



# Presidents' Forum

## Hainan, China – *October, 26<sup>th</sup> 2013*

**Dr. Klaus-Dieter Rosenbach**  
President, FEM Product Group Industrial Trucks



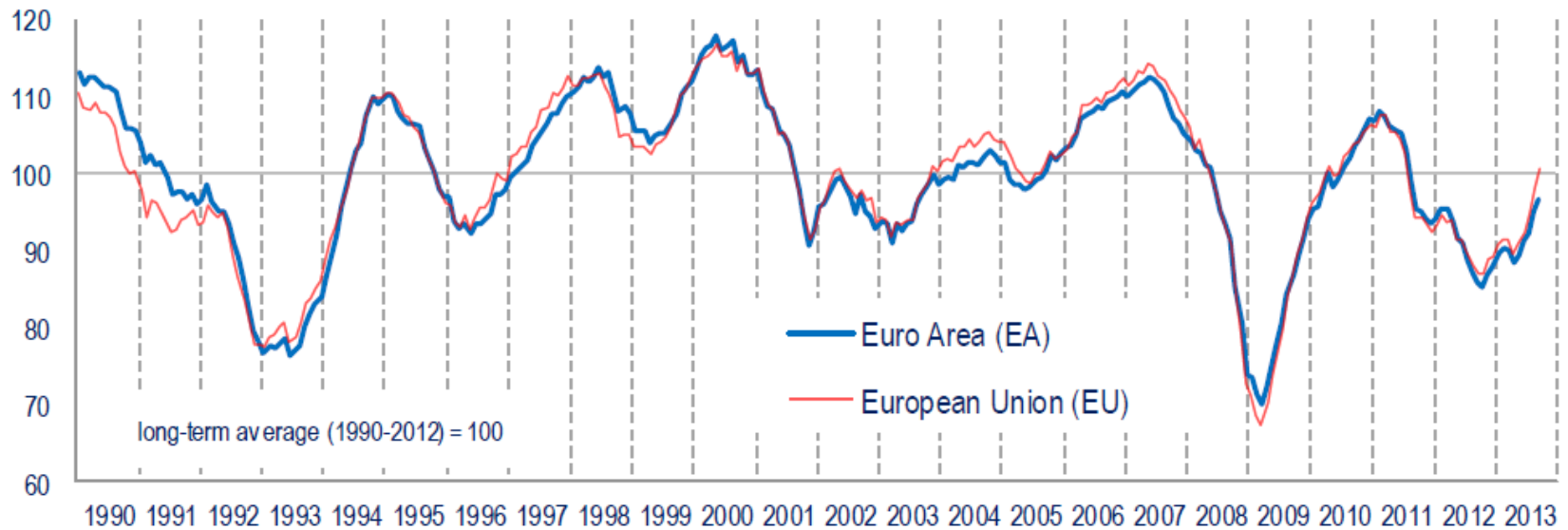
## **1. Economic Development In Europe**

