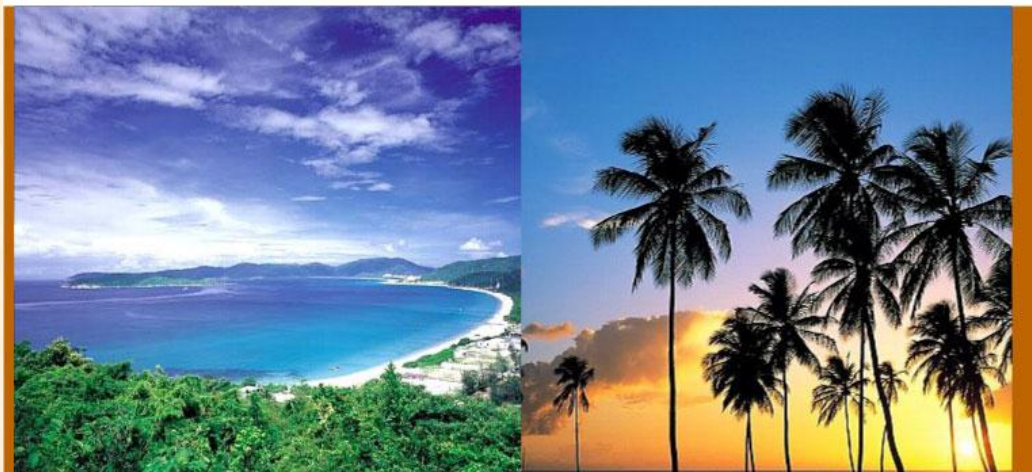




# Presidents Forum

## 主席论坛



海南島 三亞

October 26, 2013 ,Sanya, China

2013年10月26日, 中国三亞

Presentation by Kazue Sasaki

President of JIVA

JIVA主席佐々木一衛先生

# Today's agenda

## 今日议程

### 1. Trend of Japanese economy

日本经济趋势

### 2. Current and future lift trucks market in Japan

日本叉车市场的现状和将来

# Japan Revitalization Strategy 日本复苏策略

good results, snapshots compare with 2012

与2012年相比，表现良好

	2013	2012
GDP*1	+3.8 (2013. Apr-Jun) 4-6月	-3.6 (2012. Jul-Sep) 7-9月
Tokyo stock price*2 东证股价	14,445 (End of September) 9月底	8,928 (End of October) 10月底
Profits in corporations*3 企业利润	15,679billion 十亿 (2013. Apr-Jun) 4-6月	12,646billion 十亿 (2012. Apr-Jun) 4-6月
Currency (JPY/US\$) 日元行情 (日元/美元)	98.23 (2013. Sep) 9月	78.68 (2012. Aug) 8月
Unemployment Rate 失业率	4.1% (2013. Aug) 8月	4.2% (2012. Aug) 8月

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

\*1: 从上一季度折合成年率的变化率 (实际: 季节性调整)

