



Presidents' Forum

Palm Beach – *September, 24 2011*

Ambrogio **BOLLINI**

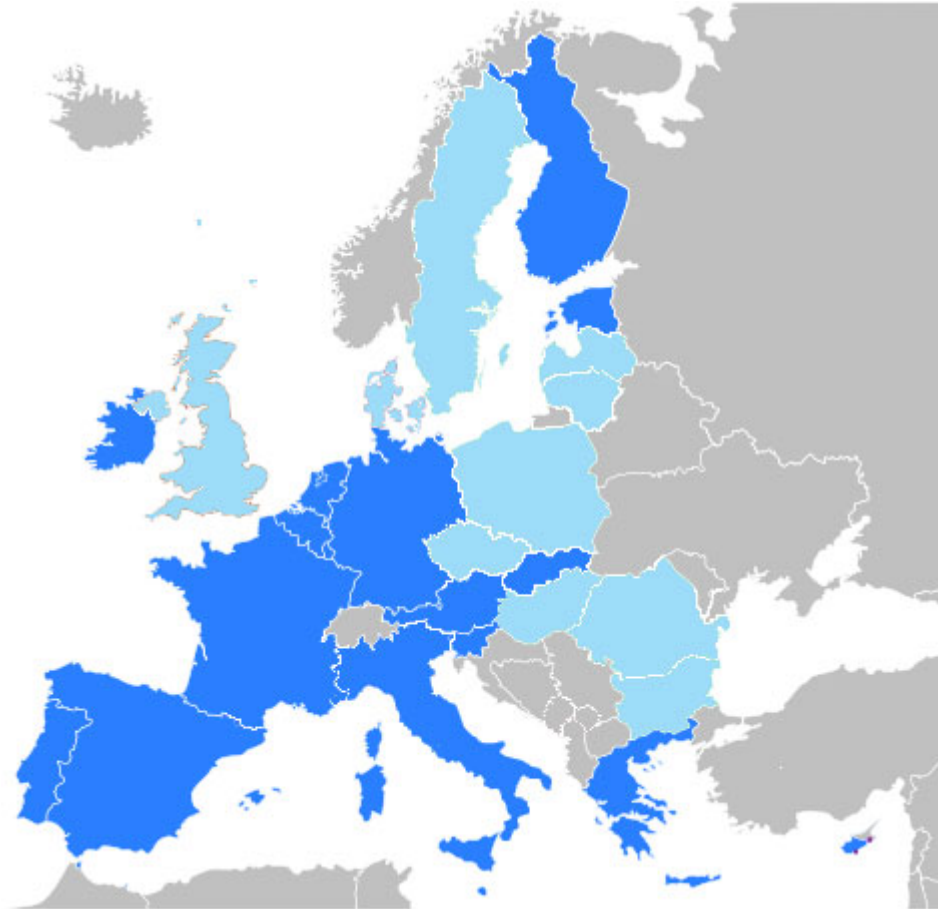
President, FEM Product Group Industrial Trucks

FEM工业车辆产品组主席



AGENDA议程

- **Economic development Europe**
欧洲的经济的发展
- **Industrial truck market Europe**
欧洲工业车辆市场
- **Market surveillance in Europe**
欧洲的市场监管



