

Alliance of Industrial Truck Organizations

世界工业车辆组织联盟

Presidents' Forum

主席论坛

Chengdu, China

中国成都

Mr. Brett Wood

ITA Chairman of the Board of Directors (Toyota – North America)

ITA 董事会主席 (丰田北美)

September 26, 2017

Global Economic Outlook 全球经济概况



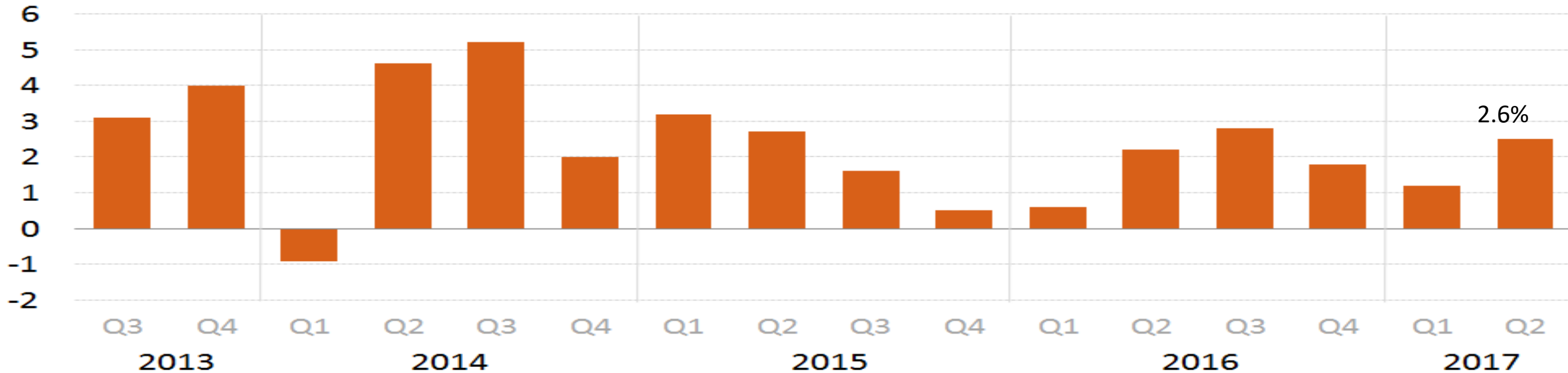
US Economic Overview 美国经济概况



US Gross Domestic Product (GDP) 美国GDP

季度实际GDP增长

