Machine Tool Business Operation

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MITSUBISHI HEAVY INDUSTRIES, LTD.

Ken Watabe
Director, Senior Vice President,
General Manager,
Machine Tool Division
Product Portfolio

- **Precision cutting tools**
- **Engine valves**
- **Power transmissions**

- **Gear cutting machines**
- **Large machines**
- **Machining centers**

- **Room temperature wafer bonding machines**
- **Micro milling machines**
- **Special-purpose machines**

- **Precision Machinery Products 26%**
- **Machine Tool 74%**
- **33%**
- **33%**
- **26%**
- **4%**
- **4%**
Direction of Business Expansion

Basic Policy of 2008 Medium-Term Business Plan

Overcome changes in the business environment
Achieve steady business expansion

[Business scale]

[Trends in machine tool orders]
(Results: Japan Machine Tool Builders’ Association)
Direction of Business Expansion

Business Environment Surrounding Machine Tool Operations

The domestic machine tools market has plateaued.

Tough Competition

The overseas machine tools market is continuing its expansionary trend

Opportunities for Business Expansion

Enhance Product Appeal

☐ Bolster product line-up
☐ Promote innovation in manufacturing

Globalization and Diversification

☐ Expand overseas business
☐ Expand operations in precision cutting tools and automobile parts, new lines of business
Priority Initiatives
(1) Enhance Product Appeal: Bolster Product Line-up

- Gear Cutting Machines
- Gear Grinding Machines
- Horizontal Boring Machines
- Special-Purpose Machining Cells

Adapting to Market Needs

- Large Gear Machines (For construction equipment, wind power generation)
- Gear Finishing Machines (For automotive gears)
- New-model Horizontal Boring Machines (Expanded Line-up)
- Portal Machine Model Changeover (Improved Large Machine Series)
- Large Special-Purpose Machines (5-axis machining center for aircraft)
- Process Concentration Cells (Short-line System)
Enhance Product Appeal: Bolster Product Line-up

1. Gear cutting machines
   ● Establish a leading position in the automotive field and move into the growing field of large gear machines.

   **Product features**
   ○ Technical advantage over competition
     Establishing completely dry cutting system
   ○ Manufacturing a full line of gear cutting machines

   **Business expansion aimed at securing a leading global share**
   ○ Standardization of global specifications
   ○ Bolstered product line-up

   Expand from cutting into grinding
   Gear Finishing Machines (For automotive gears)

   Expand to fields outside the automotive industry
   Large Gear Machines (For construction equipment, wind power generation)

   Towards a global market share of 25%

   [Global market share (estimated)]
   - MHI: 20%
   - Liebherr (German): 9%
   - MHI’s share of domestic market: over 50%

   [Value of orders in the gear cutting machine industry]
   (Japan Machine Tool Builders’ Association statistics)
   (In billion yen)
   - 2003: 6.1, 15.6
   - 2004: 11.6, 12.5
   - 2005: 12.3, 17.5
   - 2006: 17.2, 12.8
   - 2007: 16.8, 15.7
   - Other: 20.5
Enhance Product Appeal: Bolster Product Line-up

2. Large machines

- Establish brand through enhanced product appeal and overseas market penetration

Enhancing Product Appeal

- Enhanced overall strength in large workpiece machining
  - Switch line of portal machines to more sophisticated models
  - Enhance line-up of horizontal boring machines
    - High-rigidity, High-speed, High-precision

Take advantage of the increased demand for large machines through improvements to global infrastructure and capture strategic areas

- Aimed at construction equipment, power systems, etc.
- China, India, South East Asia, North America

Towards a domestic market share of 30%

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[Value of orders in the large machine industry]

(Japan Machine Tool Builders’ Association statistics)

(In billion yen)

<table>
<thead>
<tr>
<th>Portal machining centers</th>
<th>Boring machines</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003: 20.0</td>
<td>10.2</td>
</tr>
<tr>
<td>2004: 44.3</td>
<td>17.3</td>
</tr>
<tr>
<td>2005: 51.2</td>
<td>22.8</td>
</tr>
<tr>
<td>2006: 58.9</td>
<td>24.5</td>
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<tr>
<td>2007: 54.5</td>
<td>27.5</td>
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</table>