■ Eurozone 欧元区
■ EU Union 欧盟

Europe 欧洲

Geographic EU 47 countries
地理上的欧洲 47个国家

Political EU (union) 27 members
政治上（欧盟） 27个成员

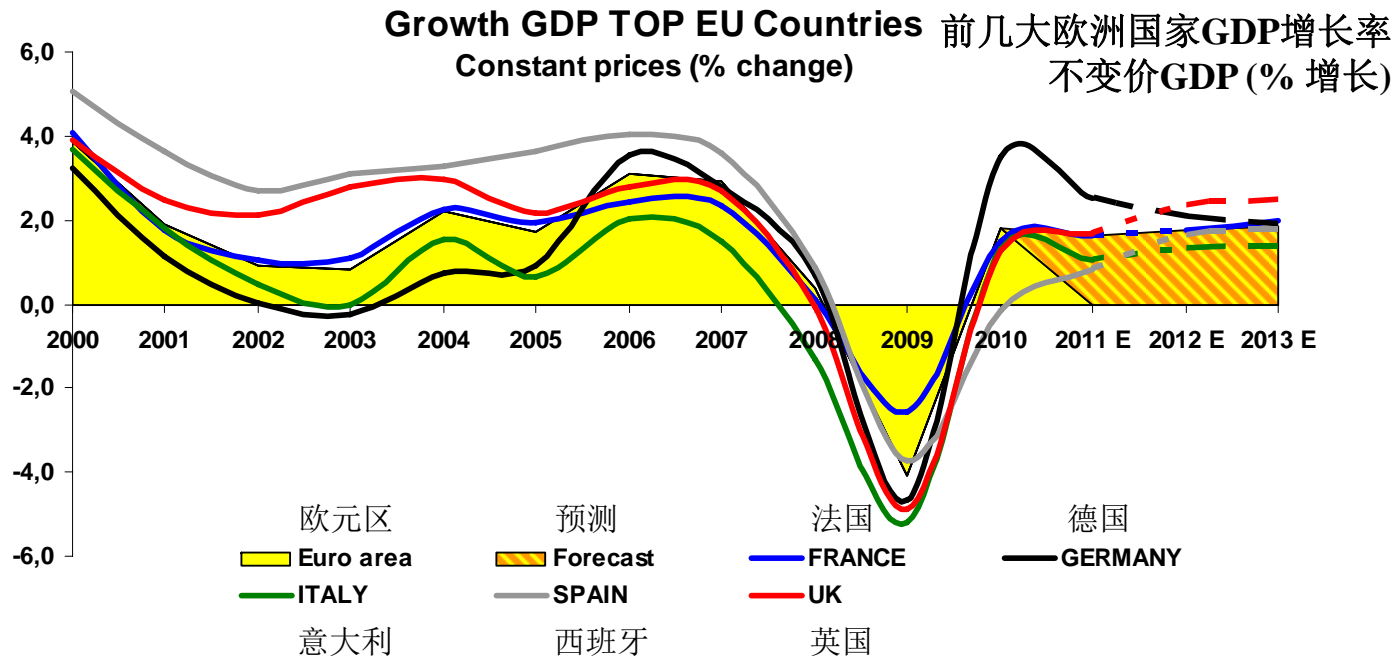
Euro Zone 17 members
欧元区 17个成员

NOTE: Five more Countries applied for EU membership

备注：另有五个国家申请加入欧盟



Economic development 经济发展

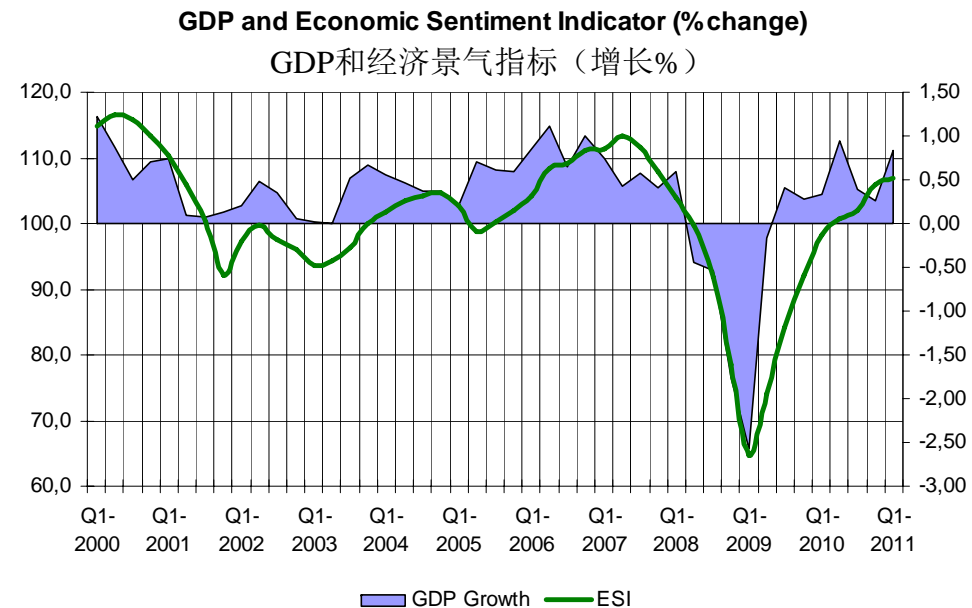
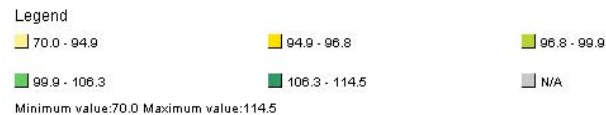
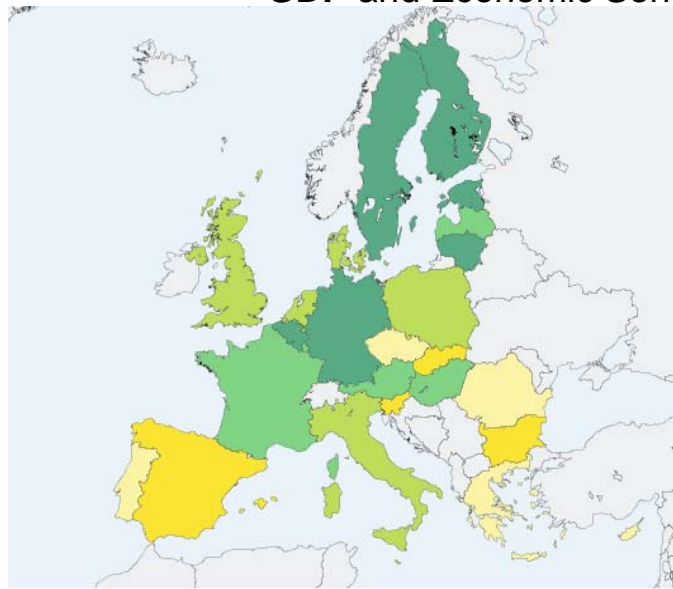


