

2013 Presidents' Forum

2013年主席论坛



Industrial Truck Institution, CCMA
中国工程机械工业协会工业车辆分会

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Macro-economic Development in China
中国宏观经济形势

2.

Industrial Truck Market in China
中国工业车辆发展状况

3.

Development Trend of Industrial Trucks in China
中国工业车辆行业未来发展趋势



China to transform its growth mode, accelerate the pace of upgrading 中国经济转变发展方式，加快转型升级步伐

The new government focus on the adjustment of industrial structure and the transformation of growth pattern. Ensuring steady growth, adjusting the structure, and benefiting the people are the main points, continue to maintain moderate economic growth, accelerate the transformation and upgrading, improve the quality and efficiency of economic growth.



2012年以来,特别是新一届政府履职后,中国经济更加注重产业结构调整、增长方式转变,以稳增长、调结构、惠民生为重点,保持中等经济增长速度,加快转型升级,提高经济增长质量和效益。

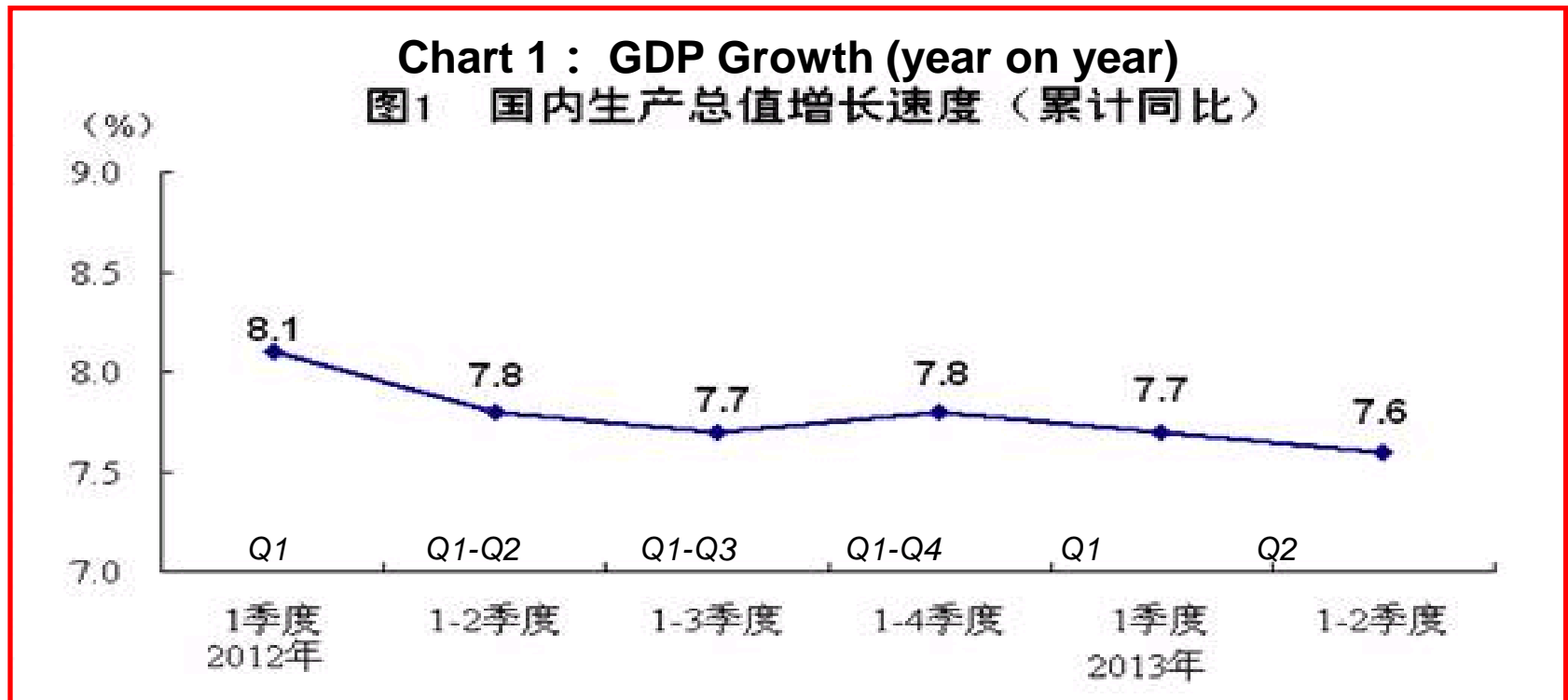


Macro-economic Development in China

中国宏观经济形势

