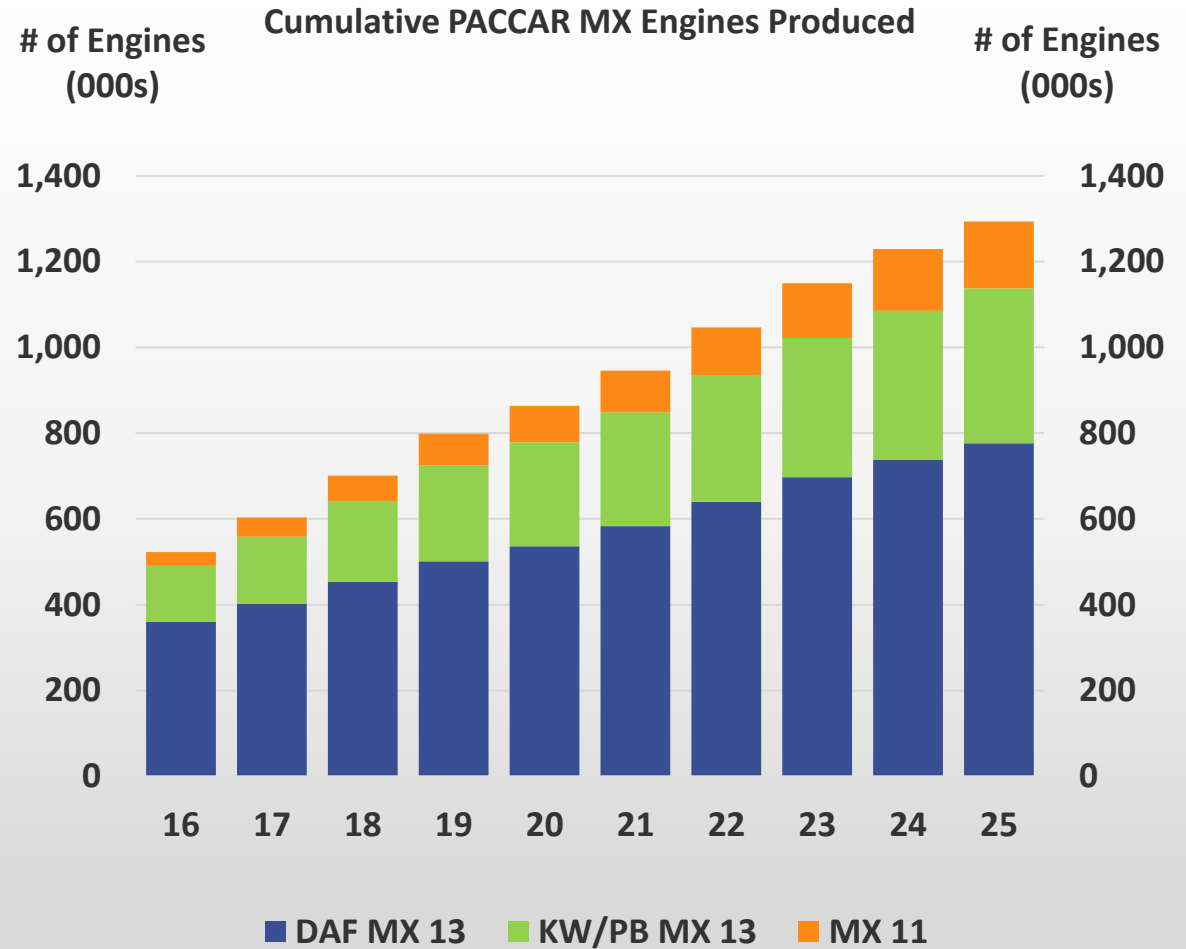
- PACCAR has produced over 776,000 engines in Europe and over 362,000 engines in North America.
- Growing presence in South America and Australia.
- The PACCAR engine factory in Columbus, MS, began operations in 2010 with the North American launch of the flagship MX-13 engine.
- PACCAR expanded its engine program in 2013 with the introduction of the PACCAR MX-11 in Europe. The MX-11 was launched in North America in January 2016.
- PACCAR opened a new engine remanufacturing facility in Columbus, MS, in 2026



PACCAR MX-13
12.9 Liter



PACCAR MX-11
10.8 Liter



PACCAR Zero Emission Truck Lineup



Market Specific Models

PACCAR Batteries Reduce Cost in Multiple Applications



Battery Electric



Fuel Cell Electric



Hybrid Electric



Charger Energy Storage

Level 4 Autonomous Trucking



L4 Autonomy Technology

Maturing Technology Solutions

Expanding Operational Scenarios

Supplier and Service Ecosystem Solidifying



Commercial Traction

Increasing Scale: > 150 Weekly Autonomous Trips

Strong Interest from Carriers and Shippers

Planning Initial Commercial Deployments

No Longer “Always 5 Years Away”

PACCAR is Integral in Autonomous Trucking

Aurora



kodiak



STACK

Multi-Partner Strategy

PACCAR
Autonomous Vehicle
Platform

Advanced Powertrain Controls

Sensor Mounting

Sensor Cleaning Provision

Proprietary Embedded Software

Redundant Thermal System

Redundant Brakes

High Reliability Power Supply

Redundant Steering

Proprietary Vehicle Systems

PACCAR PARTS
A DIVISION OF PACCAR

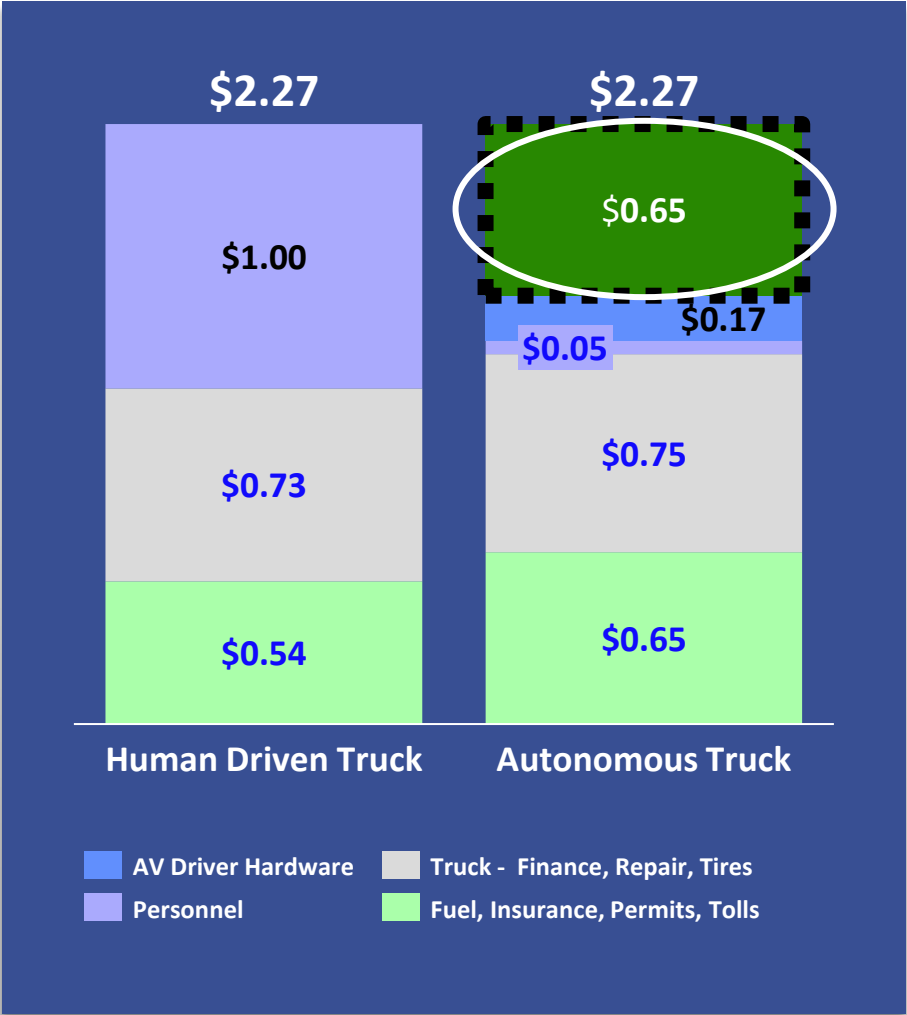


Replacement Parts



Service and Uptime

Autonomy Value Creation and Claims



~\$25B Annual Value Creation

- AV Driver
- PACCAR
- Fleet
- Shipper

Enhances PACCAR Profit Pools

PACCAR Electronics Creates Strong Competitive Advantage



Engine Controller



- PACCAR Electronics addresses the growing importance of electronics within product development
- Electronic systems include new vehicle architecture, safety systems, vehicle controls and switches and connectivity
- PACCAR trucks have approx. 100 control systems with about 100 million lines of code
- Connected trucks are sophisticated and run by software that requires ongoing investment
- Proprietary content creates a strong advantage for PACCAR

Connected Services

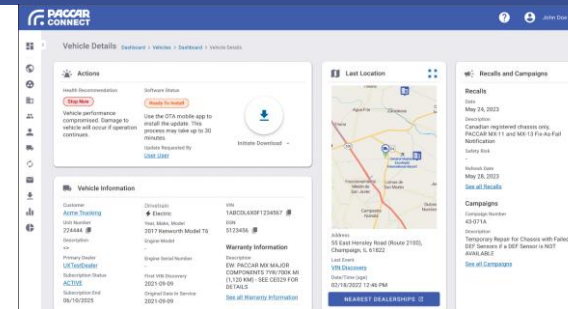
PACCAR Connect is a state-of-the-art global connected truck platform built on proprietary hardware.