Real GDP: Percent change from preceding quarter



U.S. Bureau of Economic Analysis

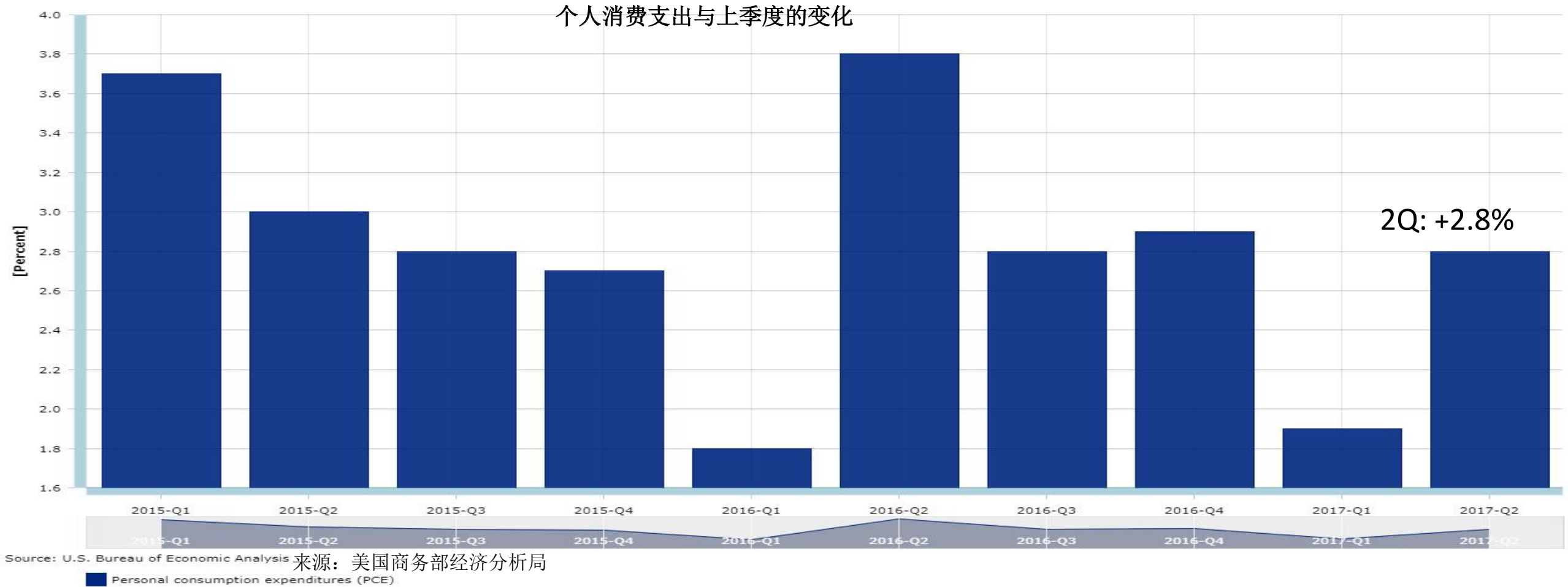
美国经济分析局

Seasonally adjusted annual

季节调整后的年利率

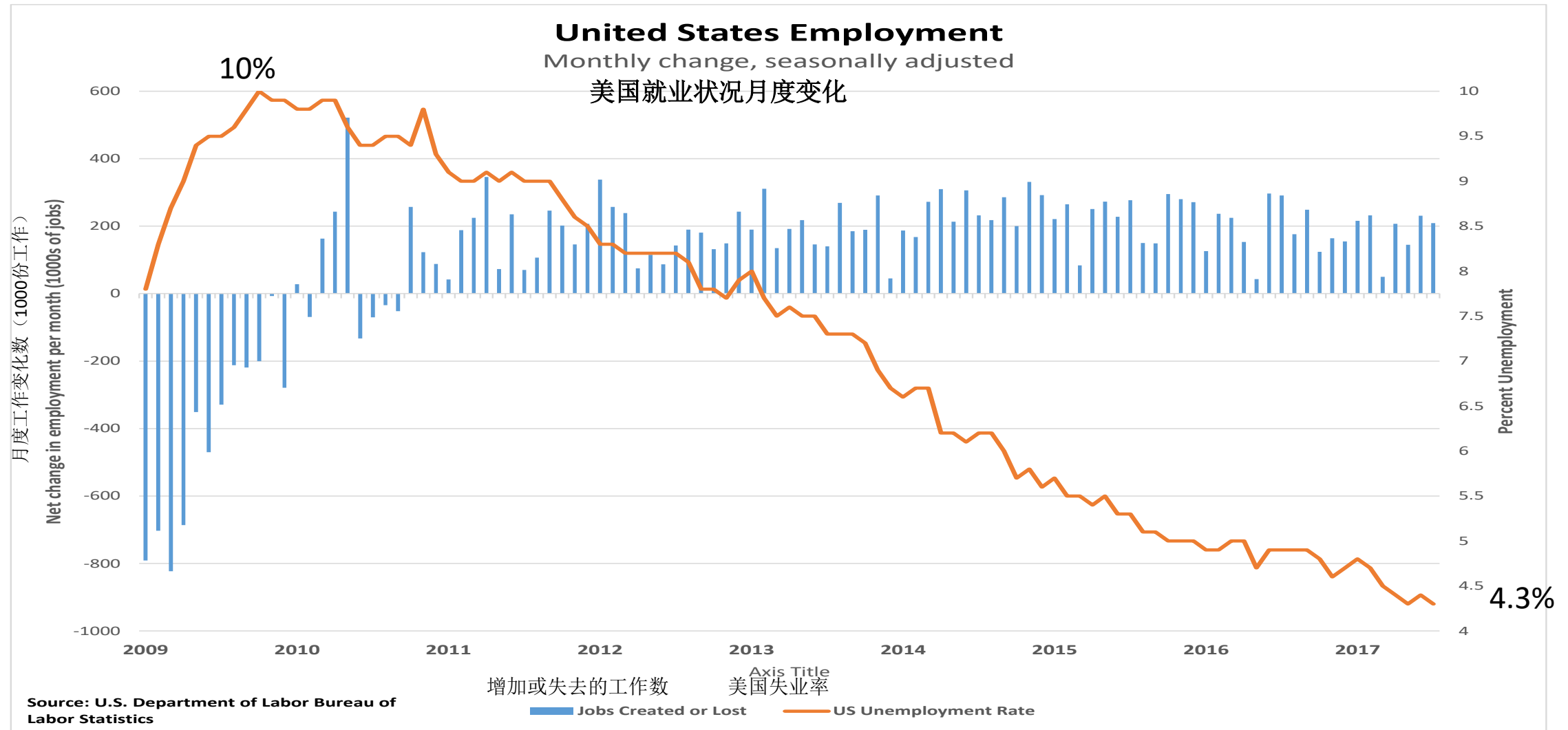
US Personal Consumption 美国个人消费

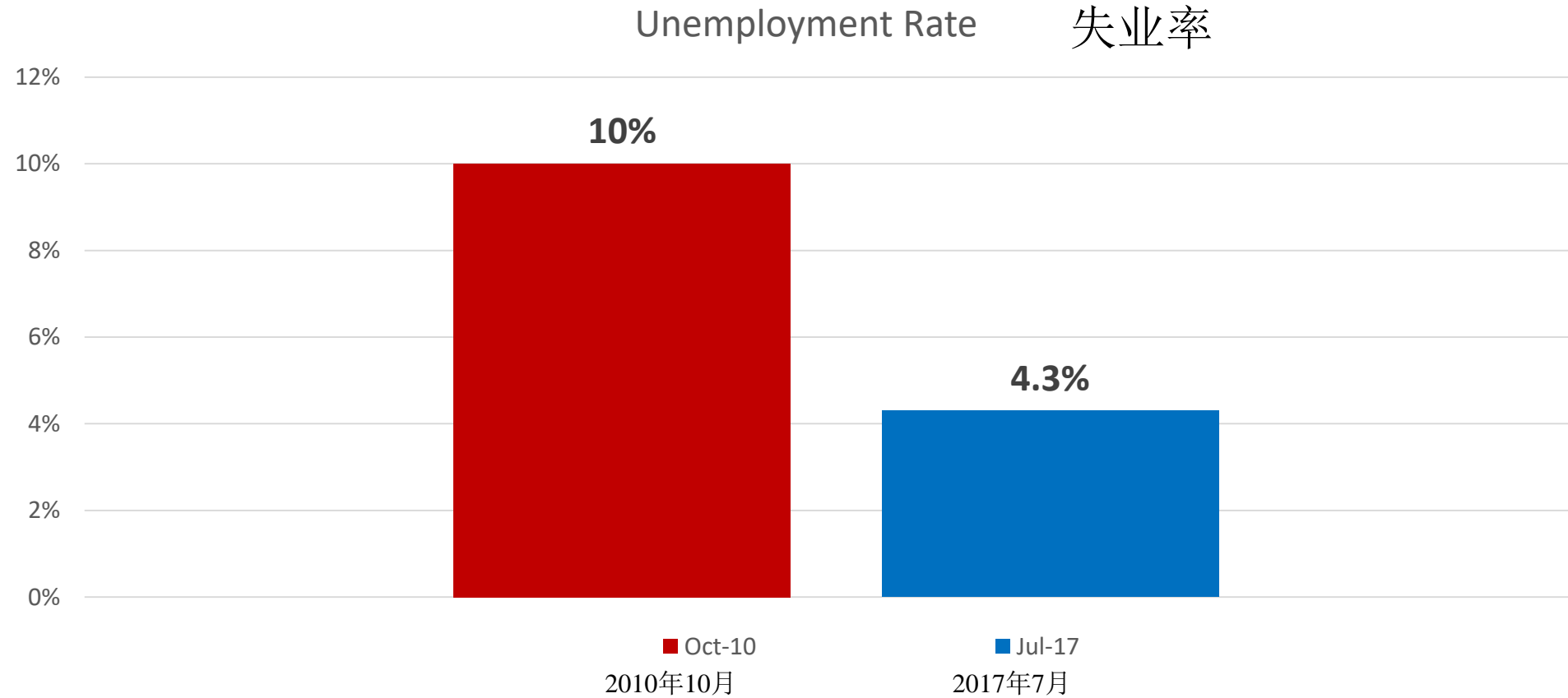
Table 2.3.1. Percent Change From Preceding Period in Real Personal Consumption Expenditures by Major Type of Product