- A moderate and uneven recovery is taking shape across Europe where Germany and France drive stronger GDP growth 欧洲地区正进行着缓慢而不平稳的经济复苏，其中德国、法国拉动着较强的GDP增长
- Growth is expected to pick up during 2011-12, but the traditional drivers of the recovery are likely to be weaker than usual, due to the fiscal imbalance in Eurozone (i.e. Greece, Portugal, Ireland insolvency issue) 预期经济的增长将于2011、2012开始，但是由于欧元区的财政不平衡，比如希腊、葡萄牙、爱尔兰等国破产因素，传统“经济复苏的驱动力”将比以往更加微弱



Drivers of recovery 复苏的驱动力

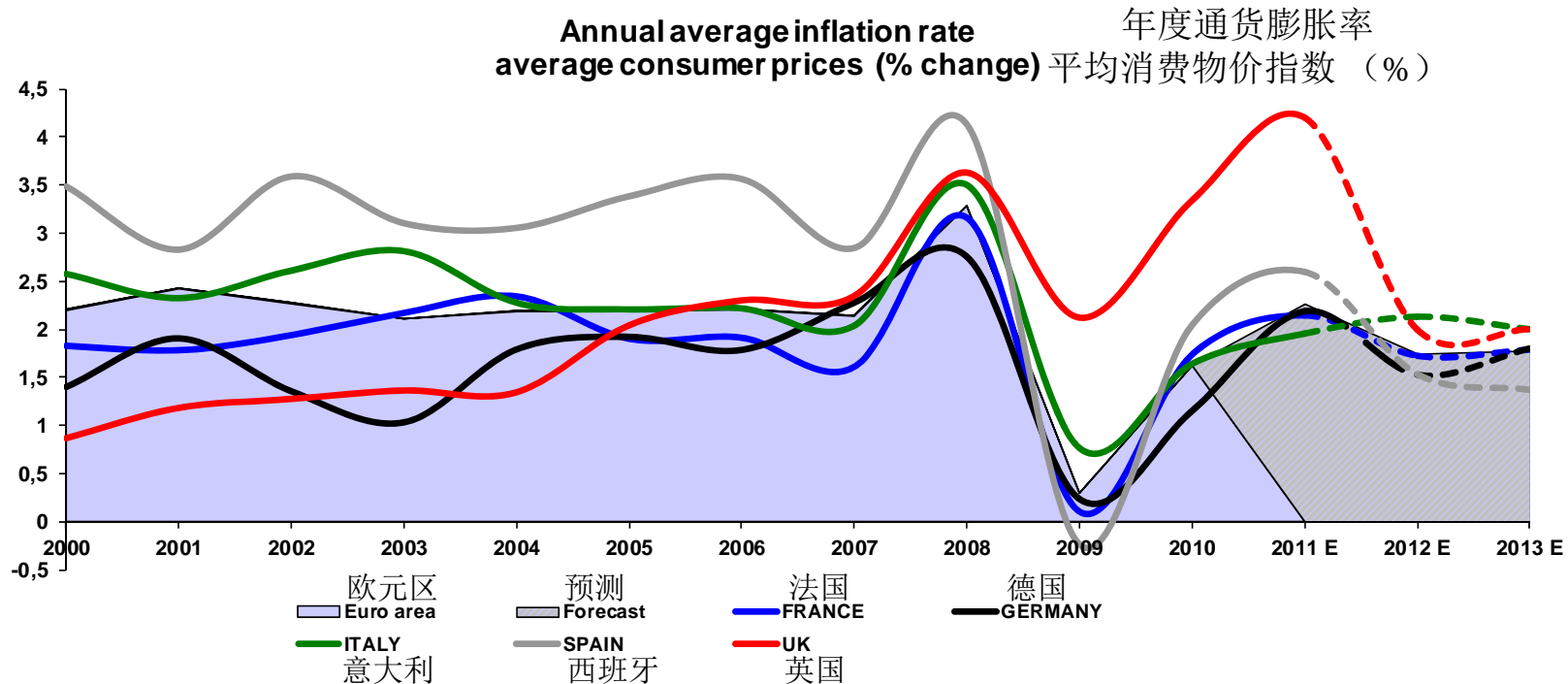
GDP and Economic Sentiment Indicator relation 国内生产总值和经济景气指标的联系