It enables:

- Integrated uptime and fleet vehicle insights
- Data-as-a-Service capabilities
- Direct access to transportation and fleet applications
- First-to-market embedded display and transportation marketplace
- Enterprise-grade cybersecurity and over-the-air software updates



Core Services



Data Services



Marketplace Services



Vehicle Services



PACCAR and Platform Science Connected Vehicle Partnership

- PACCAR has made a strategic investment in Platform Science
- PACCAR and Platform Science will collaborate on connected trucks
- PACCAR will integrate Platform Science Virtual Vehicle into Kenworth and Peterbilt trucks
- The solution enables fleets to access telematics, software solutions, real-time data, and third-party applications directly from their vehicles
- Customers will have access to a customizable platform elevating their capabilities to innovate and utilize, manage and deploy digital applications



PACCAR Innovation Center, Sunnyvale, CA



- PACCAR Innovation Center in Silicon Valley enhances PACCAR's access to emerging technologies and talent globally
- The Innovation Center collaborates across PACCAR to develop next generation technologies such as vehicle prognostics
- PACCAR Innovation Center establishes strategic partnerships, such as the autonomous vehicle collaborations with Aurora and Stack AV
- The Innovation Center truck lab is equipped with advanced tools for working with emerging technologies

Artificial Intelligence

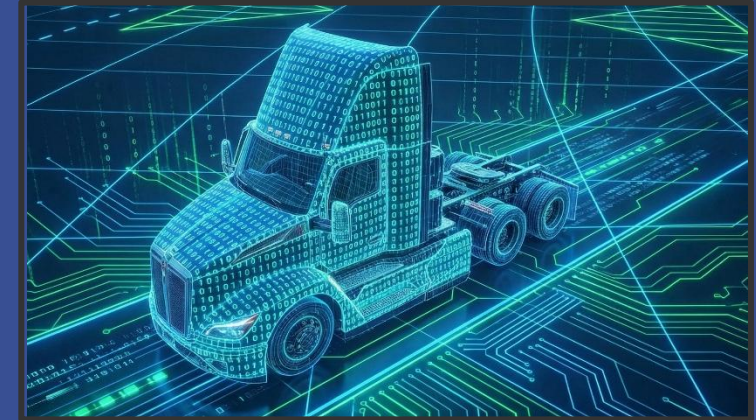
PACCAR Manufacturing



PACCAR Parts



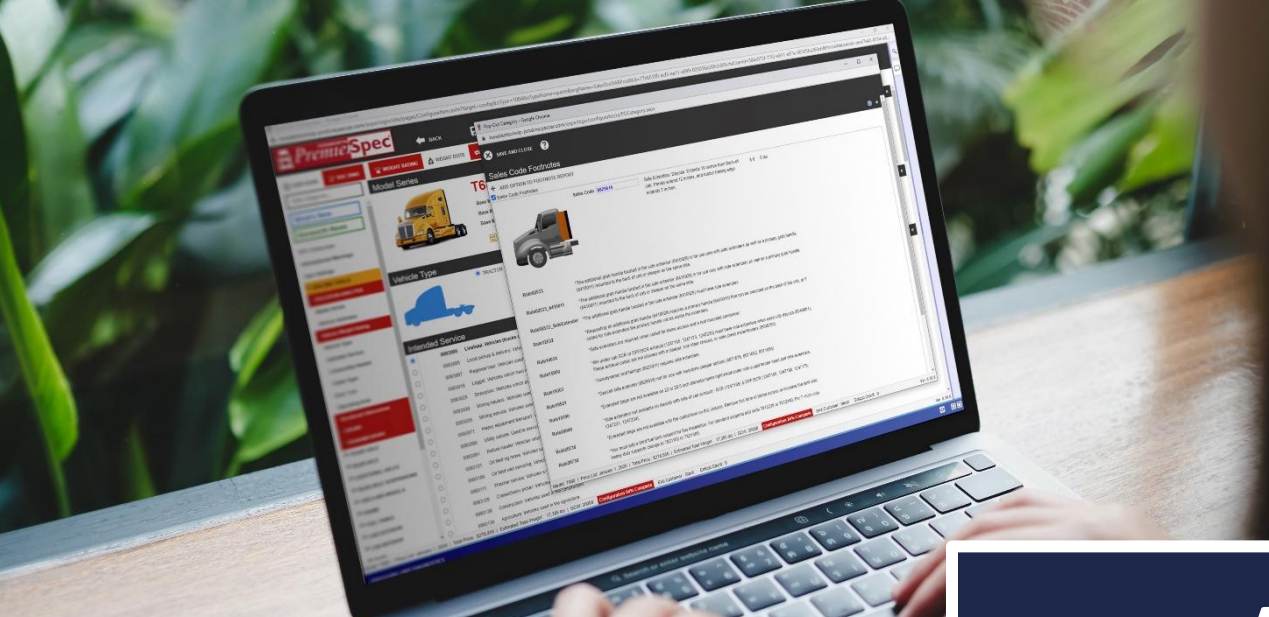
Internal Development



**Greater Flexibility in
Factories**

**Advanced Material
Management**

**Faster Product
Development**



Truck Specification

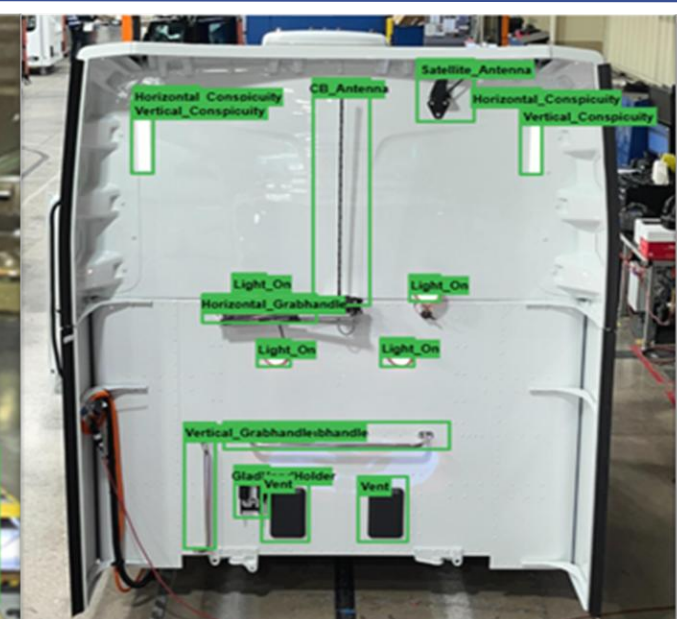
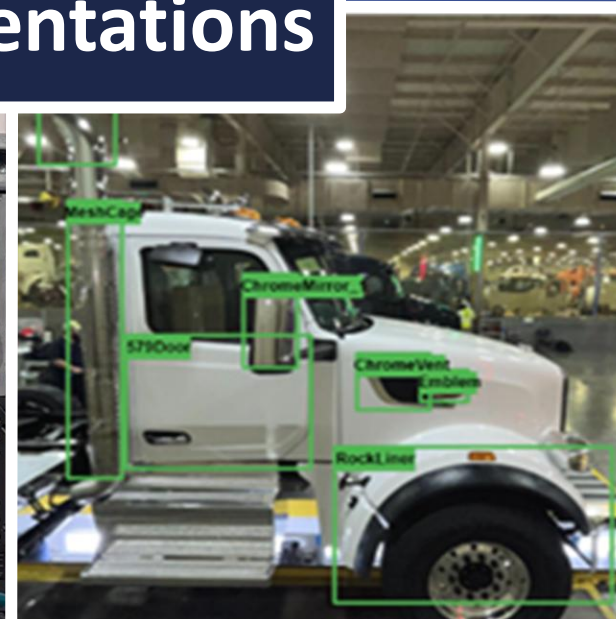


