



Hyster Jumbo Truck Strategy Meeting

Conquest and New
Accounts



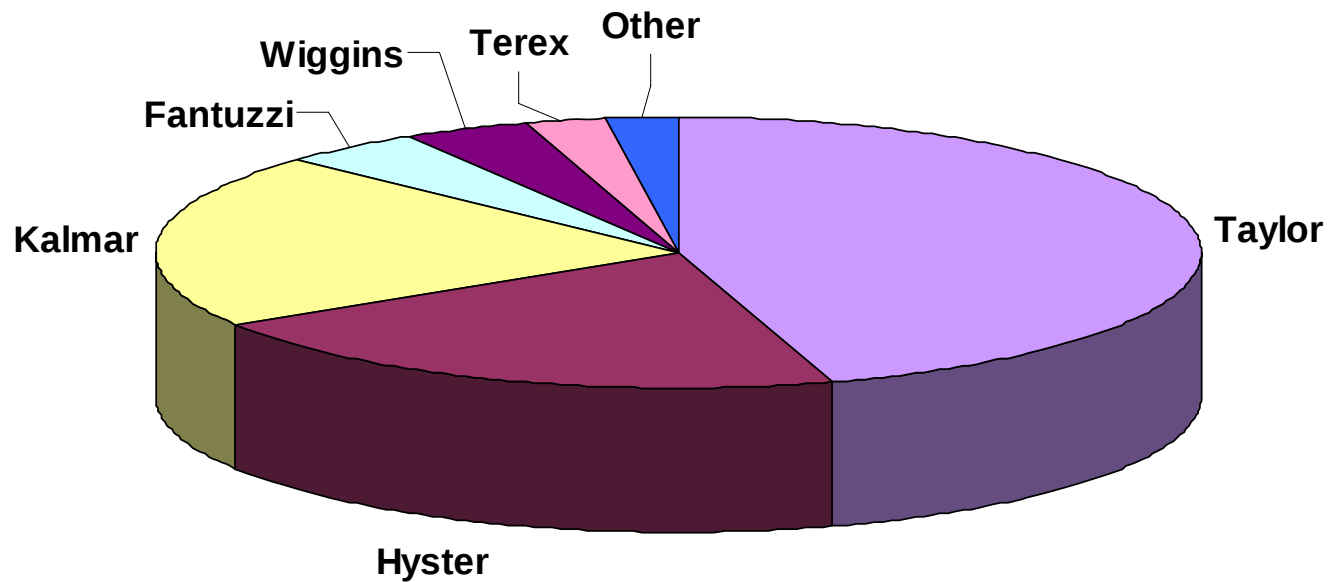
Conquest and New Accounts

- Review product and industry segmentation
- Share strategies to win new business
- Panel discussion on what has worked
 - Industry and product sold
 - Approach strategy used to win the business
 - Competition
 - Steps used to close the deal
- Summary