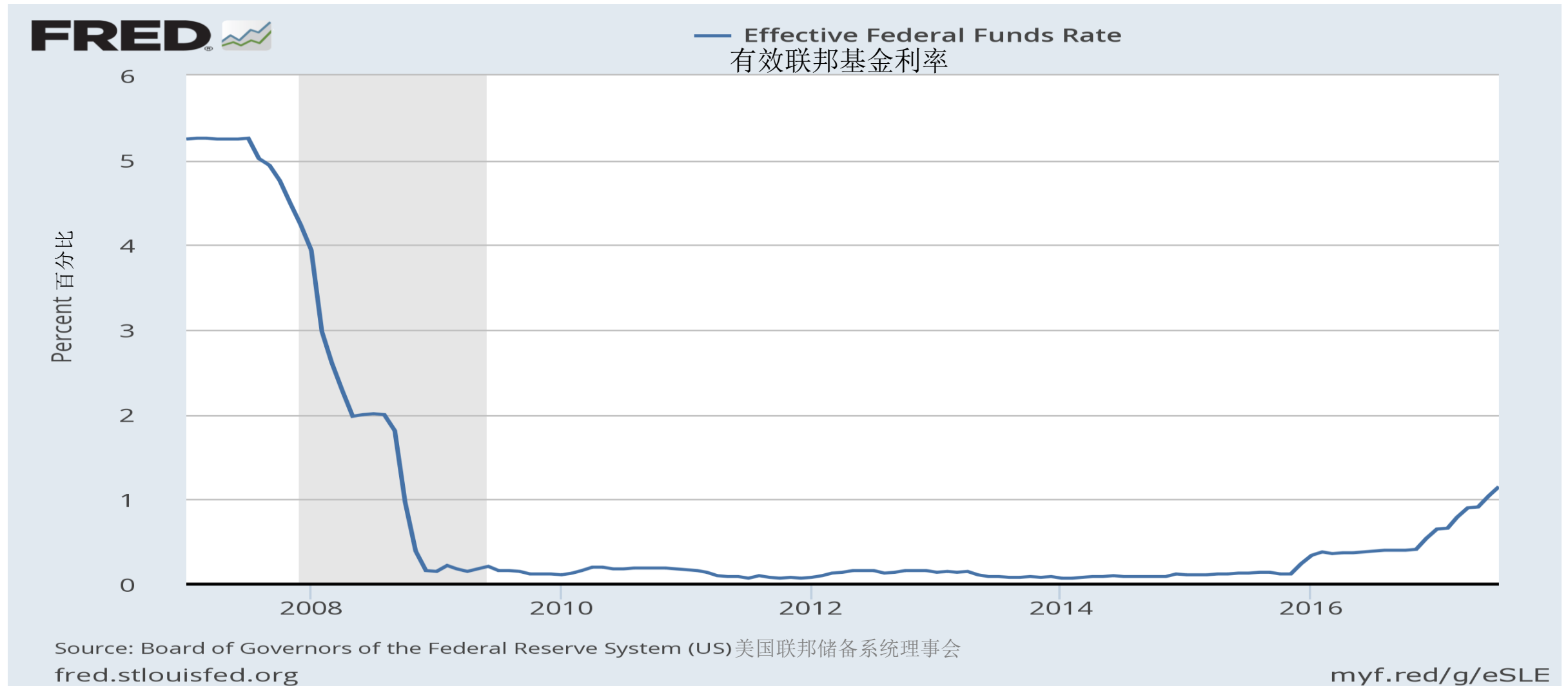
- 231,000 Jobs Added in June
6月增加23.1万职位
- 209,000 Jobs Added in July
7月增加20.9万职位
 - 16,000 Manufacturing Jobs in July
7月有1.6万制造业职位
 - 3,800 Transportation Equipment Manufacturing Jobs in July
7月有3800运输设备制造业职位







Monetary Policy 货币政策



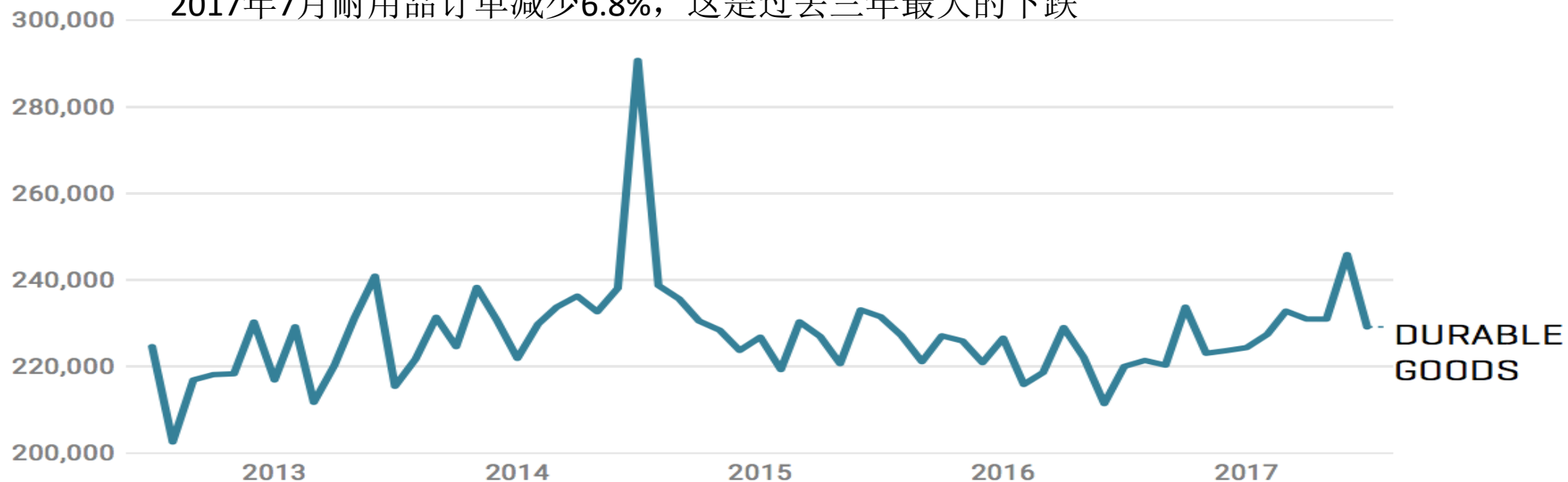
Durable Goods Orders 耐用品订单

耐用品订单在7月下跌

Durable Goods Orders Fell in July

Orders for durable goods decreased 6.8% in July 2017, the largest drop in three years.