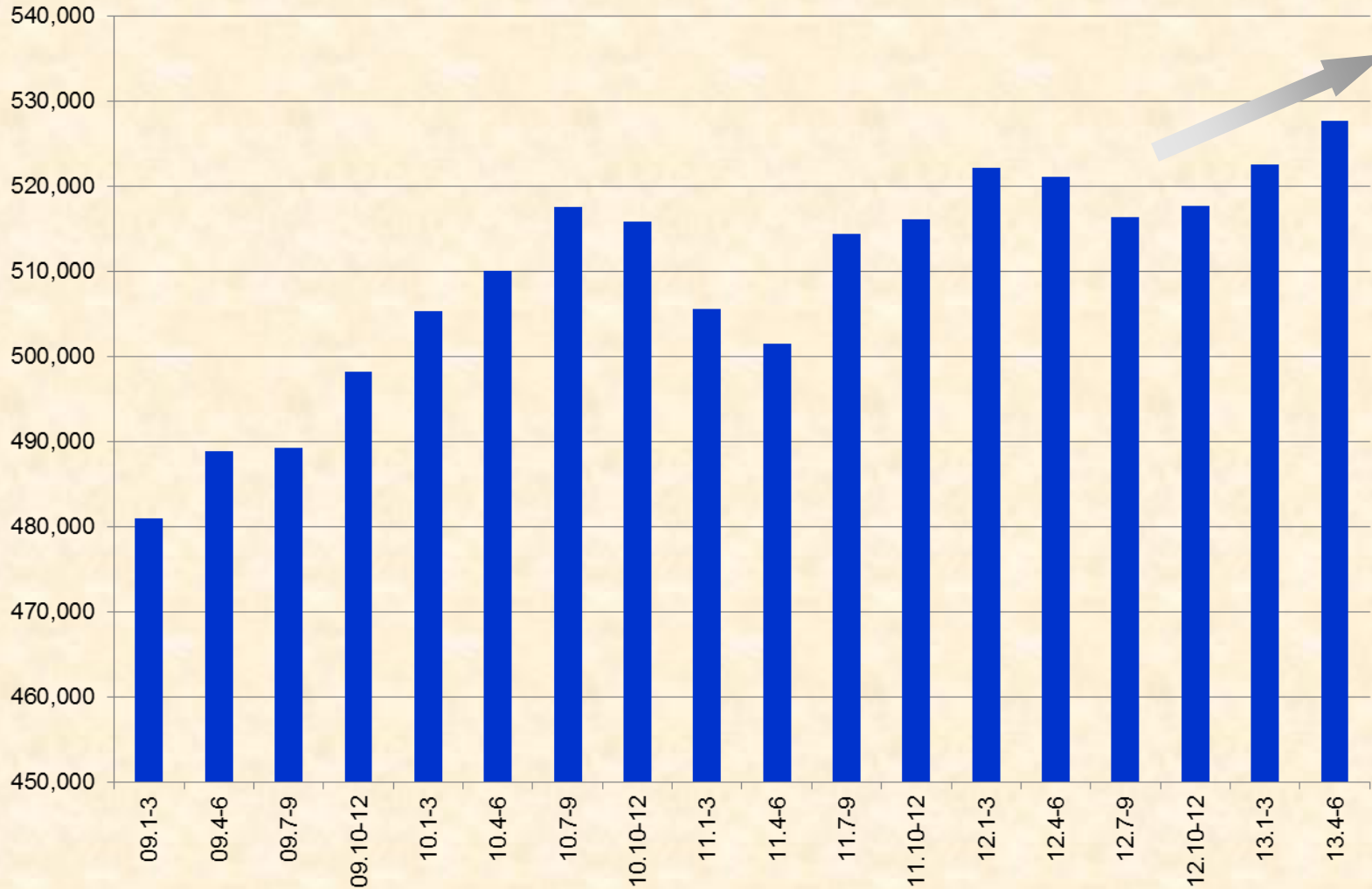
\*2: The Nikkei Stock Average (225 Issues), \*3: Ministry of Finance, Financial statements statistics

