



HYSTER NATIONAL ACCOUNTS

Hyster Logistics Industry News

Industry Headlines

UPS Now Offers Express Service Inside Sixteen Additional Countries

UPS today began offering domestic express pickup and delivery services inside 16 additional countries across

Europe, Africa, the Middle East and Latin America. The nations involved in the expansion are Algeria, Argentina, Chile, Cyprus, Czech Republic, Hungary, Kazakhstan, Kenya, Malta, Pakistan, Romania, Saudi Arabia, Serbia, South Africa, Ukraine and UAE.

Logistics business: ISM reports indicate both manufacturing and non-manufacturing still slipping

TEMPE, Ariz.—The latest reports from the Institute of Supply Management (ISM) are in, and while non-manufacturing looks slightly better than the manufacturing sector, there is still no sign of the end of a months-long decline, at least not in the first quarter of 2009

Taking it off the streets (and highways)

The trucking industry's future may lie not with the roads, but with the rails. Those seeking to divine the future of American trucking may want to examine the third-quarter results of J.B. Hunt Transport Services Inc. Like everyone else in an industry suffering through the worst freight recession in decades, the Lowell, Ark.-based freight giant posted double-digit declines in its over-the-road revenue and income. But its intermodal traffic—by far the largest segment of Hunt's business—grew at a



record pace, with revenue and operating income up 24 percent and 21 percent, respectively.

Will Teamster givebacks be enough to save YRC?

As of this mid-December writing, 40,000 Teamsters working at YRC Worldwide's four trucking units were voting on wage concessions their leaders had negotiated with YRC management, an agreement that called for a one-time 10-percent wage cut and elimination of cost-of-living increases over the next four years in return for 15 percent ownership in the troubled trucker. If the rank and file blesses the deal, it would save YRC well over \$200 million annually. Yet some say the concessions will do little more than give the country's largest less-than-truckload carrier a reprieve from its date with destiny.

Ohio Invests \$100 Million in Logistics Industry

Although the state is battling high unemployment, the sting was tempered somewhat last week by an announcement from Ohio Governor Ted Strickland of a \$100 million investment for the state's logistics and distribution industries.

For more information go to:
www.logisticsonline.com



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Current Environment 3PL's

The State of Third Party Logistics in 2008

A number of new studies on third-party logistics reveal sustainability, security and technology as the key, crucial areas on which 3PL providers must focus. Escalating fuel prices — along with health care insurance hikes and inflation — drove up United States logistics costs 7 percent in 2007, to a record-high of \$1.4 trillion. Still, harder times are predicted to come, says Rosalyn Wilson, an independent consultant and author of the [Council of Supply Chain Management Professionals' 19th Annual State of Logistics Report](#). In 2007, transportation costs increased by 6 percent and diesel fuel went up 6.5 percent. "These days it costs over \$1,100 to fill up a big rig with a pair of tanks that hold 250 gallons, compared to about \$720 last year," Wilson points out to [IndustryWeek](#). "Fuel is close to or has surpassed labor as a trucking company's top expense." Due to the struggles of trucking companies to cover costs and stay afloat, Wilson sees

third party logistics providers (3PLs) stepping up and emerging as important players for rendering a more economical logistics operation (source: [Logistics Management](#)). Wilson suggests that "this will be a long-term phenomena, not just something that is crisis driven." In 2006, the total revenue for the 3PL industry was \$110.6 billion, representing a total industry growth rate of 11.9%. Datamonitor projects that by 2010, the total 3PL market will exceed \$140 billion.