## **2. Industrial Truck Market In Europe**

## **3. Safety and Environmental Legislation**

## **4. Summary**

# Economic Sentiment Indicator (ESI)

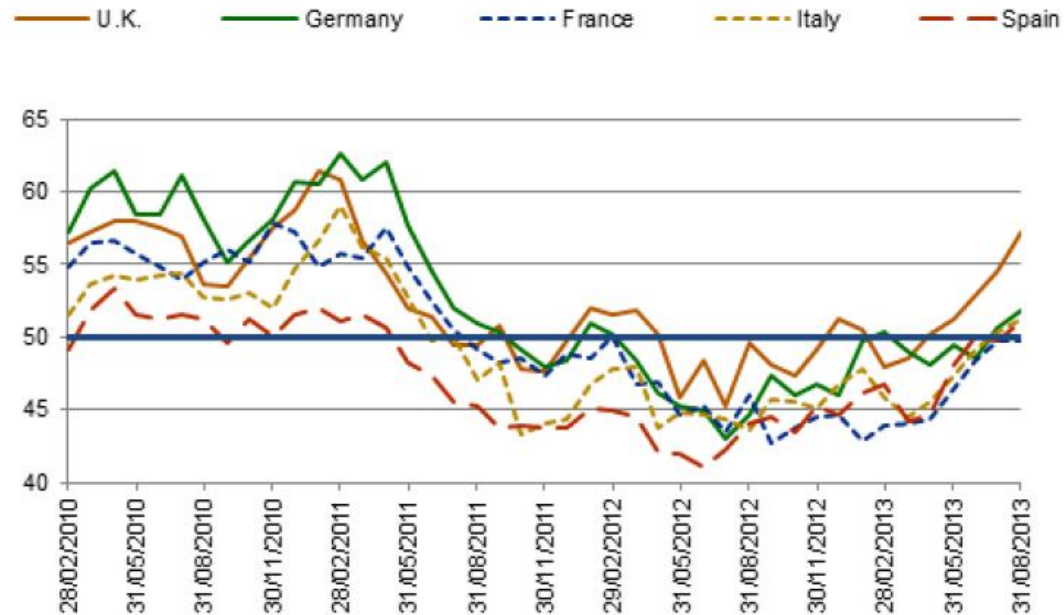


source: European Commission services

# Purchasing Managers Indices (PMI)

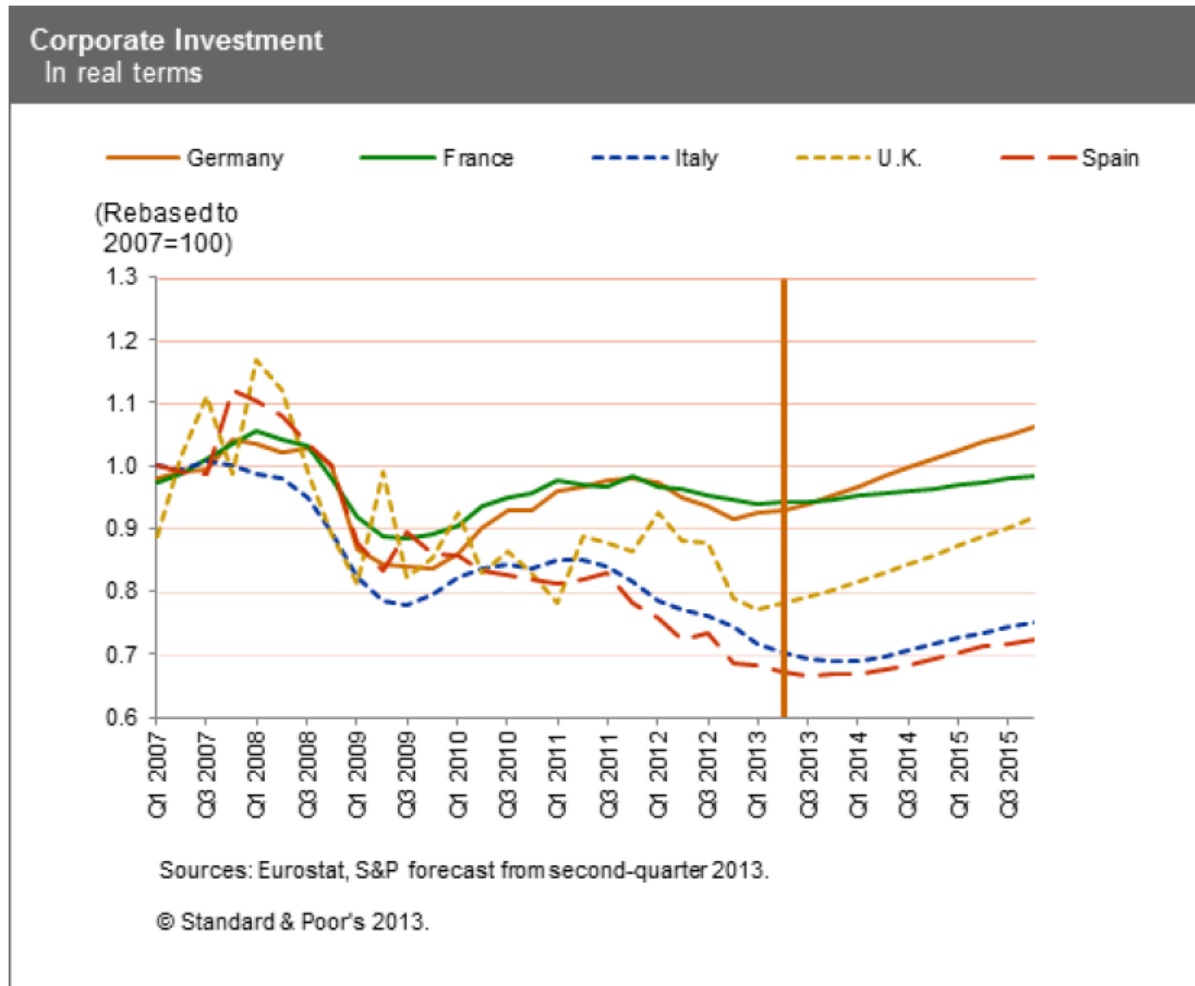


Purchasing Managers Indices