\*2: 日经股价指数 (225种), \*3: 财政部, 财务统计报告

# Trend of Real GDP 实际GDP值发展

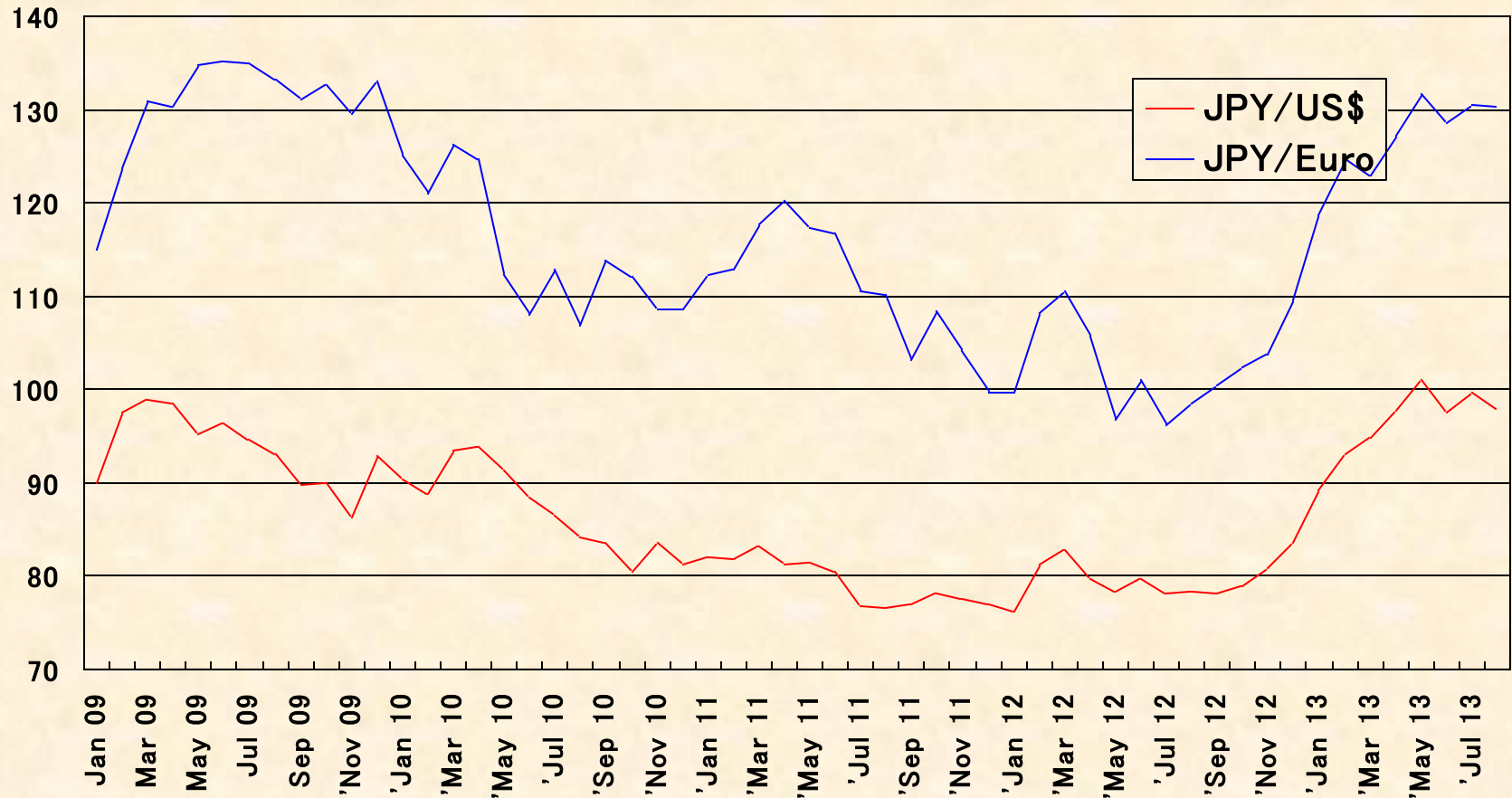
(seasonally adjusted 已作季节调整)

(billion yen)



