



Presidents Forum



September 24, 2011 , West Palm Beach, U.S.A.

**Presentation by Toshihiko Uratsuji,
President of JIVA**

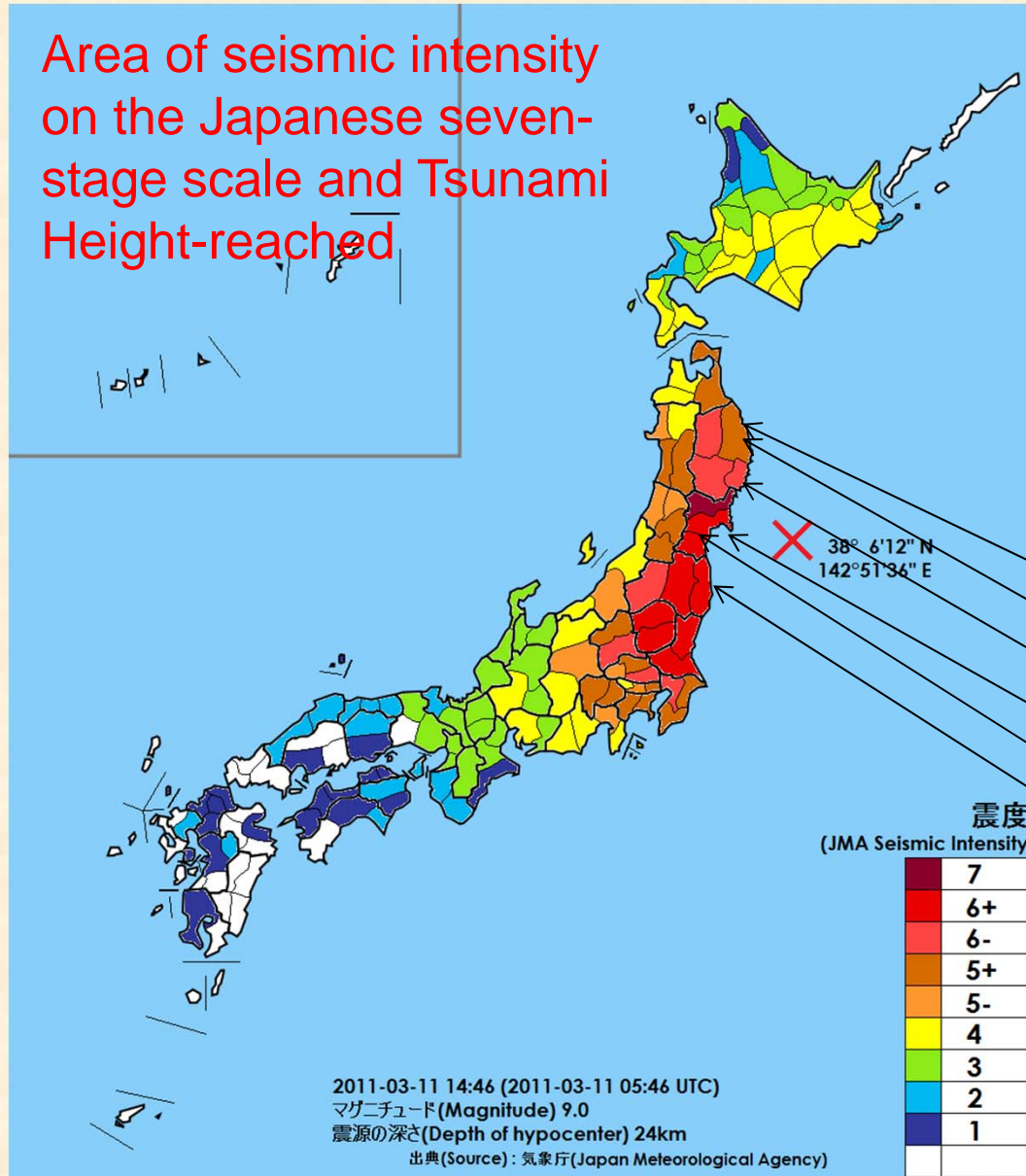
Today's agenda

1. Impact of the Great East Japan Earthquake
2. Earthquake disaster reconstruction and economy forecast
3. Current and future lift trucks market in Japan

Thank you for your sympathy,
your support
and your encouragement.



Area of seismic intensity on the Japanese seven-stage scale and Tsunami Height-reached



The 9.0-magnitude earthquake hit on the Pacific side in the North-East area of Japan on March 11, 2011
 This is the 4th biggest earthquake in the world since 1900.