TOP 10 PROVIDERS OF 3PL EXCELLENCE

- 1 Ryder
- 2 UPS Supply Chain Solutions
- 3 EXEL
- 4 C.H Robinson
- 5 DB Schenker
- 6 Transplace
- 7 Penske Logistics
- 8 (TIE) BNSF Logistics/Landstar
- 9 Schneider Logistics
- 10 (TIE) Total Logistic Control/Menlo





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Top 100 Inbound 3PL's (Red Hyster National Accounts)

3PD, Inc.
A.N. Deringer
Access Logistics
AFN
Agility Logistics
AIT Worldwide
AmeriCold Logistics
APL Logistics
Aspen Alliance Group
ATC Logistics & Electronics
Automated Distrib. Systems
Averitt Express

Bender Group
Big Dog Group
BNSF Logistics

C.H. Robinson
Cardinal Logistics
CaseStack
Cat Logistics
CEVA Logistics
CLS
COGISTICS
Corporate Traffic
CRST Logistics
CT Logistics
CTSI

DSC Logistics
Dupré Logistics

Echo Global Logistics
Evans Distribution Systems
Exel

FAC Food Service Logistics
FedEx Global (SC Svcs.)

Fidelitone Logistics
Foreway Management

GENCO
Gilbert Company
Greatwide Logistics Svcs.

Hub Group
Hyerlogistics Group

Jacobson Companies

Kane Is Able
Kelron Logistics
Kenco Logistic Services
Keystone Dedicated Logs.
Kuehne + Nagel

Landstar System
LeSaint Logistics
Logistics Insight Corp.
Logistics Mgmt. Solutions

Maersk Logistics
Mallory Alexander
Matson Integrated Logistics
Megatrux Companies
Menlo Worldwide Logistics

National Retail Systems
Network Global Logistics
New Breed Logistics
Nexus Distribution
NFI Industries
NLM
Norvanco International
NYK Logistics

Odyssey Logistics & Tech.

OIA Global Logistics
One Source Logistics
OOCL Logistics (USA)
Ozburn-Hessey Logistics

Pacer Global Logistics
Pegasus Logistics Group
Penske Logistics
Performance Team
Port Jersey Logistics
Priority Solutions International

RK Logistics
RMX Global Logistics
Ruan
Ryder

Saddle Creek
Salem Logistics
Schenker/BAX Global
Schneider Logistics
ServiceCraft Logistics

TBB Global Logistics
TLC-Total Logistic Control
TMSi Logistics
Transfreight
TransGroup
Transplace
Tucker Company

UPS Supply Chain Solutions
UTi Worldwide

Verst Group Logistics



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Total Fleet Solutions (TFS)

Progress continues with in both relationship building as well as forklift orders. Over the past year through our commitment to TFS, Hyster has improved its position within this account. In 2008, Hyster received orders for 122 units which is substantially more than prior years. TFS continues to push their philosophy to partner with the manufacturers to provide a full fleet management program from procurement to maintenance. In 2009, we are partnering to move more service work back to the dealers rather than 3rd parties. This is based on the success of our "commitment to first time fix". Hyster has been challenged by TFS to provide standardized labor rates broken down by dealer to allow for ease of quoting and initiating the program. The current list of accounts being represented by TFS is: Whirlpool, Owens Corning, Federal Mogul, Ingersoll Rand, Cooper Tire, Pinnacle, Honeywell, Dana Corp, Ferro, and Pilkington Glass. For more information on TFS and any of their accounts, please contact the National Account Manager, Brian Anderson.

Ryder Logistics

Ryder Logistics continues to grow their business with key Hyster core competency companies. Ryder currently manages supply chain logistics for automotive, food and beverage, consumer goods, construction, and industrial manufacturing businesses. They belong to the major logistics industry associations and have capitalized on these relationships to become the top ranked logistics company according to "Inbound Logistics". Ryder provides logistics services to General Motors, Lear Corporation, Visteon, CVS and Gibraltar Industries just to name a few. Ryder has a limited amount of Hyster lift trucks within their organization, but we are targeting 2009 as a growth year for our relationship. Their focus for 2009 is "Green Supply Chain" provider and we intend to the new Hyster E45 – E70XN efficiencies to help secure new business pertaining to this promotion. For more information regarding Ryder Logistics please contact Bryan Zettle.

ESTES Express Lines, Inc.