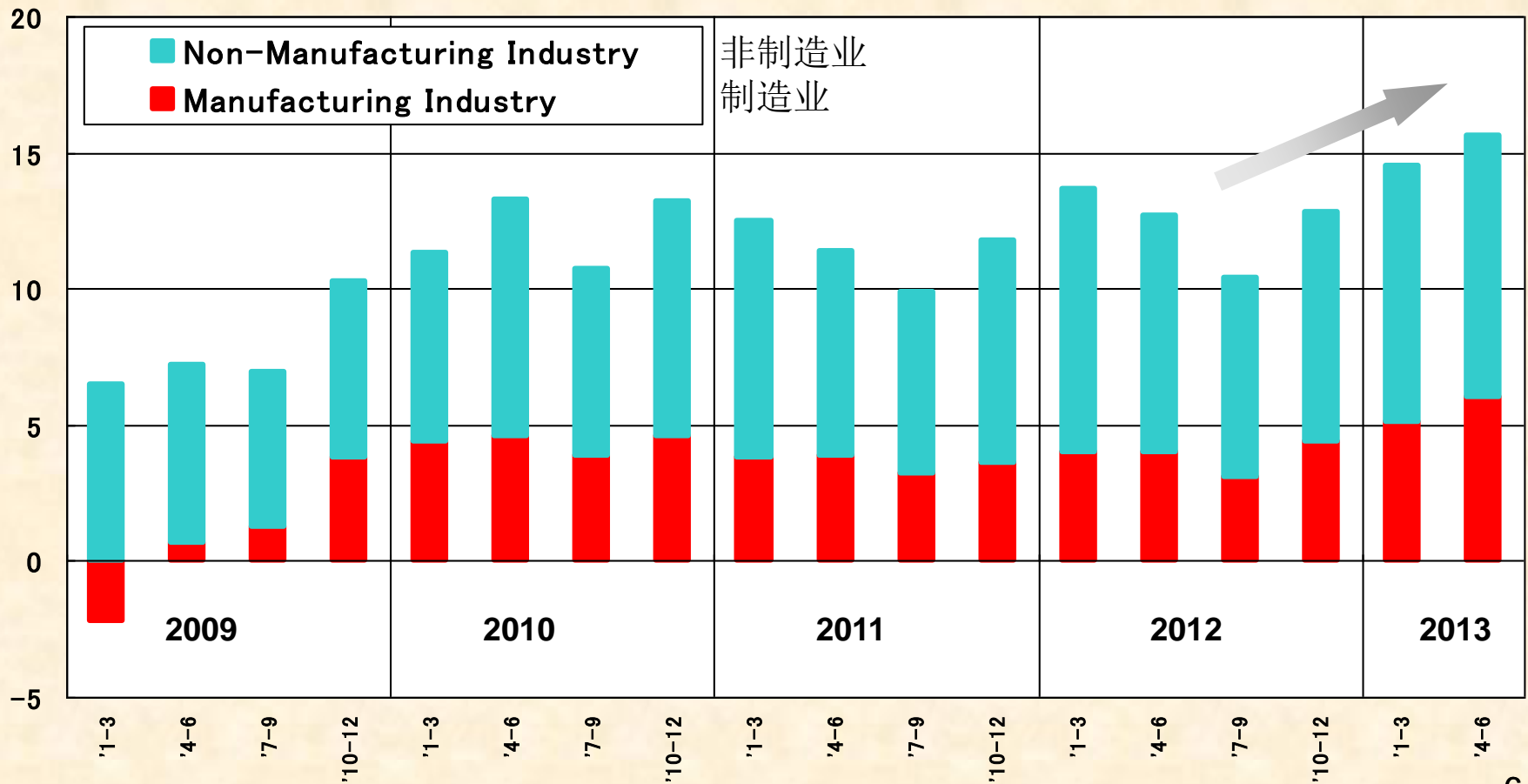
# Currency – JPY,US\$ and Euro

## 日元行情 – 日元、美元和欧元



# Current Profits in Corporations 企业当期利润

Ministry of Finance, Financial statements statistics  
(Trillion Yen) 财政部，财务统计报告（万亿日元）