- Fiscal “policies” and “stimulus” packages in EU have rebuilt **ESI** confidence index 欧洲的财政政策及刺激方案正在重建经济景气的信心指数
- The **ESI** improvement is today almost driven by an higher **Consumer** confidence while the **Industrial, Services, Construction and Retail** confidence is subdued 经济景气指标的提升绝大部分是因为较高的消费者信心，而不是工业和服务业、建筑业和零售业的信心
- Under the present circumstances, considering the Country deficit, Public debts, Bank credit restrictions, Unemployment, etc. it is likely this index will deteriorate 然而，从目前的情况看来，考虑到国家财政赤字、公共债务、银行信用限制、失业等不确定因素，这一指标有可能会恶化



Economic development 经济发展



- Inflation rose in Euro Area due to of commodity price pressures acceleration but expected to decrease the following years due to the deterioration of the consumer confidence and the unemployment. 商品价格的压力加速了欧元区的通货膨胀上升，但预计在接下来的几年由于消费者信心及失业率的恶化，通货膨胀将下降。
- Expected below 2% in the Eurozone 预期欧元区在2%以下

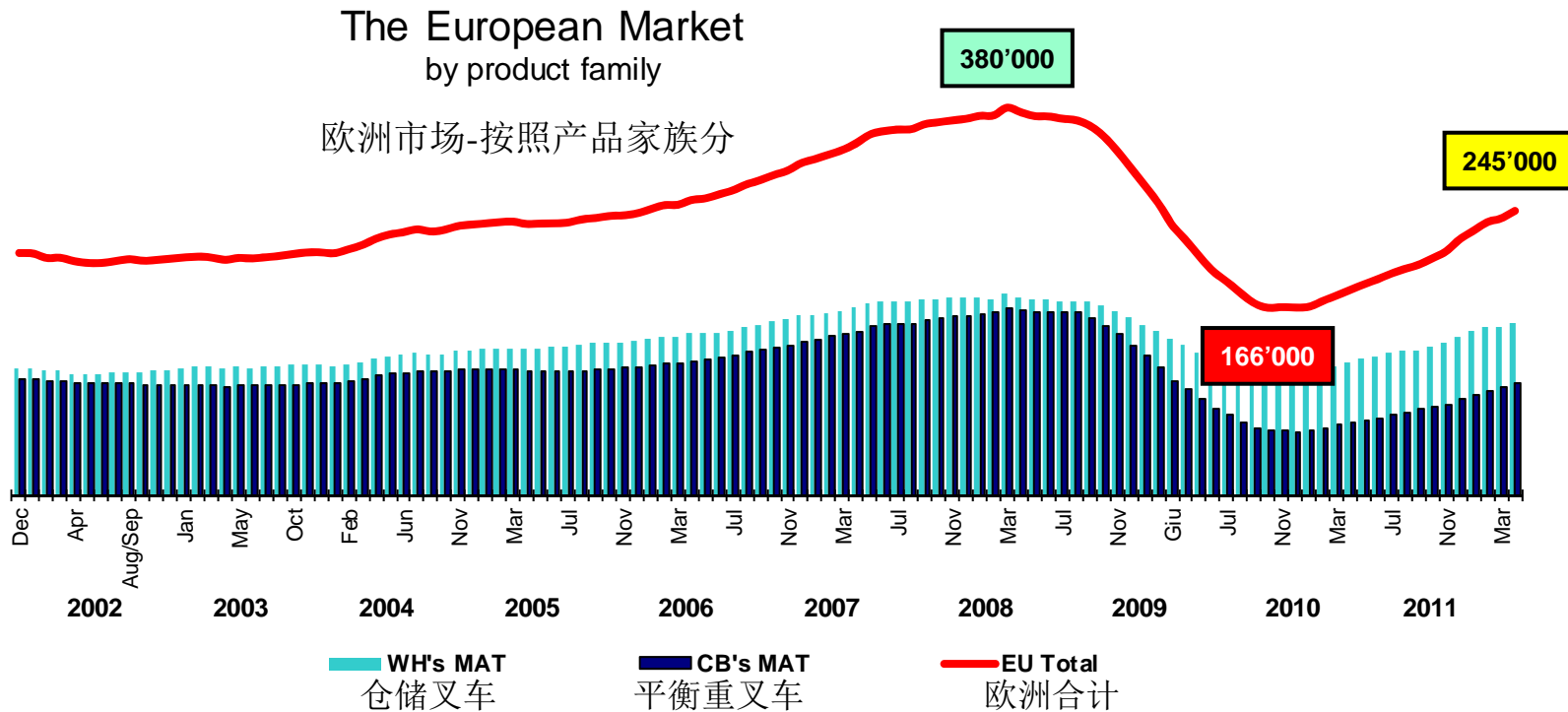


AGENDA议程

- Economic development Europe
欧洲的经济的发展
- **Industrial truck market Europe**
欧洲工业车辆市场
- Market surveillance in Europe
欧洲的市场监管