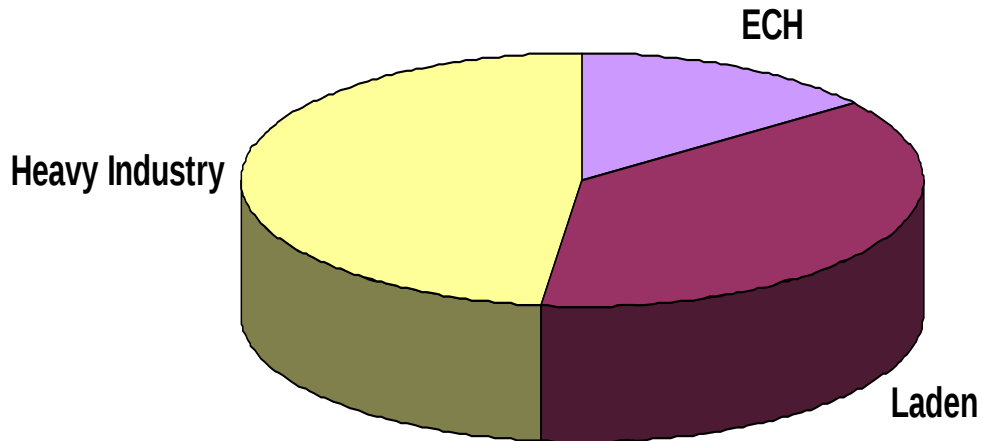
Competitive Market Share Comparison

2006 North America Commercial= 521 trucks



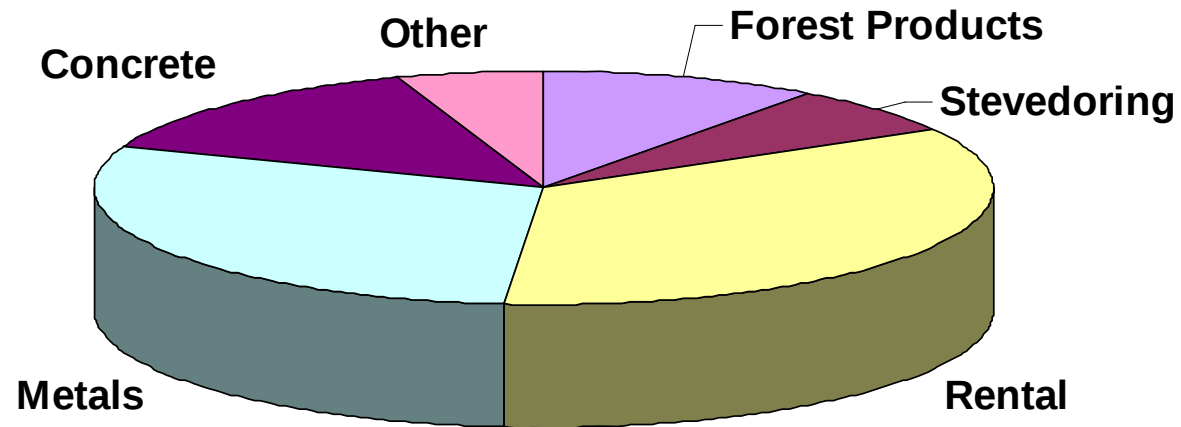
Brand	Taylor	Hyster	Kalmar	Fantuzzi	Wiggins	Terex	Other
Share	45.3	20.9	20.8	4.3	4.1	2.4	2.2

2006 Industry Market Segmentation



Industry	ECH	Laden	Heavy	Overall
Industry Mix	13.1%	33.5%	53.4%	100%
Hyster Share	22.2%	19.6%	21.4%	20.9%

2006 Heavy Industry = 278 Trucks



Heavy Industry	Forest Products	Stevedoring	Rental	Metals	Concrete	Other	Overall
Heavy Industry Mix	10.1%	6.6%	34.7%	29.4%	14.0%	5.2%	100.0%
Hyster Share	13.1%	70.2%	10.1%	28.9%	7.6%	46.2%	21.4%

Heavy Industry

- **Hyster Models**
 - H400-450HD/S
 - Released Feb. 2007
 - H550-700F/FS
 - Updated Aug. 2006
 - H800-1050HD/S
 - Released Nov. 2006



Fresh Express H400H-FLT



Fresh Express

H400H-FLT



Kinder Morgan H650F



Kinder Morgan H650F



Kinder Morgan

- **Dealer - Modern PA., Rusty Henry**
- **Industry: - Stevedoring**
- **Product Sold: H650F with a self-contained Magnet package**
- **Approach Strategy**
 - Provide the customer with a better solution for handling Steel Slabs and general cargo with one piece of equipment.
- **Competition: Kalmar**
- **Steps required in closing the sale**
 - Pricing
 - Better delivery
 - Superior Dealer support from Modern's service department.
- **Satisfied Customer: Dealer is expecting an additional order for H700F Trucks. Received \$300,000 in rental business.**