Tsunami height in the North-east Japan

Miyako	38m
Kamaishi	32m
Rikuzen Takada	22m
Onagawa	16m
Sendai	6m
Soma	22m

Level 7 quake means the highest level on the Japanese Seismic intensity.

Damage by the Earthquake & Tsunami

- Over 15,000 people were dead.
- Over 4,000 people were missed
- Over 110,000 houses were collapsed
- Around \$210 billion in damage were estimated
 - 3.6% of GDP in 2010
 - 18.3% of initial national budget in 2011

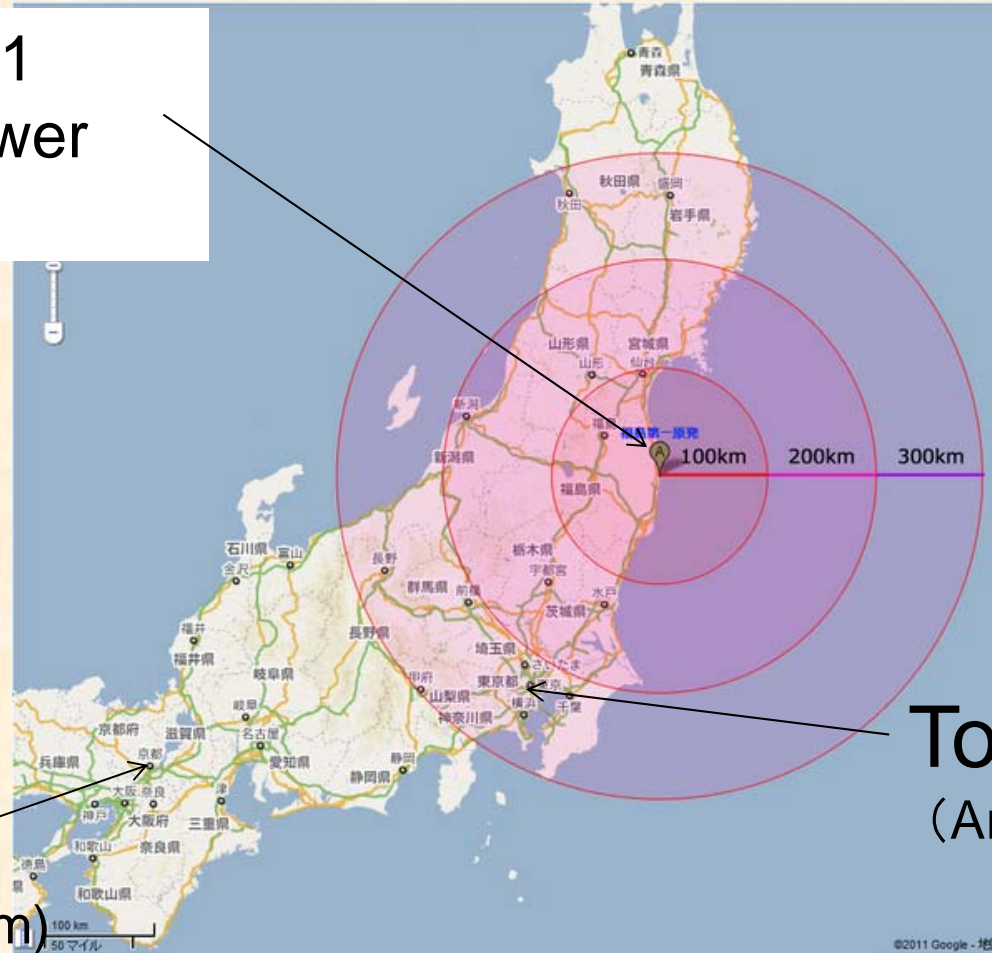
** Damage from accident of Fukushima 1 nuclear power station is not included*

Accident in Fukushima 1 Nuclear Power Station

Fukushima 1
Nuclear Power
Station

Kyoto
(Around 550km)

