


コロンビア エレベーター事業の御紹介

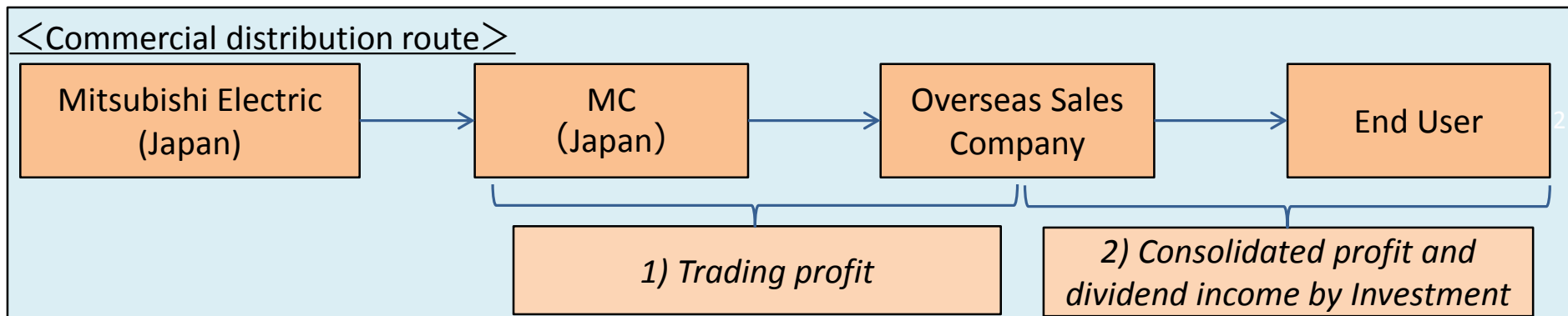
UNIDOコロンビア投資セミナー
2016年7月7日

三菱商事株式会社
産業機械事業本部
エレベーター事業部

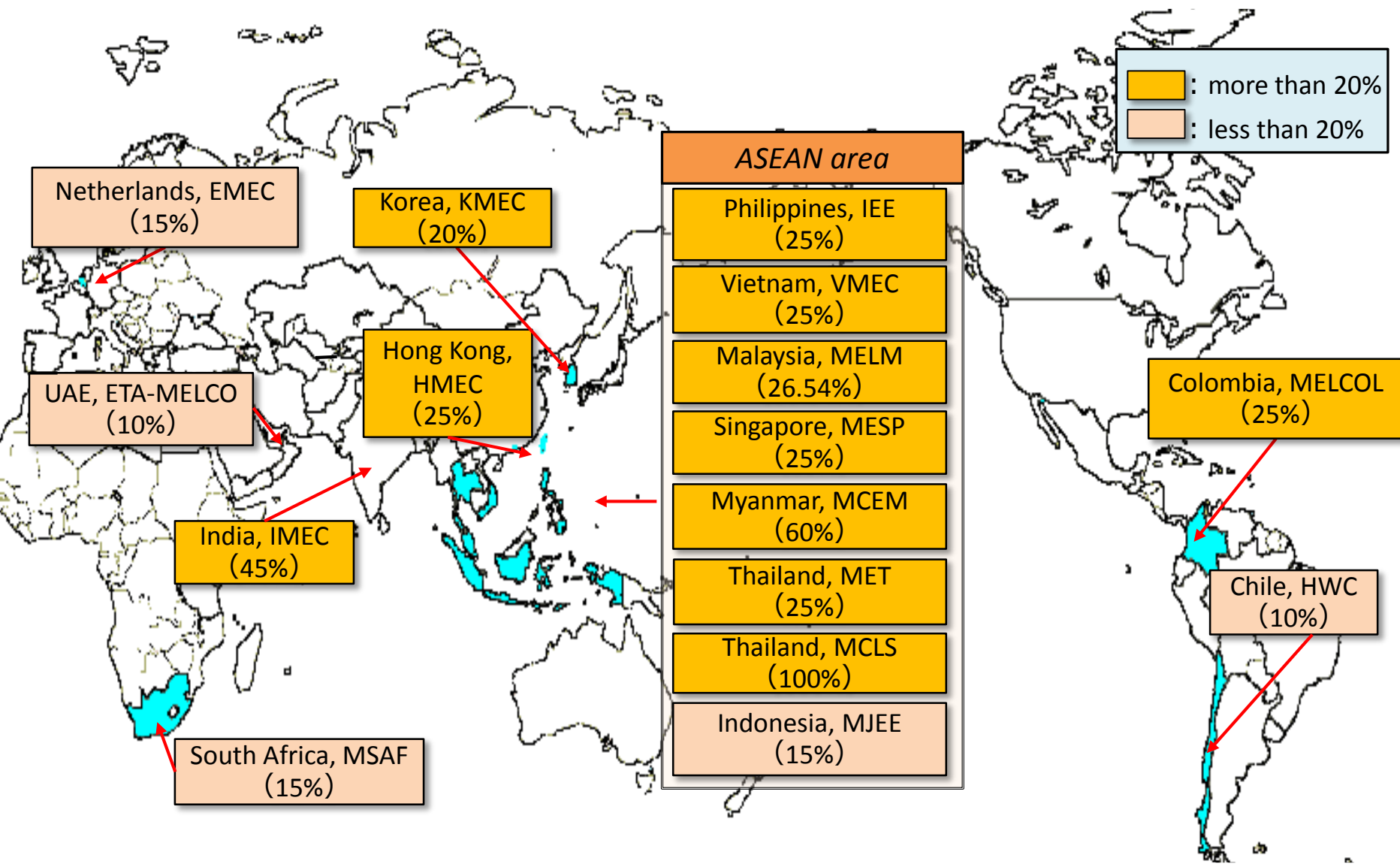
Business Model (三菱商事 エレベーター事業部のビジネスモデル)

