



Presidents Forum



海南島 三亞

October 26, 2013 ,Sanya, China

**Presentation by Kazue Sasaki
President of JIVA**

Today's agenda

1. Trend of Japanese economy

2. Current and future lift trucks market in Japan

Japan Revitalization Strategy

good results, snapshots compare with 2012

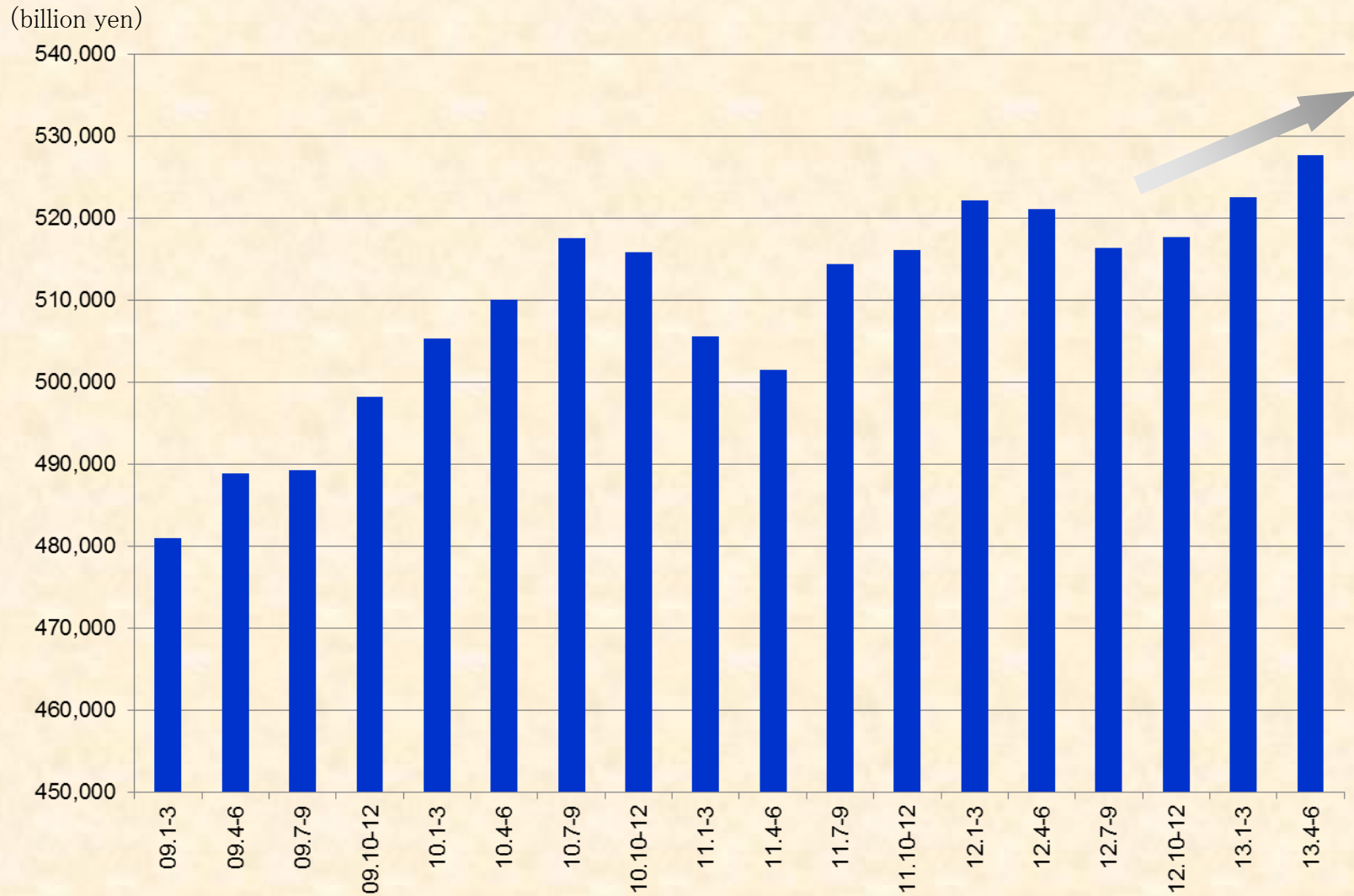
	2013	2012
GDP*1	+3.8 (2013. Apr-Jun)	-3.6 (2012.Jul-Sep)
Tokyo stock price*2	¥14,445 (End of September)	¥8,928 (End of October)
Profits in corporations*3	¥15,679billion (2013. Apr-Jun)	¥12,646billion (2012.Apr-Jun)
Currency (JPY/US\$)	¥98.23 (2013. Sep)	¥78.68 (2012.Aug)
Unemployment Rate	4.1% (2013.Aug)	4.2% (2012. Aug)