Weld Quality

AI Implementations



Paint Color Match



Option Verification

Best in Class Factory Operations

Safety

Average OSHA Score of 1.36 Across All Factories (2025)

Quality

Best in Class Quality

Capacity

Capacity Increased by 17% Over the Past 3 Years

Efficiency

Deployment of Industry 5.0 & Vision A.I. Technology

Flexibility

Local for Local Production

PACCAR Manufacturing Capacity Investments



Chassis Paint Booth, Chillicothe, Ohio



PACCAR Mexico Expansion



PACCAR Engine Factories and Remanufacturing Center



Autonomous Guided Vehicles

Local for Local Production - Optimally Positioned for Tariffs



Tariffs March - November

Tariffs on non-USMCA Components

Tariffs on Steel and Aluminum

No Tariffs on Trucks from Canada and Mexico

Post-Section 232 Finding

Tariff Offset Program

>50% Reduction in Tariff Charges

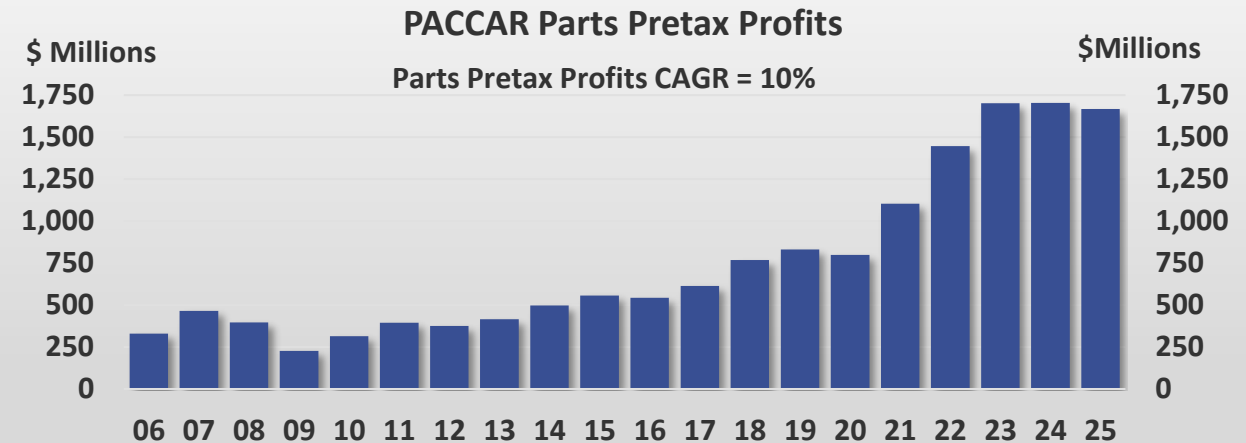
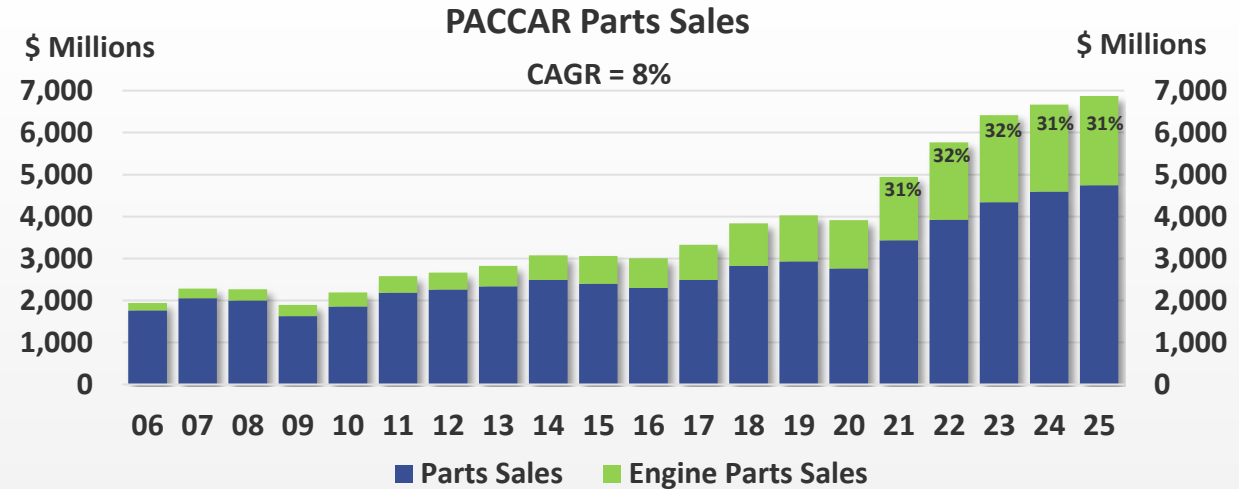
Tariffs on Trucks from Canada and Mexico

PACCAR Parts Strategy

PACCAR Parts achieved record \$6.9 billion in sales and \$1.7 billion in pretax profits in 2025. Over the last 20 years, PACCAR Parts has achieved a sales CAGR of 8% and profit CAGR of 10%.

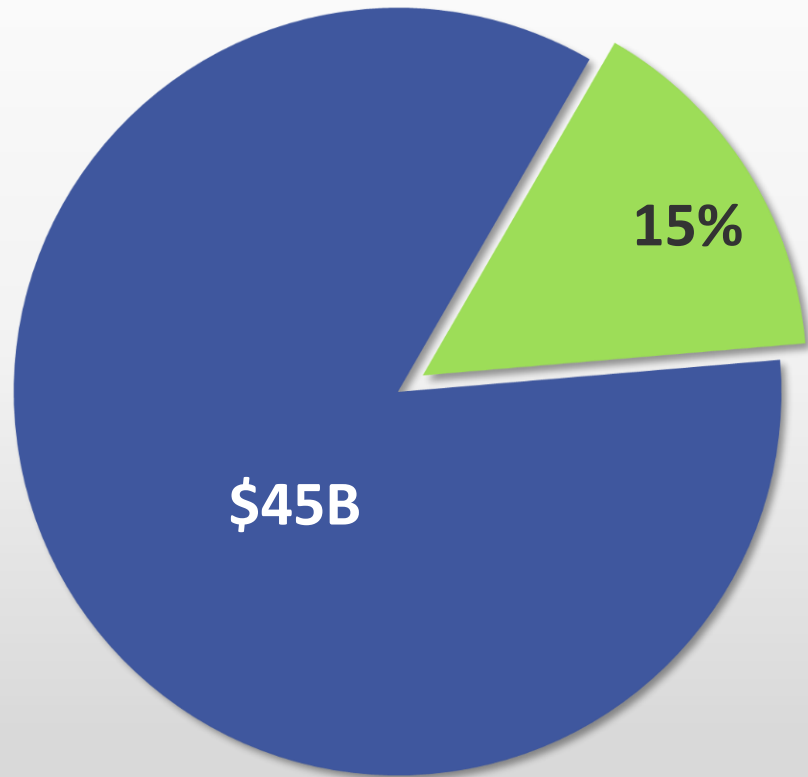
Long-Term Growth Drivers:

- Growing population of Kenworth, Peterbilt and DAF trucks due to geographic expansion and market share growth
- Increasing number of TRP locations
 - 2025: 365 locations
 - 2016: 76 locations
- Best-in-class Distribution Network
 - 21 parts distribution centers and nearly 2,400 dealer locations.
 - Proprietary, PACCAR Genuine and TRP branded parts enhance margins

