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# 2017 Presidents' Forum

## 2017年世界联盟会议主席论坛

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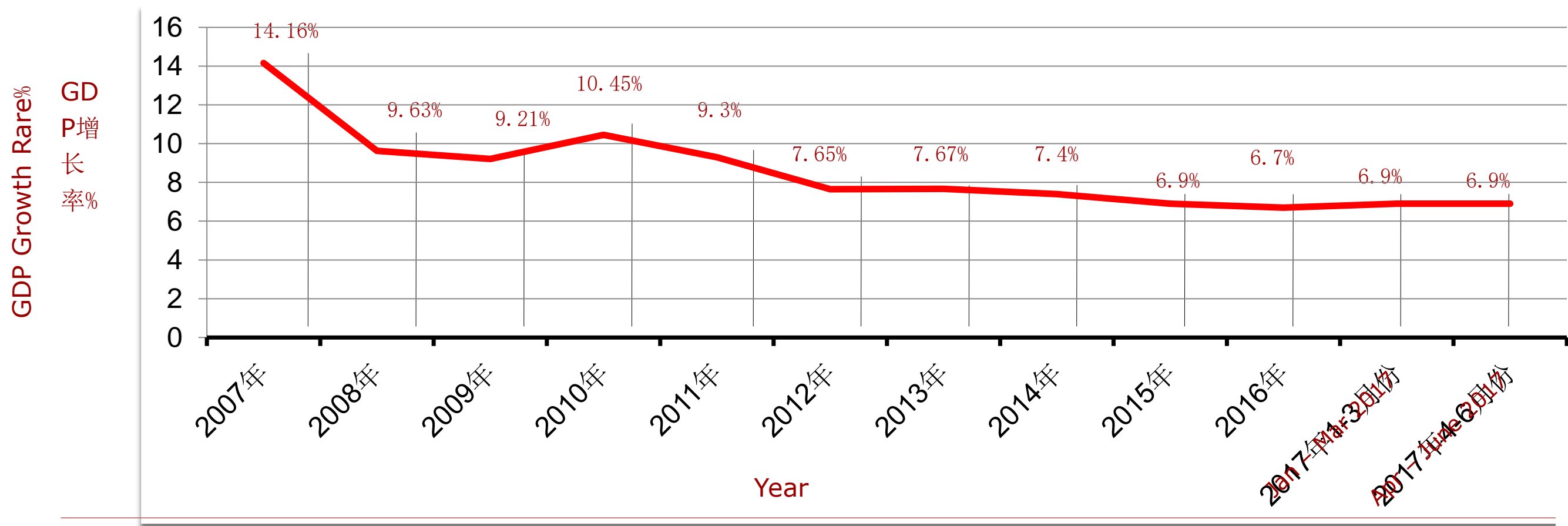
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**中国工业车辆行业现状**
- D. Development trend of industrial trucks in China  
**未来中国行业发展趋势**