[Domestic share (estimated)]

(%)

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2010</th>
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</thead>
<tbody>
<tr>
<td>Rapid increase in market share after launch of new MVR</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Internal share</td>
<td>9.5</td>
<td>14.6</td>
<td>23.1</td>
<td>25.3</td>
<td>24.6</td>
<td>30.0</td>
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</table>
Enhance Product Appeal: Bolster Product Line-up

3. Special-purpose machines

- Increase orders by developing process concentration cells and entering the large special-purpose machine market

Enhance competitiveness of process concentration cells

- Meet the wide range of needs of customers through standardization and modularization to realize improved cost competitiveness and reliability
- Establish a short-line system that incorporates a multifunctional cell with an improved level of centralized processing with peripheral equipment

Strengthened efforts in the large special-purpose machine industry

Machining Technology (Special-purpose machines) + Elemental Units (Large machines)

Large Special-Purpose Machines
(For construction equipment, power systems, aircraft)

[Value of orders in the special-purpose machine industry]
(Japan Machine Tool Builders’ Association statistics)

(In billion yen)

- 2003: 8.2
- 2004: 50.1
- 2005: 62.0
- 2006: 34.6
- 2007: 49.2

- Other
- Automobiles

* Decline in 2006 due to reduced capital investment on behalf of domestic auto manufactures

- April 2008
- Announcement of five-axis machining center for aircraft
**Priority Initiatives**  
(1) **Promote Innovation in Manufacturing**

Improved productivity and reliability by accelerating modularization and standardization

<table>
<thead>
<tr>
<th>Modularization &amp; Standardization</th>
<th>Shorter lead-times</th>
<th>Cost reductions</th>
<th>Improved product reliability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combine modules to meet customer needs</td>
<td></td>
<td></td>
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### Gear Cutting Machines

<table>
<thead>
<tr>
<th>Before 2004</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008 and onwards</th>
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<tbody>
<tr>
<td>Gear Hobbing Machines</td>
<td>Gear Shapers</td>
<td>GE-15A</td>
<td>20A</td>
<td>25A</td>
<td>06A</td>
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<tr>
<td>Gear Grinders</td>
<td>SE-25A</td>
<td>15A</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Gear Grinding Machines</td>
<td>ZE-15A</td>
<td>24A</td>
<td></td>
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</tbody>
</table>

### Large Machines

<table>
<thead>
<tr>
<th>MVR Series</th>
<th>MVR25. 30</th>
<th>MVR35. 40</th>
<th>MVR45</th>
</tr>
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<tbody>
<tr>
<td>MVR - Dx Series</td>
<td>MVR33/39Dx</td>
<td>MVR43/49Dx</td>
<td></td>
</tr>
<tr>
<td>MHT Series</td>
<td>MHT1618, 1416</td>
<td>Development of New Model MAF</td>
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</tbody>
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### Special-purpose Machines and Machining Cells

<table>
<thead>
<tr>
<th>M-CM4A(H4050)</th>
<th>M-CM4B/5B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jig, Tooling</td>
<td></td>
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</table>

Simultaneous development of Large Gear Cutting Machines
Promote Innovation in Manufacturing

Example of Gear Machine Modularization

Selectable layout tailored to needs
Standard Specification Compact Type I
Narrow Width Specification Simple Inline Type II

Type I
Hydraulic Unit
Chip Conveyor
Type II
Control Panel

Gear Hobbing Machines: GE06A 15A 20A 25A
Gear Shapers: SE15A 25A
Gear Grinding Machines: ZE15A/24A

1,900mm
1,510mm
Example of Large Machine Modularization

- MVR modularization towards the horizontal development of the MVR Dχ series

Component commoditization by sorting into fixed and variable components
Promote Innovation in Manufacturing

- Enhancement of internal production capabilities through the upgrading and expansion of equipment for large component machining
  - Two five-face machining centers have been newly installed and upgraded, with continued upgrades and expansions underway

- Logistics improvements and expanded assembly space through layout changes

- Thorough kit placement through improvements to component arrangement

- Improvements to assembly production methods
  - Expanded block-assemble methods
    Parallel assembly by unit
  - Shift to on-ground column assembly
    Laid down assembly possible by eliminating all pipe and cable laying on the rear-side of columns.