1. GDP Growth Slows

1. GDP增长步伐放缓

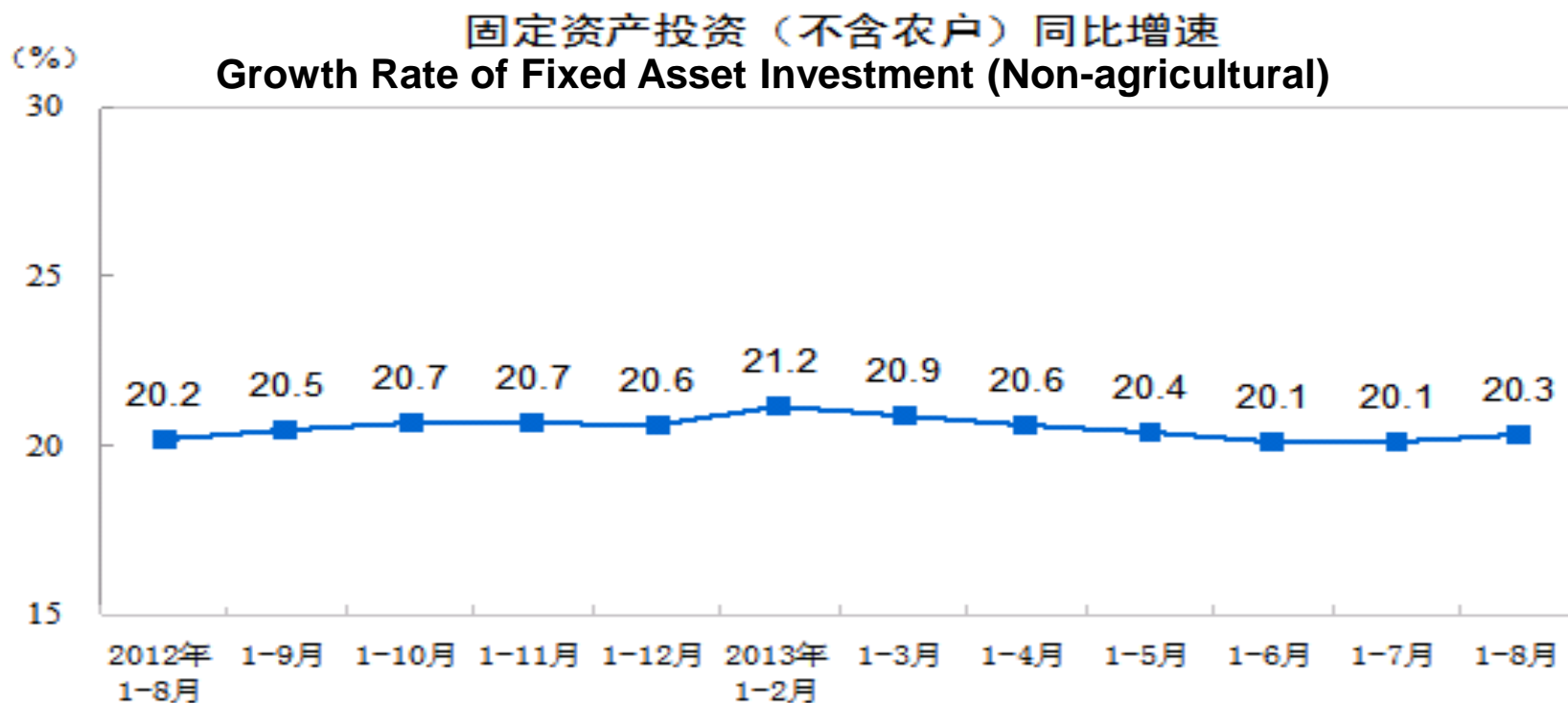


Source: National Bureau of Statistics
注：具体数据源于国家统计局



2: Fixed Asset Investment becomes slower

2：固定资产投资同比趋缓



Month 1-8 1-9 1-10 1-11 1-12 1-2 1-3 1-4 1-5 1-6 1-7 1-8
Y2012 Y2013

Source: National Bureau of Statistics

注：具体数据源于国家统计局



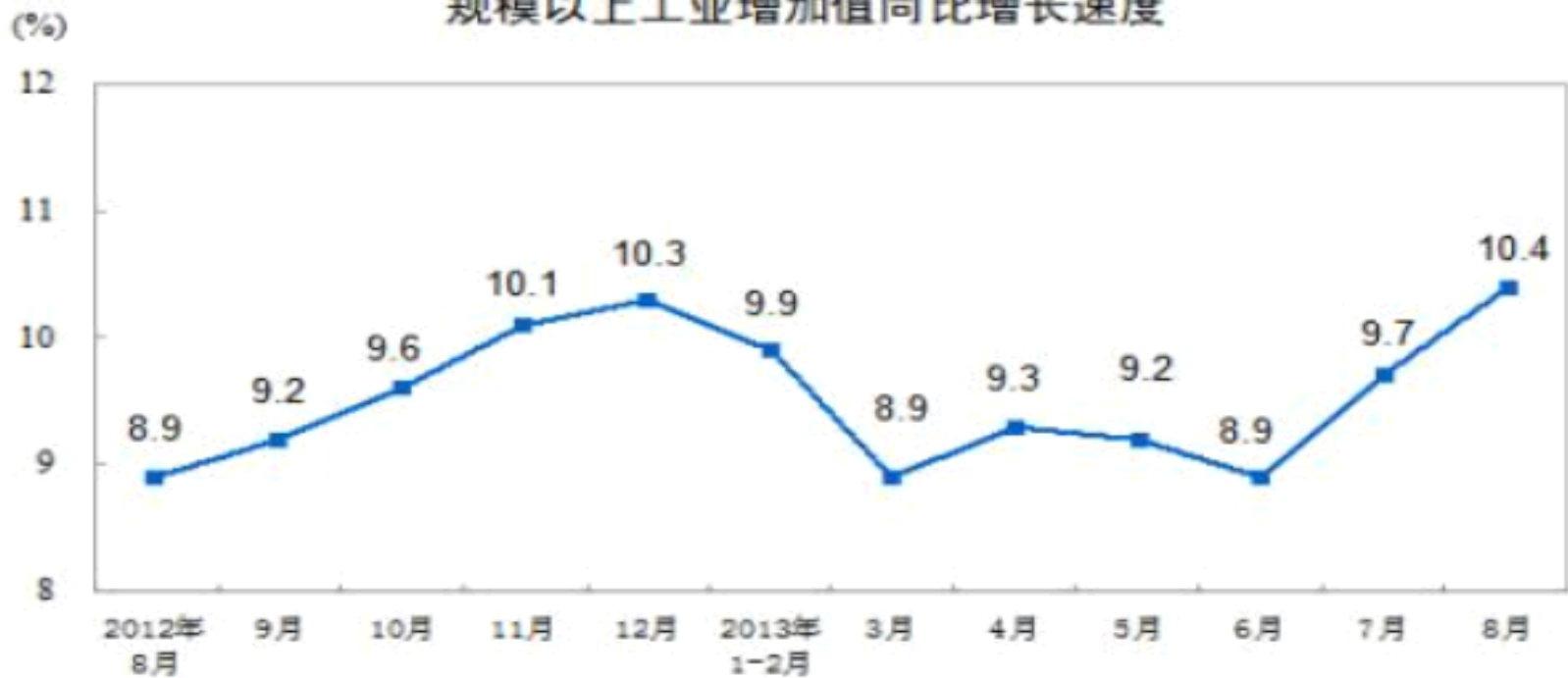
Macro-economic Development in China

中国宏观经济形势

3: Industrial Added Value has stabilized

3: 工业增加值企稳向好