# A. The trend of Chinese economy in recent years

## 近年来中国经济走势

### 1. China's GDP in the past ten years 中国近十年国内生产总值同比增长率趋势图





# A. The trend of Chinese economy in recent years

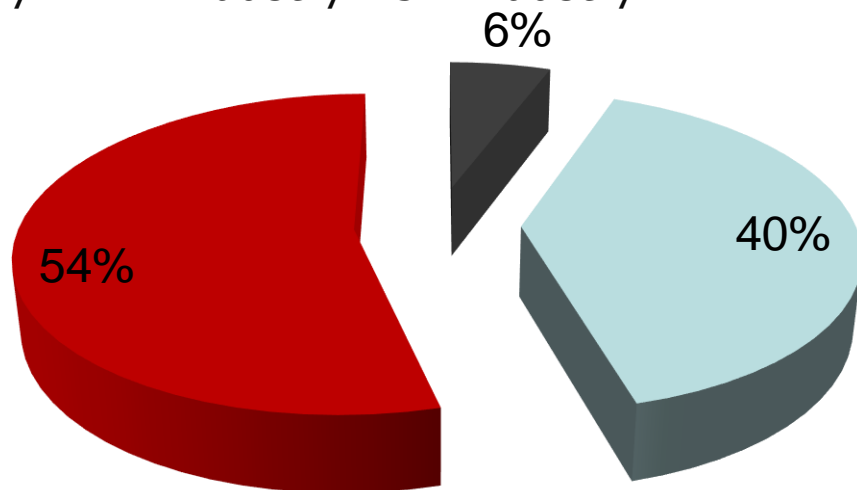
## 近年来中国经济走势

### 2. The 3 main industries in 2017H1 (SOW and Growth)

#### 2017年上半年中国三大产业占比及增长情况

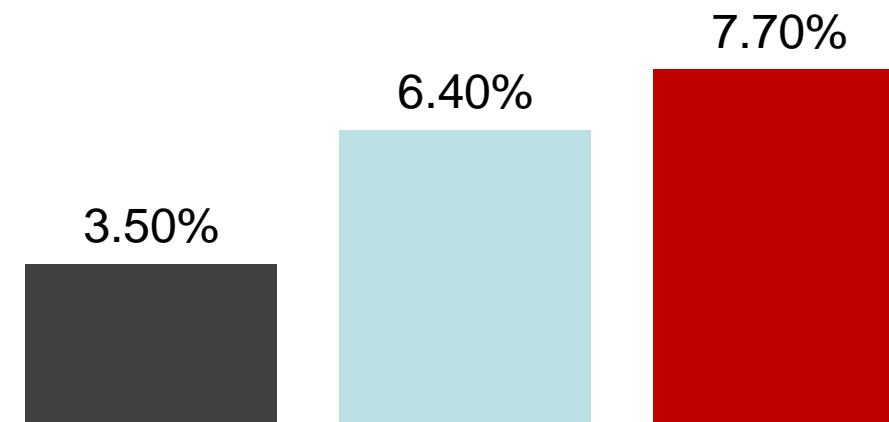
Increased value (100M RMB)  
增加值 (亿元)

■ 第一产业   ■ 第二产业   ■ 第三产业  
1<sup>st</sup> industry   2<sup>nd</sup> industry   3<sup>rd</sup> industry



YOY growth %  
同比增长率%

■ 第一产业   ■ 第二产业   ■ 第三产业  
1<sup>st</sup> industry   2<sup>nd</sup> industry   3<sup>rd</sup> industry





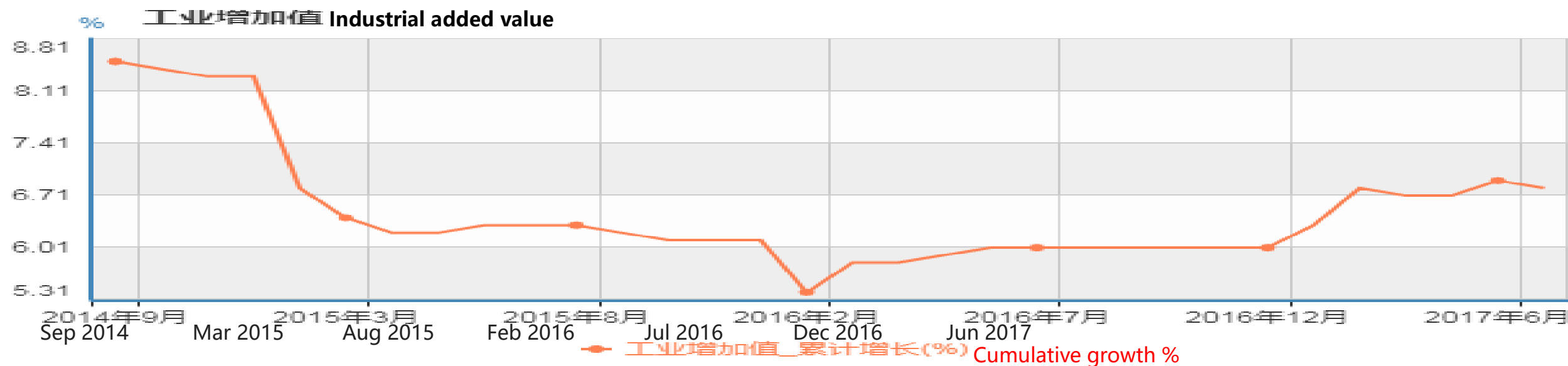
# A. The trend of Chinese economy in recent years

## 近年来中国经济走势

### 3. 2017H1 large-scale industrial added value in China grew by 6.9%

#### 2017年上半年，中国规模以上工业增加值同比增长6.9%

Among them, the manufacturing sector grew by 7.4%, the manufacturing industry fasten its steps to mid and high end market. The added value of high-tech industries and equipment manufacturing industry grew by 13.1% and 11.5% respectively 其中，制造业增长7.4%，制造业加快向中高端迈进，上半年高技术产业和装备制造业增加值同比分别增长13.1%和11.5%。