Our Business	Our business is mainly for new sales, installation, and maintenance of MELCO elevators and escalators for overseas.
Business Model	Profit from; 1) Trading 2) Investment (consolidated profit and dividend income from overseas companies)
Products	Elevator, Escalator, Moving Walk, etc. 

- ・1960年代より、三菱電機(MELCO)製昇降機の海外向けトレーディング事業を開始。
Start trading business with MELCO for Elevators and Escalators since 1960's.
- ・2002年にMELCOとのグローバルパートナーシップに関する覚書を締結し、全世界の機器輸出に関与(約90ヶ国)。
Concluding the Agreement for Global Partnership with MELCO and involve to the trading all over the world(90 countries)
- ・各国の昇降機販売会社に出資参画し、当社人材の派遣等、経営面でのサポートを実施。
Investing to Elevator Seles companies in overseas, and supporting the management with dispatching our human resources.



Business Model (三菱商事 エレベーター事業部のビジネスモデル)



About MITSUBISHI ELECTRIC DE COLOMBIA LTDA (MELCOL)

1. Name: MITSUBISHI ELECTRIC DE COLOMBIA LTDA (MELCOL)
2. Activities:
 - ① Sales, Installation, Maintenance & Modernization of Elevators & Escalators in Colombia.
 - ② Production of local supply parts of Elevators (for Export and Domestic)
 - ③ Sales of Air Conditioning Systems
 - ④ Sales/ Sales Engineering/ Field support for Elevators & Escalators to the other Latin American Countries.
3. Foundation: Oct 15, 1969
4. No. of Employee: 1,090 (FY2015)
Japanese Rotation Staff: 4 (President, Installation Dept., Maintenance Dept., Sales Engineering Dept.)
3. Office: Bogota, Bello, Medellin, Barranquilla, Cartagena, Cali, Bucaramanga, etc..
6. Shareholders: Mitsubishi Electric 65%,
Mitsubishi Corporation 25%,
Mitsubishi Electric Building Techno-Service 10%

History of MELCOL

- 1969: Established MELCO de Colombia Ltda.
- 1985: Beginning Local Supply in a Warehouse in Medellin
- 1994: Start Exportation
- 2013: Change the corporate name(三菱冠称化)



1965
Beginning of elevators Business in Colombia (First elevators, Bavaria building)



1969
Established MELCO de Colombia Ltda.



1985
Beginning Local supply in a Warehouse in Medellin



1989
The factory was moved to Bello-Antioquia.



1994
First Export to Ecuador 1 Elevator



1997
First Export to Dominican Republic 6 Elevators.
First Export to Panama 1 Elevator



1998
First Export to Peru 12 Elevators



1999
First Export to Venezuela 5 Elevators



2000
First Export to Chile 2 Elevators.



2013
MELCO DE COLOMBIA LTDA. changes its name to MITSUBISHI ELECTRIC DE COLOMBIA LTDA.

Location Map of MELCOL



Factory (Bello, Antioquia)



Head office (Bogota)