Albien Oil Sands

H700FS



Albien Oil Sands

- **Dealer – Wajax, Prairie Division, Brian Kolthof**
- **Industry- Oil Production**
- **Product Sold: H700FS**
- **Approach Strategy**
 - Leverage off past sales and service of other Hyster products
 - Dealer support
 - Liked shorter version of the truck
- **Competition: Taylor and Fantuzzi**
- **Steps required in closing the deal**
 - Wajax built a strong relationship in the Fort McMurray oil field area
 - Pricing
 - Delivery



Tex Tube

H620F



Tex Tube H620F



Tex Tube

- **Dealer – Stewart & Stevenson, Steve Mickley**
- **Industry: Pipe Manufacturing, handling steel coils**
- **Product Sold: H620F with integral coil ram mast**
- **Approach Strategy:**
 - Promote the quality of the Hyster Jumbo Trucks to the customer
 - Offer a direct lift mast with superior visibility, reduced damage to coils and increased productivity
 - Provide competitive full maintenance rates
 - Great relationship with buyer
- **Competition: Taylor**
- **Steps required in closing the deal:**
 - Offer a better product than the competition
 - Superior dealer service with full maintenance options
 - Visit other Hyster Jumbo Truck customers in the area
 - Delivery
- **Satisfied Customer: Tex Tube has ordered an additional H620F, three H360HD, and two H155XL to replace Taylor's and Cats**



Quality Tubing

- **Dealer – Stewart & Stevenson, Steve Mickley**
- **Industry: Coiled Tubing**
- **Product Sold: H1050HD-FLT, H700F and H550F**
- **Approach Strategy**
 - Long term relationship with Robert Young and Stewart and Stevenson
 - 2 H550F's on rent, leasing an H550F and H700F (they call it J-LO)
 - Pleased with 24/7 service and parts department.
- **Competition: Omega**
- **Steps required in closing the deal**
 - Had an H1150 and H550F in stock to show customer
 - Had 2 H550F's in rental fleet
 - Customer visit to Nijmegen in 2003



Dynacon

- **Dealer – Stewart & Stevenson, Steve Mickley**
- **Industry: Ocean**
- **Product Sold: H1050HD-FLT**
- **Approach Strategy**
 - Customer was renting a crane to move his heavy loads
 - Purchasing a new H1050HD-FLT would save money and be there when they needed it
- **Competition: Shopped for used Jumbo for six months**
- **Steps required in closing the deal**
 - Delivery time was most important issue
 - Jumbo units in stock and in rental fleet



Empty Container Industry

- **Hyster Models**
 - H400HD-EC
 - H450HDS-EC
 - H450HD-EC
 - H500HD-EC
- **Released July 2006**



New York Container Terminals

H400HD-EC



TDK

H450HDS-EC



TDK

- **Dealer – Wajax Vancouver, B.C. , Val Wright**
- **Industry: Empty Container Yard**
- **Product Sold: H450HDS-EC**
- **Approach Strategy**
 - Strong service and parts relationship with customer repairing his Kalmar and Taylor EC machines.
- **Competition: Kalmar and Fantuzzi**
- **Steps required in closing the deal**
 - Provide a fair price and superior service
 - Visit other customers in the area who have purchased the same product.