Growth Rate of Added Value of Above-Scale Industries
规模以上工业增加值同比增长速度



Aug
Y2012

Sep

Oct

Nov

Dec

Jan-Feb
Y2013

Mar

Apr

May

June

July

Aug

Source: National Bureau of Statistics

注：具体数据源于国家统计局

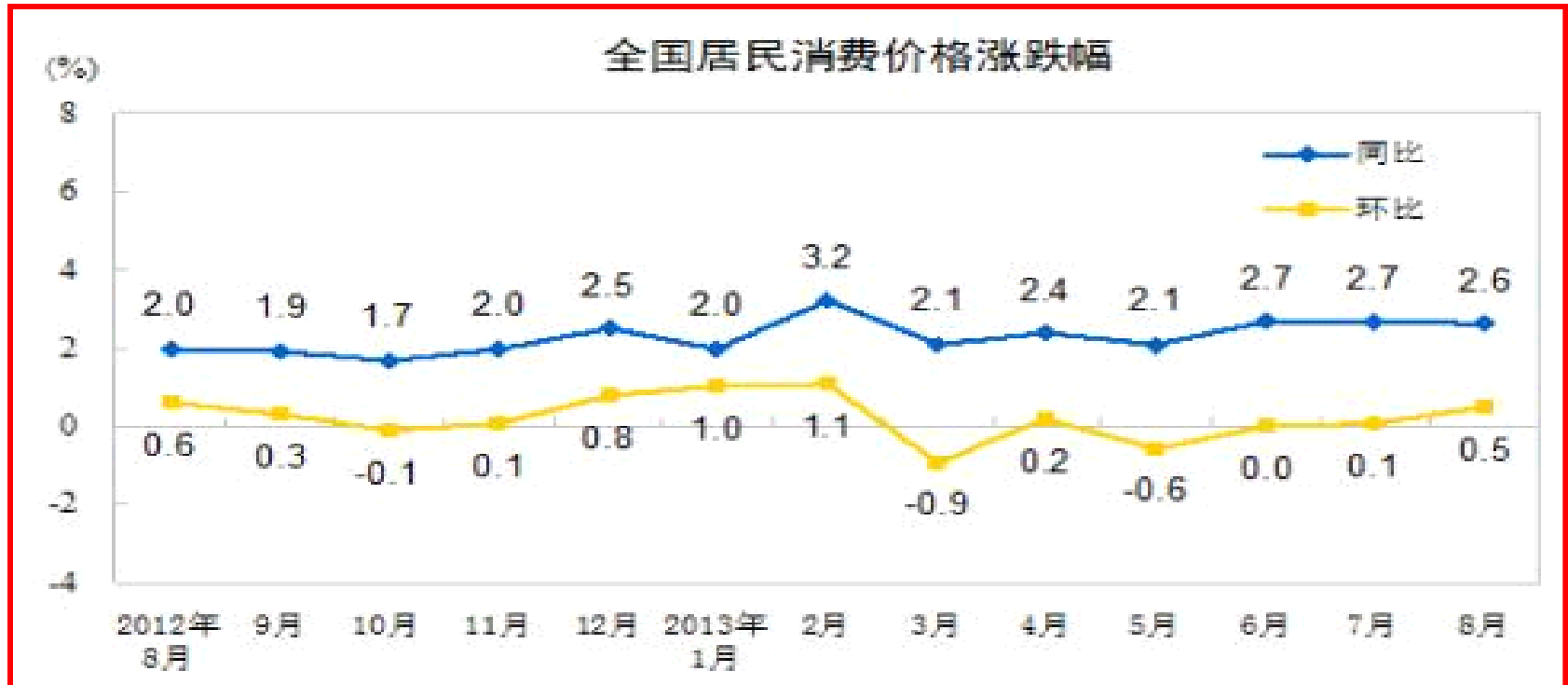
Macro-economic Development in China

中国宏观经济形势



4: Fluctuation of Consumer Price Index has become stable

4: 消费价格指数波动趋缓



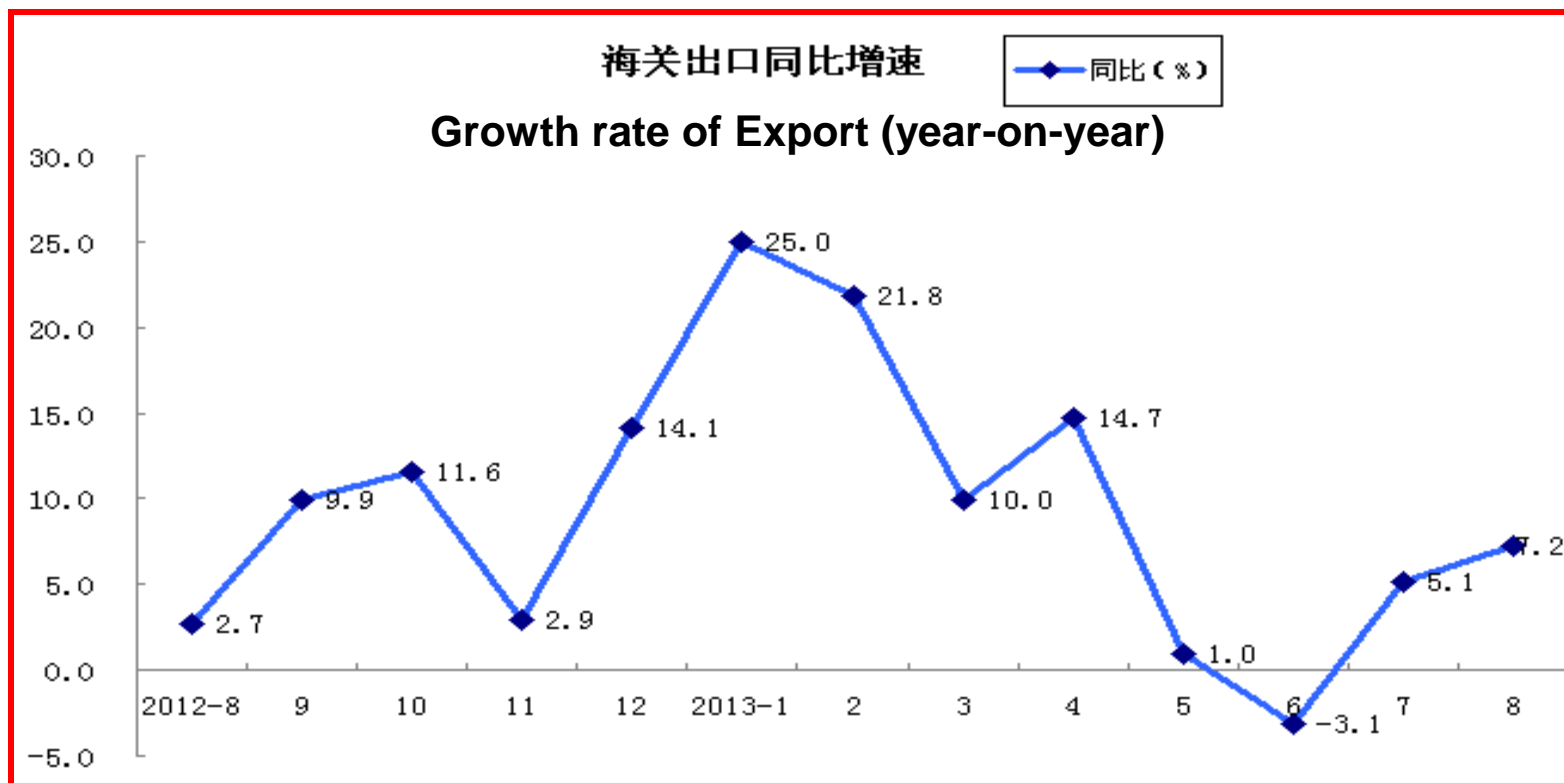
- Compared with the same period of last year
- Year on year