*1: Annualized rate of Changes from the previous quarter (Real: seasonally adjusted series)

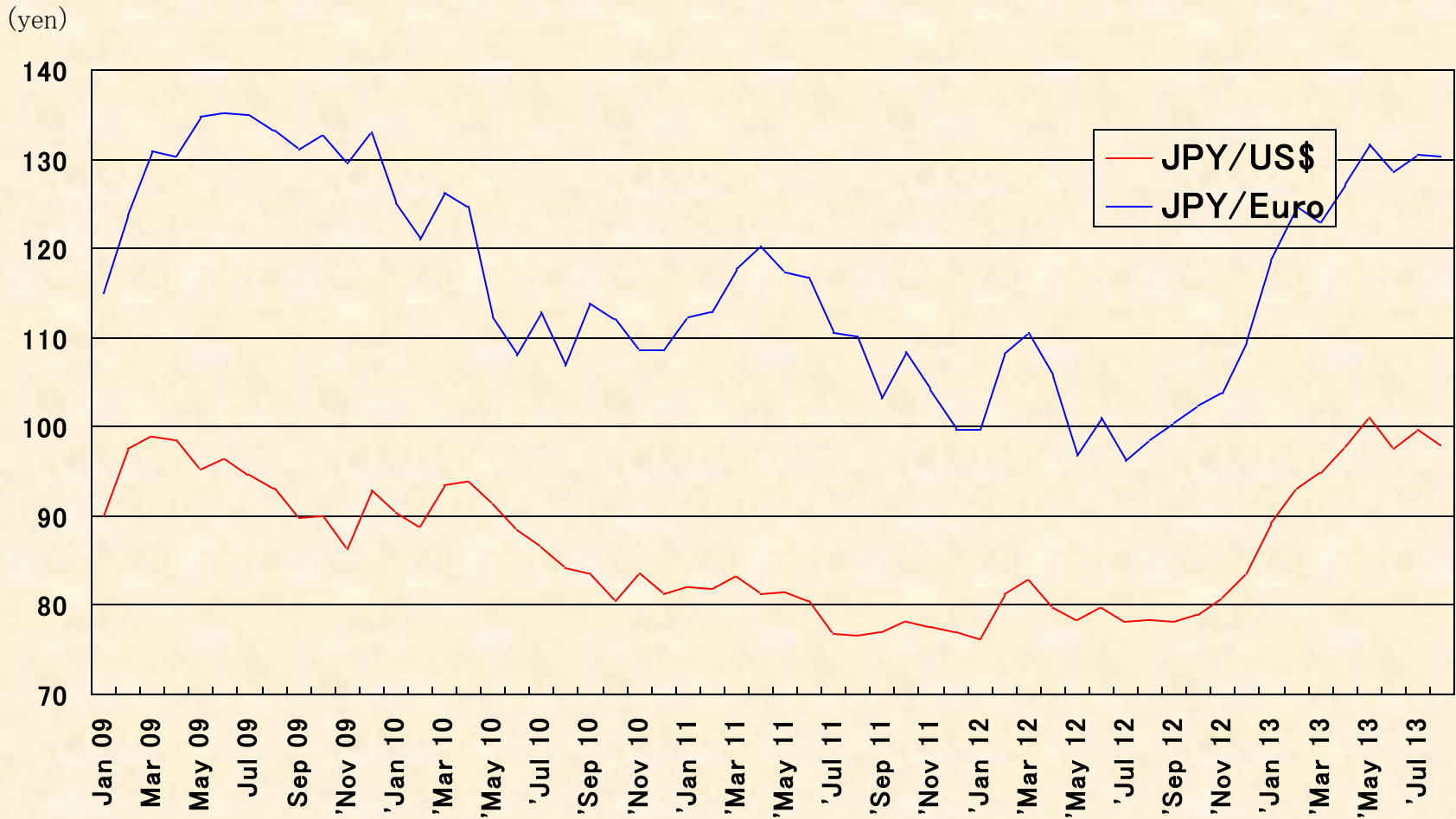
*2: The Nikkei Stock Average (225 Issues) , *3: Ministry of Finance, Financial statements statistics