Note: Figures above 50 indicate expansion, and figures below 50 indicate contraction.  
Source: Bloomberg.  
© Standard & Poor's 2013.

# Corporate Investment





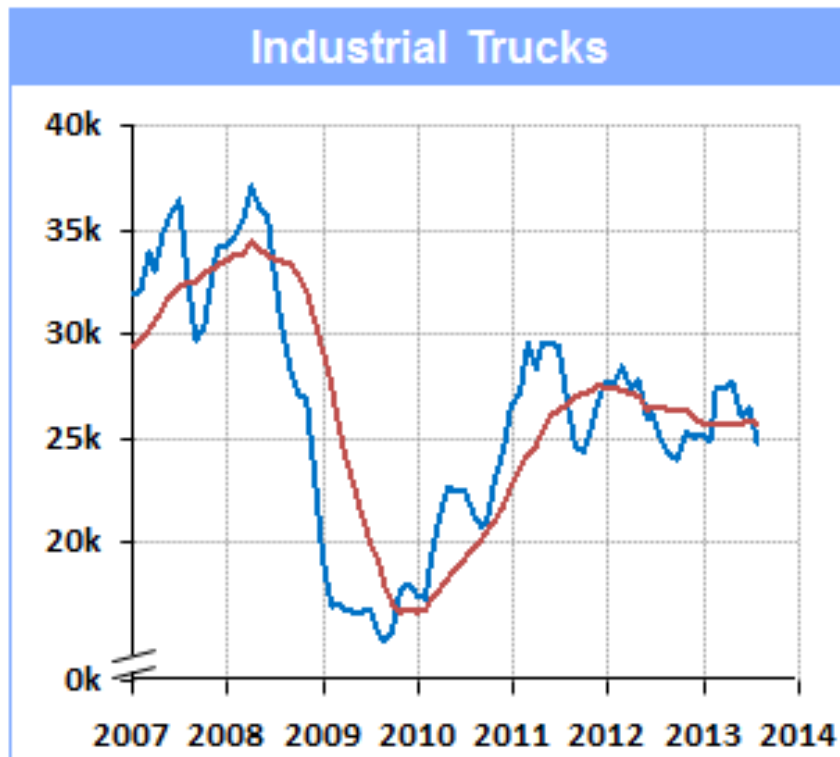
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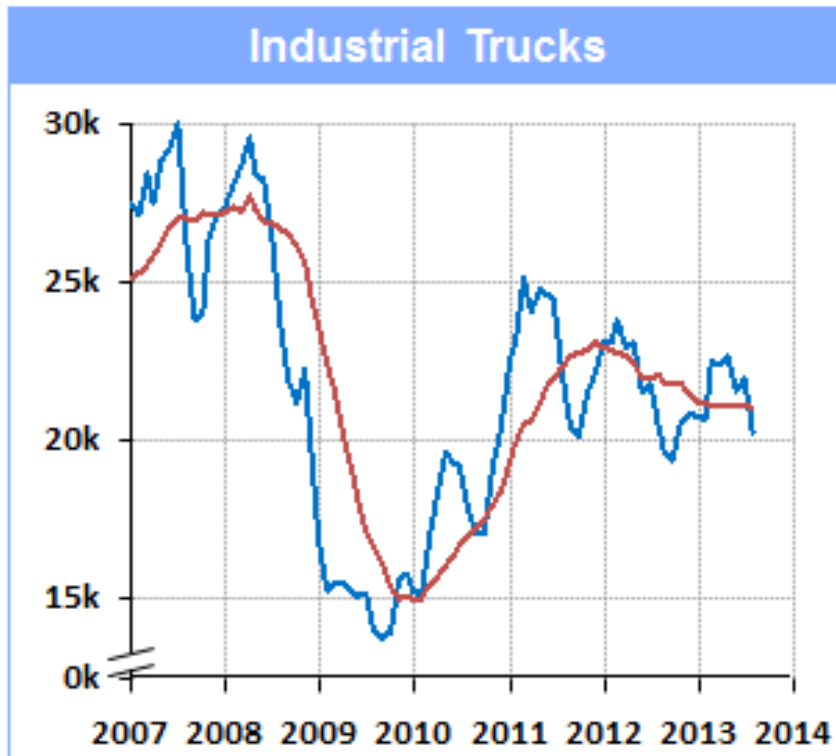
# Market Development In Europe