Source: National Bureau of Statistics
注：具体数据源于国家统计局



5: Exports Market got tough

5: 对外出口形势严峻



Source: General Administration of Customs of China

注：具体数据源于国家海关总署



Macro-economic Development in China

中国宏观经济形势

Analysis of economic slowdown 经济趋缓原因分析

The growth rate of the developed economies such as America and Japan is lower than expected. Europe is still affected by a debt crisis. The growth rate of the other emerging economies has been slow down. China face a severe export situation. 美日等发达经济体经济增速明显小于预期，欧洲仍深受债务危机影响；其他新兴经济体增长放缓，出口形势严峻；

During the rapid growth in the last 10 years, China's economy was transformed from an investment-driven to a consumption driven mode. Limited by environment and resource, China's economy needs high-quality and profitable growth. 十年的高速增长，中国由投资拉动向消费拉动转型，受环境、资源等条件的约束，中国经济需要有质量有效益的增长；


The traditional industries such as steel, nonferrous metals, chemical, and real estate, etc. are seriously influenced by the macro-control, the industrial restructuring and economy transformation and upgrade have been agreed on generally. 钢铁、有色、化工、房地产等传统行业受国家调控影响较大，产业结构调整和经济转型升级已经成为共识；

Government service has transformed to strengthening the people's livelihood and interests of the masses. 政府的服务转型，更加关注民生和群众利益；

7.5%



Be optimistic about China's economic prospect 中国经济发展前景仍然看好

-  1. China's economy will maintain moderate growth and focus on restructuring, transforming and upgrading. 中国经济将保持中速增长，注重结构调整和转型升级；
-  2. The driving force of economic growth in China include industrialization, urbanization, agricultural modernization, informatization and internationalization, especially industrialization and urbanization. 中国工业化、城镇化、农业现代化、信息化和国际化是增长动力，尤其是工业化和城镇化；
-  3. China's government accumulates rich experience in macro-control. With reform and opening up continuing, the dividends will be released continuously. 中国政府积累了比较丰富的宏观调控经验，通过持续改革开放，可以释放源源不断的改革红利；
-  4. China has vast territory, and the Midwest has great development potential. 中国地域广阔，中西部发展潜力巨大。



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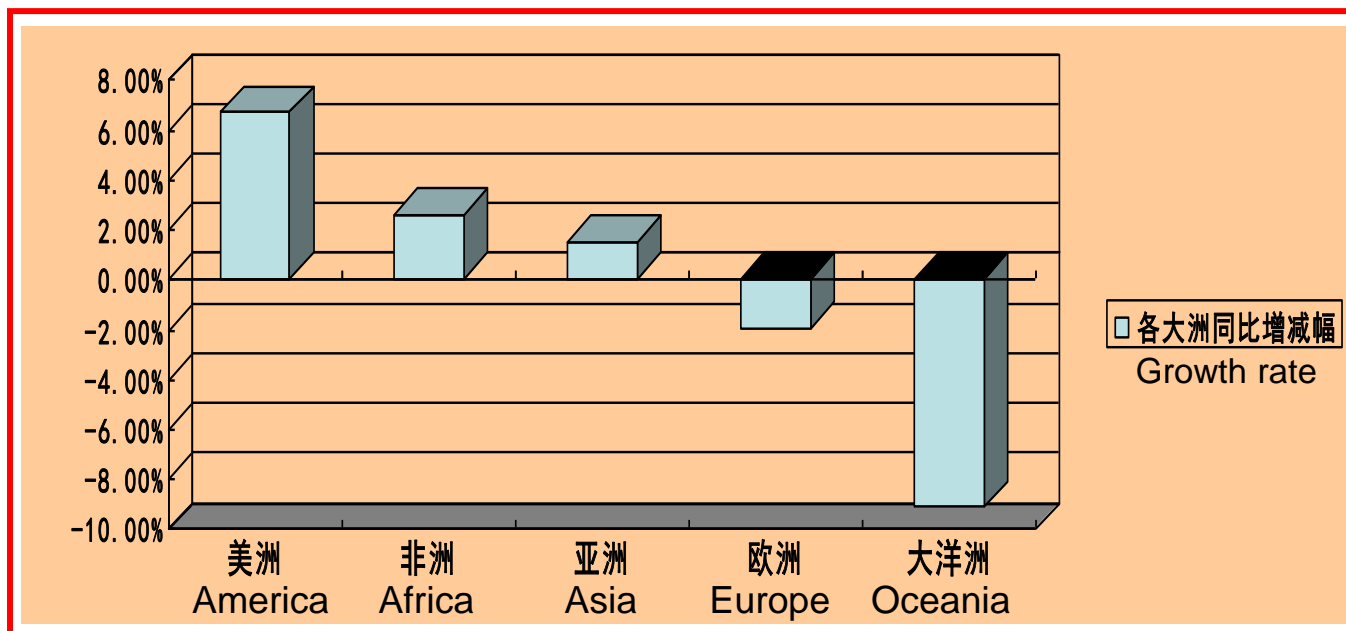


