

Presidents Forum



September 30, 2010 , Istanbul, Turkey



Presentation by Susumu Isoda,
President of JIVA

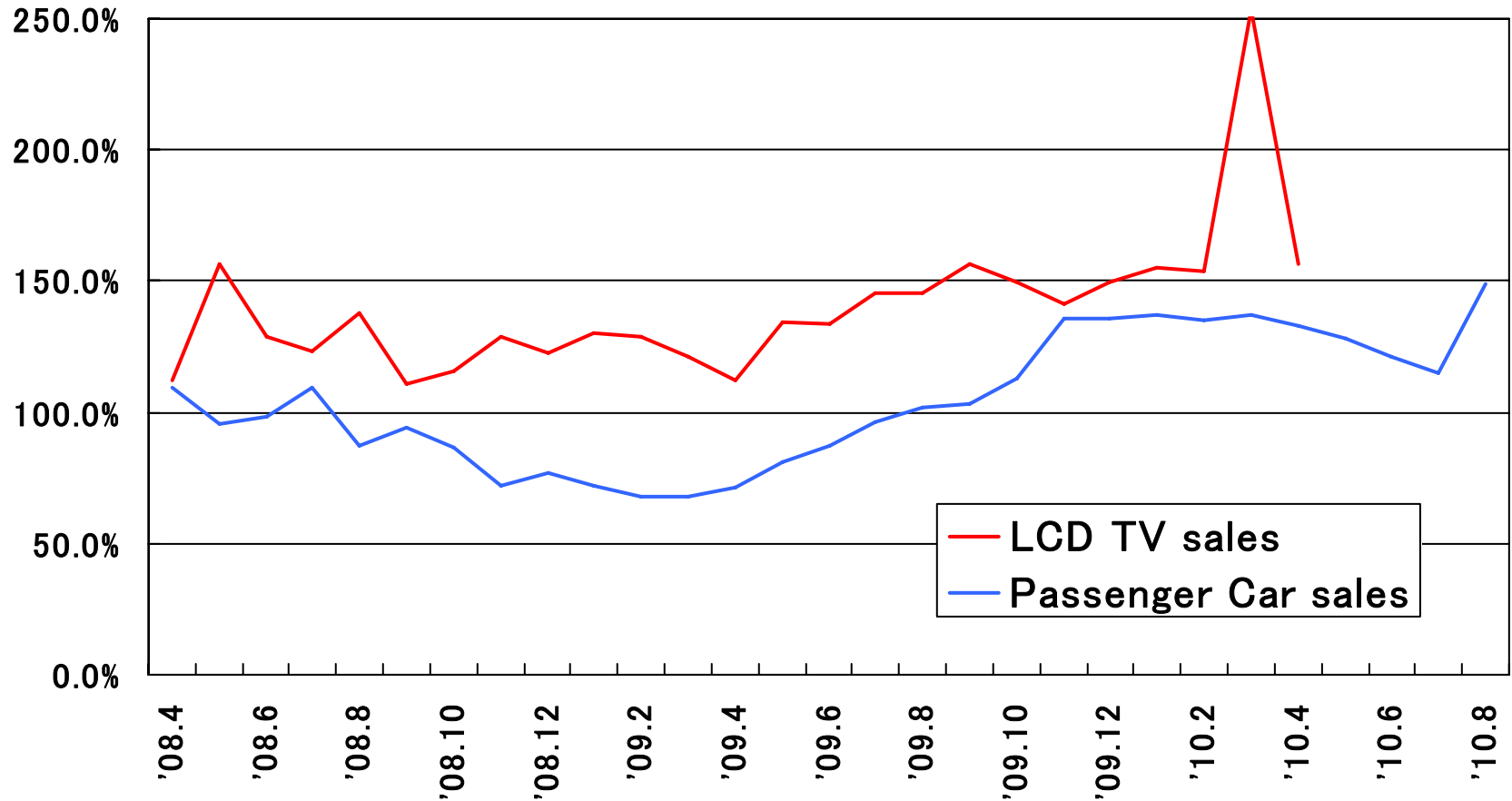
Trend of Japanese Economy and Industrial Trucks Market

Development of Real GDP

(%:Changes from the previous year)

	2008 10-12	2009 1-3	2009 4-6	2009 7-9	2009 10-12	2010 1-3	2010 4-6
GDP	-4.1	-8.9	-5.7	-5.2	-1.0	4.7	2.4
Private Consumption	-1.8	-3.7	-1.1	-0.4	1.2	3.3	1.8
Residential Investment	11.1	0.1	-9.9	-20.3	-24.5	-18.1	-10.5
Investment in Plants & Equipment	-7.6	-19.5	-22.1	-20.9	-13.5	-4.6	2.4
Public Investment	-8.7	-1.8	13.9	11.6	9.2	4.6	-5.5
Export	-13.1	-36.5	-29.3	-22.7	-4.7	34.6	30.0