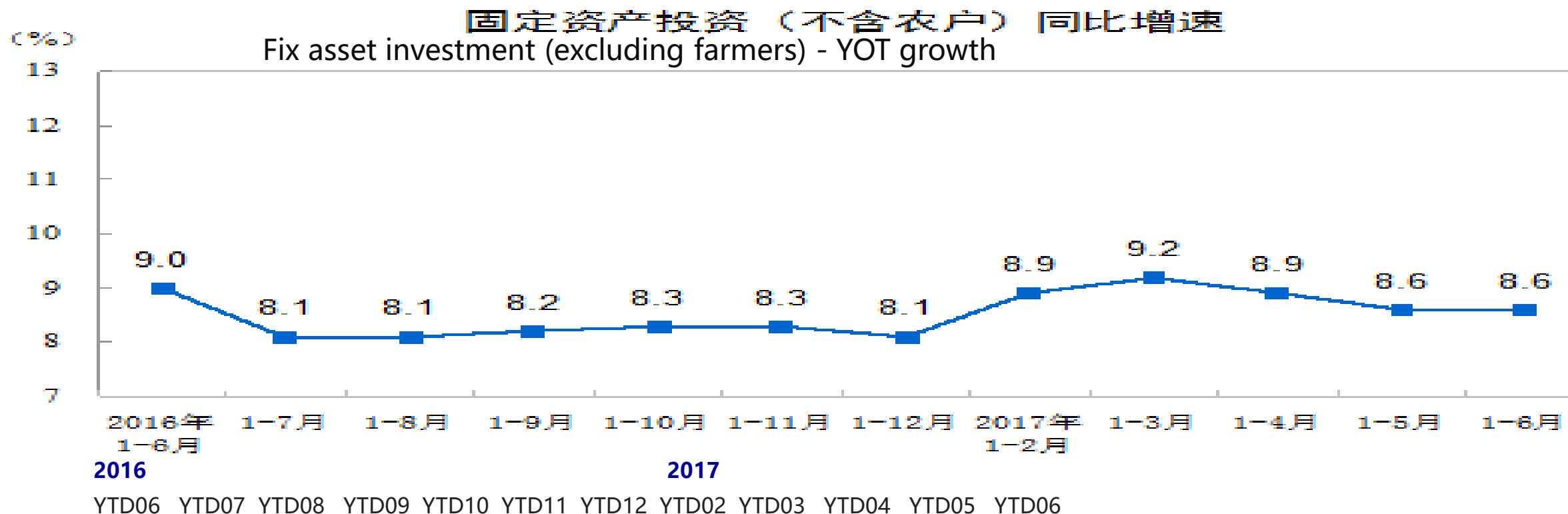




# A. The trend of Chinese economy in recent years

## 近年来中国经济走势

**4. Growth rate of fixed assets investment growth is stable and slightly slow. The investment in manufacturing and private investment growth picked up**  
**固定资产投资增速稳中略缓，制造业投资和民间投资增速回升**





# A. The trend of Chinese economy in recent years

## 近年来中国经济走势

### 5. New employment and unemployment rate in 2017H1

#### 2017年上半年中国新增就业及失业率

2017 H1 2017年1-6月份	New urban employment 城镇新增就业	YOY increase 同比多增	Achieve annual goals 完成年度目标
Employment situation 就业情况	7,350,000 ppl 735万人	180,000 ppl 18万人	66.8%

- According to the China Bureau of statistics, the unemployment rate in China's cities and towns surveyed in 2017 June has remained below 5% for two consecutive months. 根据中国统计局的调查，2017年6月份中国城镇调查失业率已经连续两个月保持在5%以下。
- The unemployment rate in 31 large cities remained below 5% for 4 consecutive months. 31个大城市的城镇调查失业率连续四个月低于5%。