Workforce in MELCOL(as of Oct, 2015)

AREA	BOG	MED	BAQ	CLO	BMGA	CTG	OTHERS	GENERAL TOTAL		
								Full	Temporary	Total
ADMINISTRATIVE AND FINANCIAL	69	69	7	7	2	2	1	126	31	157
OPERATIVE AND COMMERCIAL	18	12	1	1	0	0	1	31	2	33
INSTALLATION	67	40	9	7	9	15	7	88	66	154
MAINTENANCE	166	168	29	27	19	24	30	333	130	463
AIR CONDITIONING	5	5	3	1	0	2	0	14	2	16
FACTORY	0	188	0	0	0	0	0	154	34	188
PRESIDENCE	4	4	0	0	0	0	0	8	0	8
LACC	11	1	0	0	0	0	0	9	3	12
CUSTOMER SERVICE	11	8	2	2	1	1	0	19	6	25
TECHNICAL AUDIT	8	5	1	1	1	2	0	18	0	18
TECHNICAL ENGINEERING	7	7	0	0	0	1	0	15	0	15
GENERAL TOTAL	366	507	52	46	32	47	39	815	274	1089

Sales of Mitsubishi Elevators & Escalators in Latin America(主要4か国)

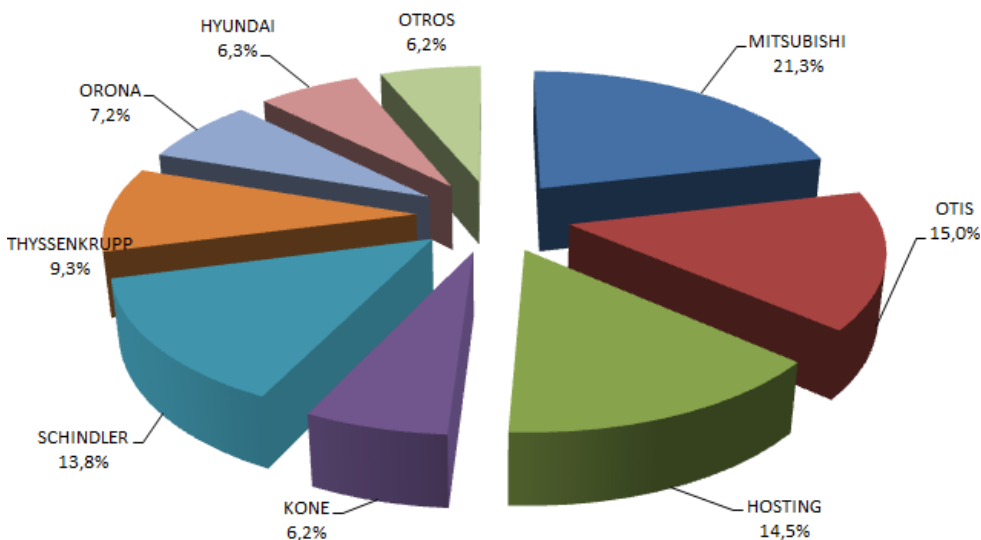
- ・コロンビア、エクアドルに於いて、市場シェアNo.1を獲得。
No.1 Market Share in Colombia and Ecuador.
- ・近年は資源価格の落ち込みに伴い、需要減となるも、底堅い建築需要に支えられ、受注台数を維持。
Total demands decreased due to the falling oil price, but secured units are kept by the stable construction demand.

(No. of Unit)		FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
		Actual	Actual	Actual	Actual	Plan	Plan	Plan
Colombia	Demand	2,200	2,300	2,800	2,800	2,600	2,600	2,800
	Sales	587	700	827	800	700	750	820
	Share	26.7%	30.4%	29.5%	28.6%	26.9%	28.8%	29.3%
Ecuador	Demand	550	600	600	700	650	550	600
	Sales	343	453	402	450	400	350	400
	Share	62.4%	75.5%	67.0%	64.3%	61.5%	63.6%	66.7%
Chille	Demand	1,350	1,400	1,400	1,500	1,300	1,400	1,500
	Sales	155	180	189	200	180	200	220
	Share	11.5%	12.9%	13.5%	13.3%	13.8%	14.3%	14.7%
Argentina	Demand	3,000	3,000	3,000	3,000	3,000	3,300	3,600
	Sales	25	40	46	50	50	50	50
	Share	0.8%	1.3%	1.5%	1.7%	1.7%	1.5%	1.4%