Effect on Stimulus Package by Government

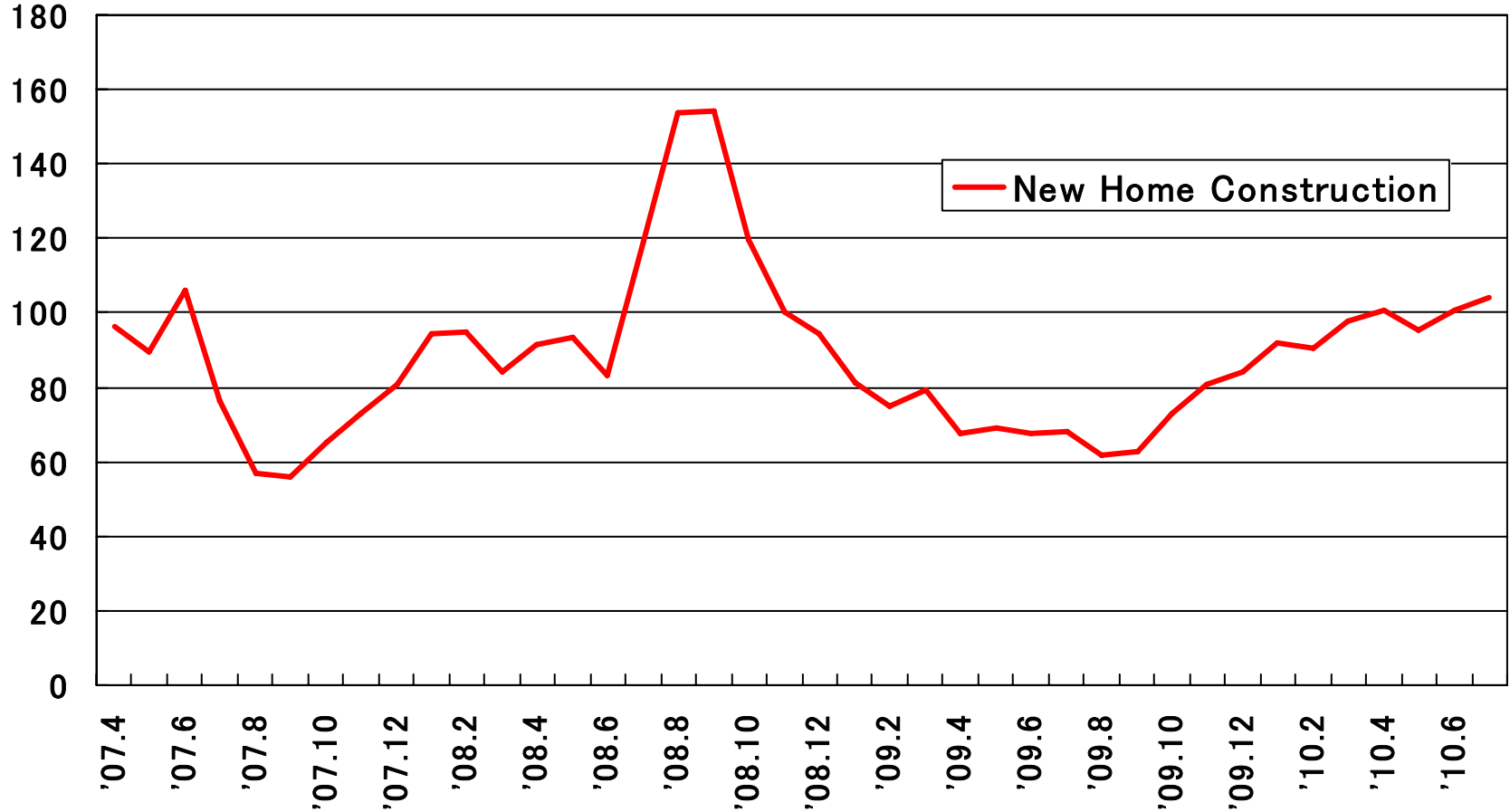


*Data from Ministry of Economy, Trade and Industry (LCD TV), Japan Automobile Dealers Association

New Home Construction

(Statistics by Ministry of Land, Infrastructure and Transportation)

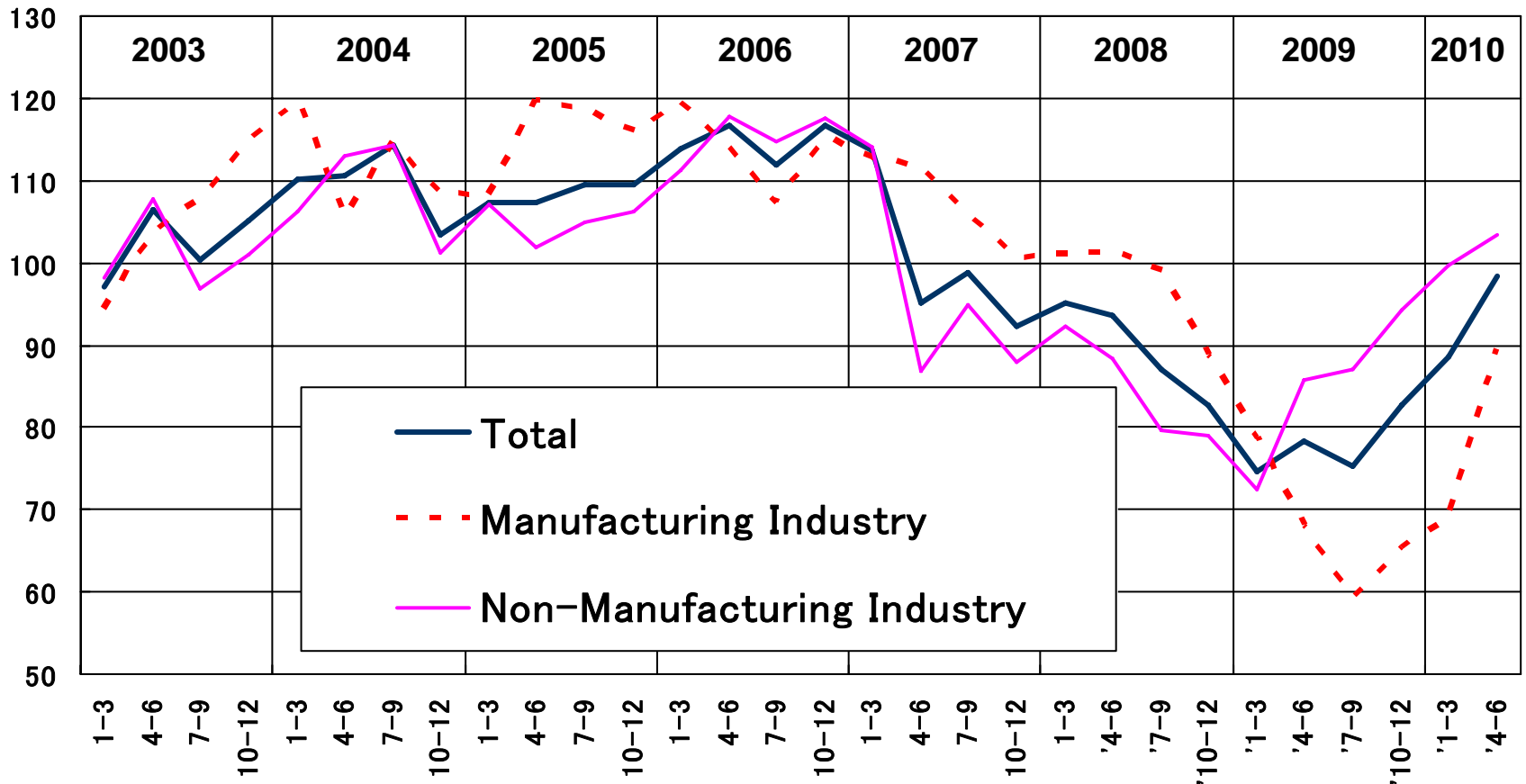
(% : Changes from the Previous Year)