# A. The trend of Chinese economy in recent years

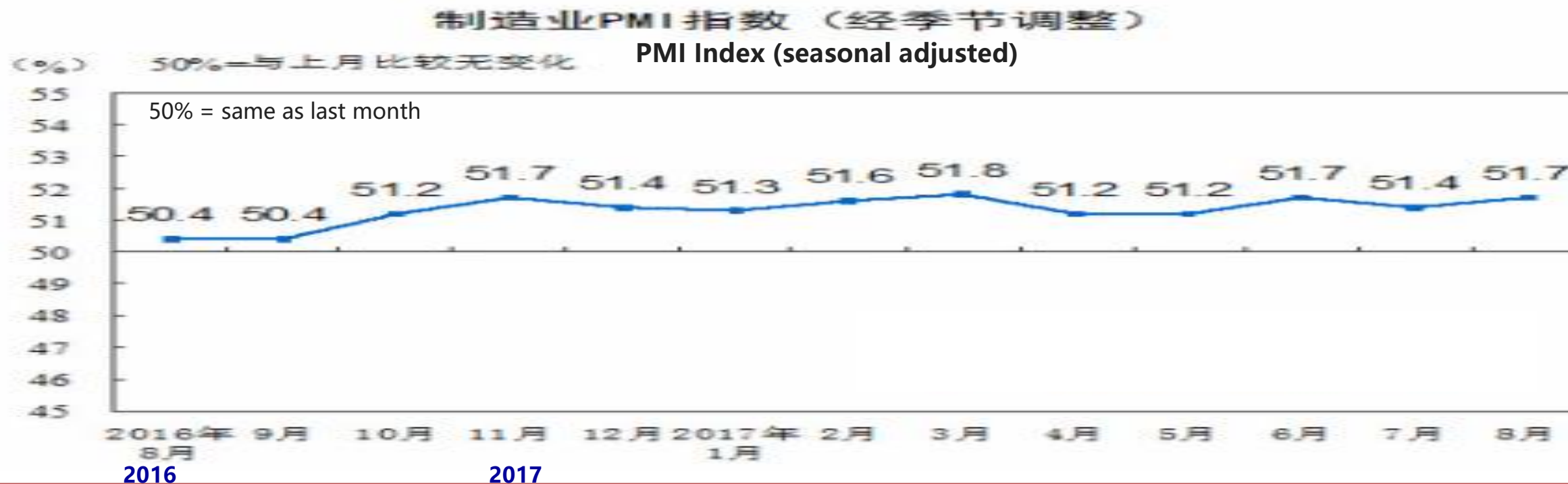
## 近年来中国经济走势

### 6. PMI index is rising steadily in 2017

#### 制造业采购经理指数稳中有升

In August, the manufacturing sector PMI was 51.7%, the second highest point in the year, and the manufacturing sector remained stable and healthy

8月份，制造业PMI为51.7%，为年内次高点，制造业总体保持稳中向好的发展态势。



Source: National Bureau of Statistics Service Survey Center and China Federation of Logistics and purchasing

来源：国家统计局服务业调查中心和中国物流与采购联合会





# B. China's construction machinery industry

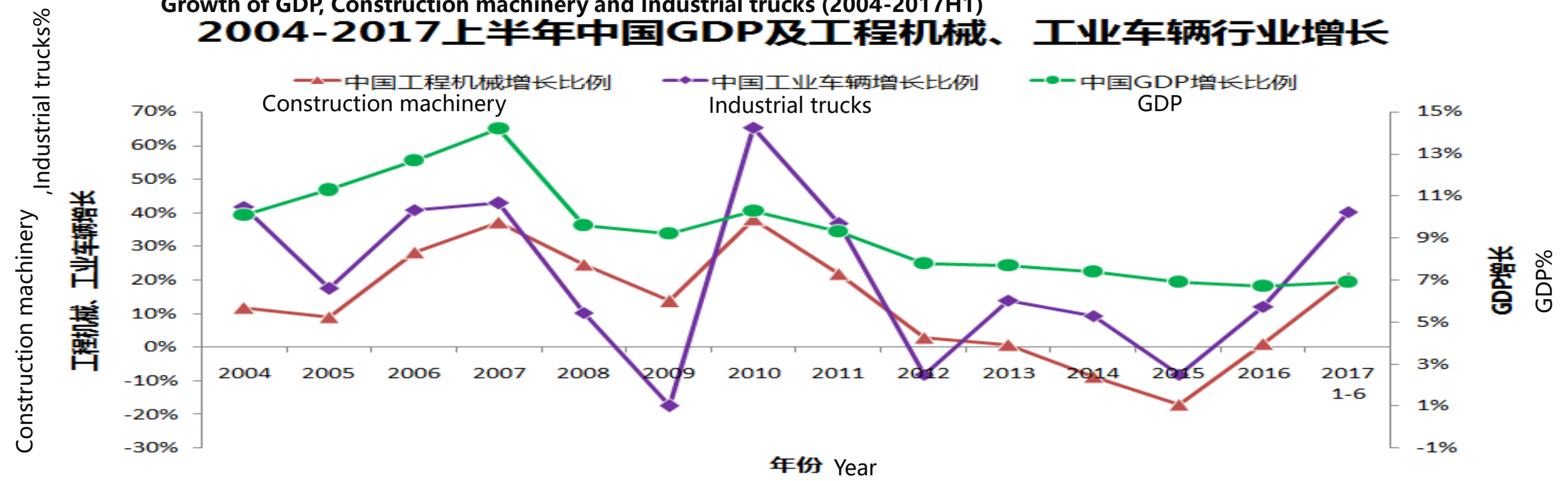
## 中国工程机械行业发展近况

### 1. Development of China's economy, construction machinery, industrial trucks

#### 近年来中国经济、工程机械和工业车辆发展情况

Growth of GDP, Construction machinery and Industrial trucks (2004-2017H1)