Trend of Real GDP

(seasonally adjusted)



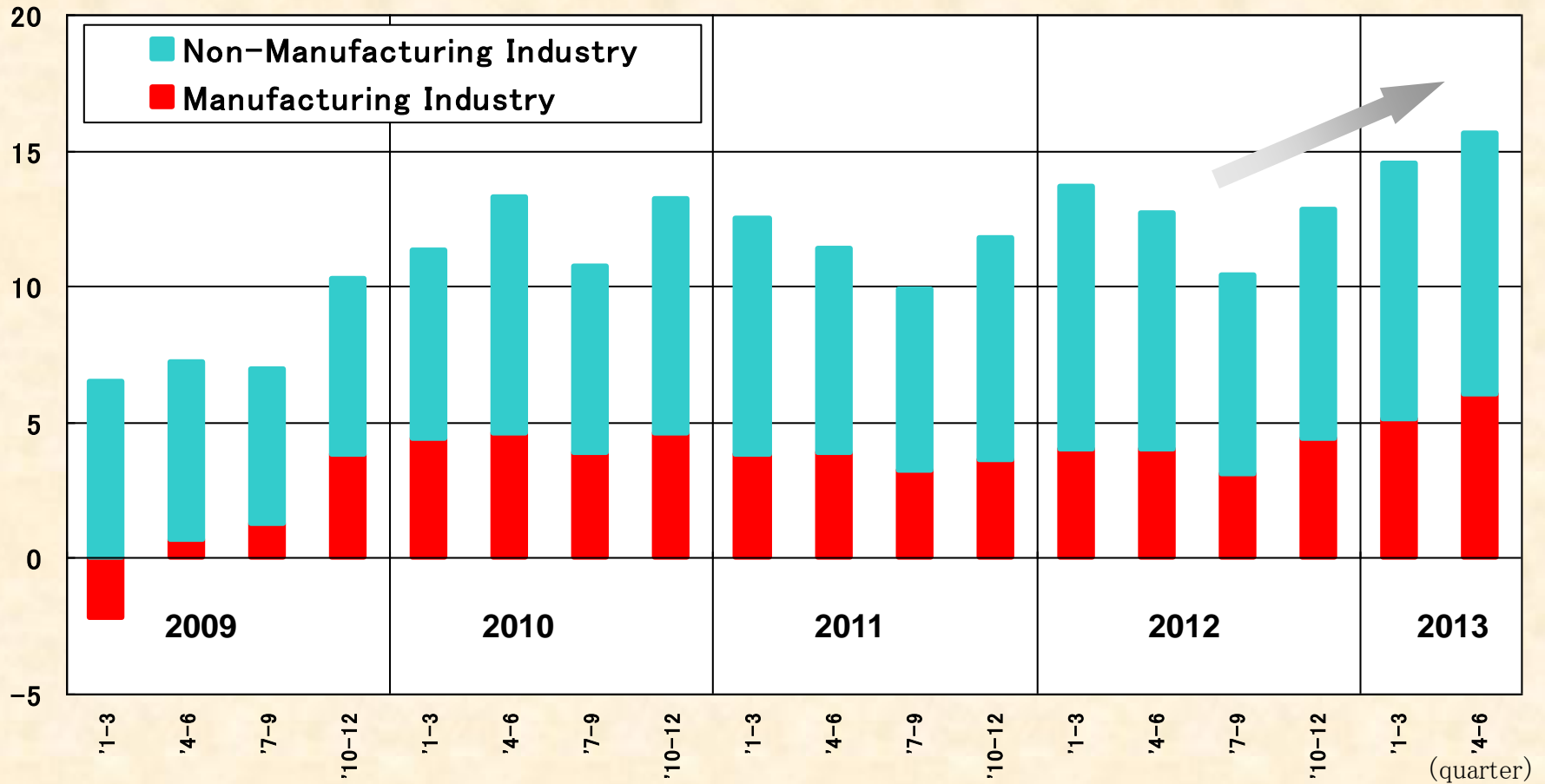
Currency – JPY,US\$ and Euro



Current Profits in Corporations

Ministry of Finance, Financial statements statistics

(trillion yen)