World Industrial Truck Sales Situation (2013 H1)

世界工业车辆销量情况(2013上半年)

The sales of powered industrial truck worldwide reached 488,000 units in 2013 H1, +1.3%, among them, America +6.7%, Africa +2.6%, Asia +1.5%, Europe -1.9%, Oceania -9.1%.

2013年上半年，全球机动工业车辆销量48.8万台，同比增长1.3%。其中：美洲上升6.7%、非洲上升2.6%、亚洲上升1.5%、欧洲下降1.9%、大洋洲下降9.1%。



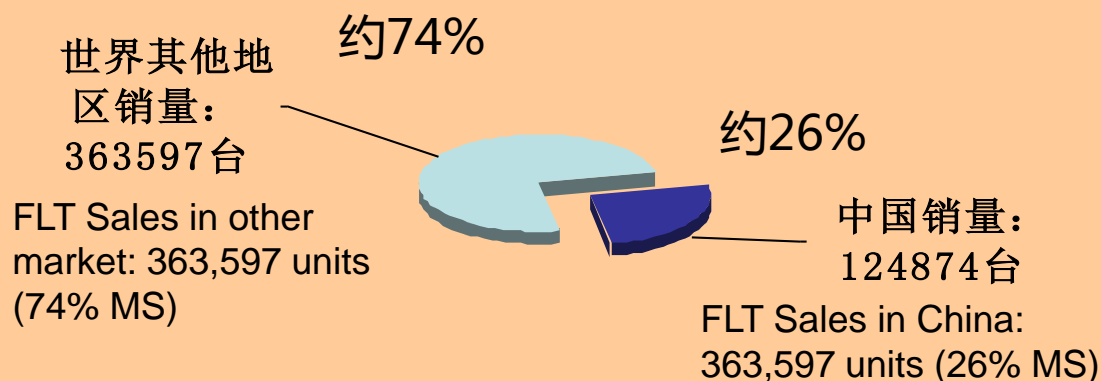


Industrial Truck Sales Situation in China (2013 H1)

中国工业车辆销量情况(2013上半年)

In 2013 H1, 165,000 units of FLT produced by Chinese manufactures were sold, +8.3% compared to the same period of last year, among the total sales, 125,000 units were sold in domestic market, +7.2%, China maintain its No. 1 market in the world.

中国：2013年上半年，中国工业车辆制造企业销量16.5万台，同比增长8.3%。中国市场销量12.5万台，增长7.2%，继续位列全球第一大市场。





Industrial Truck Market in China

中国工业车辆发展状况

The Structure of China Industrial Truck Market

中国工业车辆市场格局

- Jiangsu, Guangdong and Shandong provinces are still the top 3 market in China, and make up to 10% market share. 江苏、广东、山东继续居国内市场前三甲，市场份额均10%以上；
- Machinery, Logistics & Warehousing, Automotive, Food & Beverage industry take over 10% MS respectively out of total market demands. 机械行业、物流仓储、汽车行业、食品饮料行业对工业车辆需求占比均占10%以上。