### 2004-2017上半年中国GDP及工程机械、工业车辆行业增长



数据来源：国家统计局、中国工程机械协会

Source: National Bureau of statistics, China Construction Machinery Association



## B. China's construction machinery industry

### 中国工程机械行业发展近况

#### 2. Main situation of Chinese construction machinery industry in 2017H1

##### 2017年上半年中国工程机械行业主要情况

In 2017H1, 90% of China engineering machinery industry listed companies get strong growth, after more than six years of struggle, and then now meet high light moment. Industry concentration further increased now. The development of these listed companies also reflects the whole industry's trajectory. 2017年上半年，中国工程机械九成上市公司增势强劲，行业历经六年多的痛苦挣扎，再迎高光时刻。千淘万漉后，行业集中度进一步提高。上市公司的发展，在很大程度上也反映了整个行业的运行轨迹。

2017	Excavator 挖掘机		Bulldozer 推土机		Loading Machine 装载机	
	Units 台	Sales 销售	Growth 同比 %	Sales 销售	Growth 同比 %	Sales 销售
Jan 1月	4,548	51%	322	17%	4,495	16%
Feb 2月	14,530	298%	470	85%	7,012	110%
Mar 3月	21,789	56%	769	-16%	11,412	-20%
Apr 4月	14,397	101%	685	88%	9,050	62%
May 5月	11,283	106%	529	90%	8,524	70%
June 6月	8,933	101%	494	51%	8,595	27%