- Deepening of modularization and standardization
  - Module design on a per-model basis
  - Module design common across models
    - Expanded number of common units
    - Standardization of equipments and components used
Priority Initiatives
(2) Globalization and Diversification

◊ Expansion of operations in overseas markets with different business cycle and precision cutting tools & automobile parts and new lines of business
  • Bolster sales force in growing overseas markets
  • Enhance service flexibility by strengthening our service framework
  • Entry into new lines of business and the development of products in new fields

[Scale of Orders Received by Product]

- Percentage of overseas sales:
  - 2007: 28%
  - 2008: 31%
  - 2009: 34%
  - 2010: 37%
  - 2012: 42%

- New Fields (Including overseas)
- Precision cutting tools and Automobile parts (Including overseas)

- Machine tools (Overseas)
- Machine tools (Domestic)

• Percentage of overseas sales: over 40%
• Expansion into new lines of business
Expansion of Exports

Enhancing export readiness through strengthening of overseas sales/service bases strategic sales activities

- Speed up capturing of markets in China, India, South East Asia and North America as key strategic regions.

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Expansion of Exports

○ Bolster sales force by increasing the number of overseas sales personnel and sales engineers
  • Bolster sales force by increasing employees at each operating base (by 1.7 times)
  • Short-term and continuous dispatch of sales engineers from Division to strategic regions

○ Enhanced responsiveness through an augmentation of service staff and the development of a worldwide spare parts delivery system
  • National service staff augmentation (by 1.3 times)
  • Setup of spare parts depots and building of an online inventory search system

○ Promotion of region-oriented sales through an enhanced distributor network
  • Increase the number of distributors in key regions (1.5 times increase)

○ Utilize customers’ factories for showrooms through strategic sales activities (No. of utilized factories: 3.5 times)

○ Improve presence by more active PR through advertising, trade shows, seminars, etc.

○ Standardization of global specifications

○ Expand export outlets through alliances
Strengthening of Overseas Sales & Service Network

[Main Overseas Operating Bases]

- Germany
- Singapore
- Bangkok
- Chennai
- Beijing
- Changsha
- Shanghai
- Taipei
- Hong Kong
- Shanghai
- Seoul
- Sao Paulo
- Chicago
- Detroit

- Sales/service operating bases (including planned)
- Spare parts depots (planned)
- Showroom Factories (including planned)
Expansion of Precision Cutting Tools and Automobile Parts Business Overseas

[Mitsubishi Heavy Industries India Precision Tools, Ltd. (MHI-IPT)]

- Location: Ranipet, Tamil Nadu
- Acquisition completed in May 2005
- Manufacturing and sales of cutting tools

[Shenyang Aerospace Xinguang Mitsubishi Heavy Industries Engine Valves Co., Ltd. (Xinguang Mitsubishi Engine Valves)]

- Location: Shenyang, Liaoning
- Commenced in April 2006
- Manufacturing and sales of engine valves

- December 2007: Delhi Service Base opened
- March 2008: Investment to double production capacity completed
- Capturing of the growing 4-wheel-car market
- Capturing of the key northern Indian market and increased market share in broaches
- Increased exports from entry into European markets

[Sales]

- 2005 2006 2007 2008 2009 2010 2012
- Export 33% 42% 42% 43% 48% 50% 52%
- Domestic

- 2006 2007 2008 2009 2010 2012
- Locally Operating Japanese Manufacturers
- Japan