2017年7月耐用品订单减少6.8%，这是过去三年最大的下跌



SOURCE: U.S. Census Bureau 美国人口普查局

FORTUNE

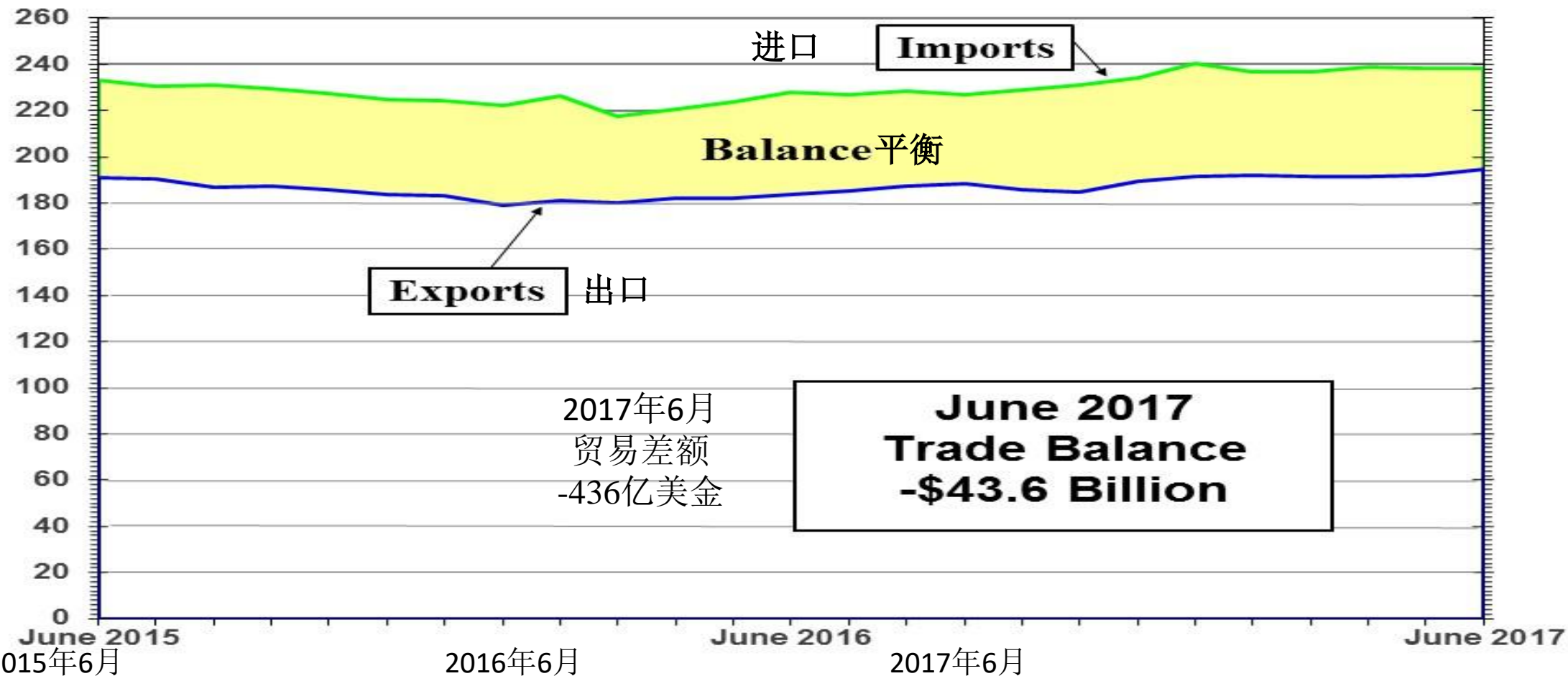
- New orders for transportation equipment decreased 19% during July to \$74.3 billion
7月运输设备新订单743亿美金，下跌19%





US Import/Export 美国进出口

美国商品和服务的国际贸易 (十亿美元, 季节调整)
U.S. International Trade in Goods and Services
(Billions of Dollars, Seasonally Adjusted)



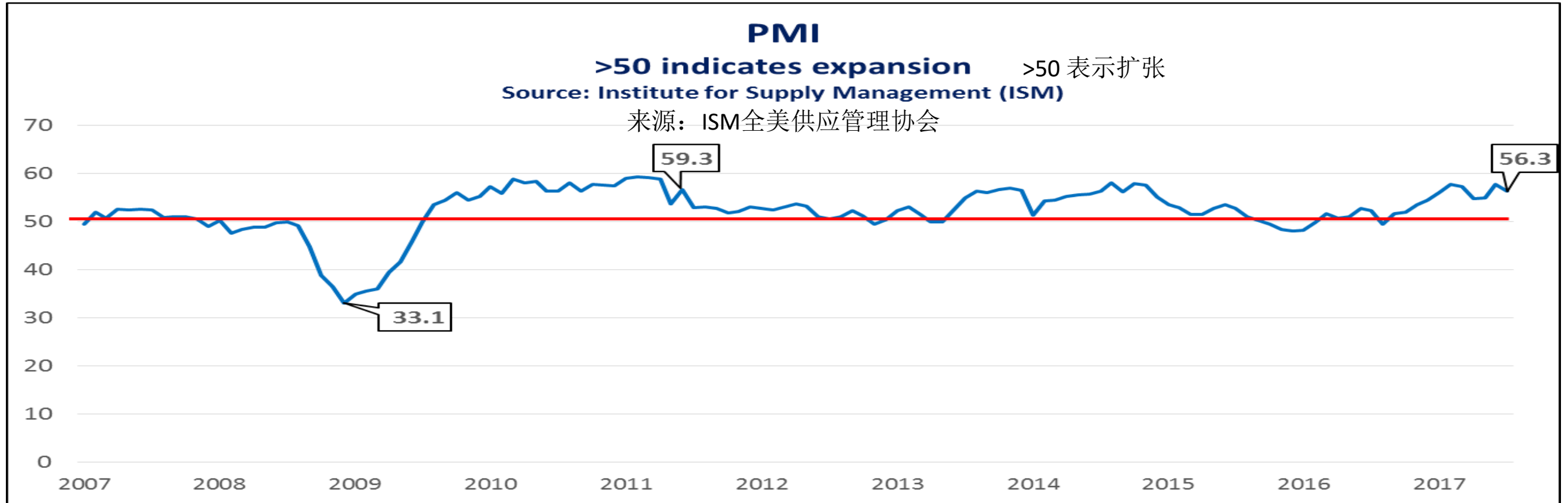
2015年6月
Source: US Department of Commerce

2016年6月
美国商务部

2017年6月



Purchasing Managers Index (PMI) 采购经理人指数 (PMI)