* Data from Ministry of Land, Infrastructure and Transportation

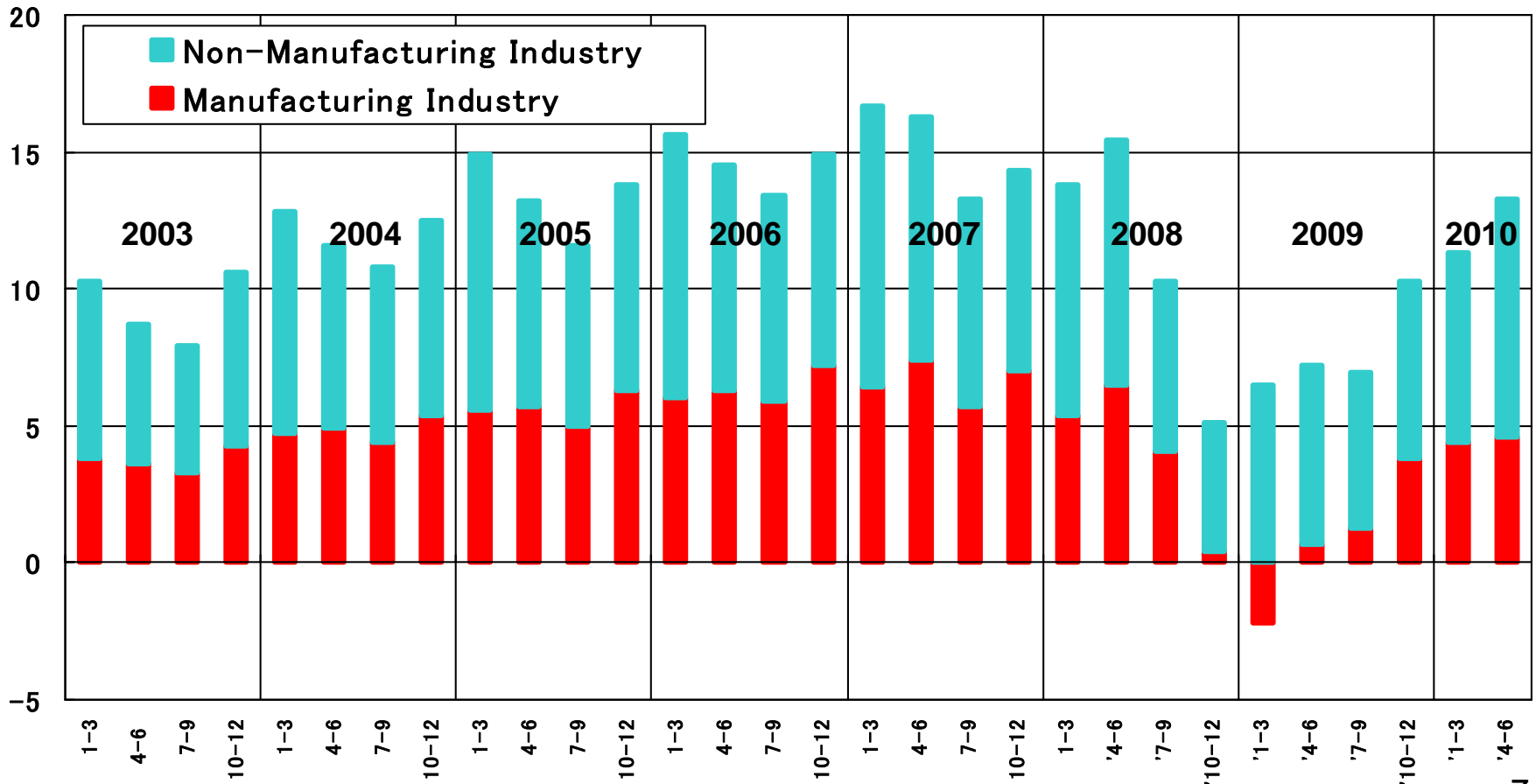
Investments in Plant and Equipment

Ministry of Finance, Financial statements statistics
 (%:Changes from the previous year)