- Establishing of a stable production system through enhanced manufacturing techniques
- Increasing orders by incorporating manufacturers, especially Japanese automobile manufacturers, from the development stages of new engines onwards.
Initiatives in Precision Cutting Tools and Automobile Parts,
Products from New Lines of Business

1. Precision cutting tools and Automobile parts

**Power transmissions**

- Entry into the market for gearboxes

  **Expansion of the Large Gearboxes Market**
  (Aimed at wind turbine, large industrial machinery, etc.)

  **Utilization of Machine Tool Technology**
  □ Machining technology, equipment development (gear machines)
  □ Large component assembly technologies (large machines)

- Entry into the general-purpose mass produced planetary roller reduction gear market
  - Aimed at cooling towers, copiers, medical devices, etc.

- Reliable quality and enhanced cost competitiveness by producing key components in-house through mass production methods
1. Precision cutting tools and Automobile parts

**Precision cutting tools**
- Accelerated development of new products
  - Next generation coating, cemented carbide tools
- Development and expansion of products with Indian tool manufacturers
  - Release large hobs on the Japanese market to expand orders received for construction equipment
- Capture the market for Japanese automobile manufacturers who are moving towards local procurement
  - Take advantage of the locality and win business from Company S by utilizing the Indian Service Base

**Engine valves**
- Bolster cost competitiveness by establishing the world’s fastest line and halving cycle times
- Take a proposal-based business approach through in-house basic technologies to secure a position as the main supplier of key domestic users
  - Adapt to high added-value general purpose diesel with high-temperature material evaluation techniques
Initiatives in Precision Cutting Tools and Automobile Parts, Products from New Lines of Business

2. Products in New Fields

Establish businesses for products in new fields

Room temperature wafer bonding machines

- The world’s first bonding machine operable at room temperatures, developed for use as a mass-production-enabled wafer bonding machine for use in electronic integrated circuits such as acceleration sensors.
- React to market changes to increase orders
  - Enhanced lineup through the development of up-sizing machines
  - Accumulated bonding process data
- Improved recognition through marketing efforts aimed at leading domestic and overseas companies

Micro Milling Machines μ V1

- Milling machines for producing precision components in the likes of medical devices, precision molds and optical lenses. Work processes traditionally requiring hand finishing can now be precision machined.
- Establish industry position as a manufacturer of compact micro milling machines.
  - Achieve test-cut output that beats the competition
  - Increase added value by enhancing possible applications
- Enter the sub-micron market through a series of developments
## Resource Planning

### Securing human resources
- Secure the staff necessary for the business expansion
- Enhancement of human resource development program so that employees can rapidly reach their full potential and become multi-skilled workers

### Capital expenditure
- Ongoing equipment upgrades to bolster internal production capabilities to support business expansion.
- Continuous capital expenditure to streamline production
- Continued active investment in MHI-IPT

### Investment in R&D
- Development of high added-value products to respond to market needs
- Enhanced line-up of modularized products
- Expansion of product lines in new fields

### Changes in the number of employees (consolidated)

<table>
<thead>
<tr>
<th>Year</th>
<th>Persons</th>
</tr>
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<tbody>
<tr>
<td>2007</td>
<td>1,679</td>
</tr>
<tr>
<td>2008</td>
<td>1,764</td>
</tr>
<tr>
<td>2010</td>
<td>1,862</td>
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<tr>
<td>2012</td>
<td>2,010</td>
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### Percentage of sales

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage (in billion yen)</th>
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<tbody>
<tr>
<td>2007</td>
<td>6.1%</td>
</tr>
<tr>
<td>2008</td>
<td>6.3%</td>
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<tr>
<td>2010</td>
<td>4.9%</td>
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<td>2012</td>
<td>4.9%</td>
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### Percentage of sales

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage (in billion yen)</th>
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<tbody>
<tr>
<td>2007</td>
<td>1.0%</td>
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<tr>
<td>2008</td>
<td>1.7%</td>
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<tr>
<td>2010</td>
<td>2.2%</td>
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<td>2012</td>
<td>2.5%</td>
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