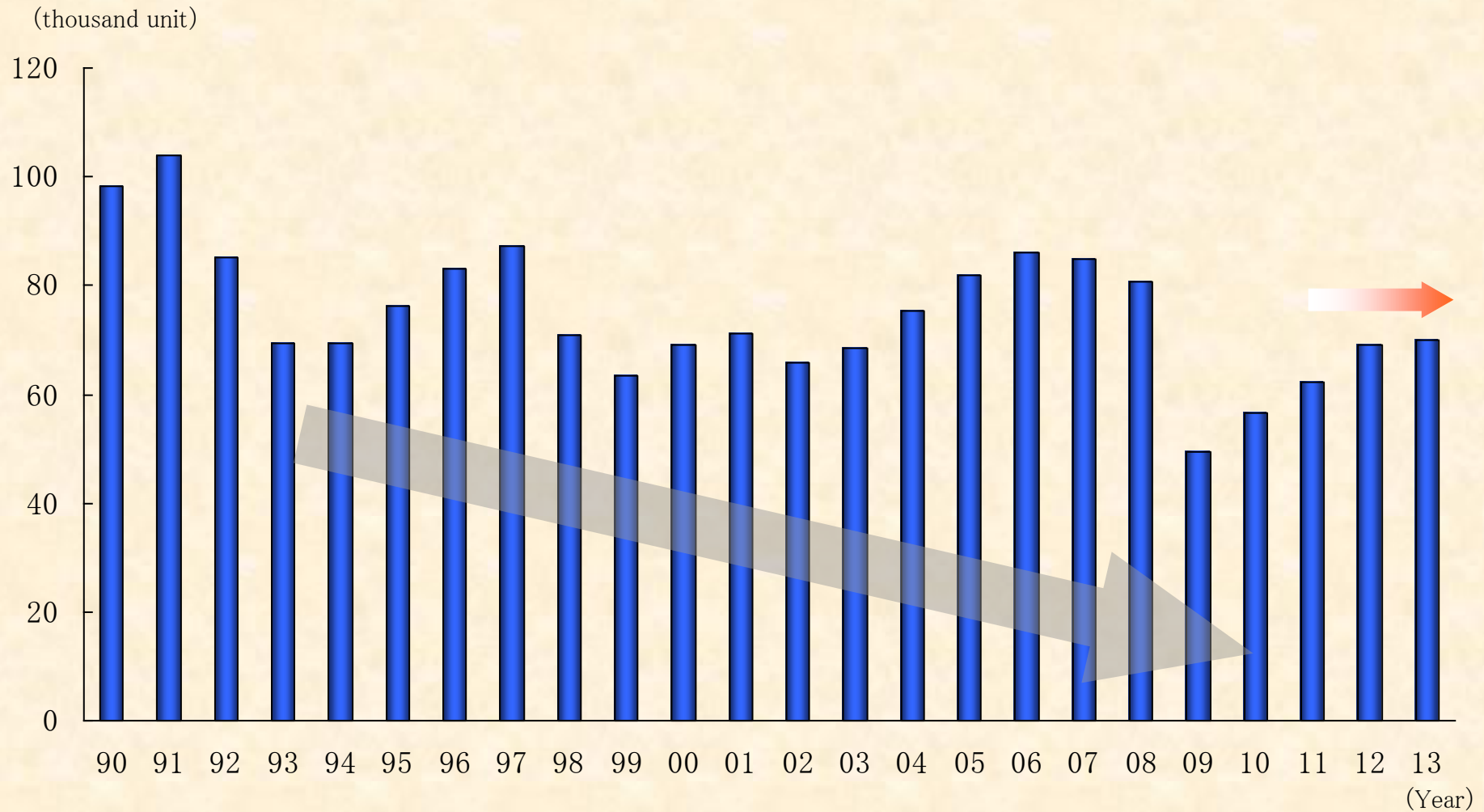


Today's agenda

1. Trend of Japanese economy

2. Current and future lift trucks market in Japan

Domestic demands in Japan would be unexpected to be high growth in the future



Company merger in Japan

(No.1 ~ 10)

Rank	Manufacturer	Year	Revenue (M. EUR)	Stock Sales (M. Units)
1		2011/12	5,173	566,746
		2010/11	4,172	490,676
		2009/10	3,390	426,919
		2008/09	4,842	635,123
		2007/08	4,942	777,691
2		2011	4,368	4,368
		2010	3,534	3,534
		2009	3,084	3,084
		2008	4,554	4,554
		2007	4,312	4,312
3		2011	1,922	1,922
		2010	1,653	1,653
		2009	1,526	1,526
		2008	1,901	1,901
		2007	1,804	1,804
4		2011	1,919	2,541
		2010	1,349	1,802
		2009	1,024	1,475
		2008	1,969	2,740
		2007	1,766	2,400
5		2011/12	1,572	2,100
		2010/11	1,267	1,800
		2009/10	1,175	1,584
		2008/09	1,355	1,803
		2007/08	1,146	1,813
6		2011/12	1,042	114,162
		2010/11	928	104,142
		2009/10	681	85,758
		2008/09	1,153	151,239
		2007/08	1,345	211,663
7		2011	1,020	1,020
		2010	1,020	1,020
		2009	1,007	1,007
		2008	1,516	1,516
		2007	1,343	1,343
8		2011	925	925
		2010	697	697
		2009	581	581
		2008	1,110	1,110
		2007	1,088	1,088
9		2011	782	6,377
		2010	576	5,084