Current Profits in Corporations

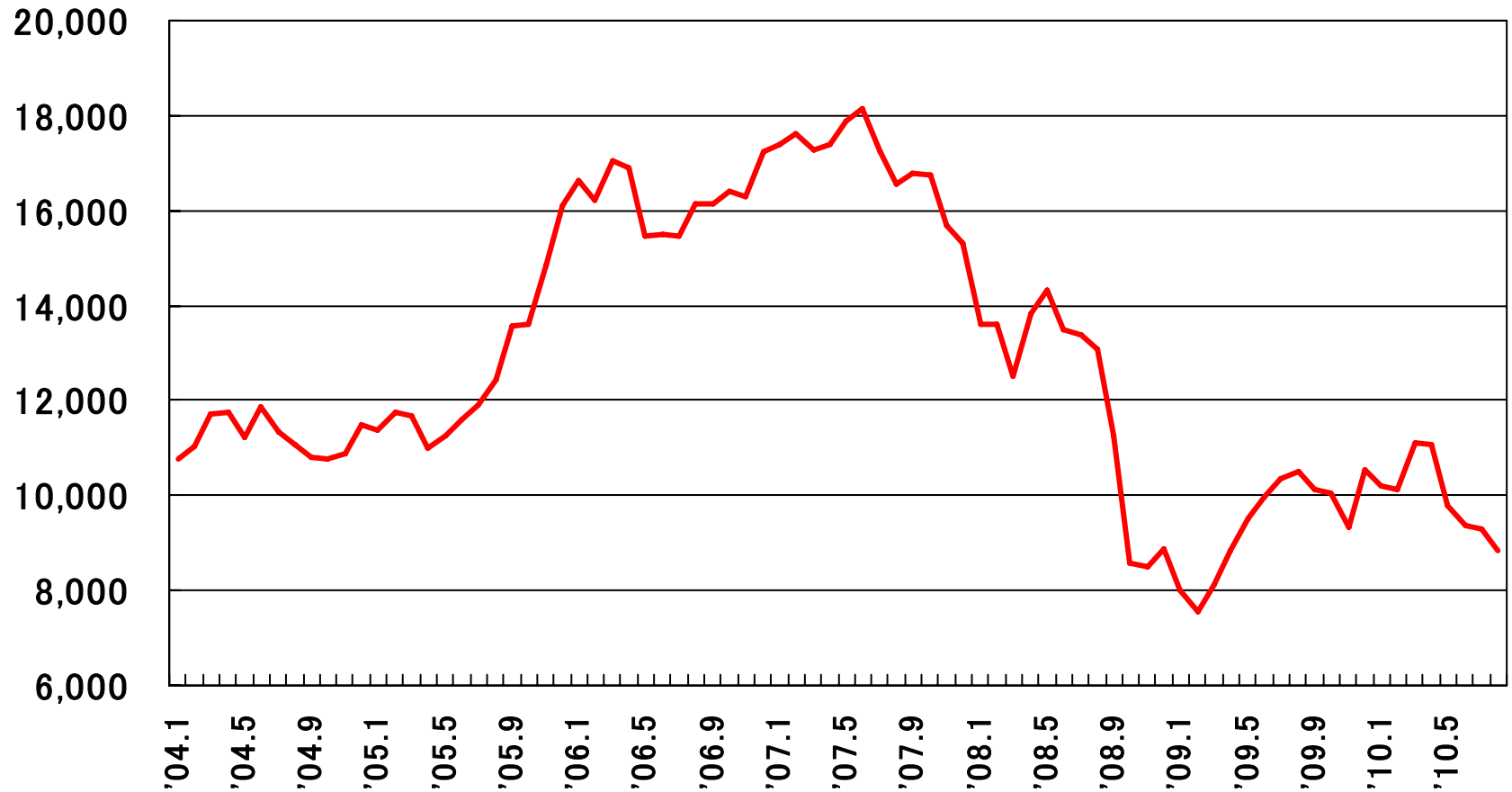
Ministry of Finance, Financial statements statistics
(Trillion Yen)



Tokyo Stock Exchange

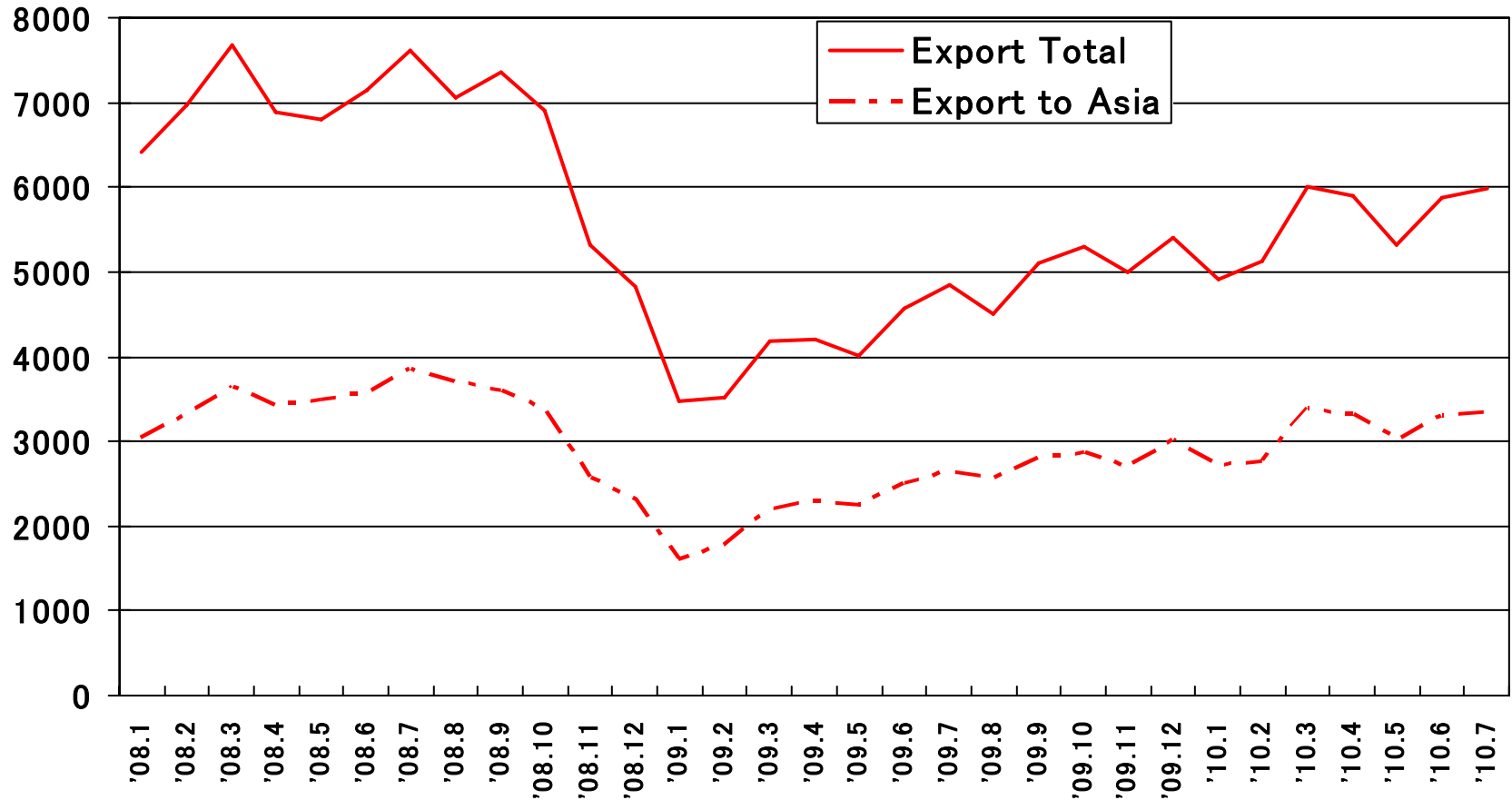
The Nikkei Stock Average (225 Issues)