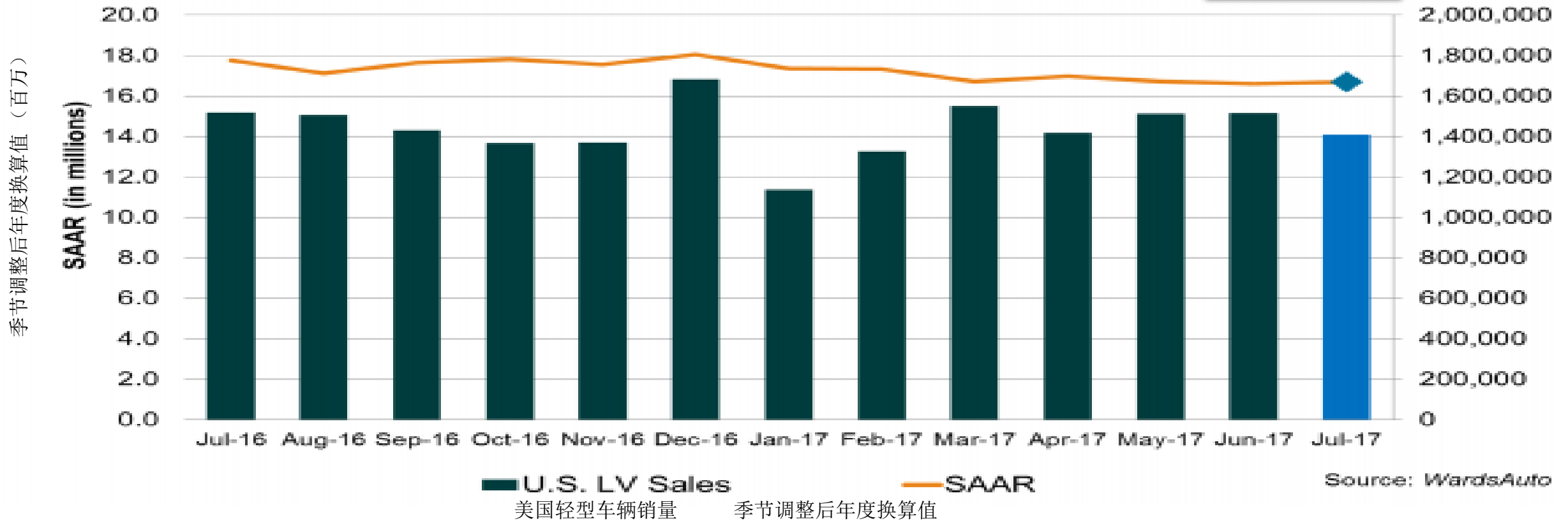


北美轻型车辆销量

U.S. Light Vehicle Sales

1.669千万台
季节调整后年度换算值

16.69 MLN SAAR

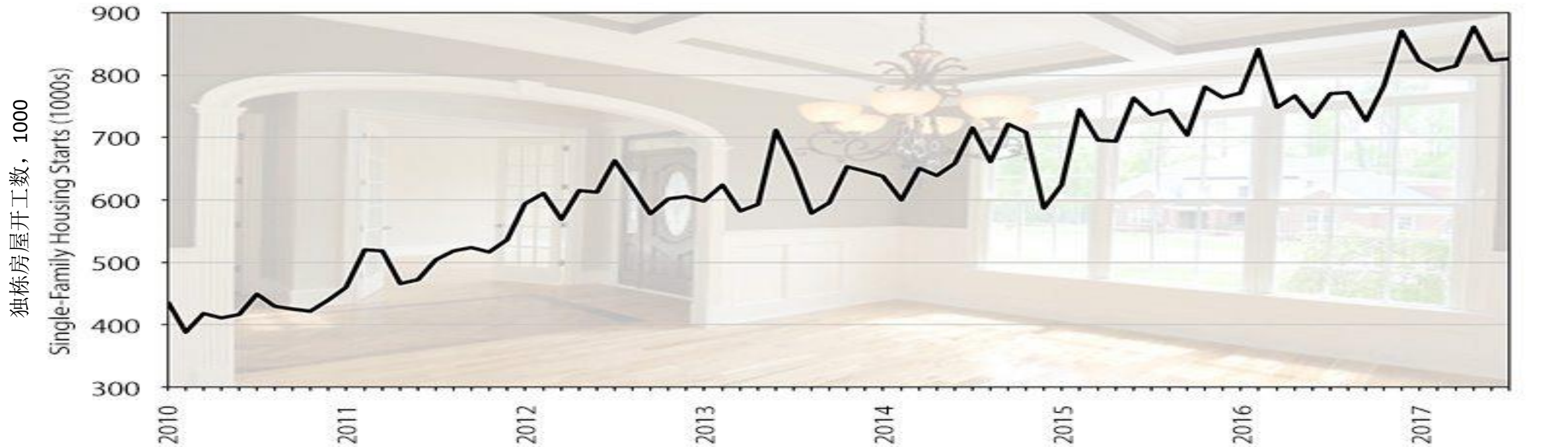


Source: *Ward's Automotive Research* 来源: Ward's汽车研究

US Housing Market 美国房市

美国独栋房屋开工率处于十年最好水平

Single-Family Housing Starts Remain Near Decade-Best Levels

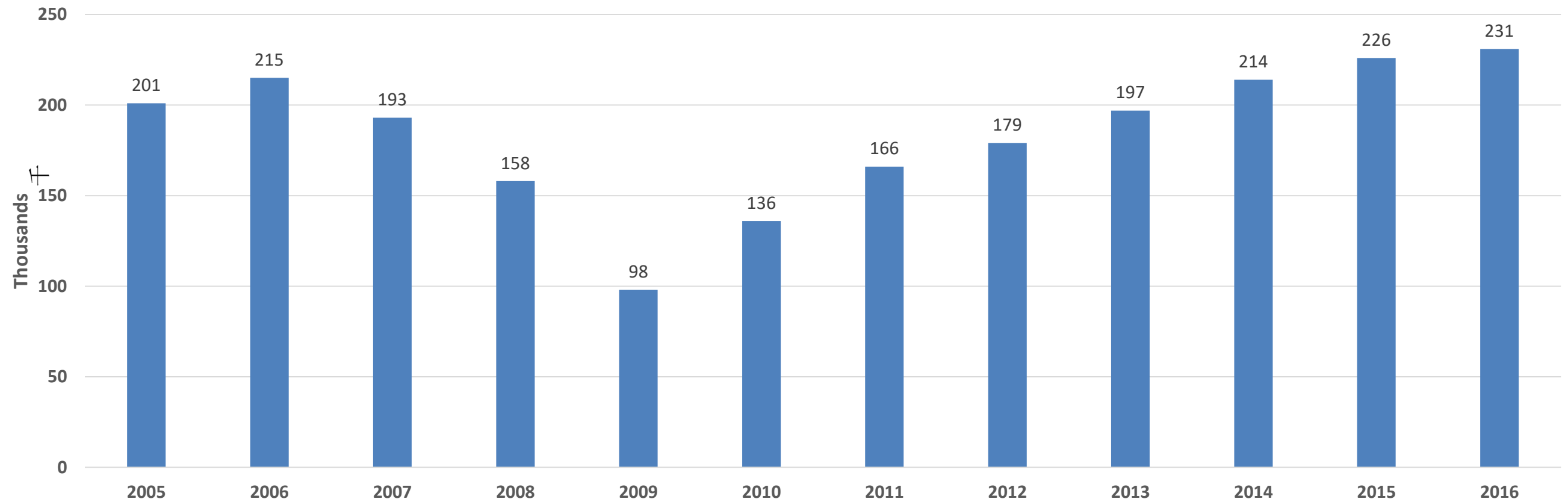


Data: Census Bureau

美国人口普查局

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Historic Retail Orders 零售订单历史



