



CARGOTEC

Load Handling – Equipped for improved performance



Cargotec's offering today

Cranes

- Hiab XS
- Hiab Loglift
- Hiab Jonsered
- Hiab ST



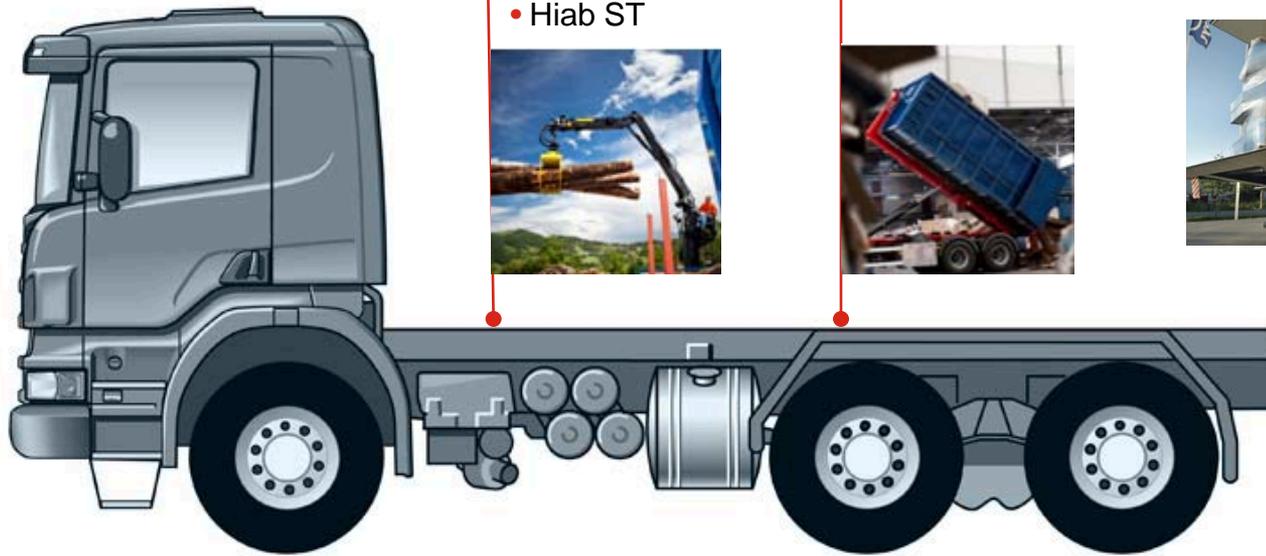
Demountables

- Hiab Multilift



Taillifts

- Zepro
- Waltco
- Del



Service



Truck-mounted forklifts

- Hiab Moffett
- Princeton Piggy Back®



Goal

The goal is to take a leading position globally in truck mounted equipment.



Wide range of customers in multiple industries

- Large transportation companies
- Constructors
- Municipalities and governments
- Fleet operators
- One-truck owners
- Rental companies
- Truck manufacturers



Construction



Waste handling



Distribution



Forestry



Defence

Load handling evolution



By hand

Undeveloped parts of Africa and Asia



Hand made solution

One-off

Example
China and India inland



Local made solution

Occasionally

Low level efficiency

Example
Parts of Africa and APAC



Semi-professional

Part of business

Medium level efficiency



Professional

Core business

High level of efficiency

Example
Parts of Europe
Australia
North America

A strong starting point

- Strong market position
- Deep customer knowledge
- Premium brands
- Working together culture
- Devoted people with deep industrial knowledge
- Global processes
- Turn-around potential



Value adding services

- Global **service network** of ~1,250 locations
- **Spare parts** delivered through hubs in EMEA, AMER and APAC with ~350K order lines annually
- **Installations** to exact customer specifications in more than 25 countries across 6 continents
- **Accessories** range with more than 1,500 different applications extend versatility of the equipment enhancing earning potential
- **Fleet management** products offer customers good resale value on their equipments
- **Training** is provided to maximise productivity and reduce costs for our customers



Outsourcing of component production



Outsourcing in implementation phase



Suppliers selected

Planned actions implemented by 2012



Purchased component share of total product cost increases

Region EMEA

- Central and North Europe show positive development
- South Europe and Middle East still weak and affected by political and economic turbulence
- Strict emission rules for trucks 2013 are expected to drive need for equipment
- 15% of the trucks above 15 tons are equipped with load handling equipment

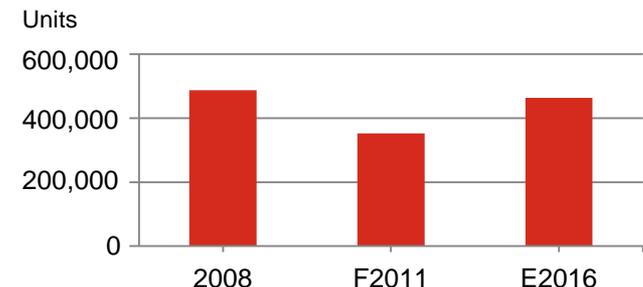
Waste handling

3 billion tons of waste produced each year in the European Union

The targets for EU Member States is to recycle 50% of their municipal waste and 70% of construction waste by 2020.



New truck sales over 15 tons - EMEA



Source: World Truck Industry Forecast Report
Detailed Sales Data

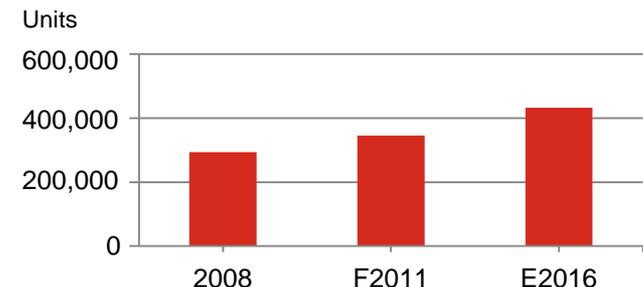
Region Americas

- Both US and Mexico are stable. Construction still on a low level but there starts to be signs of a need to re-investment as fleets are getting old.
- South America and Canada show positive signs.
- Approx 5% of trucks above 15 tons are equipped with load handling. Flat beds and box trailers are more common solutions.
- Dominant position in the distribution market with high market share

Construction



New truck sales over 15 tons - Americas



Source: World Truck Industry Forecast Report
Detailed Sales Data

Region APAC

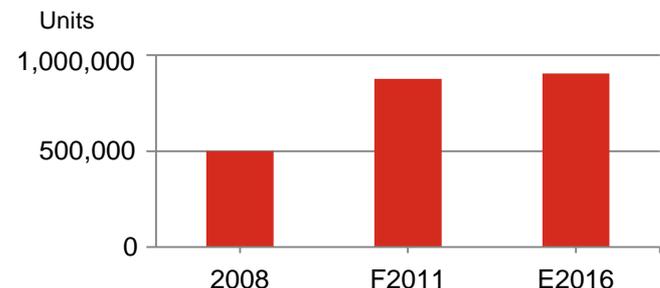
- The year started well but was affected as a consequence by the earthquake in Japan in March
- Lower truck availability especially in Japan and Australia
- The Chinese market develops positively
- Approximately 5% of trucks above 15 tons are equipped with load handling equipment

over **170**

Cities with a population over 1 million in China.



New truck sales over 15 tons - APAC



Source: World Truck Industry Forecast Report
Detailed Sales Data

Next steps

- Focus on customer needs
- Analyse future trends
- Develop operating model
- Build strong strategy
- Develop route to market
- New markets – China, India and Russia
- New product development



we keep cargo on the move™