(Yen)



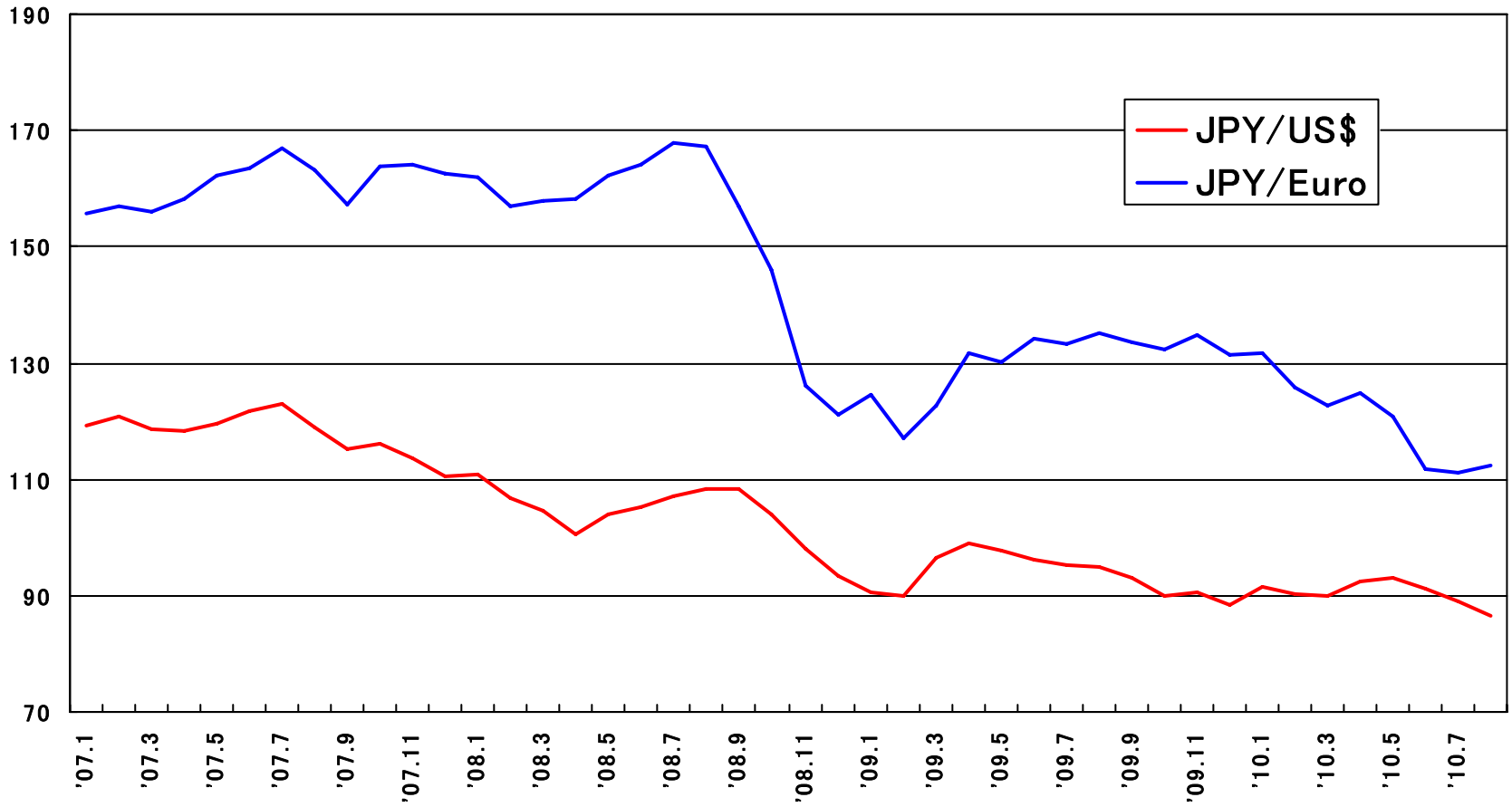
Trend of Trade Value

(Billion Yen)