Note: Includes U.S., Canada, Mexico and Government 含美国、加拿大、墨西哥和政府

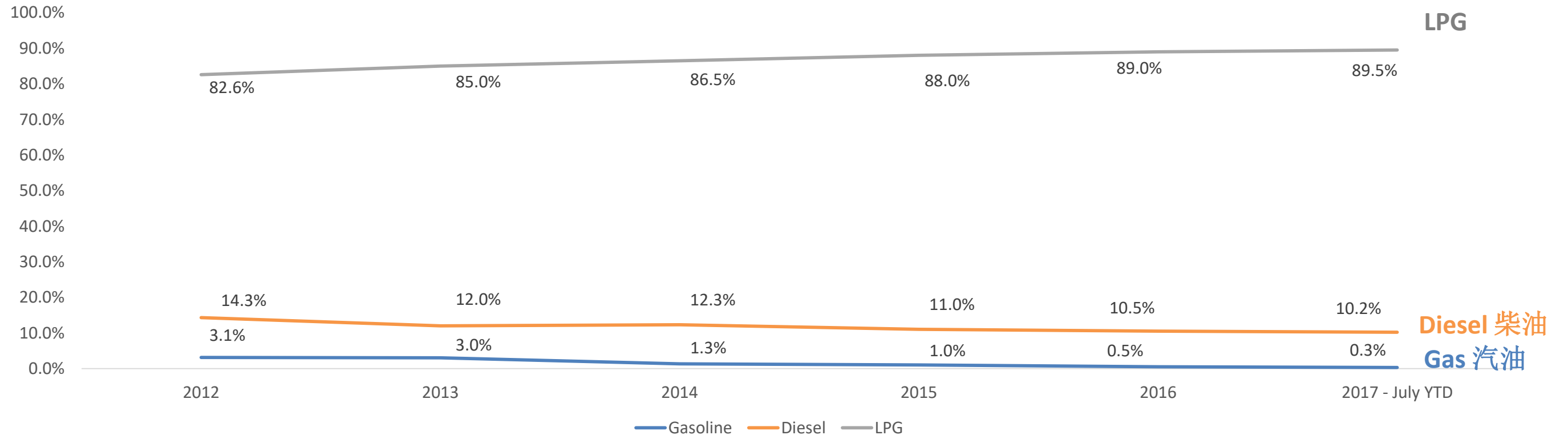


YEAR	ELECTRIC RIDER 电动乘驾 (Classes 1 & 2)第1-2类	MOTORIZED HAND 电动步行式 (Class 3) 第3类	INTERNAL COMBUSTION ENGINE (Classes 4 & 5)内燃发动机, 第4-5类
1994	36,747	34,127	65,027
1995	44,087	37,746	72,685
1996	42,263	35,375	60,287
1997	42,675	38,538	64,946
1998	48,923	40,428	80,554
1999	49,843	41,899	74,994
2000	56,090	49,121	85,993
2001	45,980	37,210	61,507
2002	39,235	36,445	55,928
2003	40,463	36,659	63,365
2004	46,886	44,308	74,228
2005	50,604	46,206	83,725
2006	53,806	50,950	85,038
2007	50,260	48,615	76,664
2008	45,361	43,716	62,104
2009	28,409	28,635	28,740
2010	31,759	36,637	36,896
2011	44,720	42,213	58,483
2012	49,126	47,339	56,618
2013	52,834	52,766	66,473
2014	57,543	52,396	75,040
2015	65,042	57,329	76,075
2016	70,242	65,764	71,455