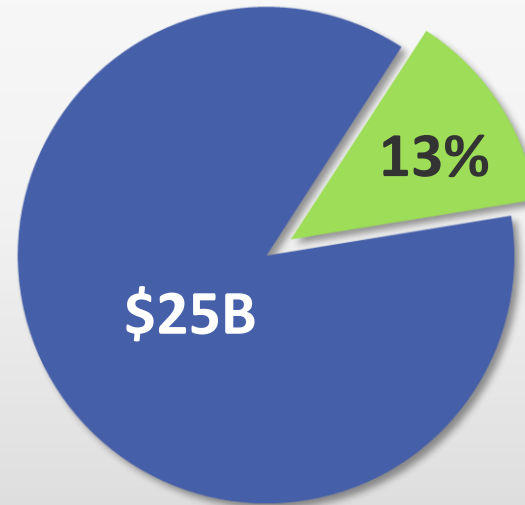


Dealer Retail Parts Market Opportunity

North America Parts
Market



Europe & Rest of World
Parts Market



■ Overall Market Size

■ PACCAR Parts Market Share

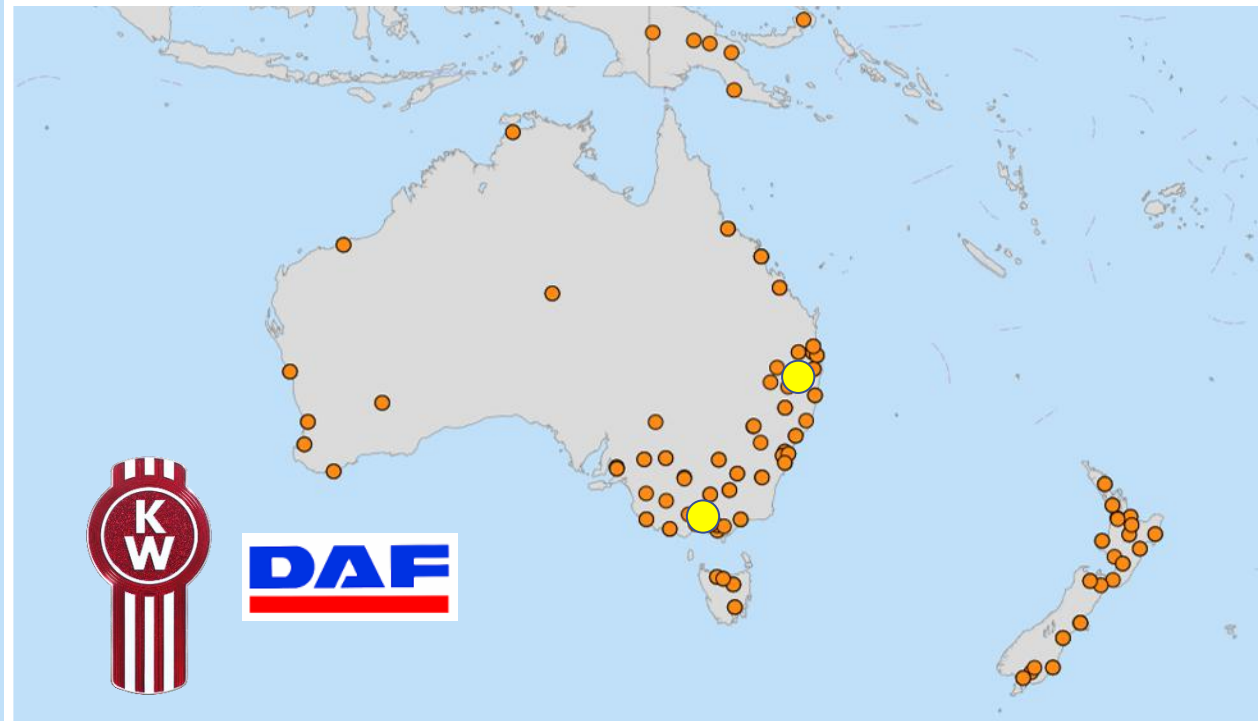
\$70B Opportunity

5% Point Gain

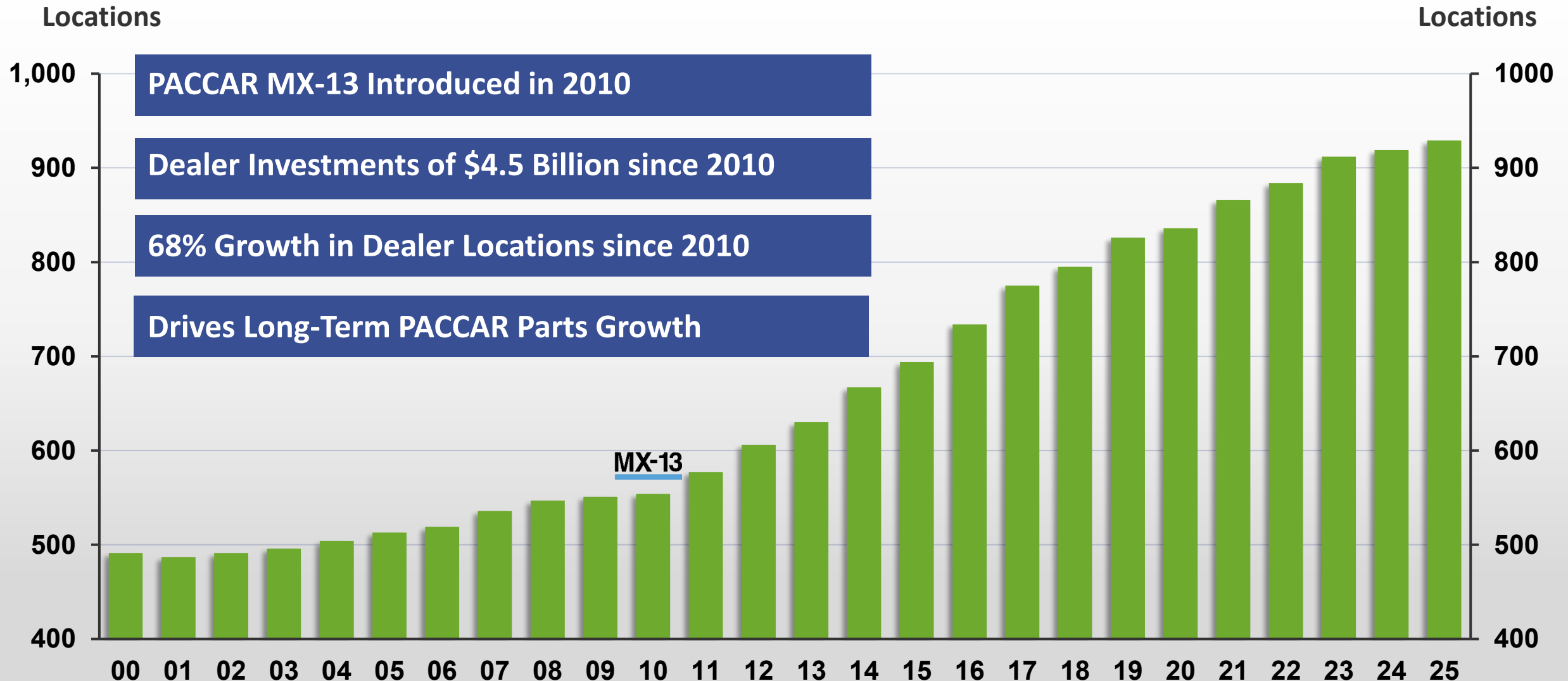
**\$3.5B Retail Sales
2030**

PACCAR Parts Distribution Centers and Dealers

21 PDCs in 10 Countries; 2,400 Dealer Locations

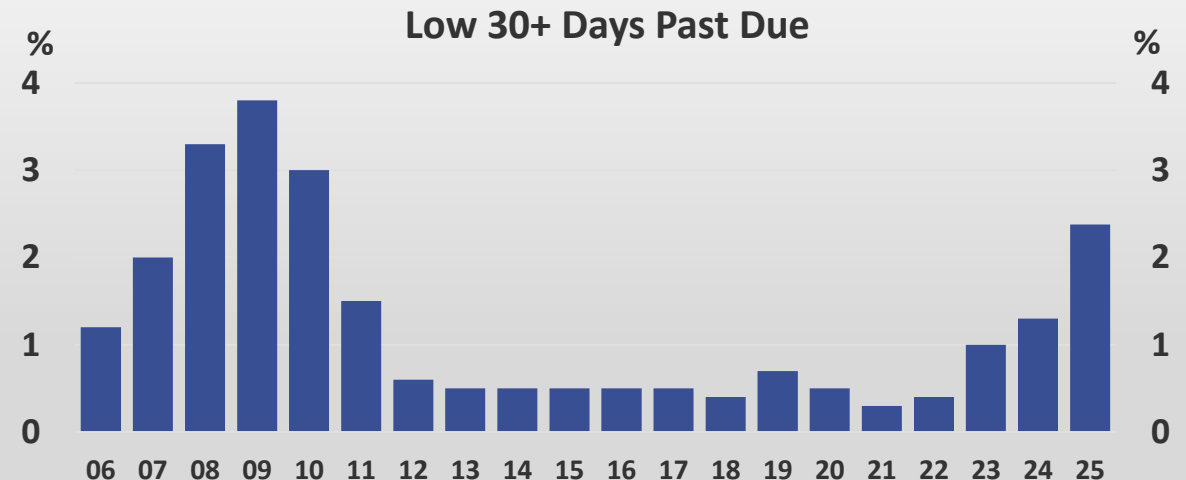
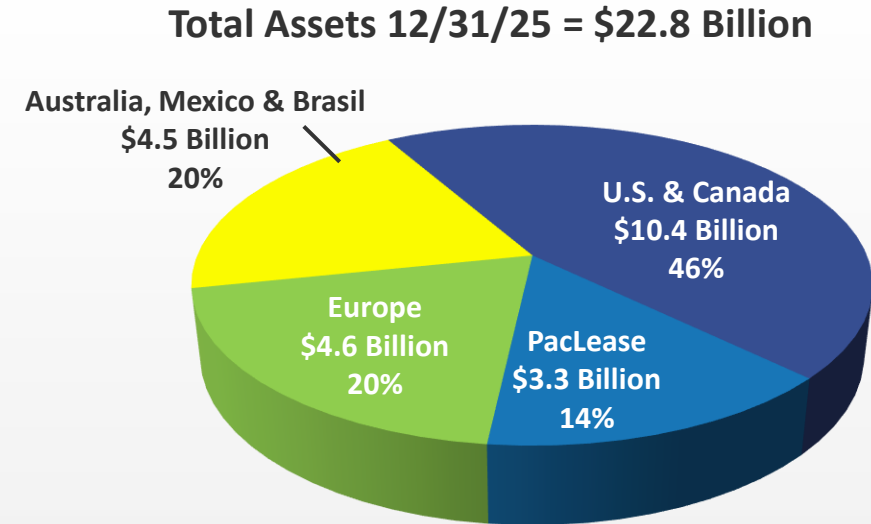