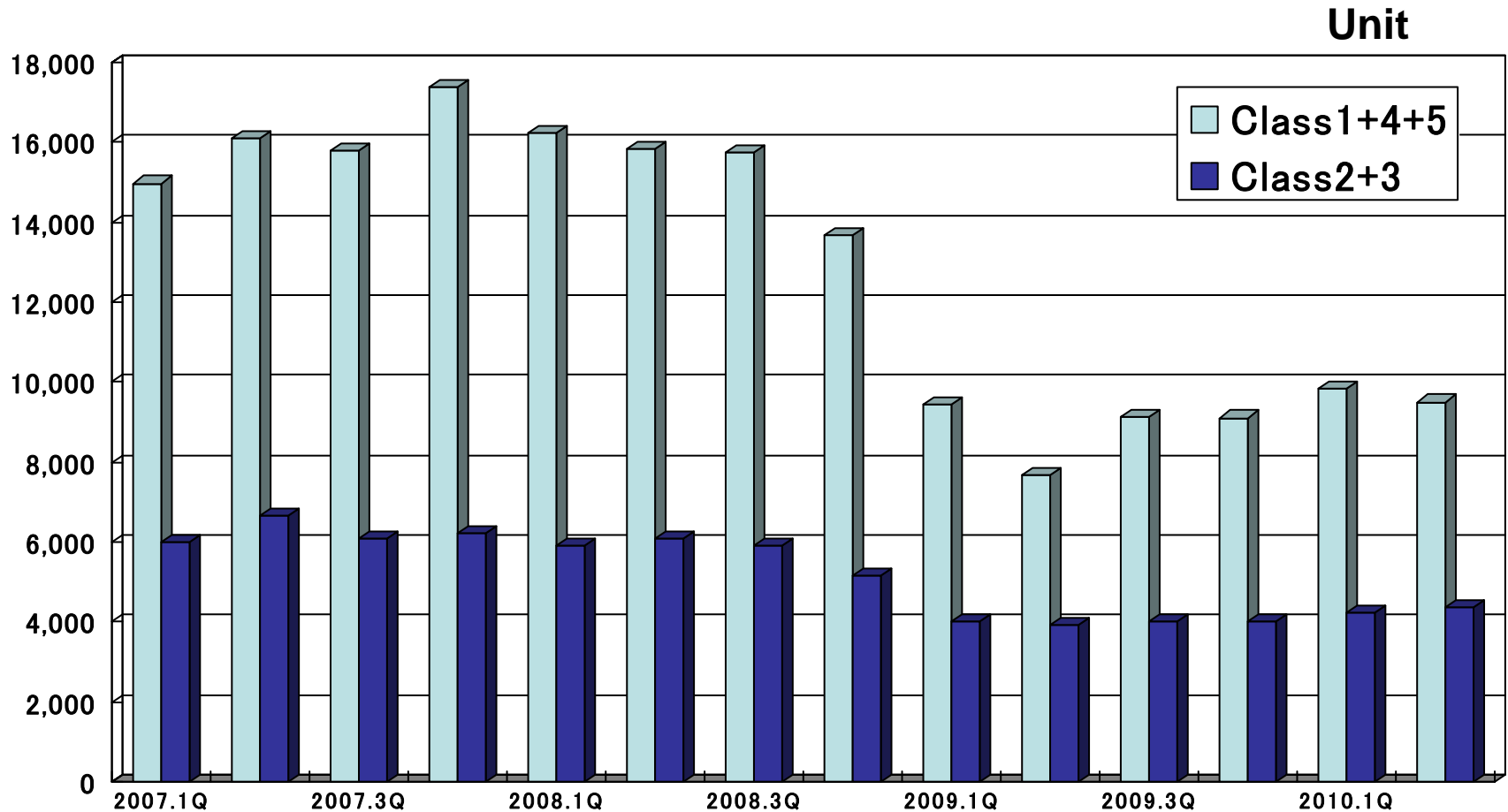
* Data from Ministry of Finance

Currency – JPY,US\$ and Euro



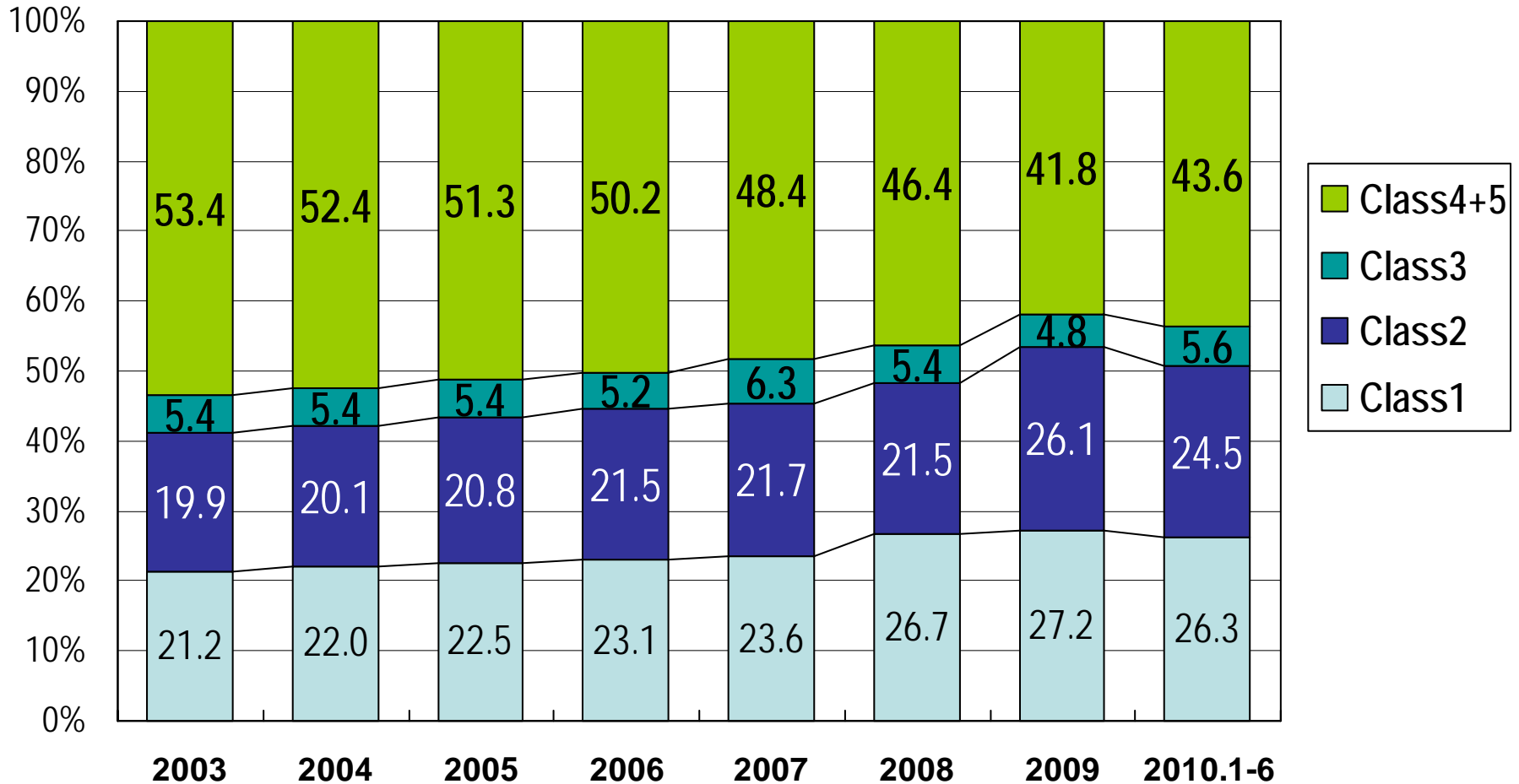
* Data from Ministry of Finance

Industrial Trucks Market in Japan



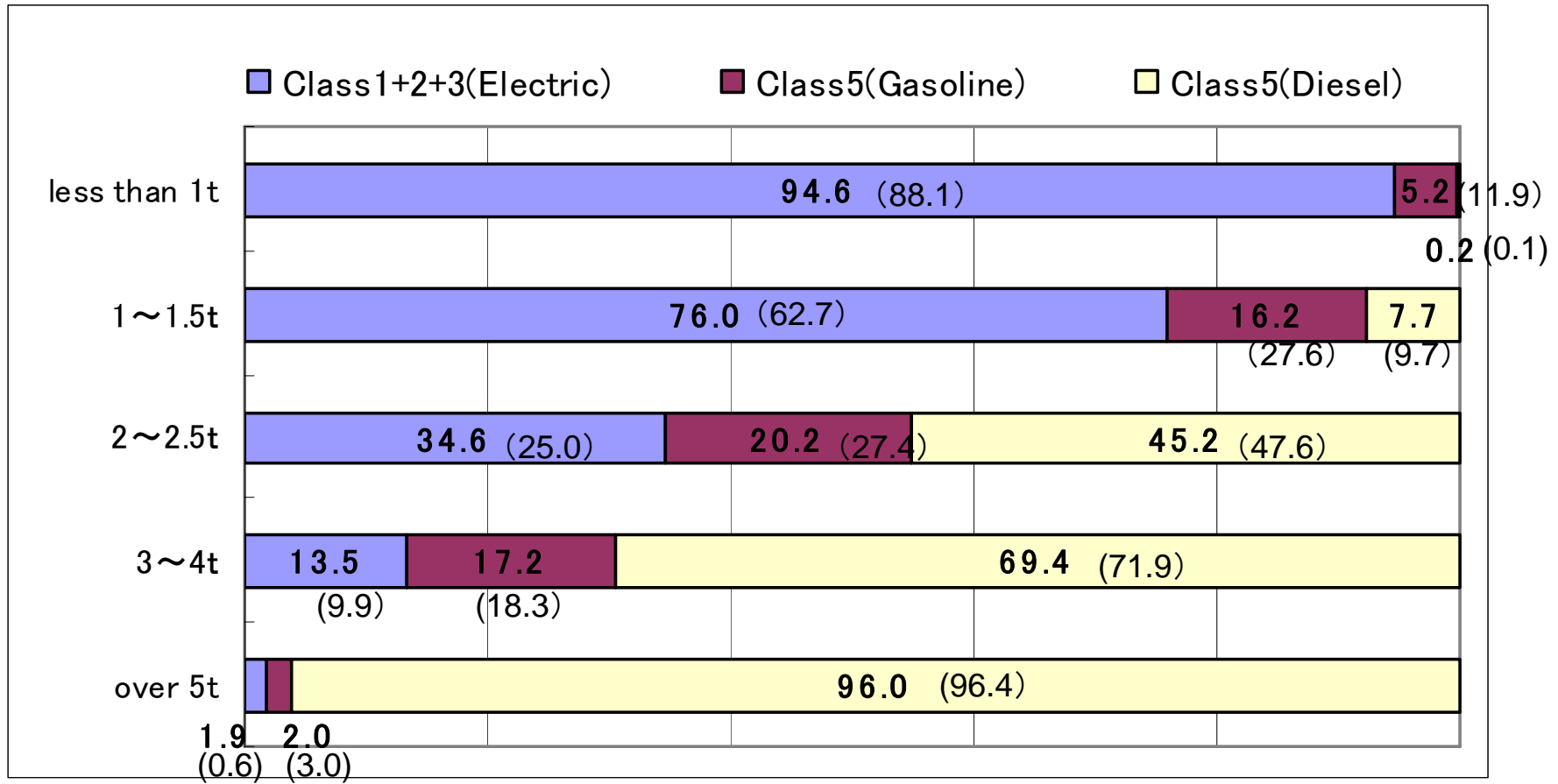
*Data from WITS Shipment Statistics

Industrial Trucks Market in Japan



*Data from WITS Shipment Statistics

Sales ratio by Capacity by Power in 2009



* Data from JIVA Statistics, Figures in () indicates 2004 sales ratio

Economic Outlook

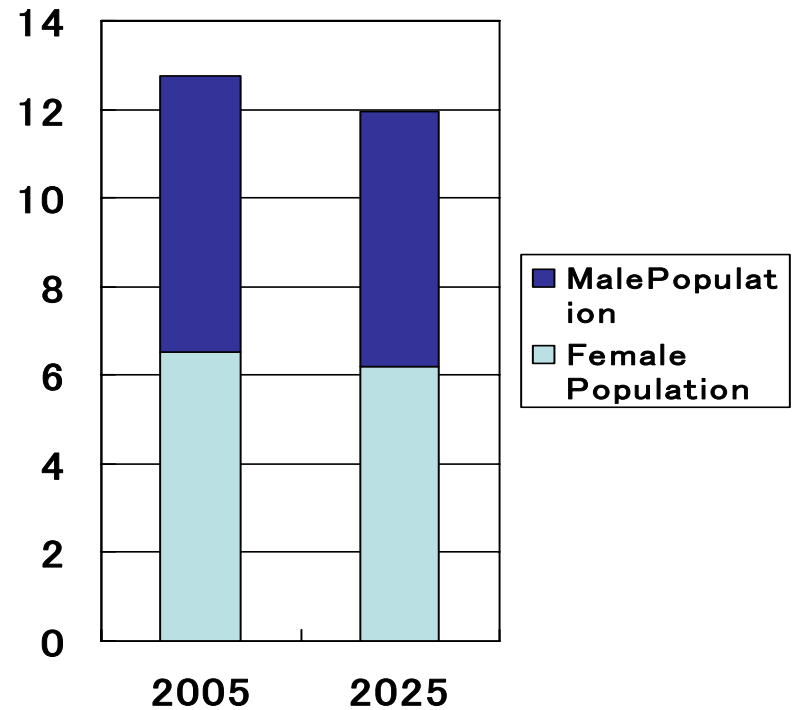