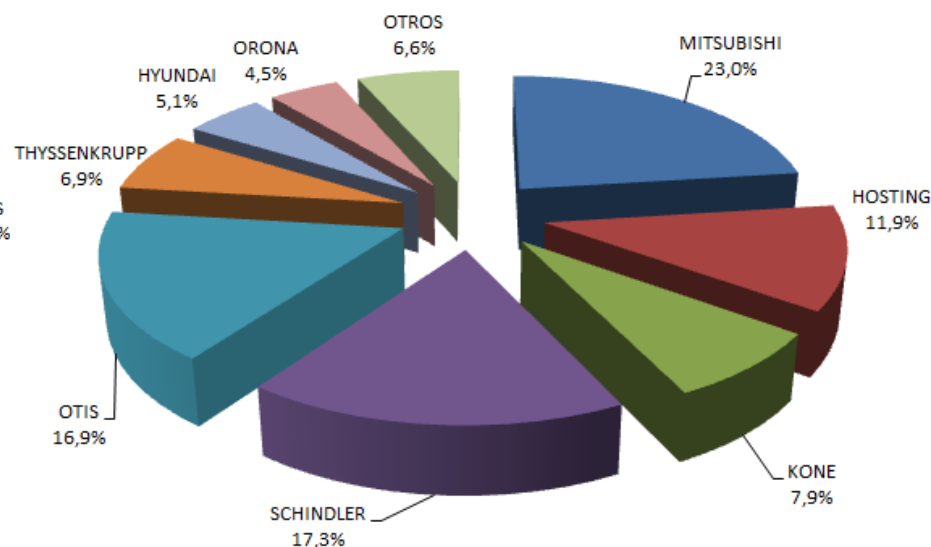
Market Share of Elevators & Escalators in Colombia

- ・コロンビアでは国産メーカーが無い為、輸入統計よりマーケットシェアを把握できる。
We can assume the market share from import data in Colombia.

2014 Import Data Jan- Dec



2015 Import Data Jan - Aug



IMPORT DATA Jan - Dec										
		MELCO	OTIS/Sigma	Schindler	Thyssen	Hosting/ Kone	Hyundai	Orona	Others	Total
2015 (Jan Aug)	Units	511	375	384	153	439	113	101	147	2223
	%	23,0%	16,9%	17,3%	6,9%	19,7%	5,1%	4,5%	6,6%	-
2014	Units	776	547	501	339	754	229	262	227	3635
	%	21,3%	15,0%	13,8%	9,3%	20,7%	6,3%	7,2%	6,2%	-
2013	Units	744	301	508	139	495	86	116	150	2539
	%	29,3%	11,9%	20,0%	5,5%	19,5%	3,4%	4,6%	5,9%	-

Main projects Secured in 2014



UNIVERSIDAD CATÓLICA - BOGOTÁ
 Elevator units: 4
 Escalator units: 14
 Handover Date: 30/06/2015
 Use of the building: University



**T7/T8 CIUDAD EMPRESARIAL
 SARMIENTO ANGULO - BOGOTÁ**
 Elevator units: 13
 Handover Date: 30/08/2015
 Use of the building: Office



NORTH POINT TORRE E - BOGOTÁ
 Elevator units: 15
 Handover Date: 30/04/2016
 Use of the building: Office



PARQUE LA COLINA - BOGOTÁ
 Elevator units: 15
 Escalator units: 36
 Handover Date: 30/09/2016
 Use of the building: Shopping Mall