Geographic Europe 地理上的欧洲





Geographic Europe 地理上的欧洲

WITS Classification 2010 WITS 2010年分类

West Europe 西欧

Main WEST EU
AUSTRIA
BELGIUM
DENMARK
GERMANY
FRANCE
GREAT BRITAIN
ITALY
NETHERLAND
PORTUGAL
SPAIN
SWEDEN
SWITZERLAND

Other WEST EU
ANDORRA
FAROE ISL
FINLAND
GIBRALTAR
GREECE
HOLY SEE (VATICAN)
ICELAND
IRELAND
LIECHTENSTEIN
LUXEMBOURG
MALTA
MONACO
NORWAY
SAN MARINO
SVLBRD/JAN MAYEN

East Europe 东欧

EAST EU
ALBANIA
ARMENIA
AZERBAIJAN
BELARUS
BOSNIA-HZ
BULGARIA
CROATIA
CZECH REP.
ESTONIA
GEORGIA
HUNGARY
KAZAKHSTAN
KYRGYZSTAN
LATVIA
LITHUANIA
MACEDONIA
MOLDOVIA
POLAND
ROMANIA
RUSSIAN FED
SLOVAKIA
SLOVENIA
TAJIKISTAN
TURKMENISTAN
UKRAINE
UZBEKISTAN
SERBIA & MONTENEGRO

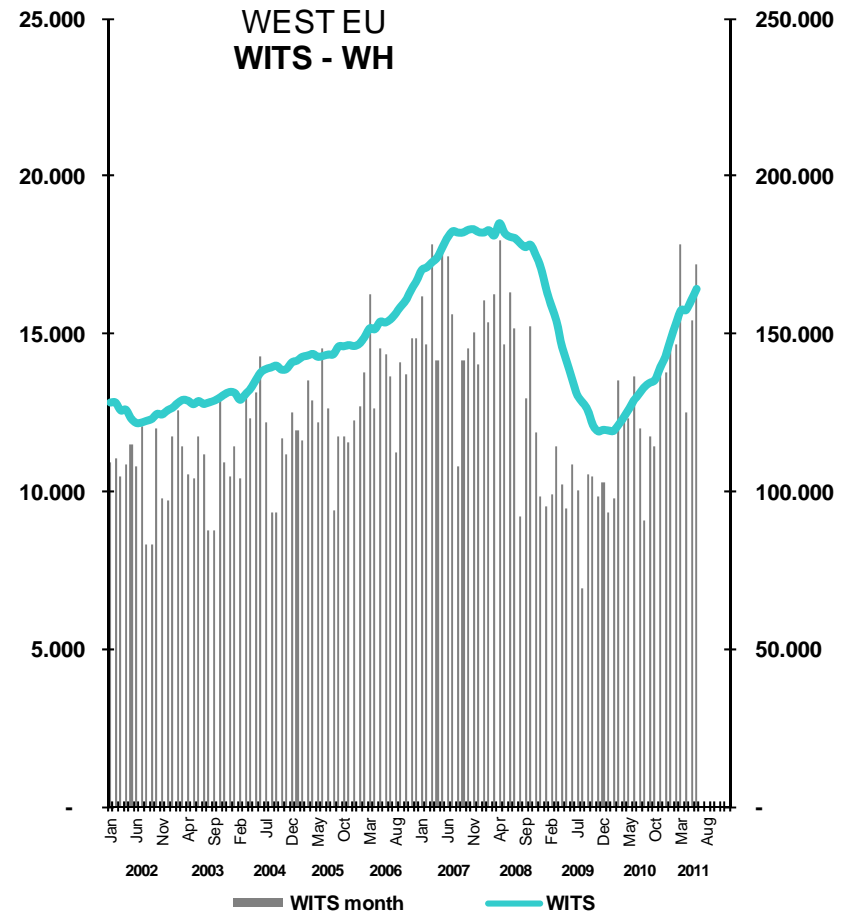
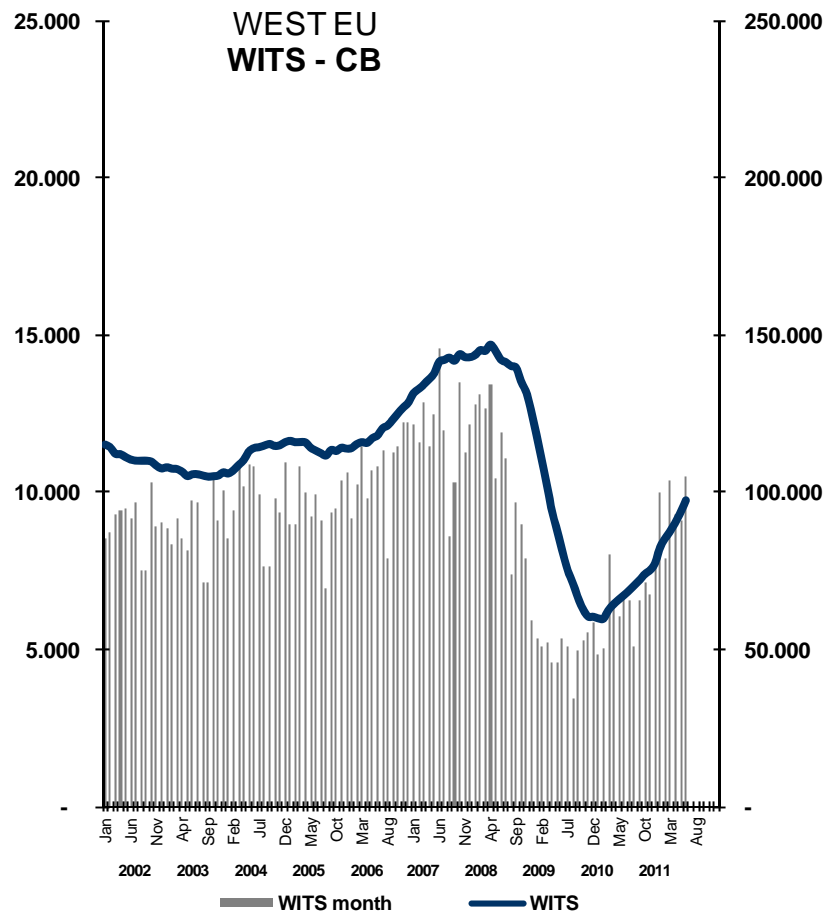
From January 2011