Source: Industrial Truck Association, US Factory Shipments

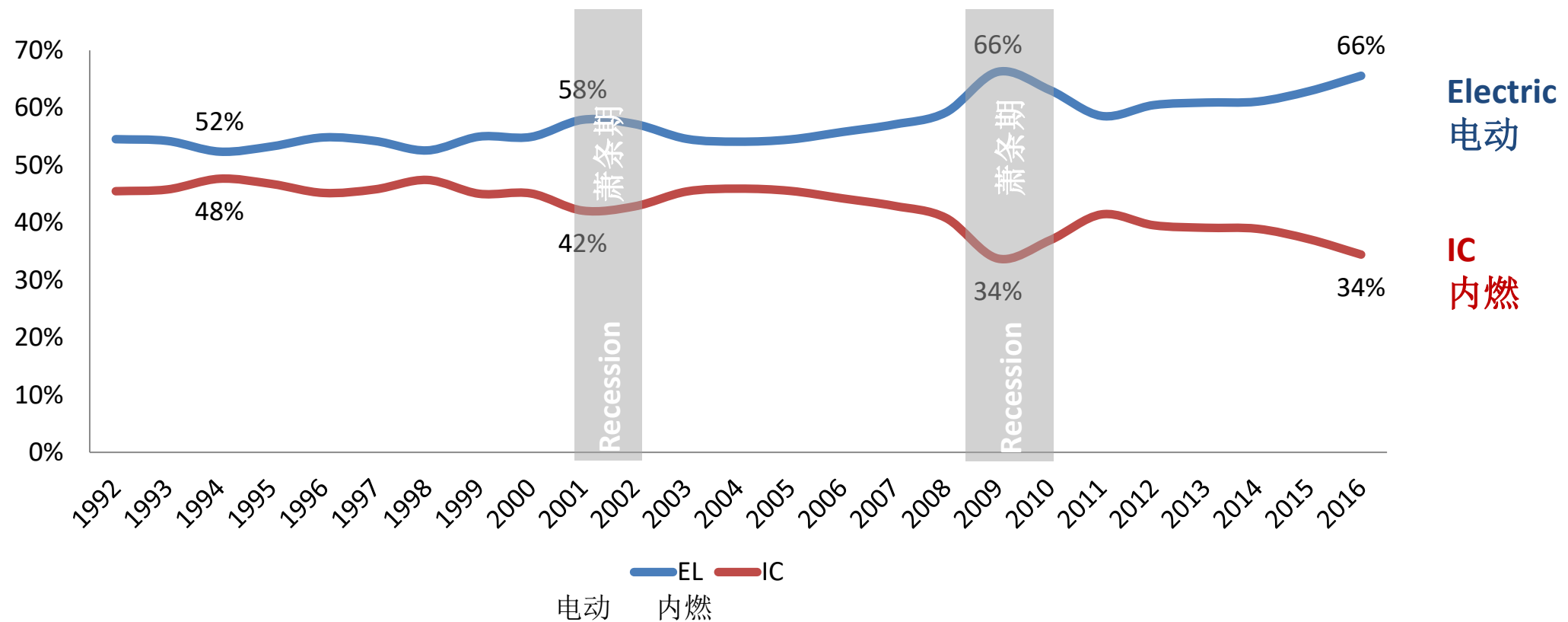
来源: 美国工业车辆协会, 美国工厂订单

Factory Orders By Engine Type – Class 4 & 5 Combined
工厂订单 - 第4&5类

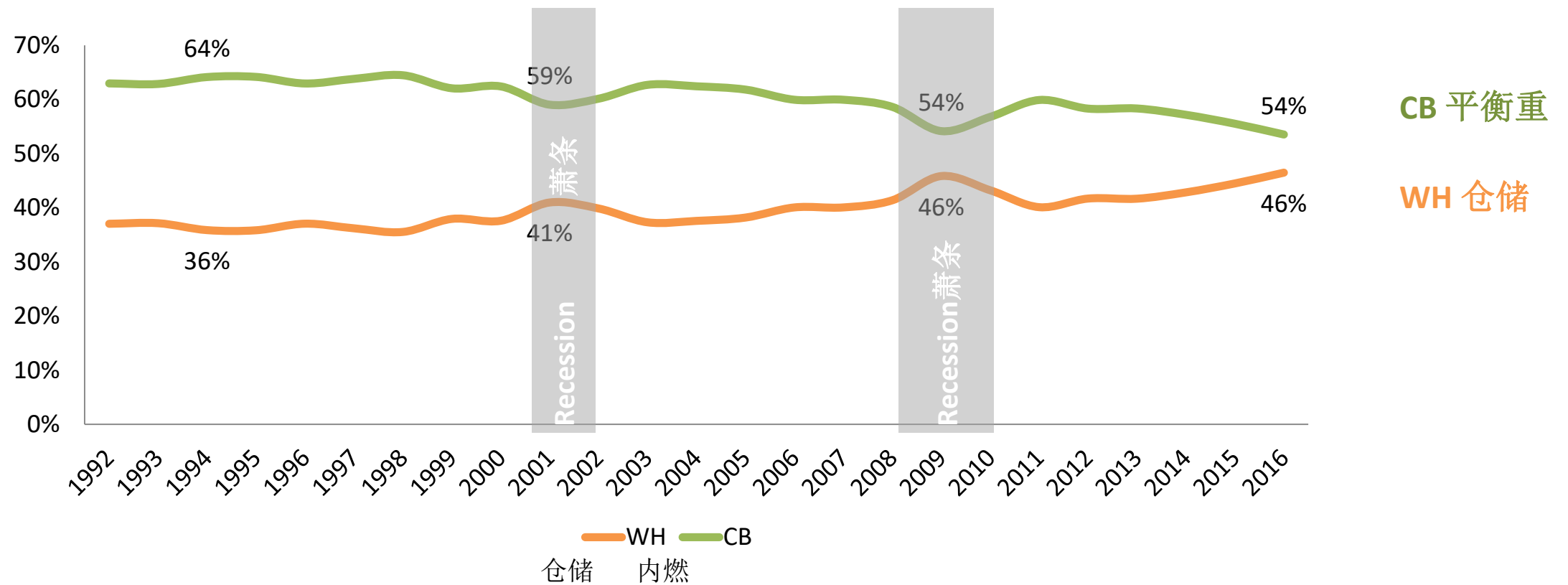


Note: Includes U.S., Canada, Mexico and Government 含美国、加拿大、墨西哥和政府

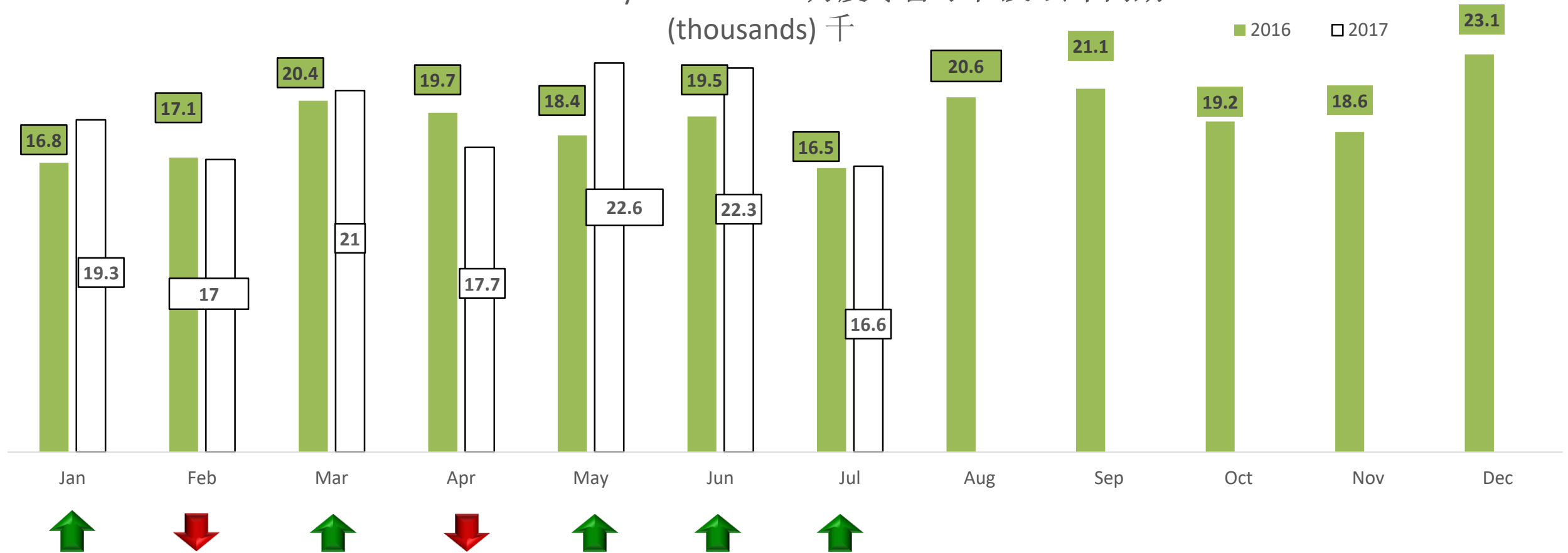
IC vs. Electric Trend 内燃和电动趋势



Warehouse vs. Counterbalance Trend 仓储和平衡重趋势

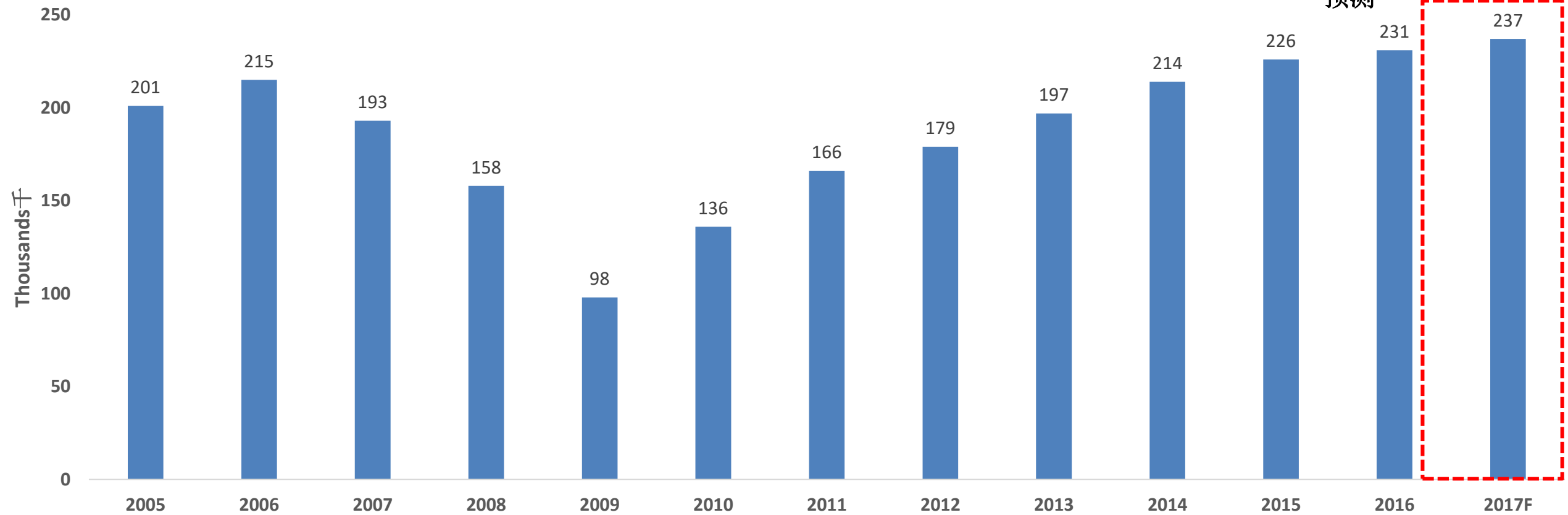


Retail Orders Monthly vs. Prior Year 月度零售订单及去年同期
(thousands) 千



Note: Includes U.S., Canada, Mexico and Government 含美国、加拿大、墨西哥和政府

Retail Orders Forecast 零售订单预测



**Guesstimate
预测**

Note: Includes U.S., Canada, Mexico and Government 含美国、加拿大、墨西哥和政府

- **International cooperation on:**
 - standards development
 - statistical information
 - free/fair trade开展标准的发展、统计信息、自由/公平贸易等方面的国际合作
- **Engineering practices: advance development of engineering practices that promote safety of the products of members** 工程实践：以推进成员的产品安全为目标发展的工程实践
- **Statistical information: collection and dissemination of statistical information relating to the industrial truck marketplace** 统计信息：搜集和发布关于工业车辆市场的相关统计信息
- **Industry communications & networking** 行业关系及联络
- **OSHA Compliance Officer Training** 职业安全与健康标准协调人员培训



**INDUSTRIAL
TRUCK ASSOCIATION**

National Forklift Safety Day 全国叉车安全日

- Spotlight the safe use of powered industrial trucks
聚焦工业车辆的安全使用
- Educate customers, policy makers, administration, etc. on forklift best safety practices
客户培训、政策制定、行政管理，如叉车安全操作最佳范例
- National Forklift Safety Day – June 13, 2017
全国叉车安全日 2017年6月13日

**NATIONAL
FORKLIFT
SAFETY DAY**





National Forklift Safety Day 2017

2017年全国叉车安全日



National Forklift Safety Day 2017

2017年全国叉车安全日





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媒体报道结果=超过57,000,000

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StarTribune

MODERN
MATERIALS HANDLING.

The Miami Herald

Newsday



Industry Profile Content

行业概况内容

- High level summary overview of the current state of the industry
高水平总结行业现状
