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

- **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

- Local made solution

- Semi-professional

- Professional

- Core business

- High level of efficiency

Occasionally

- Low level efficiency

One-off

- Example China and India inland

Part of business

- Medium level 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.
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](image)

**New truck sales over 15 tons - Americas**

<table>
<thead>
<tr>
<th>Year</th>
<th>Units</th>
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<tbody>
<tr>
<td>2008</td>
<td></td>
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<tr>
<td>F2011</td>
<td></td>
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<td>E2016</td>
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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
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™