Machinery
机械制造



Logistics & WH
仓储物流



Automotive
汽车产业



Food & Beverage
食品饮料



>40%



Industrial Truck Market in China

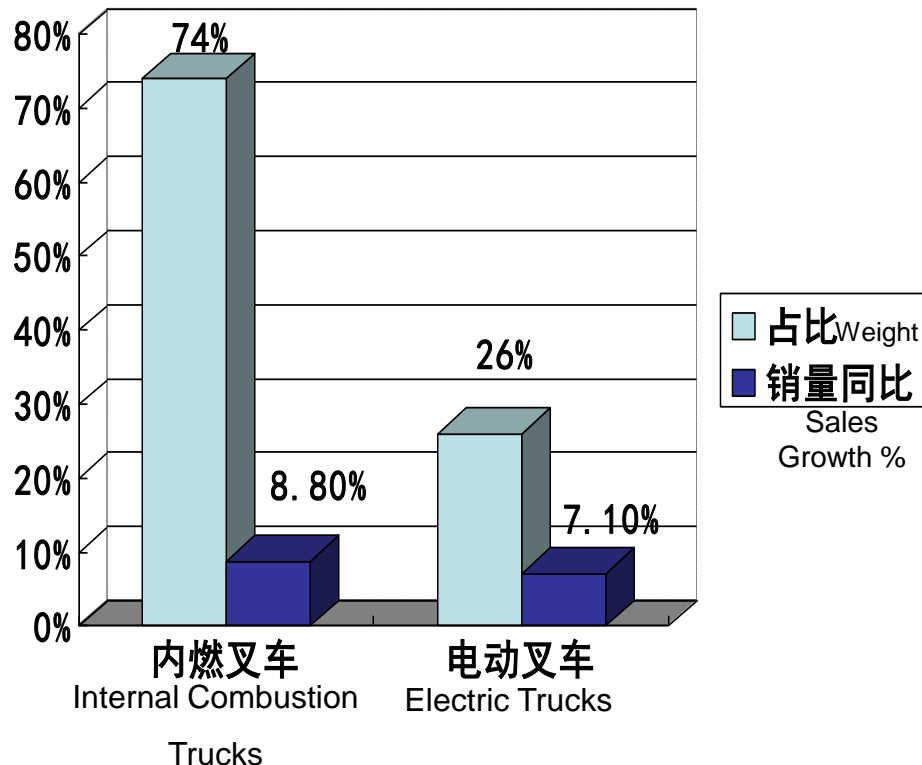
中国工业车辆发展状况

Sales of China's Industrial Truck by Product Segment (2013 H1)

中国工业车辆产品格局(2013年上半年)