— 3MMA

— 12MMA

# Market Development In Western Europe

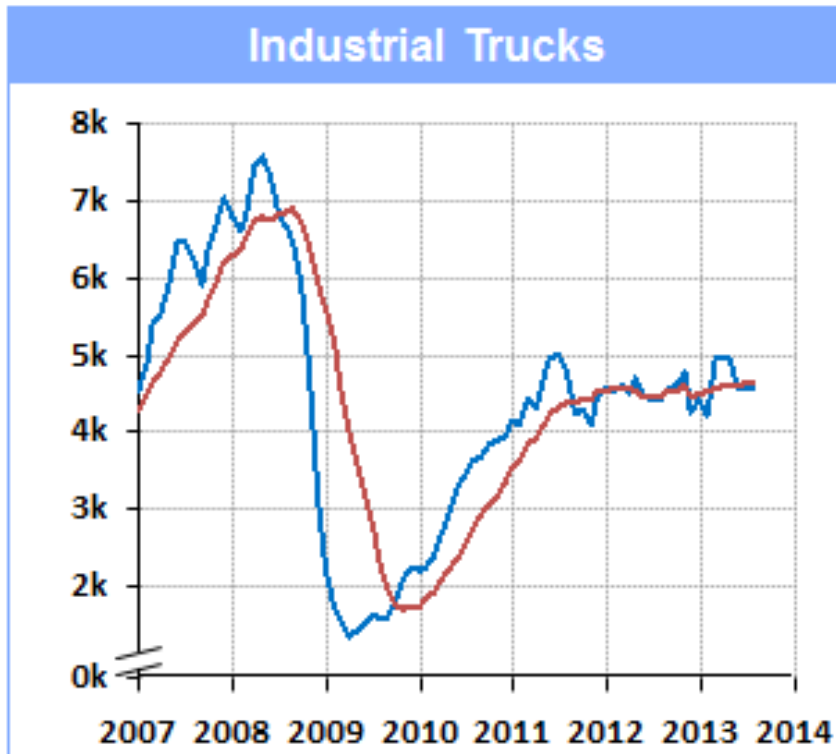


— 3MMA

— 12MMA



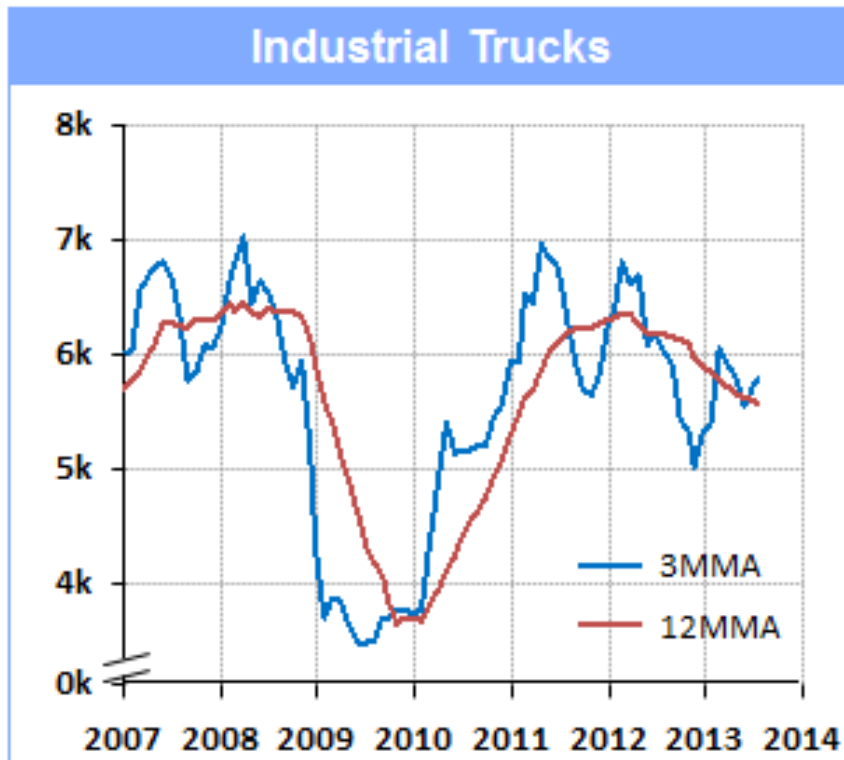
# Market Development In Eastern Europe



— 3MMA

— 12MMA

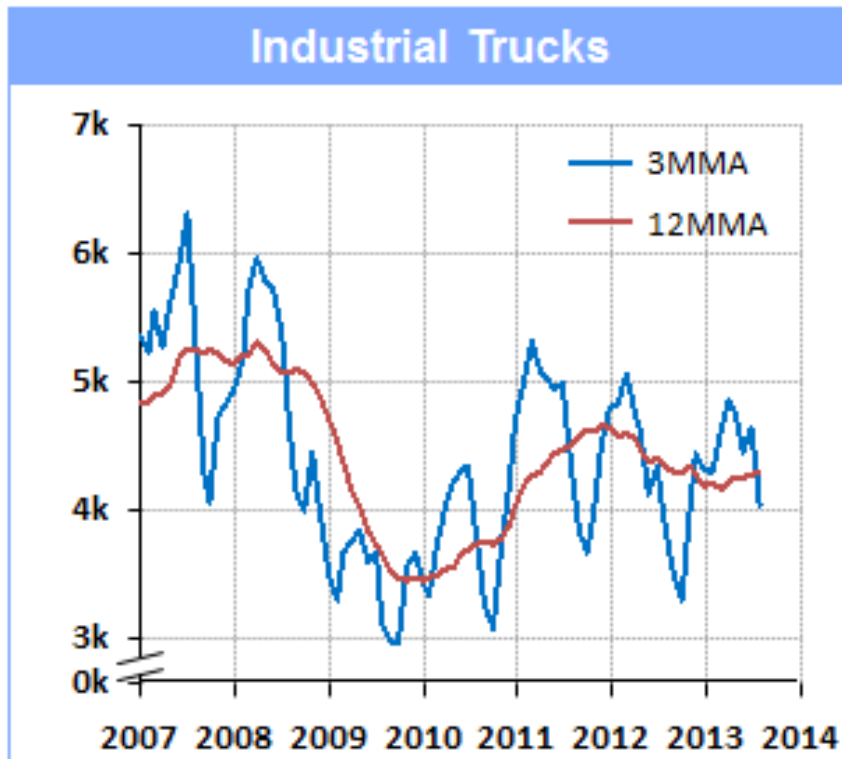
# Market Development In Germany



— 3MMA

— 12MMA