- Direct, indirect & induced contributions to national GDP
对GDP的直接、间接影响
- Employment figures
就业数据





LIFTING AMERICA

The Economic Impact of Industrial Truck Manufacturers, Distributors and Dealers

The use of industrial trucks is integral to virtually every supply chain in every industry.

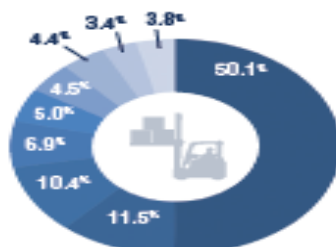
100 YEARS

The industrial truck manufacturing sector has been an important and active part of the American economy for 100 years.



For each worker directly employed by the industrial truck sector, a further 2.5 jobs are supported in the wider economy.

OCCUPATION PROFILE OF INDUSTRIAL TRUCK MANUFACTURING



Production	50.1%
Office & Administrative Support	11.5%
Engineering	10.4%
Management	8.9%
Installation, Maintenance & Repair	5.0%
Sales & Related	4.5%
Business & Financial Operations	4.4%
Transportation & Material Moving	3.4%
All Other	3.8%

\$25.7 BILLION
contribution to US GDP annually

INDUSTRIAL TRUCK MANUFACTURERS MAKE A WIDESPREAD CONTRIBUTION THROUGHOUT THE US ECONOMY.

JOBS

Economic activity of industrial truck manufacturing supports over 209,000 jobs throughout the U.S. economy.



More than **1 MILLION** units sold annually worldwide.

More than **200,000** units sold annually in the U.S.

540,000+

More than 540,000 industrial truck operators are currently employed in over 300 different industries in the US.

Source: Bureau of Labor Statistics - BLS



DISTRIBUTED SEPTEMBER 2017



MORE THAN 60% of industrial trucks sold in the U.S. are electric powered

STATES WHERE INDUSTRIAL TRUCK FIRMS GENERATED THE HIGHEST ECONOMIC IMPACT

(in terms of GVA (gross value added))

Illinois	\$3.5 billion
Texas	\$2.7 billion
Ohio	\$2.4 billion
New York	\$1.7 billion
California	\$1.6 billion
North Carolina	\$1.5 billion
Pennsylvania	\$1.0 billion
Indiana	\$970 million
Florida	\$916 million
Wisconsin	\$719 million

\$5.3 BILLION

paid in local, state and federal taxes annually



Veteran status in the industrial truck manufacturing sector is 10%. All other industries is 7%.

ALLIANCE OF INDUSTRIAL TRUCK ORGANIZATIONS



THANK YOU