		2009	317	3,115
		2008	317	3,010
		2007	259	2,787
10		2011/12	761	83,365
		2010/11	680	73,990
		2009/10	551	69,400
		2008/09	890	116,713
		2007/08	1,089	178,368

(No.11 ~ 20)

Rank	Manufacturer	Year	Revenue (M. EUR)	Stock Sales (M. Units)
11		2011/12	738	80,855
		2010/11	695	81,739
		2009/10	467	58,847
		2008/09	740	97,066
		2007/08	812	127,784
12		2011	681	5,554
		2010	521	4,593
		2009	306	3,005
		2008	346	3,266
		2007	239	2,566
13		2011/12	623	68,304
		2010/11	518	60,899
		2009/10	441	55,520
		2008/09	397	52,051
		2007/08	341	53,650
14		2011	523	783,655
		2010	427	639,472
		2009	281	468,640
		2008	526	967,338
		2007	308	425,005
15		2011/12	484	52,981
		2010/11	397	46,724
		2009/10	317	39,964
		2008/09	646	84,785
		2007/08	618	97,329
16		2011	476	773,376
		2010	322	482,697
		2009	319	531,763
		2008	461	847,839
		2007	445	613,193
17		2011	311	311
		2010	243	243
		2009	223	223
		2008	349	349
		2007	323	323
18		2011	277	414,845
		2010	179	267,642
		2009	115	192,573
		2008	162	297,756
		2007	144	198,898
19		2011	137	1,138
		2010	106	932
		2009	56	548
		2008	74	705
		2007	72	776
20		2011	124	124
		2010	91	91
		2009	81	81
		2008	102	102
		2007	95	95