# Today's agenda

## 今日议程

### 1. Trend of Japanese economy

日本经济趋势

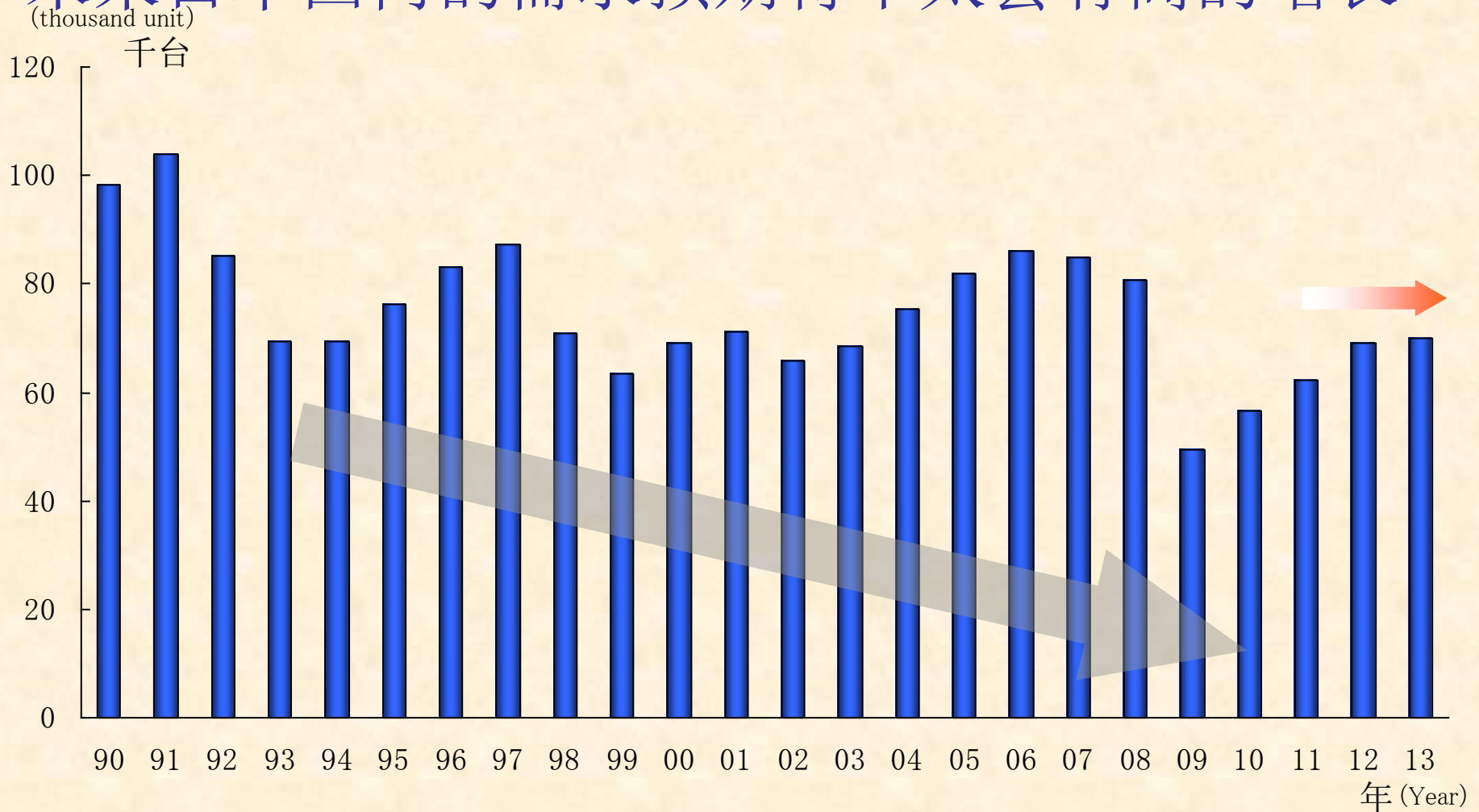
### 2. Current and future lift trucks market in Japan

日本叉车市场的现状和将来



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

未来日本国内的需求预期将不太会有高的增长





# Company merger in Japan 日本的制造商合并

(No.1 ~ 10)

(No.11 ~ 20)

Rank	Manufacturer	Year	Revenue/100 Mo. EUR	Units/100 Mo. Units
<b>1</b>		2011/12	5,173	566,746 JPY
		2010/11	4,172	490,676 JPY
		2009/10	3,390	426,979 JPY
		2008/09	4,842	635,123 JPY
		2007/08	4,942	777,691 JPY
<b>2</b>		2011	4,368	4,368 EUR
		2010	3,534	3,534 EUR
		2009	3,084	3,084 EUR
		2008	4,554	4,554 EUR
		2007	4,312	4,312 EUR
<b>3</b>		2011	1,922	1,922 EUR
		2010	1,653	1,653 EUR
		2009	1,526	1,526 EUR
		2008	1,901	1,901 EUR
		2007	1,804	1,804 EUR
<b>4</b>		2011	1,919	2,541 USD
		2010	1,349	1,802 USD
		2009	1,024	1,475 USD
		2008	1,969	2,740 USD
		2007	1,766	2,400 USD
<b>5</b>		2011/12	1,572	2,100 USD
		2010/11	1,267	1,800 USD
		2009/10	1,175	1,584 USD
		2008/09	1,355	1,803 USD
		2007/08	1,146	1,811 USD
<b>6</b>		2011/12	1,042	114,162 JPY
		2010/11	928	109,142 JPY
		2009/10	681	85,758 JPY
		2008/09	1,153	151,239 JPY
		2007/08	1,345	211,663 JPY
<b>7</b>		2011	1,020	1,020 EUR
		2010	1,020	1,020 EUR
		2009	1,007	1,007 EUR
		2008	1,516	1,516 EUR
		2007	1,343	1,343 EUR
<b>8</b>		2011	925	925 EUR
		2010	697	697 EUR
		2009	581	581 EUR
		2008	1,110	1,110 EUR
		2007	1,088	1,088 EUR
<b>9</b>		2011	782	6,377 CNY
		2010	576	5,084 CNY
		2009	317	3,115 CNY
		2008	317	3,010 CNY
		2007	259	2,787 CNY
<b>10</b>		2011/12	761	83,365 JPY
		2010/11	680	79,990 JPY
		2009/10	551	69,400 JPY
		2008/09	890	116,713 JPY
		2007/08	1,089	178,368 JPY