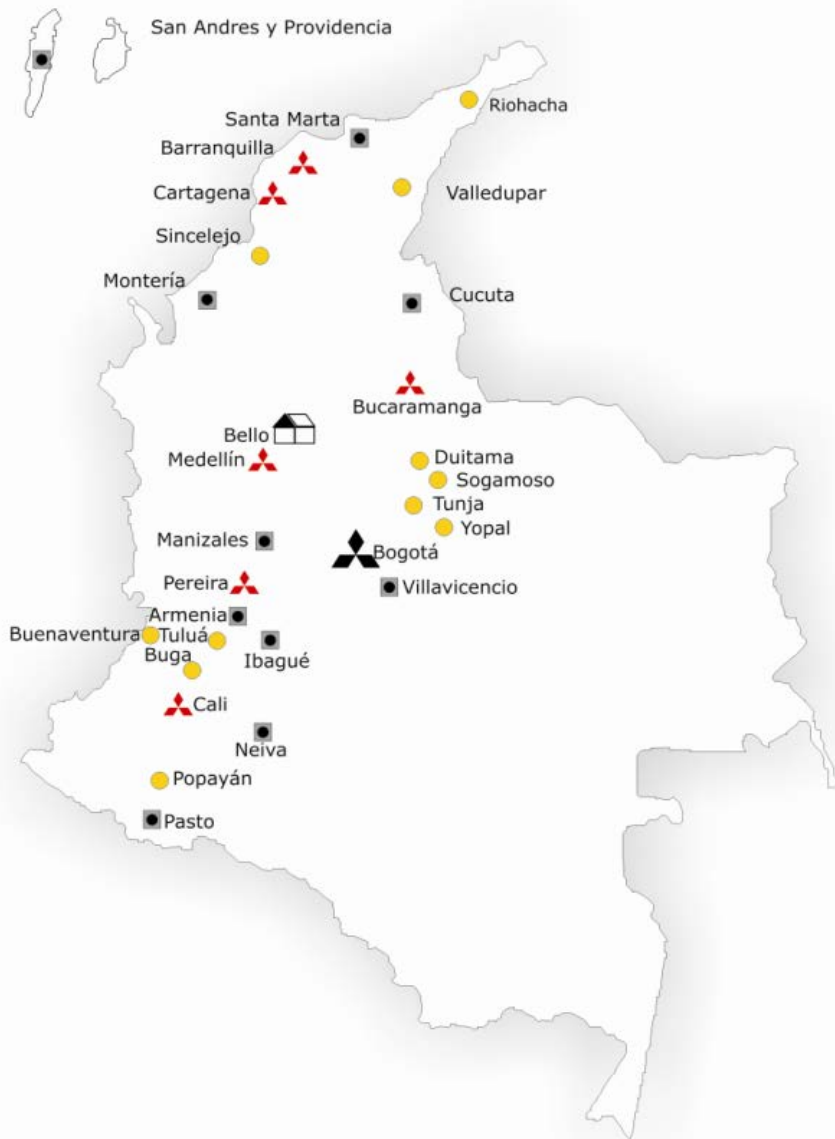
MAJESTIC - BUCARAMANGA
 Elevator units: 7
 Handover Date: 30/05/2015
 Use of the building: Residence



CENTRO COMERCIAL FONTANAR - CHÍA
 Elevator units: 8
 Escalator units: 15
 Moving walk: 2
 Handover Date: 14/10/2015
 Use of the building: Shopping Mall



Units Under Paid Maintenance(as of Oct, 2015)



- ・無償保守を含む総保守台数は8,624台(2016年4月時点)
Total maintenance units are 8,624 units(as of Apr, 2016)

City	Number of equipments
Bogota	2674
Medellin	2368
Cali	530
Barranquilla	450
Cartagena	386
Bucaramanga	372
Pereira	191
Manizales	122
Santa Marta	99
Armenia	89
Monteria	80
Pasto	58
cucuta	56
San Andres	51
Ibague	36
Palmira	31
Villavicencio	30
Barrancabermeja	26
Neiva	14
Yopal	13
Total	7676

Factory at Bello, Antioquia

- 元々は繊維工場だったアンティオキア県 ベジヨ市にある工場を取得し、1989年操業開始。
Start operation since 1989 by acquiring the existing factory in Bello which previously for manufacturing the fabric.



Land Area:

●	Production:	5,500m ²
●	Warehouses:	13,200m ²
●	Office:	2,000m ²
○	Others:	2,000m ²
	TOTAL:	22,700m²