Growth in Kenworth and Peterbilt Dealer Locations U.S. and Canada



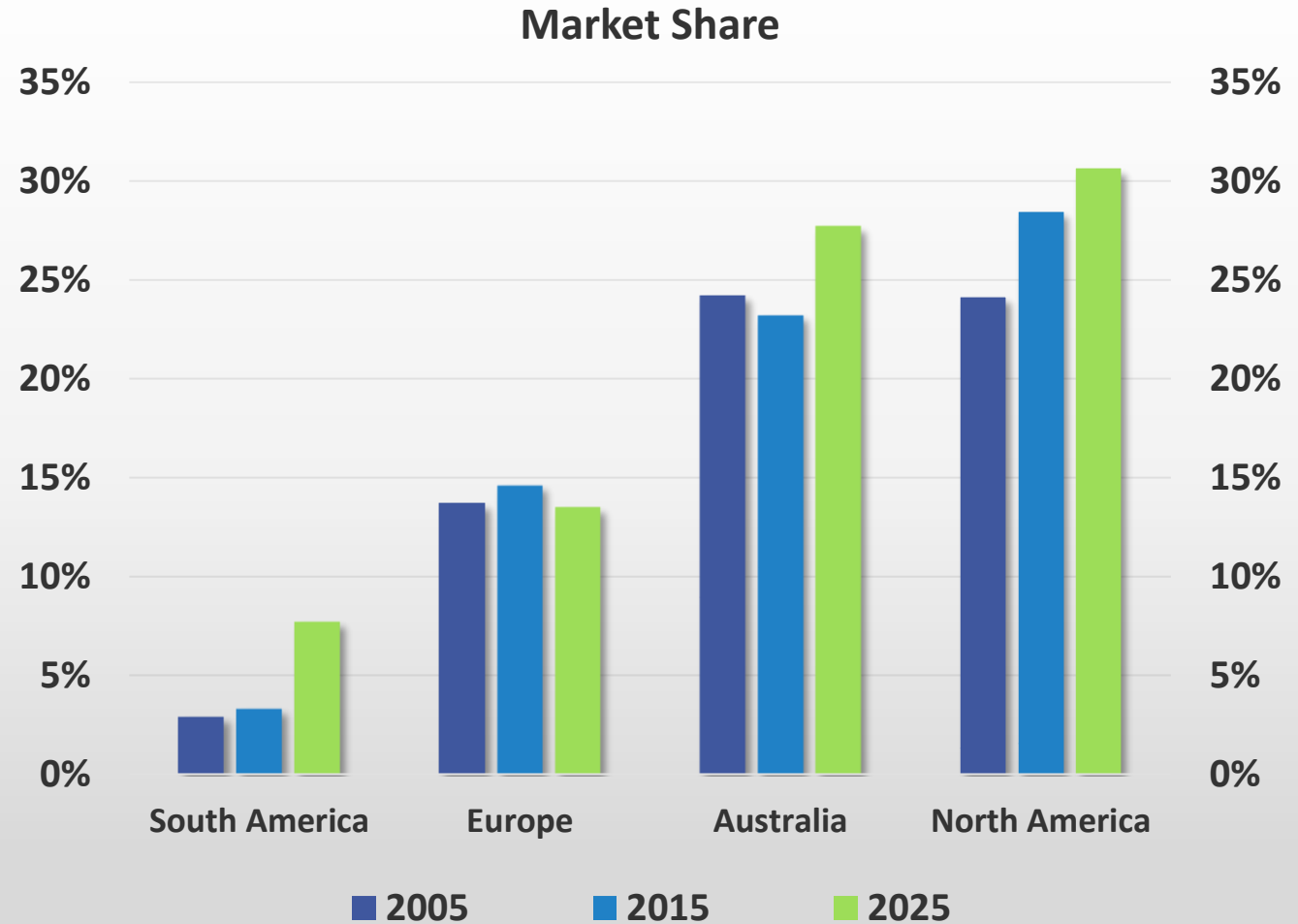
PACCAR Financial Services Strategy

- PACCAR Financial Services supports truck sales by providing financing and leasing services to PACCAR customers
- In 2025, PACCAR Financial financed 27% of all Kenworth, Peterbilt and DAF trucks
- Geographical diversification, disciplined credit underwriting, and rigorous portfolio management have enabled PACCAR Financial to earn excellent profits throughout the business cycle
- Key strategies and investments:
 - Predictive data analytics for credit quality
 - Expanded used truck centers
 - Mobile finance and credit system
 - E-contract and e-signature
 - Customer on-line portal

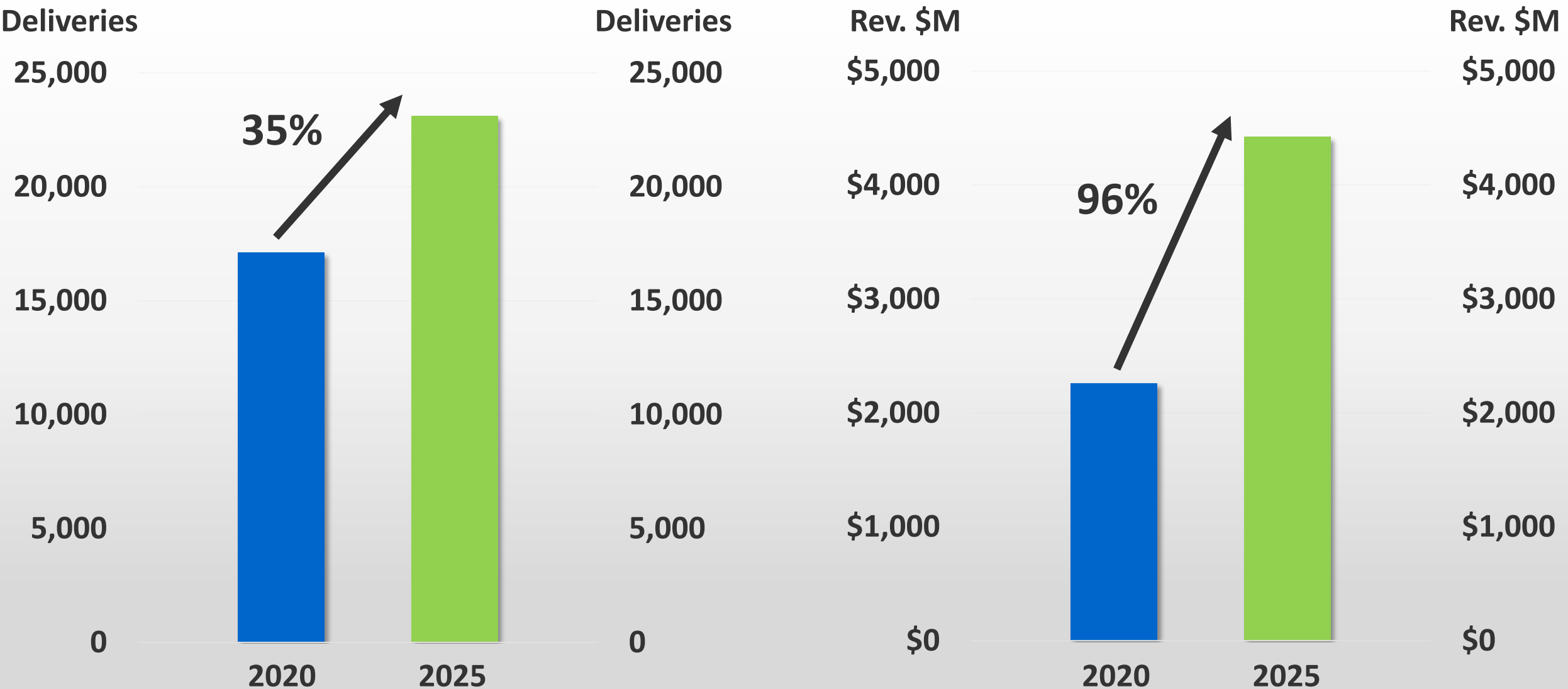


Long-Term Growth in PACCAR Heavy Duty Market Share

- Since 2005, PACCAR's above 16 tonne market share has increased in South America, Australia, and U.S. & Canada
- Kenworth is the market leader in Australia
- PACCAR's investment in truck manufacturing in Brasil supports PACCAR's medium-term goal of 15% market share for Kenworth and DAF products in South America.