TURKEY 土耳其
CYPRUS 塞浦路斯

KAZAKHSTAN 卡萨克斯坦
KYRGYZSTAN 吉尔吉斯坦
TAJIKISTAN 塔吉克斯坦
TURKMENISTAN 土库曼斯坦

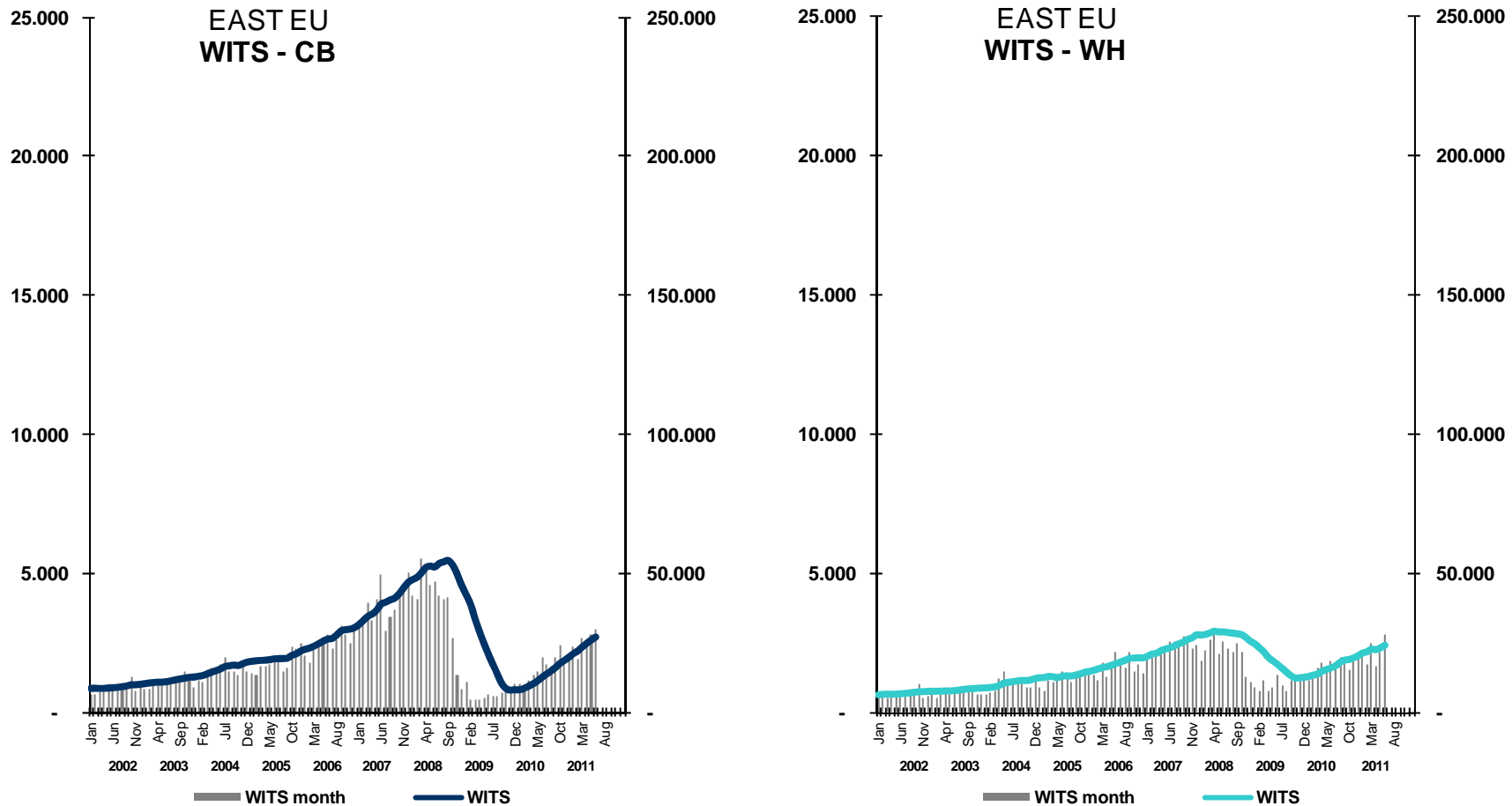


FEM & WITS - CB Market comparison FEM和WITS平衡重市场比较
West Europe detail 西欧详情





FEM & WITS - CB Market comparison 平衡重市场比较
East Europe detail 东欧详情





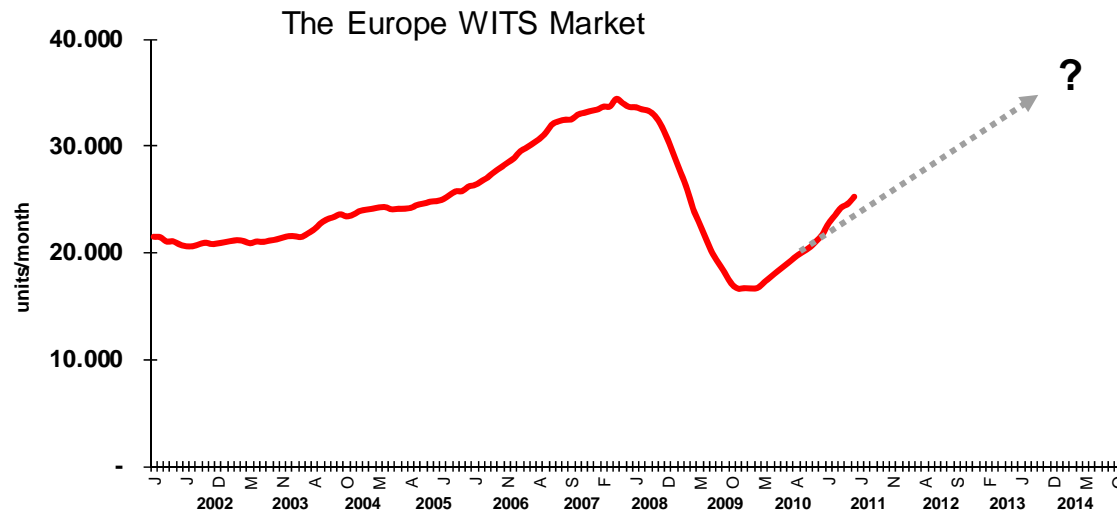
The today EU scenario 欧盟的现状

- The recovery has solidified, thanks to higher consumer spending and substantial fiscal policies but unemployment remains high which might “hold back” the general consumer confidence 归功于较高的消费性支出以及坚固的财政政策，目前的经济复苏业已稳固。但失业率的高居不下，有可能会阻碍消费者信心的恢复进度。
- Despite the positive outlook there are still risks for the near future related to the sovereign risk of certain countries in Euro Area and the development policy to support them, high debt rate, the insufficient progress on banking system repair, the increment in oil price and political and social problems 除了积极正面的展望，一些欧元国家仍存在着主权危机以及经济支持政策、高负债率、银行系统修复进展不足、原油价格上涨、政治及社会问题等方面的风险。
- The GDP growth rate in Q1 2011 was of 0,84% and the latest data seems confirm same growth in Q2. In Q3 the growth rate pace might slow-down due to a number of still open uncertainties 第一季度的GDP增长率为0.84%，而且最新的数据似乎验证了第二季度拥有同样的GDP增长率。由于许多还不确定的因素，第三季度的增长率将放缓。



EU Material Handling - Market expectations 欧盟的物料搬运市场预期