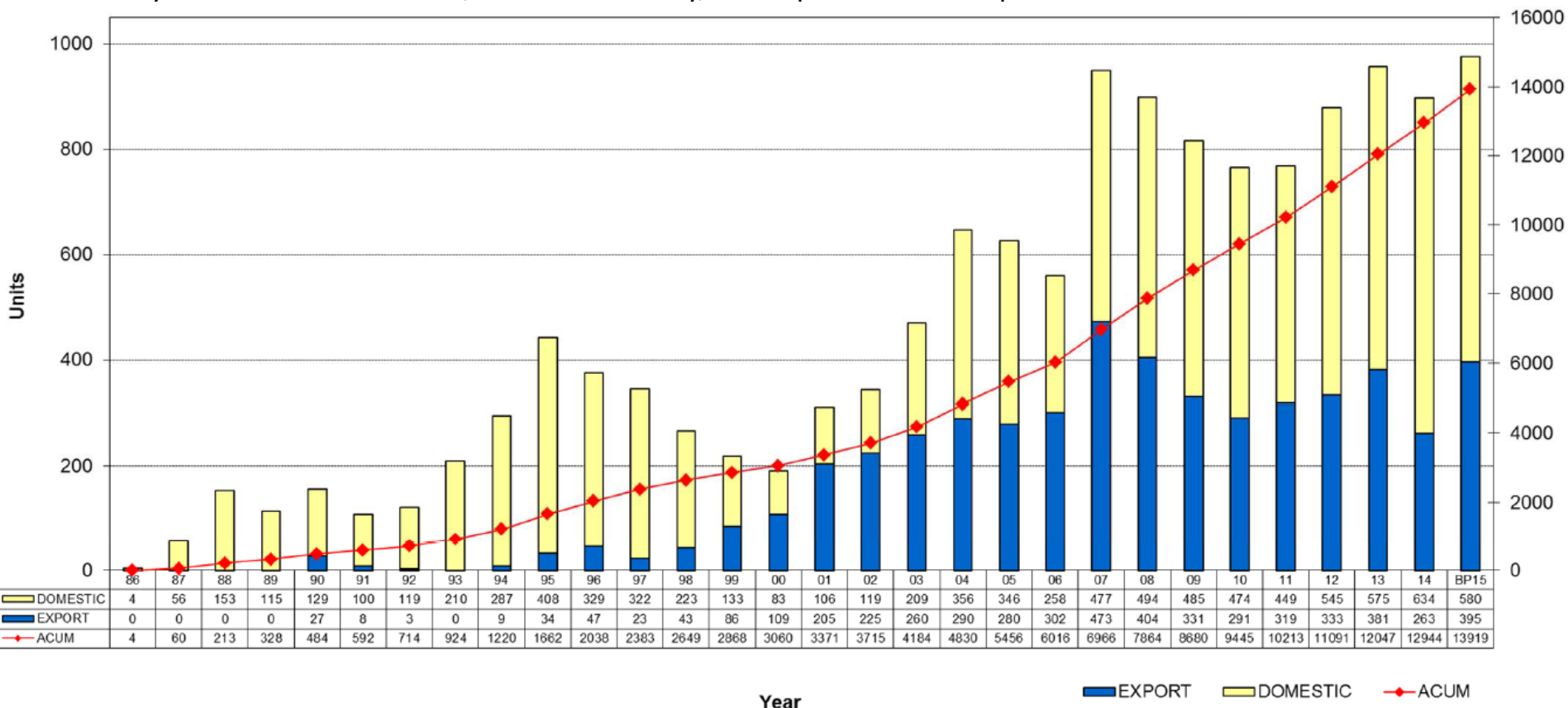
Local Supply Parts

・巻上機や制御盤等の主要コンポーネントは日本やタイのメイン工場から輸入し、コロンビアの工場では、主にドア装置や内装等の板金加工を中心に行っている。

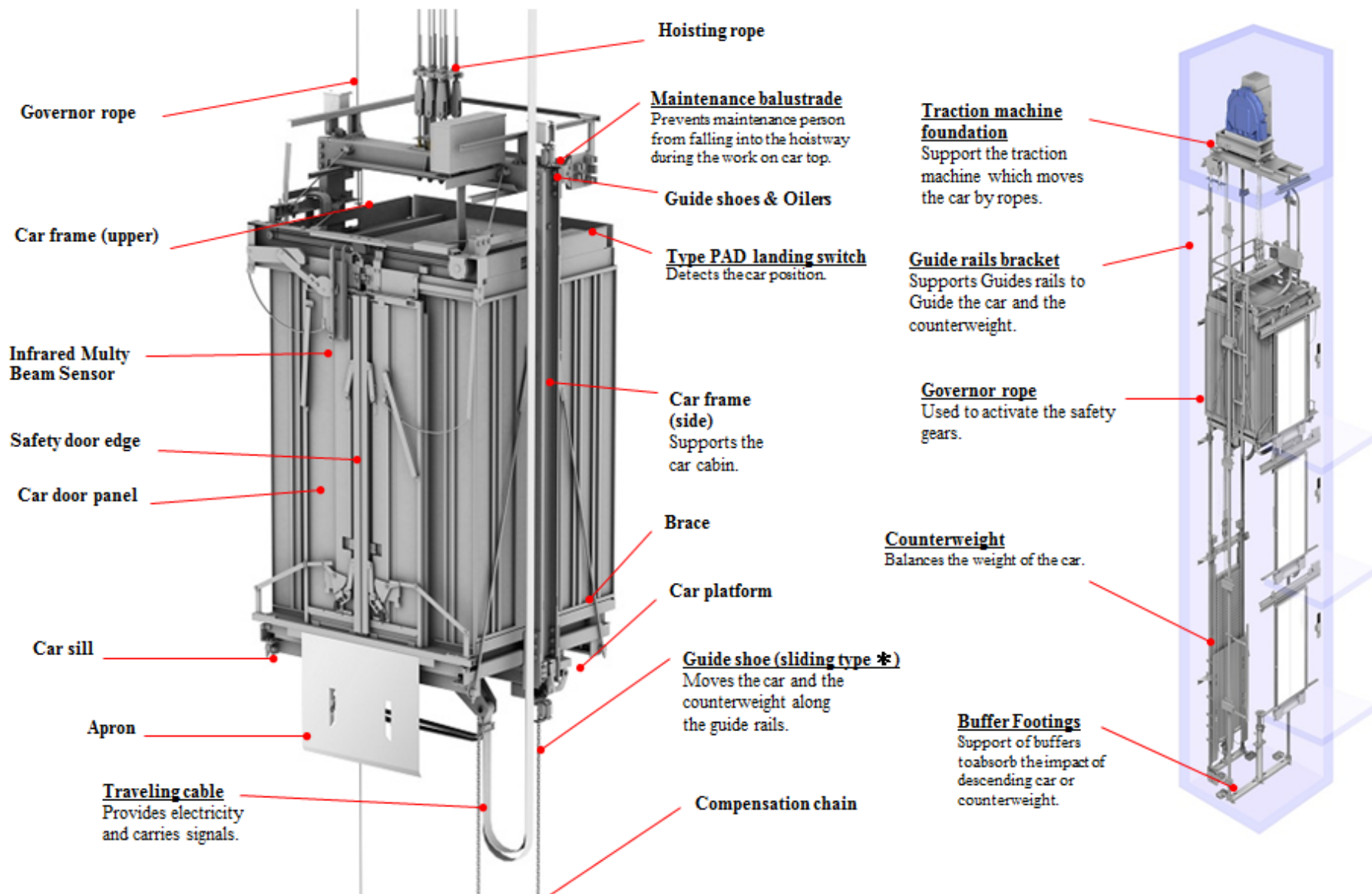
The factory is steel metal plant and manufacturing doors and interiors of elevators. Main