Columbia Container H450HDS-EC



Columbia Container

- **Dealer – Wajax, Vancouver, B.C., Val Wright**
- **Industry: Container Yard, Empty and Loaded**
- **Product Sold: H450HDS-EC**
- **Approach Strategy**
 - Sold on the success of the H1150HD-CH purchased last year.
- **Competition: Taylor and Fantuzzi**
- **Steps required in closing the deal**
 - Financing options
 - Delivery



Laden Container Industry

- **Hyster Models**
- **Container Handlers**
 - H1050HD-CH
 - H1150HD-CH
- **Updated Nov. 2005**



New York Container Terminals

H1150HD-CH



Young Brothers H1150HD-CH



Columbia Container H1150HD-CH

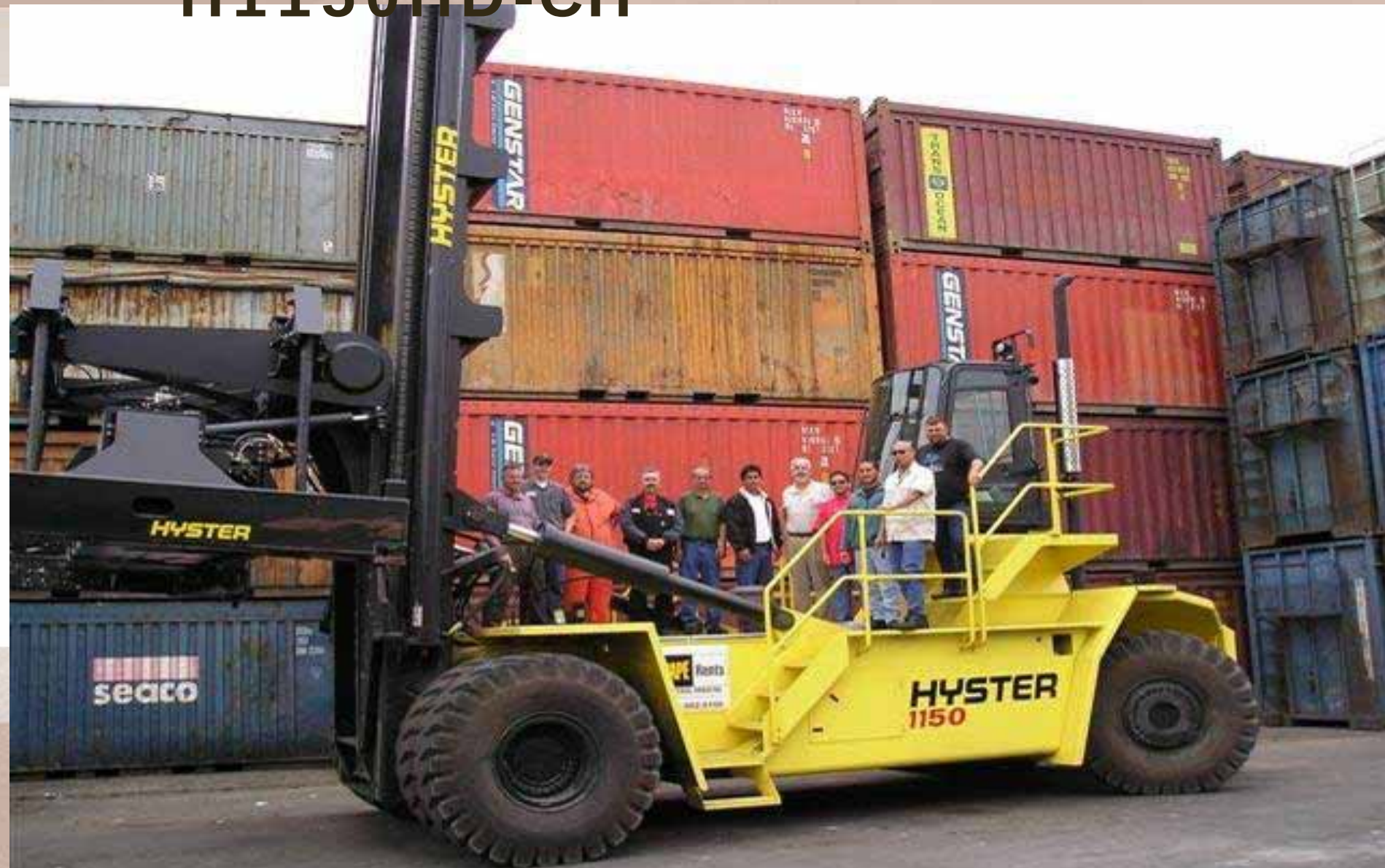


Rabanco

H1150HD-CH



Rabanco H1150HD-CH



Rabanco

- **Dealer – Pape Seattle – John Parisi**
- **Industry: Landfill Transfer Station**
- **Product Sold: H1150HD-CH**
- **Approach Strategy**
 - Demo at Seattle transfer station
- **Competition: Kalmar**
- **Steps required in closing the deal**
 - Demo at transfer station
 - Parts and service support
 - Pricing and RPO program
 - Parts support and consignment at landfill locations
- **Successes: Repeat orders**



Washington United Terminal

H1150HD-CH



Washington United Terminals

- H1150HD-CH



Washington United Terminals

- **Dealer PMH Seattle, John Parisi**
- **Industry: Handling Loaded Containers**
- **Product Sold: RPO for a H1150HD-CH**
- **Approach Strategy:**
 - Supplied a demo
 - Account not satisfied with Kalmar maintenance costs
- **Competition: Kalmar**
- **Steps required in closing the deal**
 - Demo for Thirty days
 - Operator satisfaction
 - Better features and performance in operation
 - Performance guarantee
- **Success: Demo scheduled for HR45-31 Yardmaster II**



Logistec H1150HD-CH



Logistec

- **Dealer – Wajax, Montreal, Bob Bierman**
- **Industry: Handling Loaded Containers**
- **Product Sold: H1150HD-CH**
- **Approach Strategy**
 - Offer a superior truck to a satisfied Taylor customer.
 - Better standard features.
 - Priced below Taylor