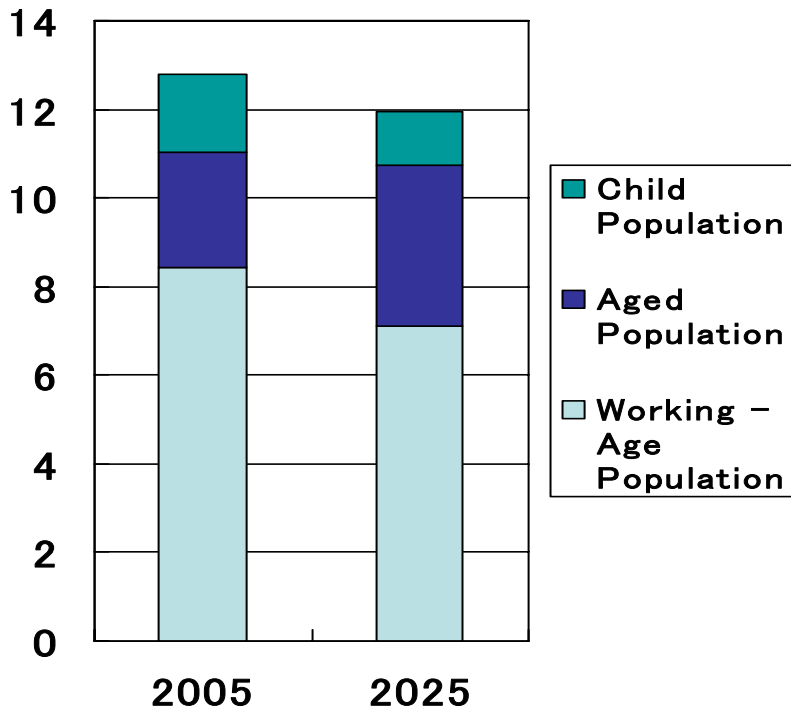
	FY2007 Actual	FY2008 Actual	FY2009 Actual	FY2010 Estimated on Jan.22
GDP	1.8	-3.7	-2.0	1.4
Private Consumption	1.4	-1.8	0.6	1.0
Residential Investment	-13.5	-3.7	-18.5	4.4
Investment in Plants & Equipment	1.3	-6.8	-15.3	3.1
Public Investment	-6.4	-6.6	9.3	-9.5

FY2010 estimate from Government

The Forklift in 2025

Future Vision in 2025 Japan

- Depopulating society and Desired MH -



In 2025 :

- 1) More automated material handling equipment will be required
- 2) More operator friendly material handling equipment will be required

Which technologies in Lift trucks will be come to realization in 2025

	◎	○	△	×	N.A
FC lift trucks		3	6		
lithium-ion battery lift trucks	7	2			
Engine Hybrid lift trucks	5	1	3		
Capacitor Hybrid lift trucks	2	5	2		
Opportunity Charging	3	4	1		1
Fast Charging	8	1			
LED Light	7	2			
RFID Reader	4	3	1	1	
Lift trucks – IT devices alignment	5	3	1		

*Answers from JIVA Engineering Committee members (N=9)

◎: Very likely, ○:Likely, △: Unlikely, × : Not likely

Thank you for your attention