components are imported from Japan and Thailand.

・年間の製造台数は約1,000台で、その内4割をエクアドル等の近隣諸国に輸出している。

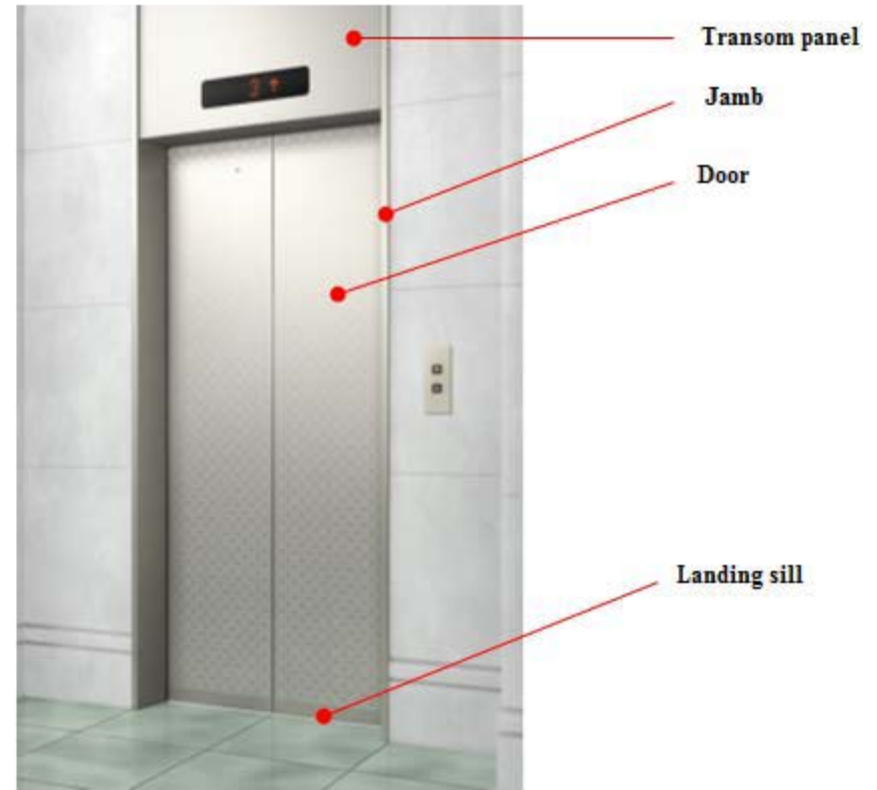
The factory manufactures around 1,000 units annually, and exports 40% of its production to other Latin countries.