PACCAR Rest-of-World Growth



DAF Brasil

Opened Manufacturing Plant	2013
PFS Brasil Begins Operations	2019
Opened New Parts Distribution Center	2020
4 th Brand of the Year Award from FENABRAVE	2021
DAF CF Rigid Introduced	2021
DAF Brasil Builds 20,000 th Truck	2022
DAF Brasil 10 th Anniversary	2023



Parts Distribution Center Ponta Grossa, Brasil



DAF CF



DAF Brasil Manufacturing Plant

Emissions Regulations



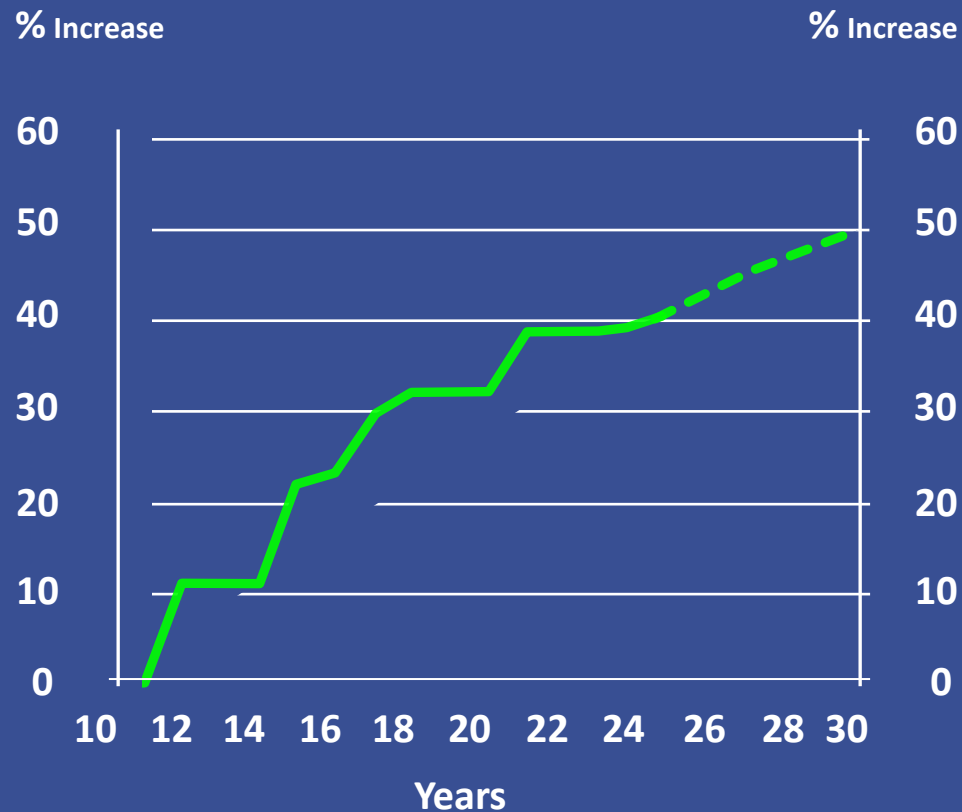
- Effective January 2027 35 mg NOx Standard; Flexibilities Possible
- EPA 27 NOx Technology Increases Costs
- EPA Widely Expected to Rescind GHG Endangerment



- No Changes to Expected GHG and NOx Regulations and Deadlines
- NOx 50% Reduction in 2029 (Euro VII)
- GHG 28% Reduction in 2030

Fuel Economy Improvement

PACCAR Fuel Economy



40% Improvement Since 2010

**NHTSA Fuel Economy Remains
(2027 Final Step)**

**New Engine Platforms Meet Standards
Without Electrification**

**Fuel Economy Improvements Drive
Customer Benefit**

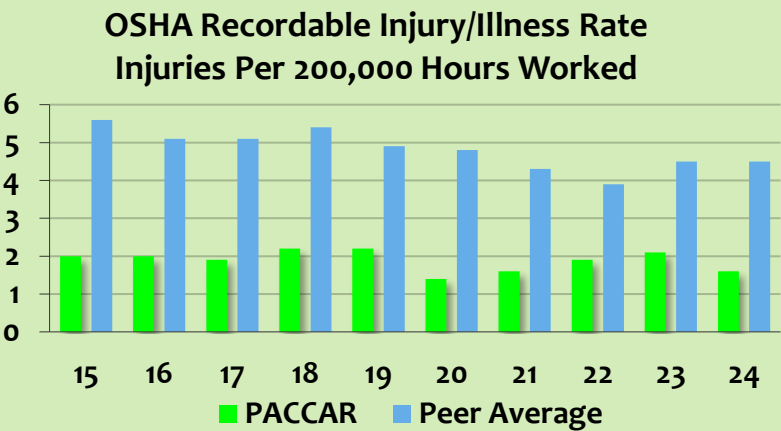
PACCAR is a Global Leader

Environmental



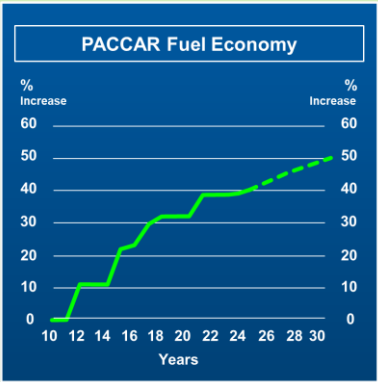
PACCAR Earned “A” Rating
Top 4% of Companies
Earned “A” or “A-” For 11 Years.

Operational Safety



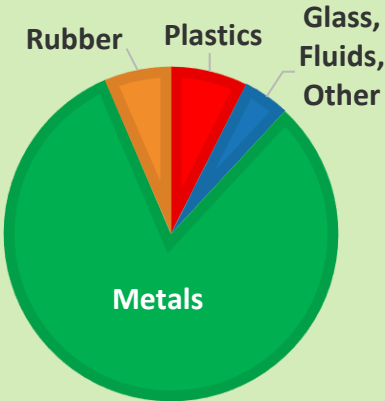
Record OSHA
Score of 1.36
in 2025!

Fuel Efficiency



Highest Fuel Economy
Lowest GHG Emissions

Truck Material Recyclability



90% Recyclable



Second Quarter 2026 Earnings

PACCAR Revenues and Profit

87 consecutive years of net profit

Dividends every year since 1941

	2 nd Quarter		First Half	
(\$ in Millions)	2026	2025	2026	2025
Revenues	\$7,547	\$7,511	\$14,323	\$14,952
Net Income	\$752	\$724	\$1,357	\$1,229
Adjusted Net Income	\$752	\$724	\$1,357	\$1,493
Adjusted Return on Revenues	10.0%	9.6%	9.5%	10.0%
Adjusted Diluted EPS	\$1.43	\$1.37	\$2.57	\$2.83
New Truck Deliveries (units)	38,700	39,300	71,800	79,400

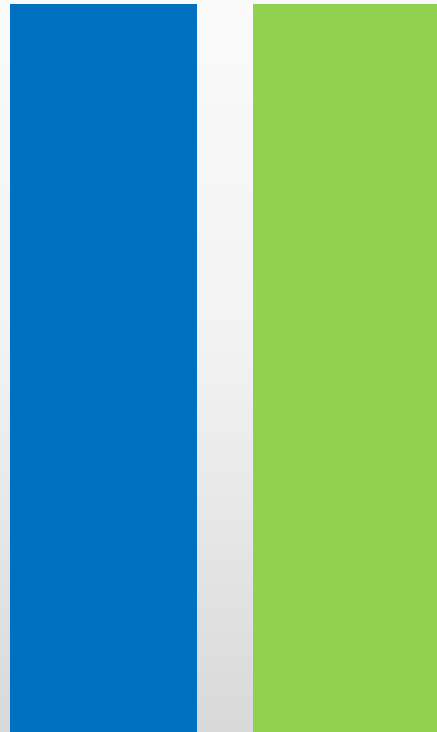
2026 Financial Results

Second Quarter 2026 vs. Second Quarter 2025

Sales and Revenues (Billions of Dollars)

\$7.5

\$7.5



2025

2026

Net Income (Millions of Dollars)