 - Better delivery
- **Competition: Taylor**
- **Steps required in closing the deal**
 - Better standard features.
 - Priced below Taylor
 - Better delivery
 - Parts support
- **Successes: Repeat orders**



Montreal Gateway Terminals

- **Dealer – Wajax, Montreal – Bob Bierman**
- **Industry: Handling Loaded Containers**
- **Product Sold: H1150HD-CH**
- **Approach Strategy**
 - Dealer sponsored trips to New Orleans and New York.
- **Competition: Fantuzzi and Kalmar**
- **Steps required in closing the deal**
 - Dealer salesman persistence with customer.
 - Supply customer required special items – Tilting Cab – Specific tire size.
 - Price
 - Delivery
- **Successes: New trucks soon to be delivered should lead to Fantuzzi fleet replacement**



Laden Container Industry

- **Hyster Models**
- **YardMaster II**
 - HR45-27
 - HR45-31
 - HR45-36
- **New March 2006**



Oceanex HR45-31



Oceanex

- **Dealer – Wajax Montreal – Bob Bierman**
- **Industry: Container Handling**
- **Product Sold: HR45-31 Yardmaster II**
- **Approach Strategy**
 - Offer a superior truck to a satisfied Taylor customer.
 - Better standard features.
 - Priced below Taylor
 - Better delivery
- **Competition: Taylor and Fantuzzi**
- **Steps required in closing the deal:**
 - Demo for thirty days
 - Performance guarantee



Approach Strategies To Win New Business

- **Summary**

- Provide a better solution through SPED and supplier support
- Quality of product, features and performance
- Competitive full maintenance rates
- Strong service and parts support
- Build on past relationships
- Demo truck



Steps Used To Close New Business

- **Summary**
 - Competitive pricing
 - Superior dealer support
 - Parts consignment
 - Delivery time
 - Customer and plant visits
 - Financing
 - Performance guarantees
 - Rental Purchase Option



Jumbo Trucks

2011 Hyster Share Target

Industry	ECH	Laden	Heavy	Overall
2006 Hyster Share	22.2%	19.6%	21.4%	20.9%
2011 Hyster Target	28.1%	26.2%	35.0%	30.0%