Hyster continues its partnership with ESTES for the calendar year 2009 with a contract awarded to the Hyster team in January 2009. The thrust of the new opportunity is service and demonstrable cost savings. ESTES has again chosen the 2.2L Mazda and Duramatch configuration at

a premium price to realize the long term benefits of such a configuration. We at Hyster have asked the customer to help us in providing cost savings realized in tires and brakes, because of the past purchases and success of the Duramatch, to share with our prospects. We will continue to look for any and all areas to help ESTES through these trying economic times with tangible cost saving measures, and will look to the dealer network to help with any means they can. Please feel free to call or email Mark Koffarnus with any questions, suggestions, or concerns.

Schenker Logistics

Schenker Logistics, formerly known as The CCW Group, was acquired by Schenker in February, 2003. Today, Schenker Logistics services provide contract and public warehousing, transportation, manufacturing support, packaging and fulfillment services in strategically located sites throughout the US with over 1,000 employees and 10 million square feet. Schenker Logistics' parent company, Schenker, provides complete global supply chain solutions with 42,000 associates in 100+ countries. Schenker Logistics core competencies include contract & multi-client warehousing, manufacturing support services and packaging and fulfillment. They focus services on various consumer goods industries, including health & beauty (P&G), furniture, electronics, high tech, and foods. In addition, Schenker Logistics provides services to industrial goods industries such as plastics, fibers, film, polyester, and many other raw materials. Our customer base ranges from start up enterprises to multi national Fortune 500 companies.

Hyster Company established Schenker as a National Account in 2006 doing targeted business to their 3PL locations within Proctor & Gamble. Our relationships include direct corporate contact with the Sr. Corporate Procurement Manager as well as local relationships with several 3PL P&G locations. Corporate Purchasing will not direct a local decision but rather suggest suppliers leaving the final buying decision up to the local facilities manager. Toyota and Raymond exercise strong visibility in the Schenker organization....local relationships are crucial to the success of any opportunities. Please call Ken Kinsella with any questions.



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Market Opportunities and Strategies

Hyster National Accounts has taken the opportunity to refocus the team segmented by industries. The intent is to provide industry expertise that will parley into more Hyster opportunities and sales. We on the logistics team are focused on our growing industry, which is predicted to do even better in the downturned economy, as many companies will look to cut costs and out-

source their operations. Please see the attached list of Logistics Industry Accounts and National Account Manager responsibilities. If you should have any questions please feel free to call either the assigned Hyster National Account Manager, Mark Koffarnus, Logistics Industry Manager, or Brett Schemerhorn, Vice President, Hyster National Accounts.

Hyster Contacts By Account

Brian Anderson

USF Holland / US Freight
RSC-Atlas Copco
Central Transport
Circuit City
Cooper Tire / TFS
Jarden
Kohler Company
Kohls
Reyes Holdings
TFS
Whirlpool / TFS
WW Grainger
Federal Mogul
Sears / Kmart
True Value
Leggett & Platt
Ingersoll-Rand
Honeywell

Bryan Zettle

APL
Arizona Tile
BAX Global
States Logistics

Yellow Freight
Averitt Express
Ferro Corporation
APM Terminals / Logistics
Atlas Cold Storage
Best Buy
JC Penney
Ryder Logistics
AutoZone
Ozburn-Hessey
Amazon
McKesson
Jacobson Companies

Ken Kinsella

Dollar General
Hertz
Sunbelt Rentals
Barnes & Noble
BI-LO / Bruno's
GAF Materials Corporation
Iron Mountain
Brooks Pharmacy/Eckerd
DuPont
Procter & Gamble

Schenker US
Engelhard
Exel Logistics
Kuehne & Nagel
National Equipment Services
Bed Bath & Beyond
Johnson & Johnson
Newell Rubbermaid
Toys R Us
United Rentals

Mark Koffarnus

Estes
Office Depot
Dollar Tree
Advance Auto Parts
FedEx Corp
Unisource
Southeast Freight Lines
Electrolux
Home Depot / Water Works