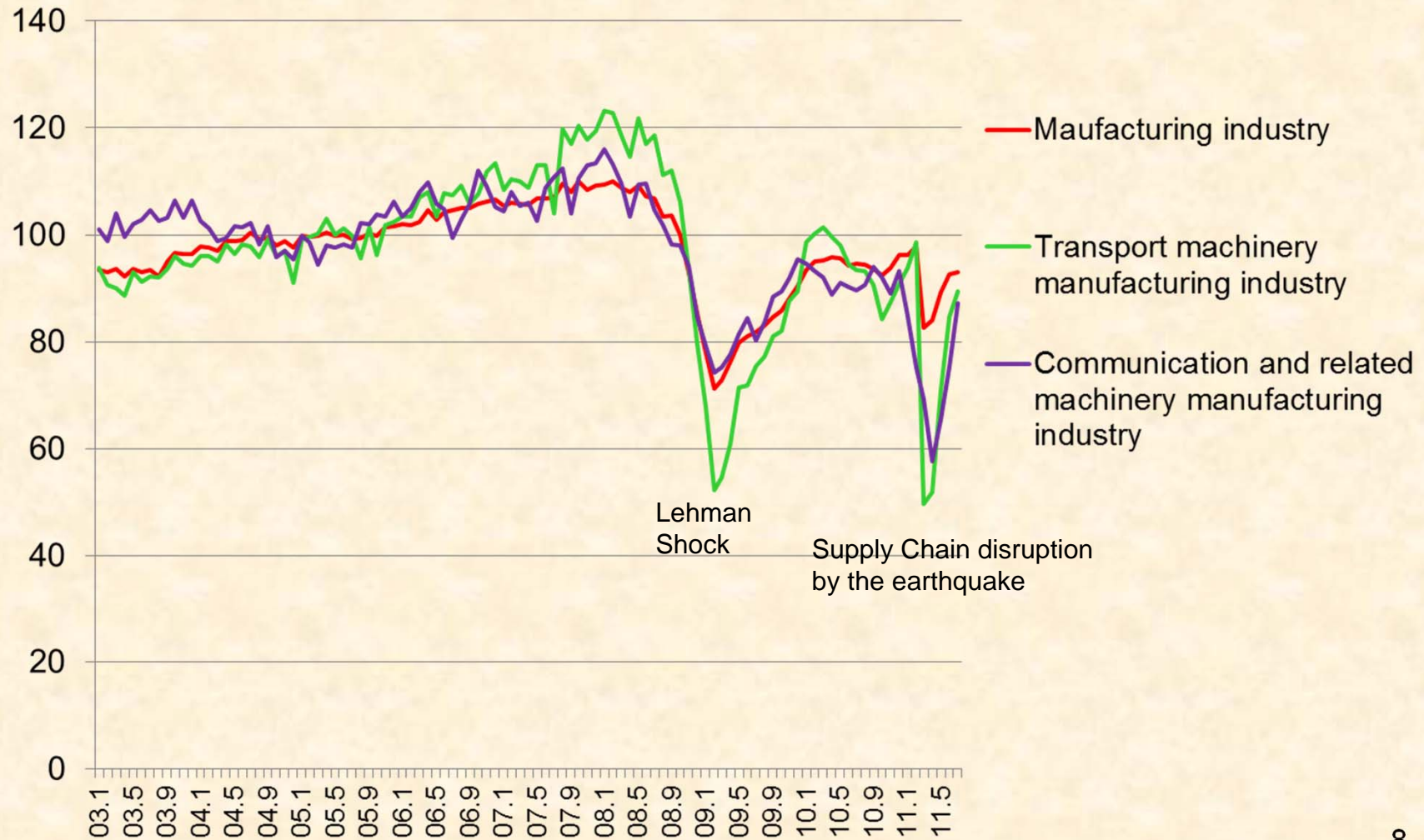
Tokyo
(Around 220km)



Roadmap for immediate actions for the verification of and Restoration from the Accident at Fukushima 1 Nuclear Power Station

Actions	Targets	Current situation
Step 1 (Target: Mid-July 2011)	Radiation does is in steady decline	Completion (19 July)
Step 2 (Target: around 3-6 months)	Release of radioactive materials is under control and radiation does is being significantly held down	
Mid-Term Issues	Confirm the safety of the removal and disposal methods of the spent or damaged fuels	

Industrial Production Index



Japanese industry is well on the way to recovery from earthquake disasters

According to a survey in June 2011 by Ministry of Economy, Trade and Industry (n=123 companies)

1. 80% of production site in the disaster stricken area have recovered pre-March 11 level in their production capacity.
2. 70% of the rest of site will recover until 2011.
3. 60% of manufacturing companies expect increase of their sales on reconstruction needs.