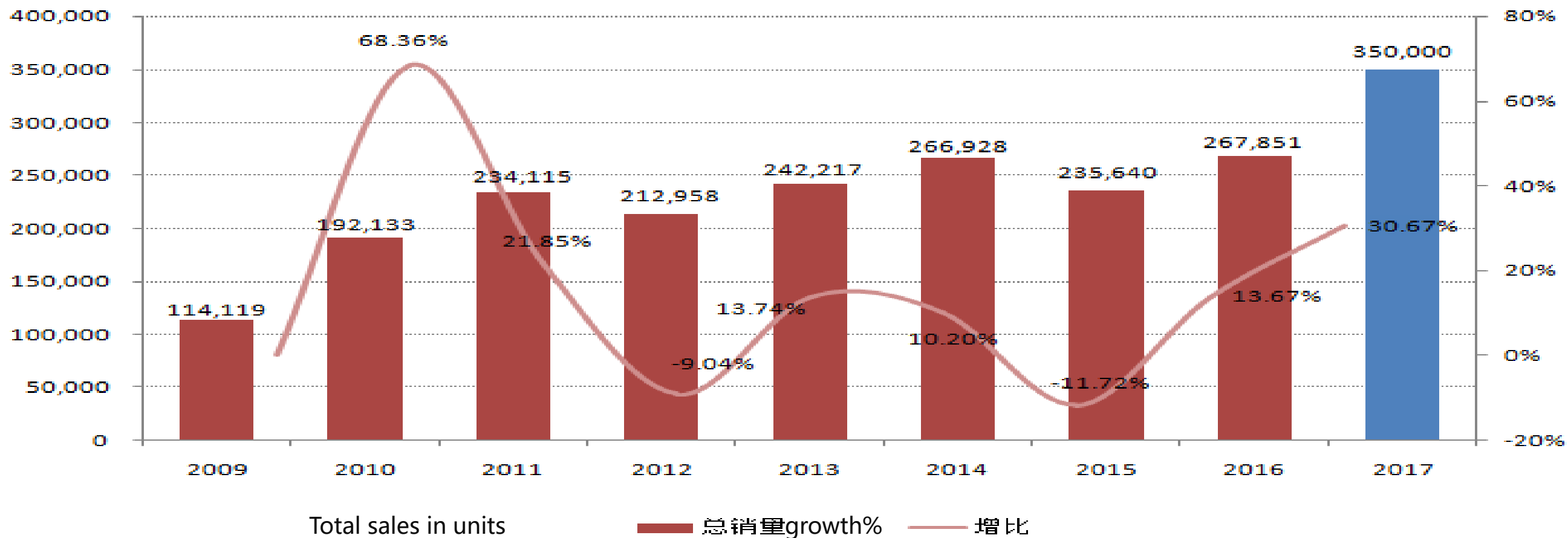


# C. Industrial truck market in China

## 中国工业车辆行业现状

### 1. China's industrial truck development (2009-2017)

#### 2009-2017年中国工业车辆发展情况



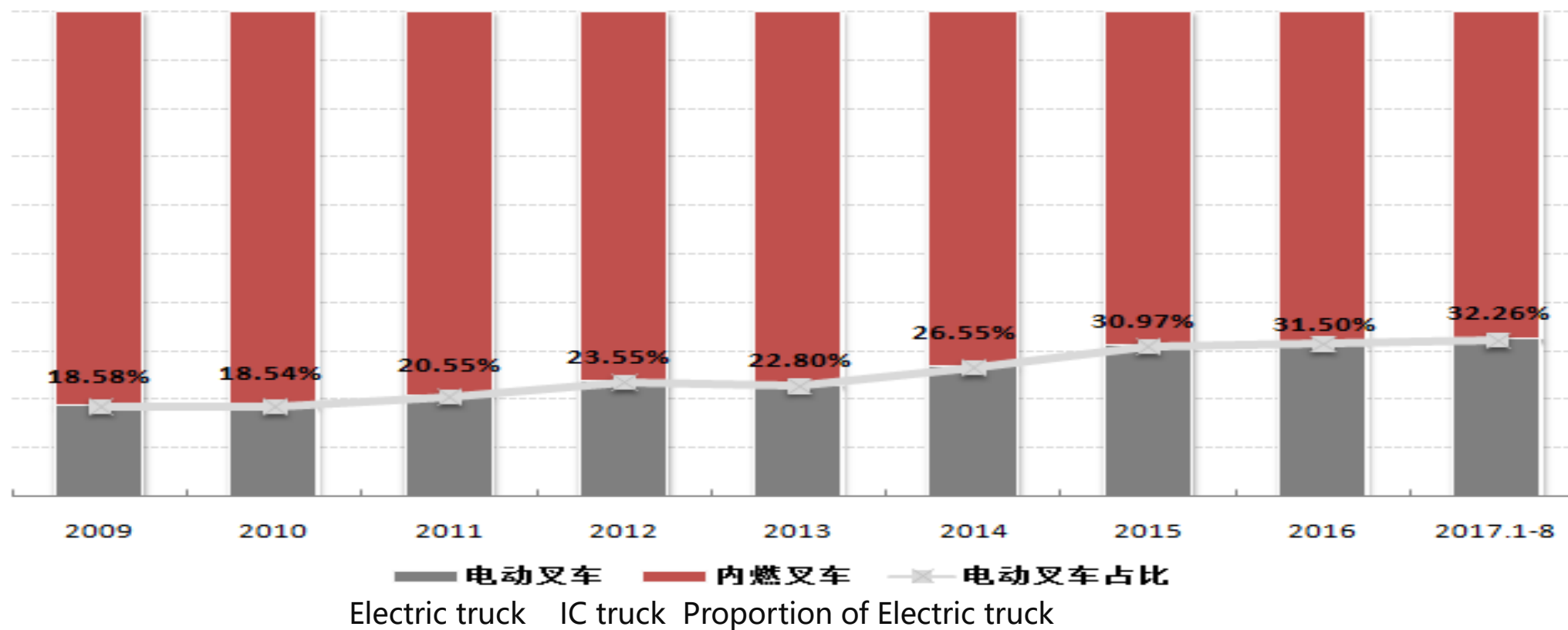


# C. Industrial truck market in China

## 中国工业车辆行业现状

### 2. Electric truck vs. IC truck comparison – China (2009 - YTD201708)

2009-2017年8月中国市场电动与内燃的比例变化情况



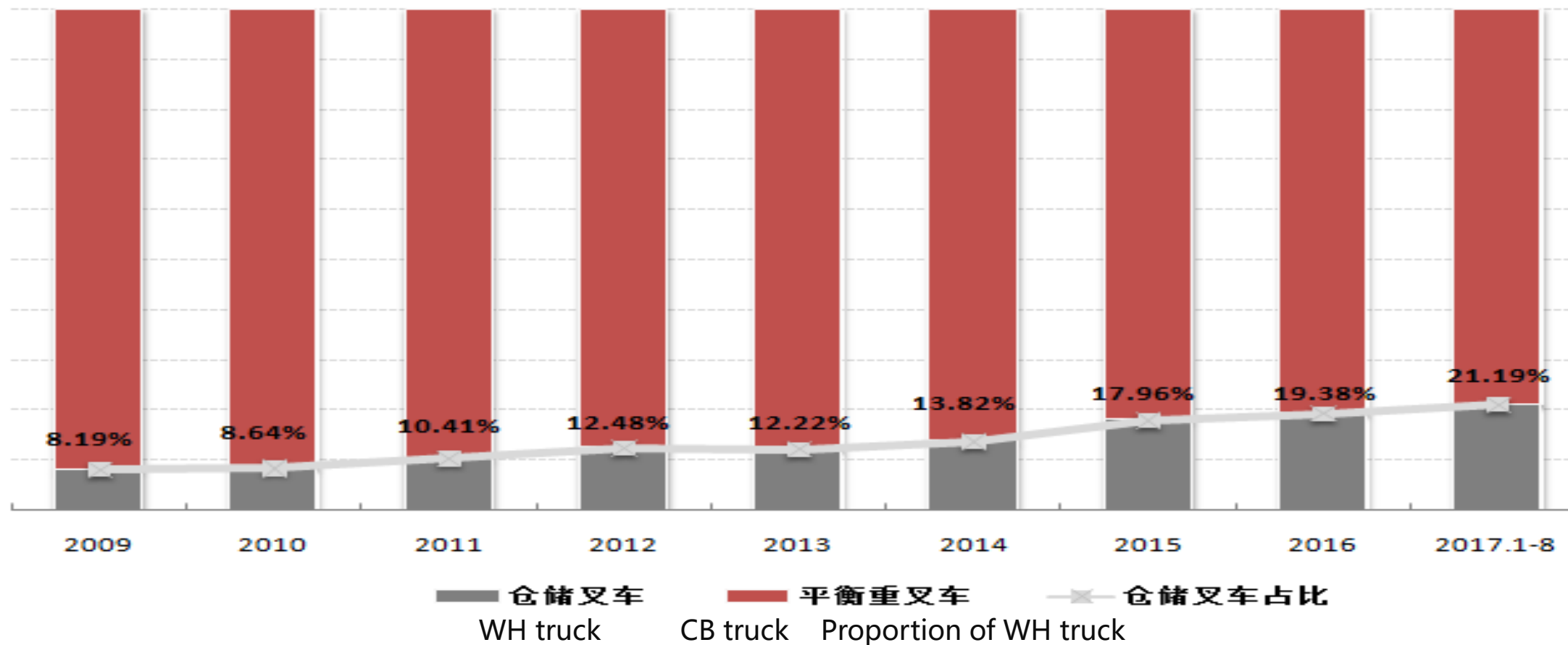


# C. Industrial truck market in China

## 中国工业车辆行业现状

### 3. WH truck vs. CB truck comparison – China (2009 - YTD201708)

#### 2009-2017年8月中国市场平衡重与仓储的比例变化情况





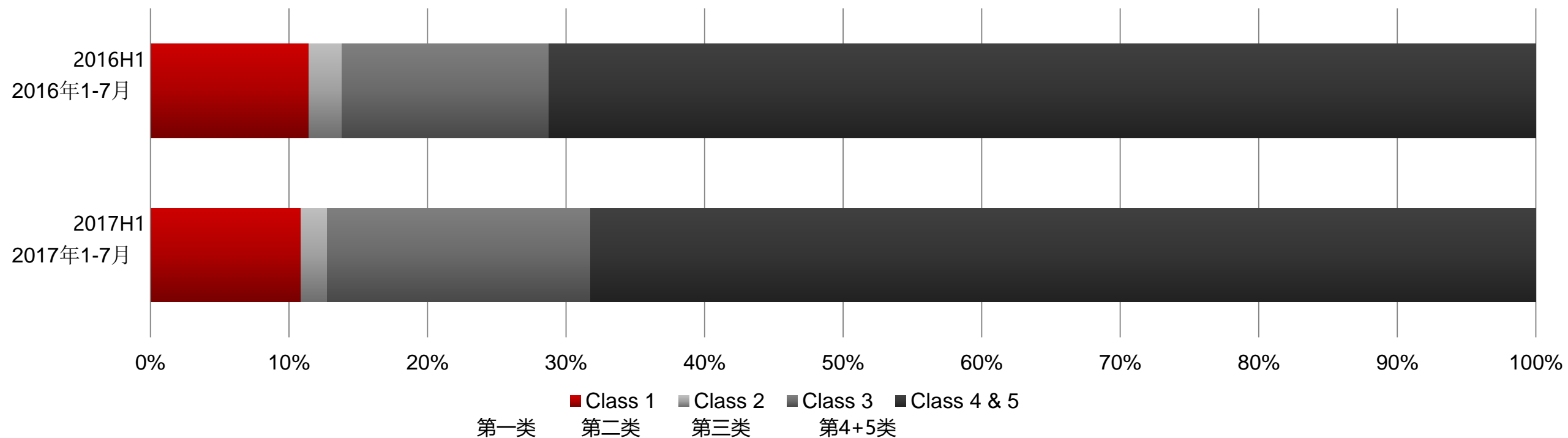
# C. Industrial truck market in China

## 中国工业车辆行业现状

### 4. 2017 Jan – July China FLT sales proportion per truck type

### 2017年1-7月中国叉车各类产品销售台数比重情况

Proportion change per truck type 各类产品比重变化图