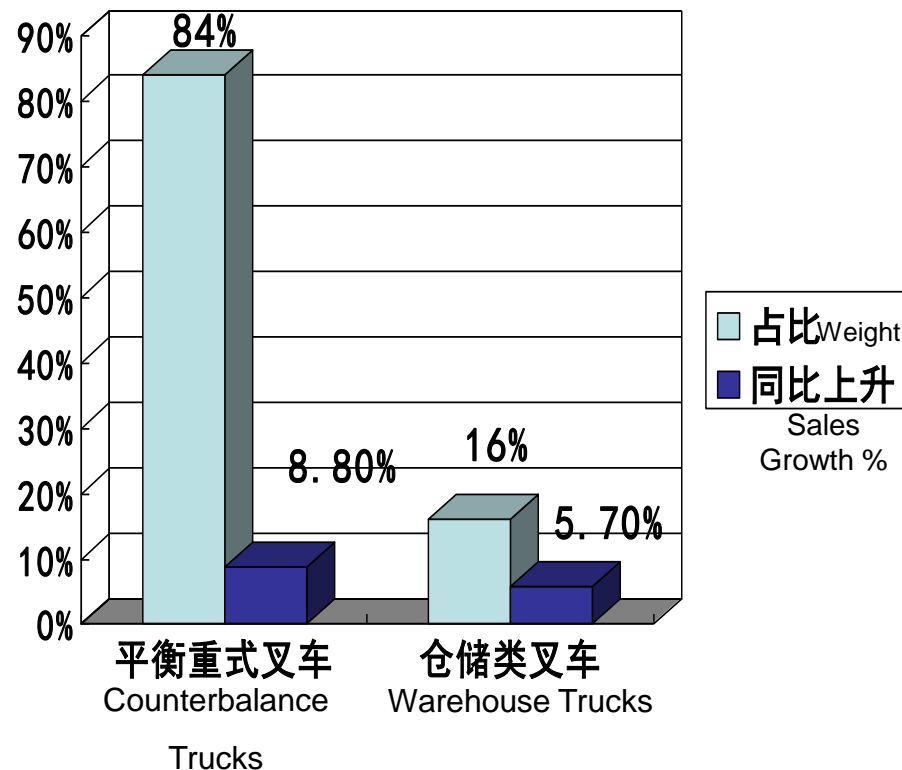
Sales & Share of IC/ E Trucks

内燃与电动叉车占比和销量上升图



Sales & Share of CB Trucks/WH Trucks

平衡重式与仓储式占比和销量上升图





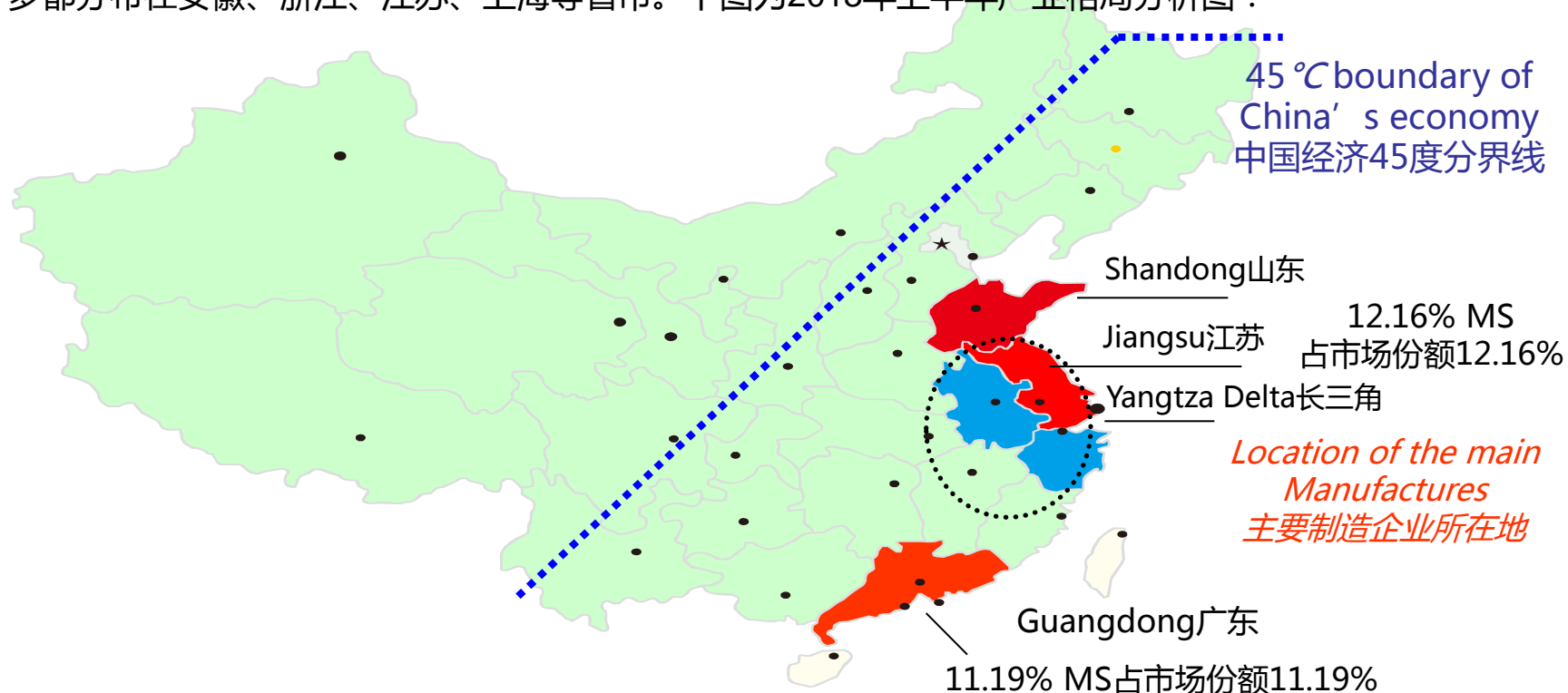
Industrial Truck Market in China

中国工业车辆发展状况

China's Industrial Truck Market Structure

中国工业车辆产品格局

Currently, there are up to 120 forklift enterprises in China, and above 60 of them perform actively in the industry, most of which are in Anhui, Zhejiang, Jiangsu, and Shanghai. Here are the analytical diagram for 2013 H1. 目前，中国叉车企业多达120家，活跃在行业内大概有60多家，大多都分布在安徽、浙江、江苏、上海等省市。下图为2013年上半年产业格局分析图：





The Competition Pattern of China Industrial Truck Market

中国工业车辆竞争格局

2012, the concentration of China industrial truck is still very high, the top 2 companies make up to 44% of the total sales, and the top 10 companies make up to 69%, and top 20 make up to 81% of the total sales in China.

2012年，中国工业车辆企业行业集中度依然较高，前2名占全国销售总量44%、前10名占69%、前20名占81%。





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Development Trend of Industrial Trucks in China 中国工业车辆行业未来发展趋势

1. The growth of 2013 China Industry Truck Market is expected to reach 5-10%. 2013年中国工业车辆行业将实现5-10%增长。

2. The features of China industrial truck development 中国工业车辆行业会呈现一些特点:

- The competition structure will not be changed a lot, but the product structure and company positioning of the industry are being changed. 行业竞争格局不会有太大变化，但行业产品结构和厂家定位正在发生变化；

- The requirements for the emission of diesel trucks in China and global market should be noticed. 中国及全球市场对内燃机排放的要求应引起关注；

- China FLT industry should use the mature development mode of developed market for reference, and transform its strength from homogenous production to product, service and related mode transformation. 中国工业行业应借鉴成熟市场的发展模式，从同质化的单纯产品竞争向产品、服务、模式转型；

- The electric warehouse products will be the highlight of the development in next-stage. 电动仓储类产品将是下一轮发展的重点。



Thanks for your attention
感谢各位的聆听