\$724

\$752



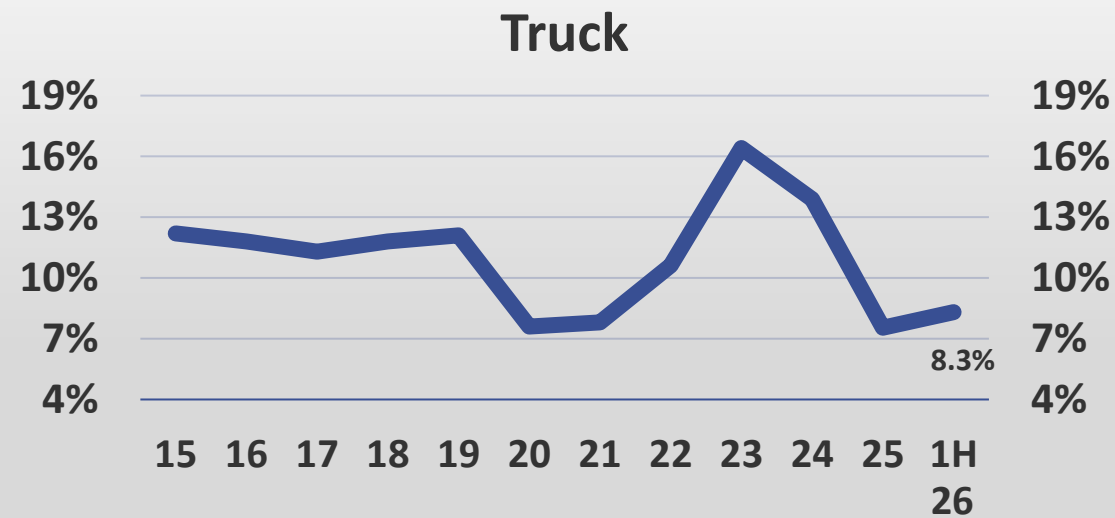
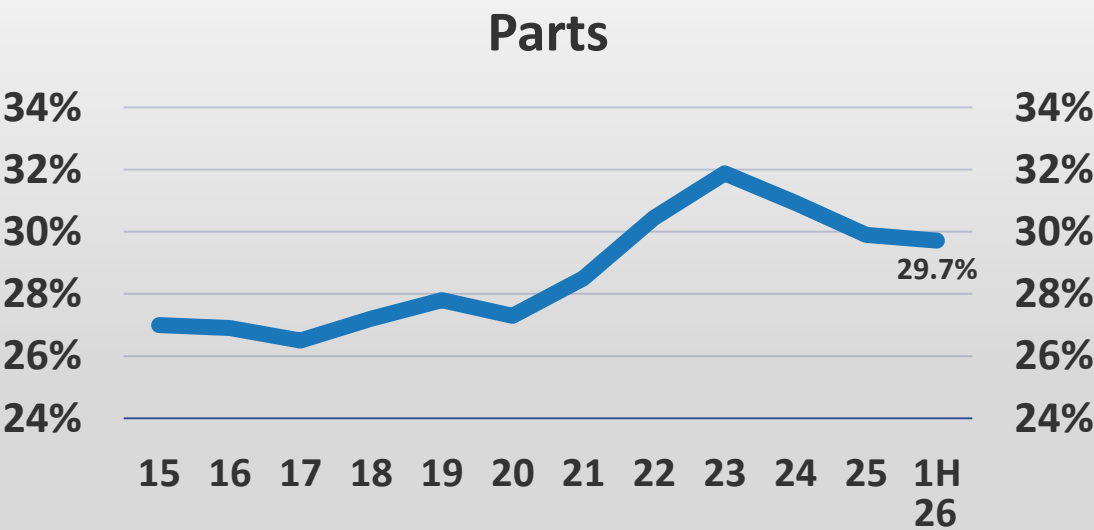
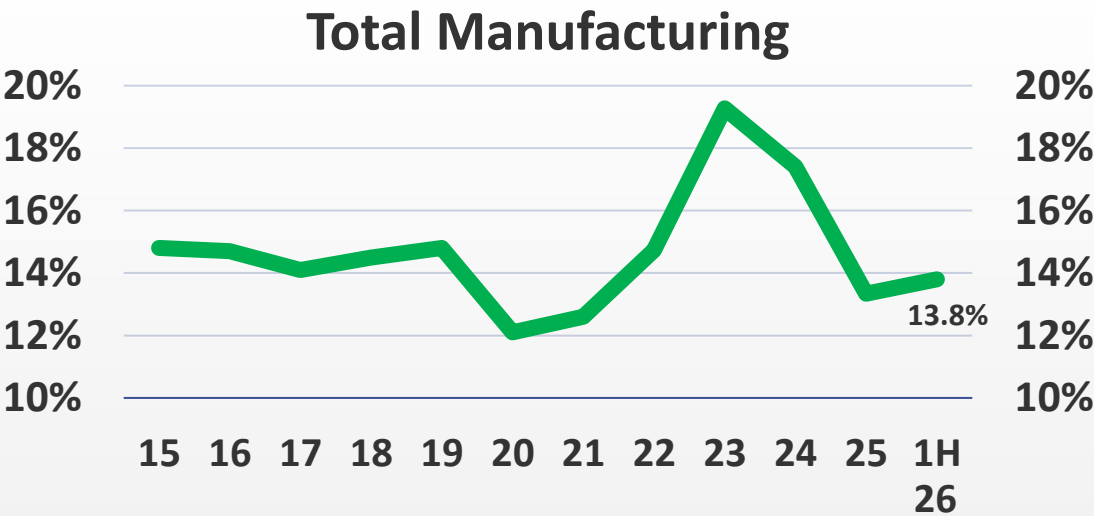
2025

2026

- Sales and revenues of \$7.5 billion
- Net income of \$752 million
- After-tax return on revenues of 10.0%
- PACCAR Parts revenues of \$1.7 billion
- PACCAR Parts pretax income of \$417 million
- Financial Services pretax income of \$124 million
- R&D expenses of \$114 million
- Deliveries of 38,700 trucks

Historical Annual Gross Margins

- Truck margins benefited from new products launched in 2021/2022
- Parts margins have benefited from distribution and technology investments and growing populations of PACCAR trucks and engines in operation

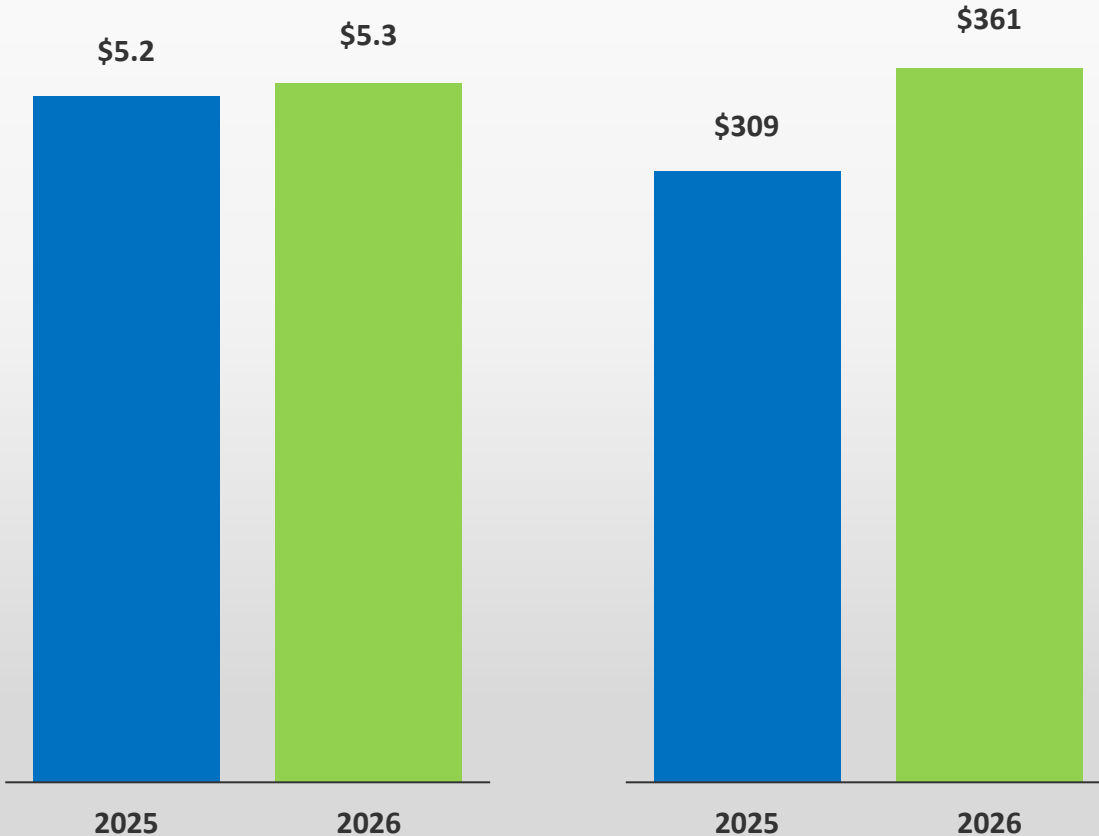


Truck

Second Quarter 2026 vs. Second Quarter 2025

Sales
(Billions of Dollars)