Local Supply Parts



Local Supply Parts



Publicities · Advertisement

- ・業界紙などへの定期的な宣伝広告に加えて、2013年の社名変更(三菱冠称化)の際には、新聞広告や雑誌、不動産のモデルルームでのポスター展示なども含めて、積極的に宣伝広告を展開。

Taking the opportunity of the change of company name, we are putting more efforts in advertisement in Newspaper, Real Estate/Construction magazines, and Posters at model rooms.

【Newspaper】



【Magazine】



【Poster】



【Magazines we put advertisement periodically .】



Advantage(Benefit) and Challenge of Manufacturing in Colombia(利点及び課題)

Advantage(Benefit)

①上質な人的資源 (High Quality of Human Resources)

- ・法務、税務、監査、経理、財務といった高い専門性が求められる分野の人材が豊富であり、またエンジニアという国家資格を有する理系大卒の人材も非常に豊富で、採用時のコストも比較的低い。

There are many human resources with the high degree of expertise, such as legal, tax, audit, accounting and finance. Moreover, the human resources graduated in the science and engineering with a national qualification of engineers is also very rich, and the cost of recruiting is also relatively low.

②関税メリット (TAX Benefit for Exportation)

- ・“Plan Vallejo”と呼ばれる制度で、輸出額に応じて輸入時の関税が還付される制度で、実際にきちんと関税の還付を受けられる事ができ、輸出時の競争力を促進させる事が出来る。

There is a tax institution called "Plan Vallejo", in a system that customs duties at the time of importation shall be refunded in accordance with the export amount, actually being able to receive the refund of customs duties properly, and it enables to promote the competitiveness of the exportation from Colombia.

③治安の改善 (Restoration of Public Safety)

- ・2002年に就任したウリベ大統領の施策により、治安改善⇒外国直接投資拡大⇒景気回復⇒失業率改善⇒治安改善という好循環が生まれ、生活環境、ビジネス環境が大幅に改善した。また、FARC(コロンビア革命軍)の和平協定調印が間近と目されており、調印後は更なる外国直接投資が期待される。

Colombia experienced the positive cycle from the Restoration of public safety, increment of direct investment from overseas, economic upturn, improvement of unemployment rate, and restoration of public safety. Moreover, it is expected to sign a peace agreement with FARC, and further economic upturn with direct investment.

Advantage(Benefit) and Challenge of Manufacturing in Colombia(利点及び課題)

Challenge

①製造業の裾野(the Supporting Industries for Manufacturing)

- ・製造業の裾野がまだ十分に広がっておらず(薄板、厚板等)、日本、韓国、ブラジル等から輸入せざるを得ない。

Supporting Industries for manufacturing such as sheet metal industries are not matured yet, and you have to import such materials from Japan, Korea and Brazil.

②未成熟な国内インフラ(Unsufficient Infrastructure)

- ・アジア方面からの輸入の際にはBuenaventura港を利用するが、同港のキャパシティ、港からの輸送道路整備がまだまだ成熟しておらず、輸送に係るコストが高止まりしている。

You need to use the Port of Buenaventura for importing from Asian countries. However, the capacity of the port is not enough and transportation from this port is not paved well, so the logistic cost is extremely high.

③税制改革(Tax Reform)

- ・原油価格の下落による政府の歳入減を背景に、2014年末に税制改革が承認され、18年迄に法人税(公平税を含む)を段階的に引き上げていく予定となっており、海外からの直接投資を行う上での懸念点となりうる。

Due to the downslide of oil price, Colombian government decided to increase the corporate tax rate(including CREE) gradually by 2018. It can be a bottleneck for the foreign investment to Colombia

御清聴ありがとうございました
¡GRACIAS POR SU ATENCIÓN!
THANK YOU FOR YOUR ATTENTION!