GDP forecast made a downward revision

	GDP
2007	1.8%
2008	-4.1%
2009	-2.4%
2010	2.3%
2010 IV	-2.5%
2011 I	-3.6%
2011 II	-2.1%

Risks for Japanese Economy

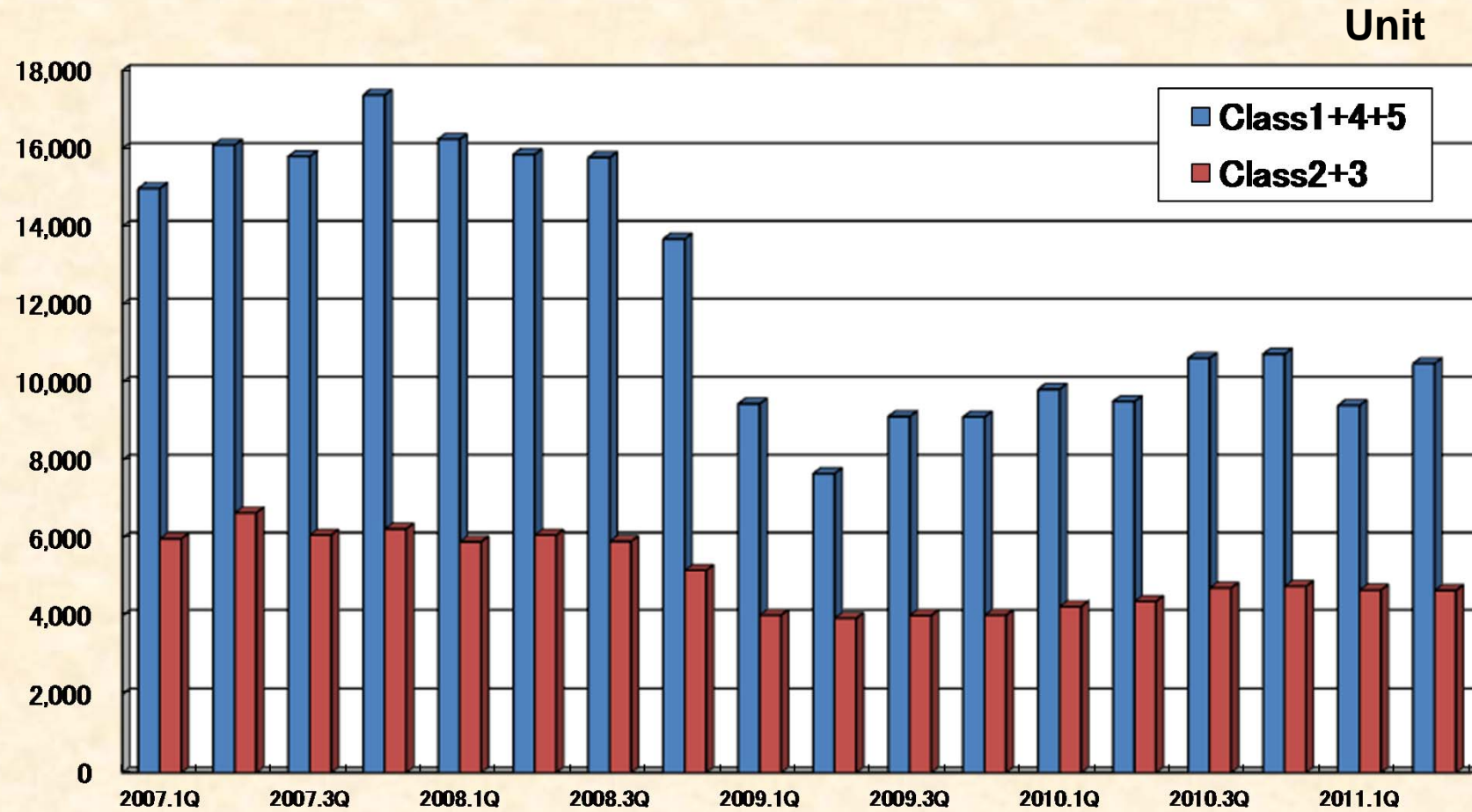
1. Shortage of electric power
2. Harmful rumor
3. Strong Yen
4. Lame-duck government

Contribution to reconstruction in disaster stricken area by Industrial trucks Industry

- Over 5000 lift trucks are missed in disaster hit area and JIVA members has supplied around 100 trucks without compensation.
- Special heavy-duty forklift featuring a cabin that shields against radiation, for safer handling of contaminated rubble near the Fukushima 1 Nuclear Power Station



Industrial Trucks Market in Japan



*Data from WITS Shipment Statistics

**JIVA will host the next AITO
meeting in 2012**

**JIVA is looking forward to
welcoming AITO members!**

Thank you for your attention