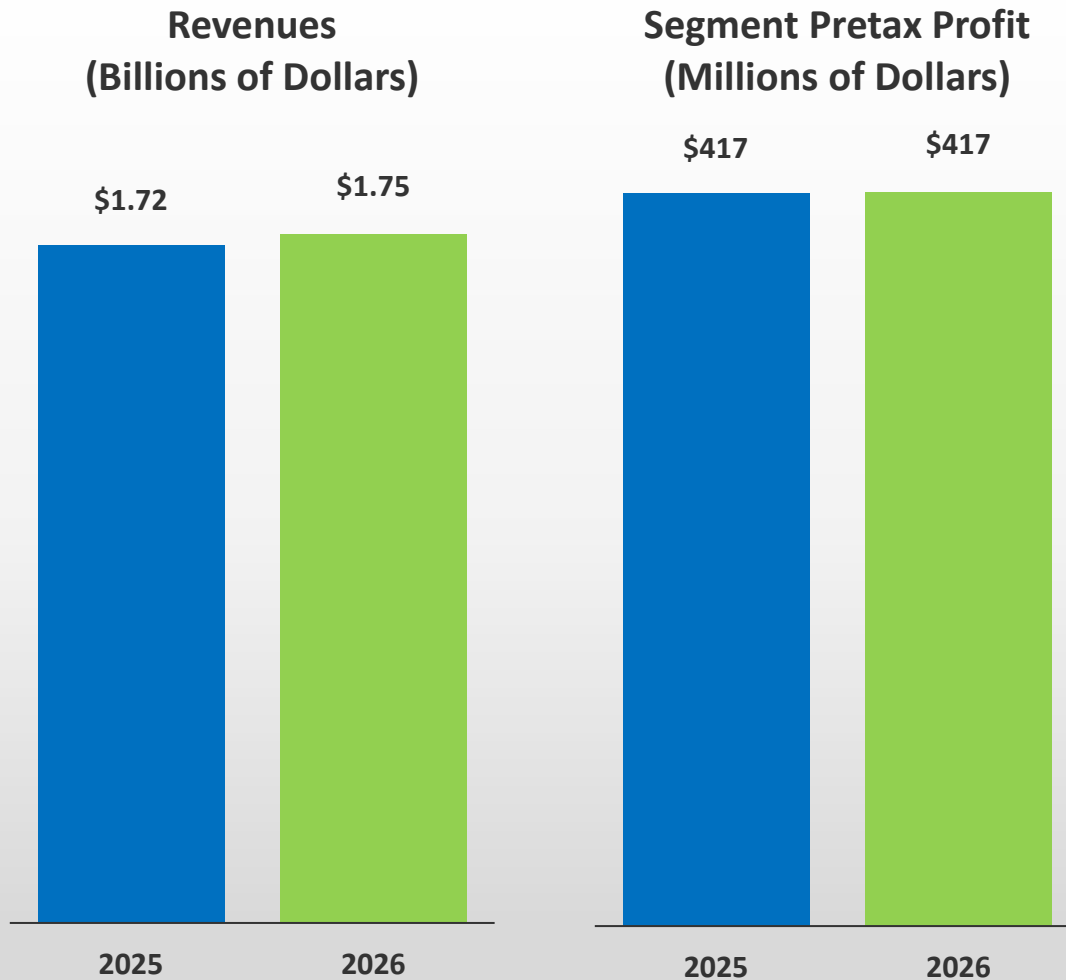
Segment Pretax Profit
(Millions of Dollars)



- Sales totaled \$5.3 billion
- Pretax operating profit of \$361 million
- Deliveries for 2Q26 totaled 38,700 compared to 39,300 units in the same period a year ago
- Truck gross margin of 9.4%

Aftermarket Parts

Second Quarter 2026 vs. Second Quarter 2025

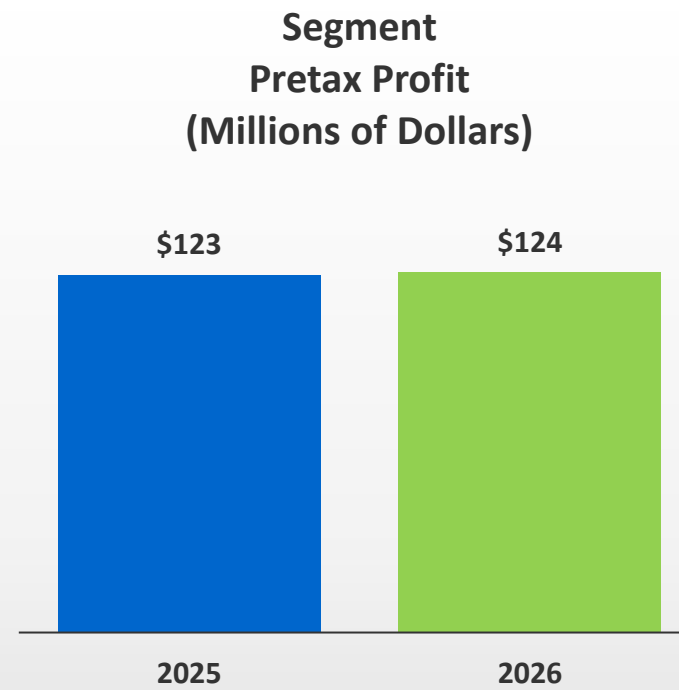


- Revenues of \$1.75 billion, an increase of 2%
- Pretax profit of \$417 million
- Strong 29.8% Parts gross margin

Financial Services

Balance Sheet & Second Quarter 2026 Profit

	\$ Millions 6/30/2026
Finance & Other Receivables	\$19,312
Equipment on Operating Leases	1,896
Other Assets	1,058
Total Financial Services Assets	\$22,266
Commercial Paper & Bank Loans	\$4,789
Term Notes	9,908
Deferred Taxes & Other Liabilities	1,594
Total Financial Services Liabilities	\$16,291
Equity	\$5,975
Total Liabilities & Equity	\$22,266



- Pretax profit of \$124M
- Portfolio of 222,000 trucks and trailers
- Excellent portfolio quality
- 13 worldwide used truck centers
- Used truck prices showing signs of improvement

PACCAR Inc

A+/A1 Credit Ratings

- Superb balance sheet
- \$8.7 billion in manufacturing cash and securities to support growth opportunities and investments in all phases of the cycle
- No manufacturing debt – a capital structure that has proven beneficial throughout the business cycle
- A+/A1 credit rating provides PACCAR Financial Services excellent access to the credit markets

	(\$ Millions)
	6/30/26
Mfg Cash & Securities	\$8,667
Other Manufacturing Assets	13,047
Financial Services Assets	22,266
Total Assets	\$43,980
Manufacturing Debt	\$ -
Manufacturing Liabilities	7,368
Financial Services Liabilities	16,291
Shareholders' Equity	20,321
Total Liabilities & Equity	\$43,980

PACCAR is the Leading Industrial Company

Demonstrated Cycle Over Cycle Performance

Advanced Manufacturing Strategy

Investing in the Right Technology

Robust Parts & Financial Services Growth

Excellent Profitability

Appendix

This earnings release includes “adjusted net income (non-GAAP)” and “adjusted net income per diluted share (non-GAAP)”, which are financial measures that are not in accordance with U.S. generally accepted accounting principles (“GAAP”), since they exclude a charge for EC-related claims. These measures differ from the most directly comparable measures calculated in accordance with GAAP and may not be comparable to similarly titled non-GAAP financial measures used by other companies.

Adjustment for the EC-related claims relates to a pre-tax charge of \$350 million (\$264.5 million after-tax) for estimable total costs recorded in Interest and other expenses (income), net in the first quarter 2025.

The Company utilizes these non-GAAP measures to allow investors and management to evaluate operating trends by excluding a significant charge that is not representative of company performance.

Reconciliations from the most directly comparable GAAP measures to adjusted net income (non-GAAP) and adjusted net income per diluted share (non-GAAP) are as follows:

(\$ in million, except per share amounts)	Six Months Ended June 30, 2025
Net income	\$1,228.9
EC-related claims, net of tax	264.5
Adjusted net income (non-GAAP)	\$1,493.4
Per diluted share:	
Net income	\$2.33
EC-related claims, net of tax	0.50
Adjusted net income (non-GAAP)	\$2.83

PACCAR