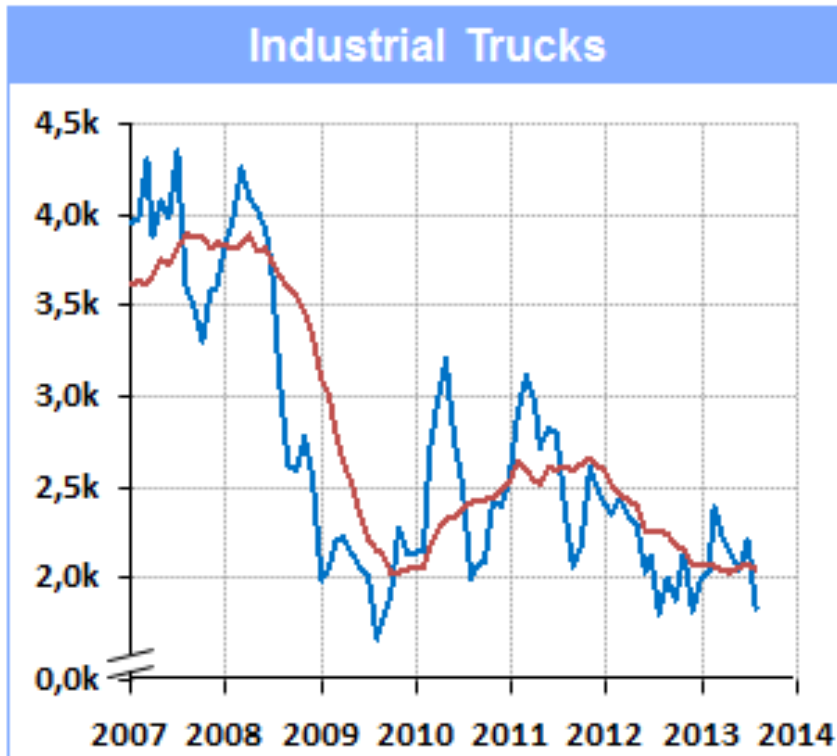
# Market Development In France



— 3MMA

— 12MMA

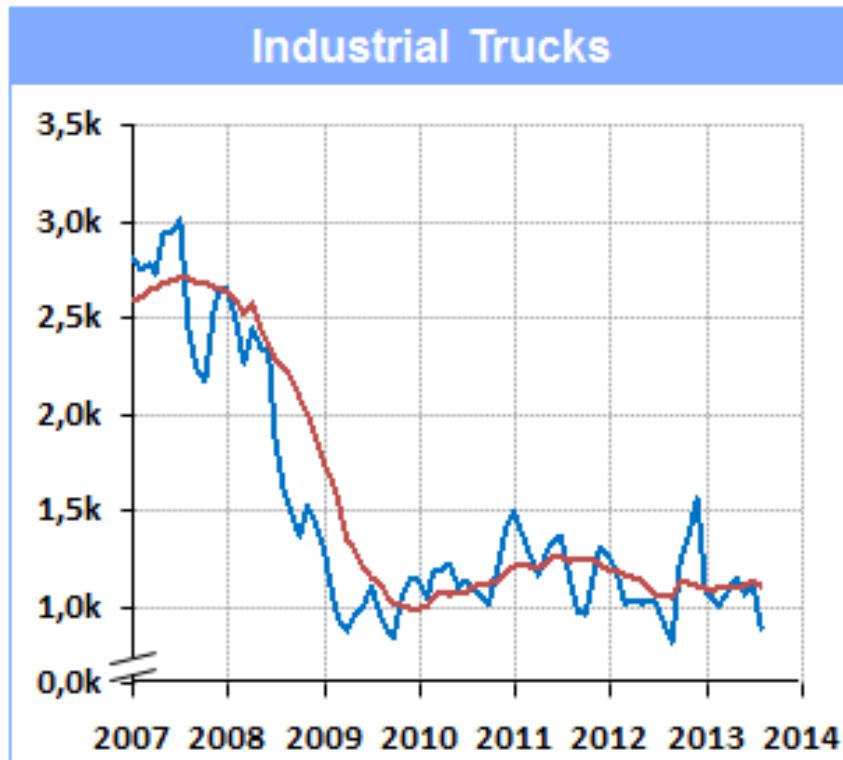
# Market Development In Italy



— 3MMA

— 12MMA

# Market Development In Spain



— 3MMA

— 12MMA

# Agenda

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# Safety and Environmental Legislation in Europe



- EN ISO 3691 Part 1 ✓
- EN 16307 ✓

- Stage 4 for all engines above 56 KW ➡ October 2014 ✓
- ERP directive ➡ Work program expected for 2016 ✓
- Exhaust limits ➡ Ongoing discussions ✓

# Agenda

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**Thank you for your attention!**