- Global economy has definitely turned the corner from the great recession after implementing structural policies and reforms in the most important economies 在最主要经济体实施结构化政策和改革后，全球经济已经从大衰败中走出来。
- The today market recovery, largely driven by Germany and few other countries, is likely to continue but a “W shape” is to be foreseen 目前主要由德国和其他几个国家所推动的市场的复苏将会持续，但可以预见将以W曲线进行；
- Back to 2006/7 level by 2014? 2014年是否将回到2006年水平？





AGENDA议程

- Economic development Europe
欧洲的经济的发展
- Industrial truck market Europe
欧洲工业车辆市场
- **Market surveillance in Europe**
欧洲的市场监管



Market surveillance 市场监管

- The system of Market surveillance in Europe shall ensure the Compliance of products to Safety, Environmental and Exhaust emission legislation controlled by the “Market surveillance authorities” 欧洲市场监管体系是用于确保产品符合由“市场监管机构”管理的安全、环境及排放法规的要求。
- As all other regions of the world, Europe has legislation in place also applicable to industrial trucks. 与世界上其他地区相似，欧洲已制定的某些法律同样也适用于工业叉车行业。
- The system is very liberal, all manufacturers can confirm their compliance to the applicable legislation by their own, no third party certification is required. 这一体系是非常开放的，所有生产商都可自行确认其产品是否符合适用法规，而不需要第三方认证。
- But, on the other hand, authorities are obliged to perform product checks regarding the fulfillment of the applicable legislation. 但是，从另一方面来说，机构有责任进行检验，以查看该产品是否满足了适用法规中的要求。
- That process is called “Market surveillance” 该步骤就称为市场监管