Mitsubishi Nichiyu
Forklift

Up to
No.5



Up to
No.7

UNICARRIERS

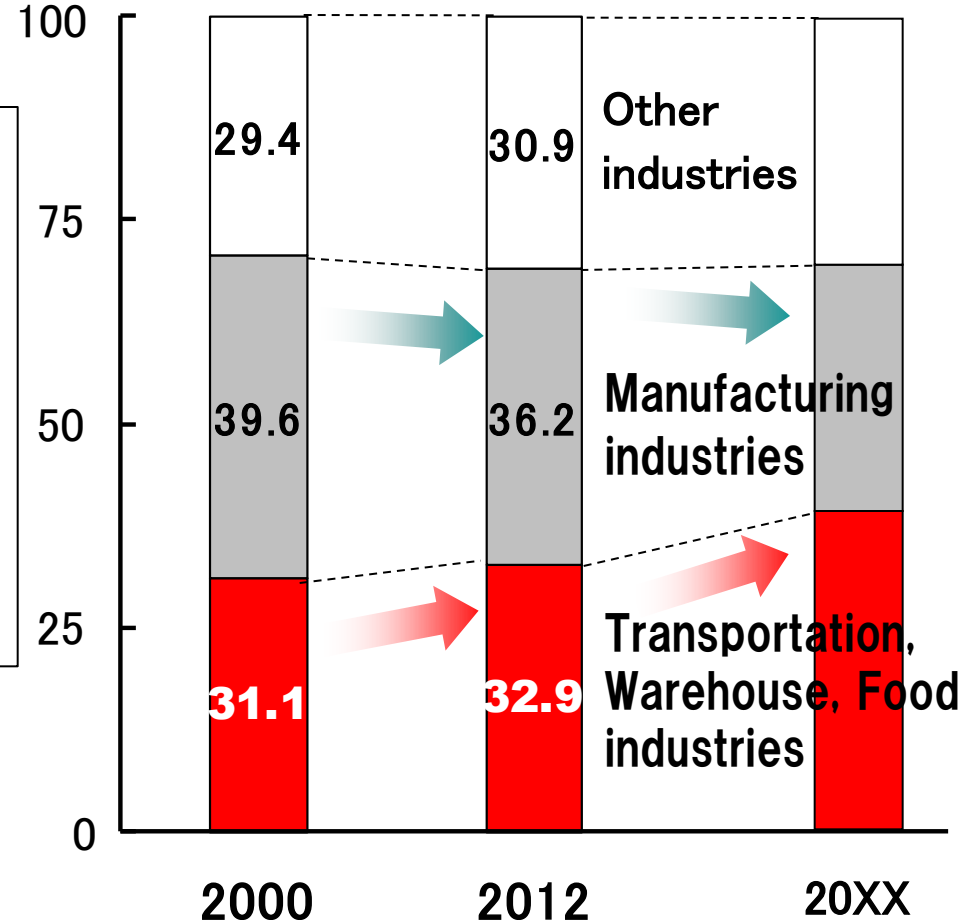
(Amount of money base(FY11), according to dhf intralogistic)