Rank	Manufacturer	Year	Revenue/100 Mo. EUR	Units/100 Mo. Units
<b>11</b>		2011/12	738	80,855 JPY
		2010/11	695	81,739 JPY
		2009/10	467	58,847 JPY
		2008/09	740	97,065 JPY
		2007/08	812	127,784 JPY
<b>12</b>		2011	681	5,554 CNY
		2010	521	4,593 CNY
		2009	305	3,005 CNY
		2008	346	3,286 CNY
		2007	239	2,566 CNY
<b>13</b>		2011/12	623	68,304 JPY
		2010/11	518	60,899 JPY
		2009/10	441	55,520 JPY
		2008/09	397	52,051 JPY
		2007/08	341	53,650 JPY
<b>14</b>		2011	523	783,655 KRW
		2010	427	639,472 KRW
		2009	281	468,640 KRW
		2008	526	967,338 KRW
		2007	308	425,005 KRW
<b>15</b>		2011/12	484	52,981 JPY
		2010/11	397	46,724 JPY
		2009/10	317	39,964 JPY
		2008/09	646	84,785 JPY
		2007/08	618	97,329 JPY
<b>16</b>		2011	426	713,326 KRW
		2010	322	482,697 KRW
		2009	319	531,763 KRW
		2008	461	847,839 KRW
		2007	445	673,193 KRW
<b>17</b>		2011	311	311 EUR
		2010	243	243 EUR
		2009	223	223 EUR
		2008	349	349 EUR
		2007	323	323 EUR
<b>18</b>		2011	277	414,845 KRW
		2010	179	267,642 KRW
		2009	115	192,513 KRW
		2008	162	297,756 KRW
		2007	144	198,898 KRW
<b>19</b>		2011	137	1,118 CNY
		2010	106	932 CNY
		2009	56	548 CNY
		2008	74	705 CNY
		2007	72	776 CNY
<b>20</b>		2011	124	124 EUR
		2010	91	91 EUR
		2009	81	81 EUR
		2008	102	102 EUR
		2007	95	95 EUR