# D. Development trend of industrial trucks in China

## 未来中国行业发展趋势

### 1. FLT after service market to be developed as the new business model

做大叉车后市场 开拓行业新业态



**配件、维修及服务**

Accessory, maintenance and service



**融资租赁** Leasing



Rental

**设备租赁**



New FLT + Core components

**新车+核心零部件**



Renew, 2<sup>nd</sup> hand, fleet management

**再制造、二手车、车队管理**

# D. Development trend of industrial trucks in China

## 未来中国行业发展趋势

### 2. The proportion of electric and other green energy products kept increased

#### 电动等绿色环保能源产品比例越来越大

Green products: light weight, energy saving, emission reduction, recyclable

绿色产品：轻量、节能、减排、可回收

绿色环保 Environmental friendly;  
免维护 Free maintenance;  
使用寿命长 Long lifetime;  
高效节能  
适合高低温工作

High efficiency & energy saving, Suitable for high and low temperature environment



**10吨锂电池平衡重式叉车**

10t Counter Balance Battery Forklift Truck

绿色、经济、安全  
高效率、低油耗  
全液压动力制动  
多级安全保护



Green, economical, safe, high efficiency, low fuel consumption, full hydraulic power brake, multi stage safety protection

**25吨天然气燃料集装箱空箱堆高机**

25t Empty Container Stacker - Gas

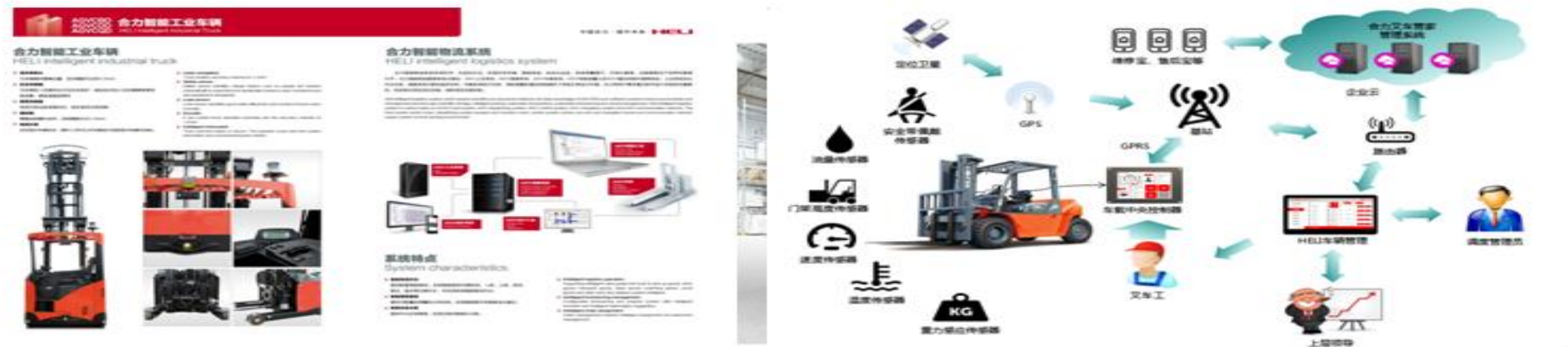


# D. Development trend of industrial trucks in China

## 未来中国行业发展趋势

### 3. Intelligent, digital products and services to be the new forces

#### 智能化、数字化产品及服务将会异军突起



高端智能叉车

High-end intelligent FLT

智能物流系统

Intelligent logistics system

智能车队管理

Intelligent fleet management

智能运维服务

Intelligent operation and maintenance service

# D. Development trend of industrial trucks in China

## 未来中国行业发展趋势

4. Industry competition will be more intense, which required higher new requirements to the enterprises

行业竞争将会更加激烈，对企业提出更多更高的新要求





**THANK YOU**  
感谢各位聆听