Demand from warehouse industries would be expected to steady grow

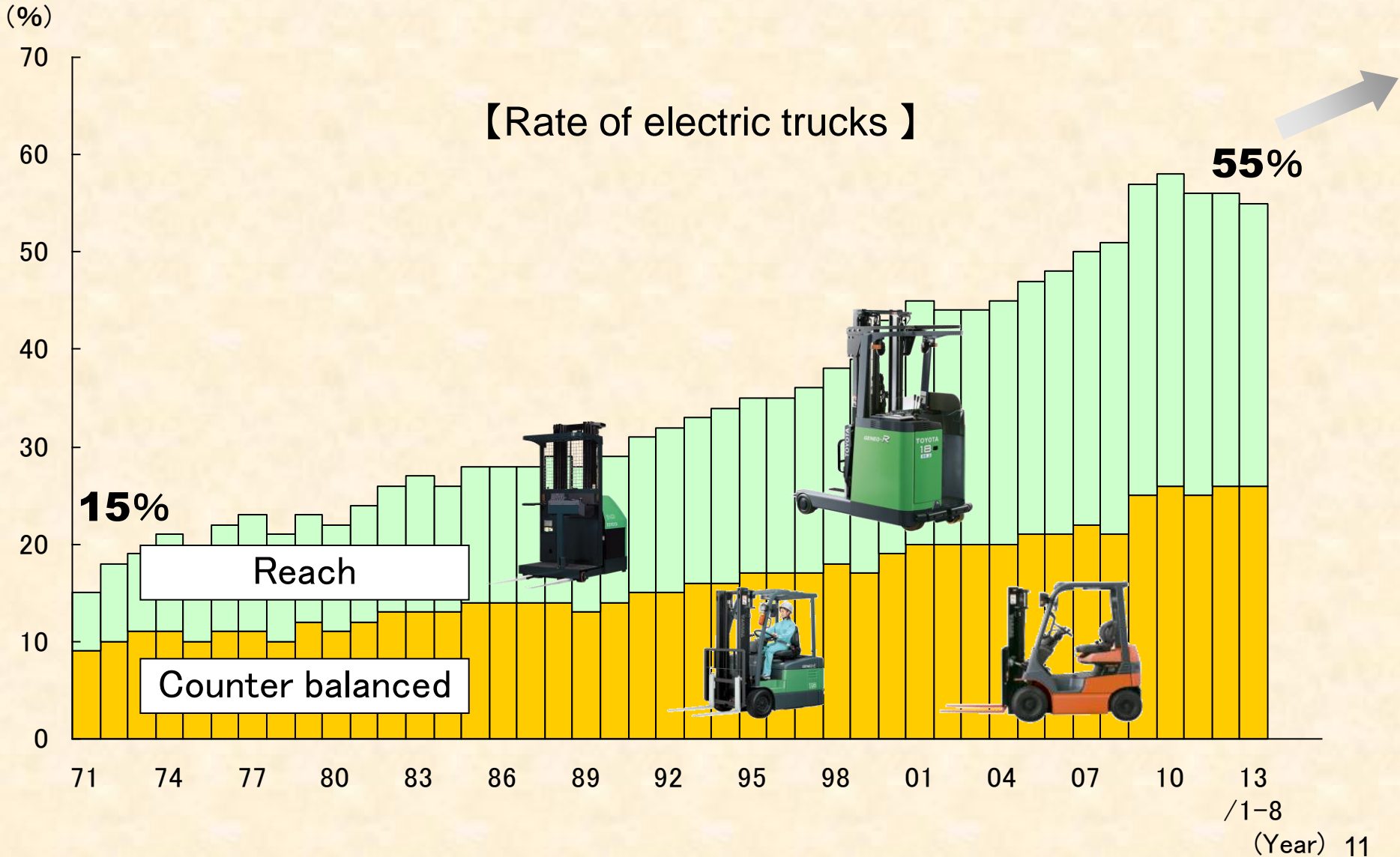
大型物流施設の供給増加

Major real estate companies has been aggressive to invest in logistic facilities, correspond to expansion of E-commerce.

(%) 【Change of share by customer industries】



Share of electric trucks has been up



Emission control would be more strictly required for diesel lift trucks in JAPAN

Engine Power	Load capacity	2012	2013	2014	2015	2016
19kW and over less than 37kW	around 1 – 1.5t		Enforce on Oct. 2013			←full implementation on Sep. 2015
37kW and over less than 56kW	around 1 – 3.5t		Enforce on Oct. 2013		←full implementation on Nov. 2014	
56kW and over less than 75kW	around 3.5 – 8t		Enforce on Oct. 2013		←full implementation on Apr. 2014	
75kW and over less than 130kW	around 6 – 10t		Enforce on Oct. 2013		←full implementation on Nov. 2013	

How to adjust to the regulation must be challenging for manufacturers

LOGIS-TECH TOKYO 2014

One of the largest exhibition featuring material handling equipment and services in Asia.

- Number of exhibitors (Planned)
 - : 450 (411 in 2012)
- Number of entries (Planned)
 - : 55,000 professionals (52,467 in 2012)

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Logis-Tech Tokyo 2014
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<http://www.logis-tech-tokyo.gr.jp>

国際物流総合展

Thank you for your attention