ニチュ三菱フォークリフト

Up to No.5  
上升到第五名

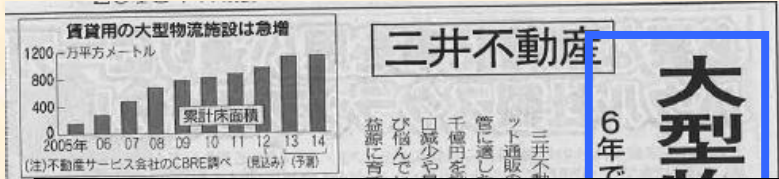
Up to No.7  
上升到第七名

UNICARRIERS

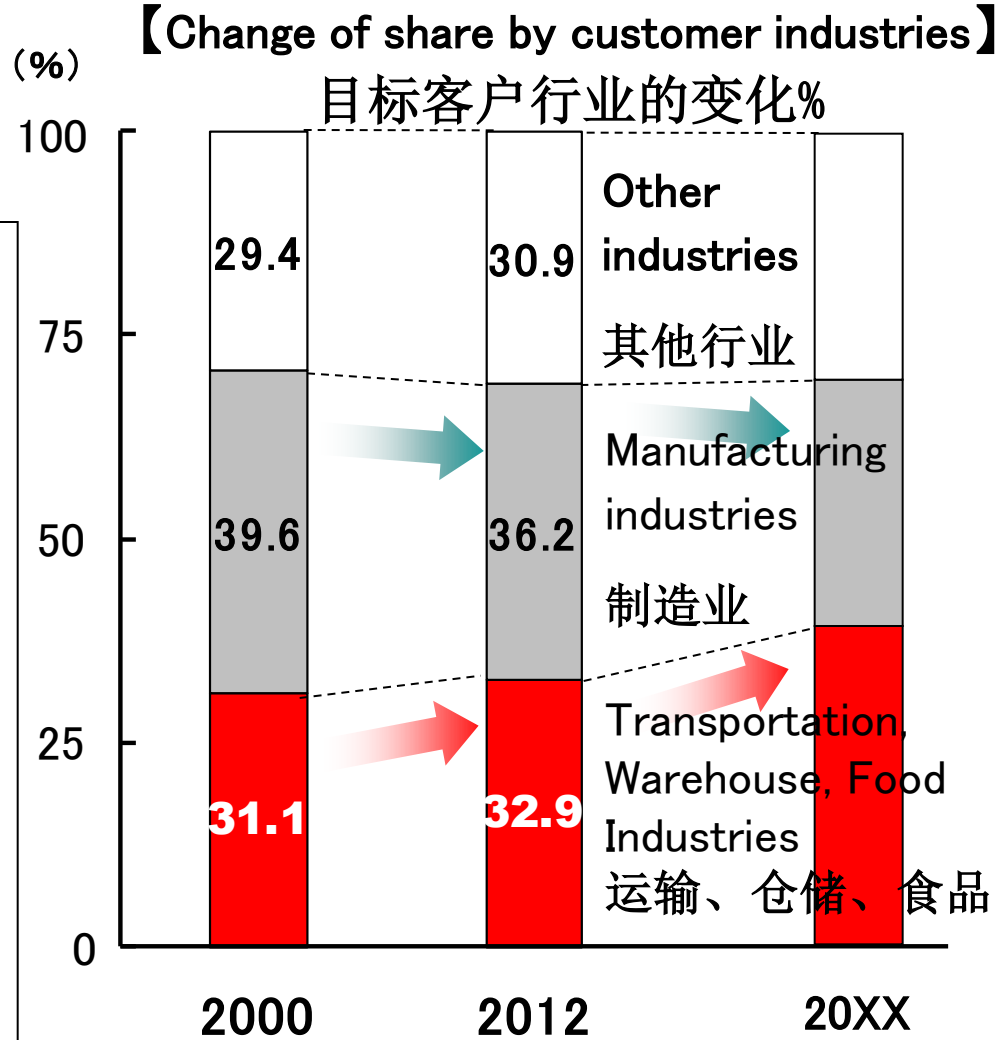
(Amount of money base(FY11), according to dhf intralogistic)