Market surveillance in Europe 欧洲的市场监管

- As announced in AITO-Meeting 2010 in Istanbul, **European Market Surveillance Authorities** will act more proactive 如同在2010年伊斯坦布尔的联盟会议上提到的，市场监管机构的行动将更加积极
 - *Market surveillance authorities will be supported by industry* 市场监管机构将得到行业的协助
 - *Major aim is to prevent accidents with noncompliant/unsafe industrial trucks which is in the interest of authorities, manufacturers and users* 主要的目的是为了**避免不符合规定/不安全的工业车辆发生事故，以保护政府、制造商及用户的利益**
- **FEM IT** supports market surveillance authorities by „**A brief guide for identification of non-compliant industrial trucks**“ FEM IT提供”关于鉴别不符合法规的工业车辆的简明指导”，为市场监管机构提供支持
 - *Machinery directive* 机械指令
 - *Outdoor Noise directive* 室外噪音指令
 - *Non-Road mobile machinery directive* 非道路行驶机械设备指令
 - <http://www.fem-eur.com/index.php/Market%20Surveillance/en/>
- A significant number of non-compliant equipment was seen on **IMHX/Birmingham** show as well as during auctions in various EU countries (no punishment for exhibitors) 在英国伯明翰举办的国际搬运及物流展中出现了相当多的不符合法规设备（没有惩罚参展商）



Market surveillance at CeMAT 2011

2011 CeMAT期间的市场监管行动

- German National Committee of **FEM** (VDMA) conducted inspection on first day of the show regarding obvious violations on industrial trucks 德国机械设备制造业联合会在展会的的第一天就有明显违规的工业车辆进行了检查
- “More than 50 exhibits from the industrial trucks segment did not meet the requirements of the **European directives** regarding machine safety, exhaust emissions and noise emissions.”* “工业车辆环节有超过50个展品没有符合欧洲在设备安全、废气排放以及噪音污染方面的指令要求” *
- “The information collected during the inspection was turned over to the **Trade Supervisory Office** in Hannover. The Trade Supervisory Officials, in their function as market surveillance authorities, confirmed the violations found by the **VDMA**.”* 在检查中搜集的信息被移交给汉诺威的贸易监督机构做进一步调查。官员们代表市场监管的执法机关核对VDMA发现的违规事项。
- “Sealed, tamperproof signs had to be affixed to some exhibits informing visitors that the products were not in conformance with **European directives** regulations (*the signs were intended to at least protect potential buyers from becoming involved in the illegal operation of such products in Europe*)
“为了告知参观者该产品并不符合欧洲的指令规定，有些展品不得被贴上密封且不能篡改的标签。贴标签是为了至少保护潜在买家不卷入在欧洲违规操作该产品的可能。
- The **Trade Supervisory Office** has affirmed that it will investigate and follow up on all information it receives after the trade fair as well.”*贸易监督机构已声明将在展会后检查并跟进搜集的所有信息” *



Outlook展望

- Follow up on market surveillance authorities actions against violations found on CeMAT 2011 跟进市场监管机构在2011年CeMAT展中发现的违规事宜
- Several press releases or articles regarding legal consequences for operators of non-compliant industrial trucks were or will be published 发布或者即将发布关于使用不符工业车辆的法律后果的若干新闻稿或文章
- 4th chapter for „**A brief guide for identification of non-compliant industrial trucks**“ regarding technical details in preparation → “TOP TEN obvious violations” 关于技术细节的第四篇 “关于鉴别不合法规的工业车辆的简明指导” 正准备中 → “十个明显违规”
- Other product groups of FEM join the initiative of FEM IT and will publish “**brief guides...**” FEM的其他产品组加入FEM IT的行动并且将发布 “。。。简明指导”
- 24th November 2011: EU conference on market surveillance 2011年11月24日：关于市场监管的欧盟会议



Appeal to all industrial truck manufacturers 呼吁所有工业车辆制造商

An increase of unsafe trucks in operation will result in more accidents使用的不安全叉车的越多，事故也会越多。

This is detrimental for any manufacturer of industrial trucks这对任何工业叉车生产商都是不利的。

We request all AITO-members to appeal to their members to use the world wide agreed standard ISO 3691 regarding safety and obey national legislation regarding exhaust and outdoor noise emissions我们要求所有联盟成员呼吁其成员采用被全世界范围内认同的ISO 3691安全标准，并遵守有关排放和室外噪声发射的国家法规。

Otherwise governments might get in favor of third party certification否则，政府有可能采用第三方认证的方式。