根据2011财务年度的统计数据，来源dhf intralogistic

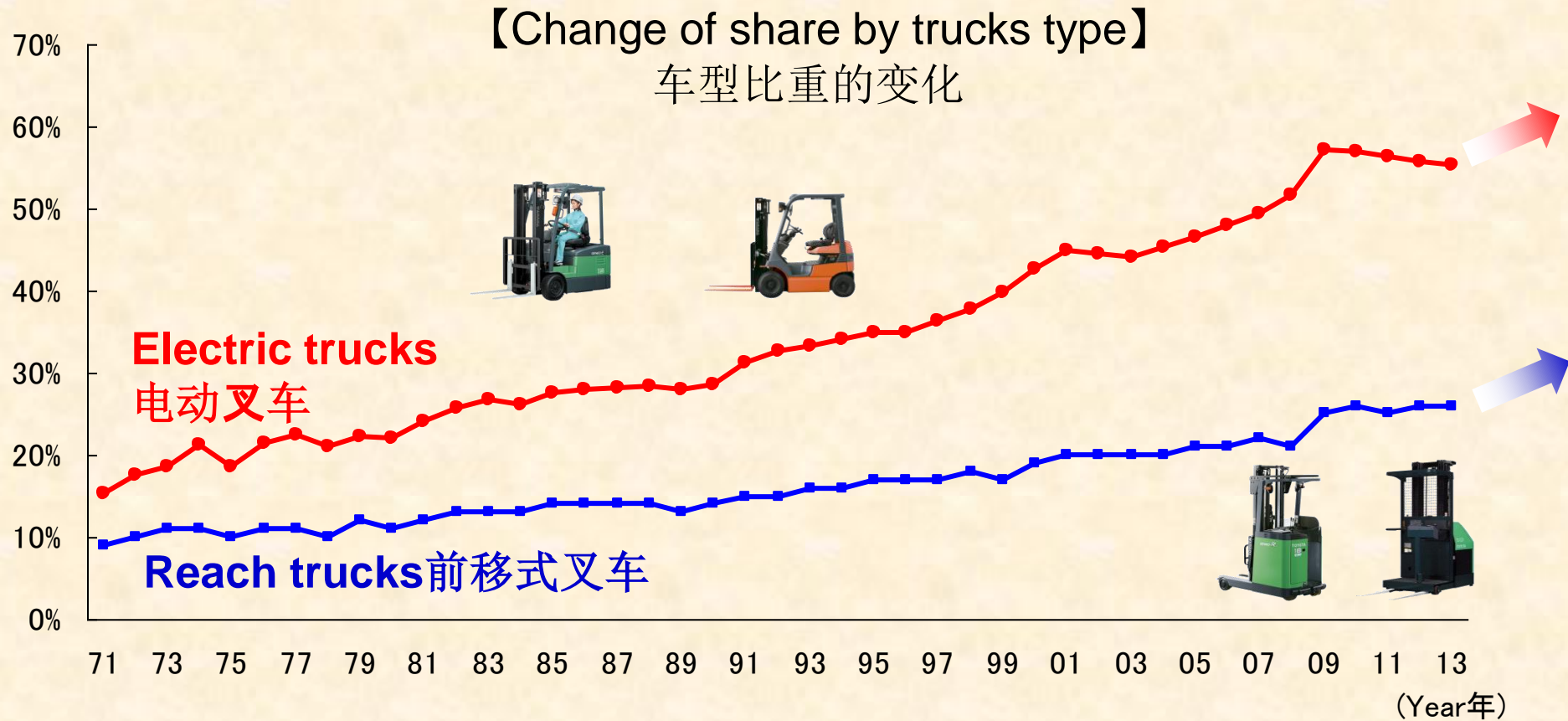
Demand from warehouse industries would be expected to steady grow 预期来自仓库市场的需求将呈稳定增长



Major real estate companies has been aggressive to invest in logistic facilities, correspond to expansion of E-commerce. 面对扩张的电子商务市场，主要的房地产商积极投资于物流设施。



# Share of electric trucks has been up 电车的比重提高



# Emission control would be more strictly required for diesel lift trucks

## 对于柴油叉车的排放控制更加严格

Engine Power 发动机功率	Load capacity 吨位	2012	2013	2014	2015	2016
19kW and over less than 37kW	around 1 - 1.5t		Enforce on Oct. 2013 2013年10月实施			←full implementation on Sep. 2015 2015年9月全面推行
37kW and over less than 56kW	around 1 - 3.5t		Enforce on Oct. 2013 2013年10月实施		←full implementation on Nov. 2014	2014年11月全面推行
56kW and over less than 75kW	around 3.5 - 8t		Enforce on Oct. 2013 2013年10月实施		←full implementation on Apr. 2014	2014年4月全面推行
75kW and over less than 130kW	around 6 - 10t		Enforce on Oct. 2013 2013年10月实施		←full implementation on Nov. 2013	2013年11月全面推行

How to adjust to the regulation must be challenging for manufacturers

对制造商来说，如何适应规定是一挑战



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: 450 (411 in 2012)  
预计参展商：450家（2012年有411家）
- Number of entries (Planned)  
: 55,000 professionals (52,467 in 2012)  
预计参观人数：55,000名专业人士  
（2012年有52,467名）

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国際物流総合展

Thank you for your attention

感谢您的倾听