

Alliance of Industrial Truck Organizations

世界工业车辆联盟

Presidents' Forum

主席论坛

Coronado, California

科罗拉多，加利福尼亚

Mr. Scott Johnson

*ITA Chairman of the Board of Directors
(CLARK Material Handling Company)*

September 7, 2019

ITA 董事会主席 (CLARK 物料搬运公司)

US Trade Policy Overview 美国贸易政策概览

Highlights

- United States Mexico Canada Agreement (USMCA)
(formerly NAFTA)
美国-墨西哥-加拿大协议 (USMCA) (原NAFTA)
- Section 232 – Steel & Aluminum Tariffs
第232节-钢和铝关税
- Section 232 – Automotive & Automotive Parts Tariffs
第232节-汽车和汽车零部件关税
- Section 301 – Tariffs on Chinese Products Transatlantic
Trade & Investment Partnership (TTIP)
第301节-中国产品关税跨大西洋贸易与投资伙伴关系
(TTIP)
- Japanese Free Trade Agreement
日本自由贸易协定
- Others 其他



WORLD ECONOMIC OUTLOOK • JULY, 2019

GROWTH PROJECTIONS 增长预测

Still Sluggish Global Growth
全球经济的发展仍然缓慢



INTERNATIONAL MONETARY FUND • www.IMF.org • #WEO

US Economic Overview 美国经济综览



US Gross Domestic Product (GDP) 美国国内生产总值

Real GDP: Percent change from preceding quarter

实际GDP: 与上季度相比的增长变化%



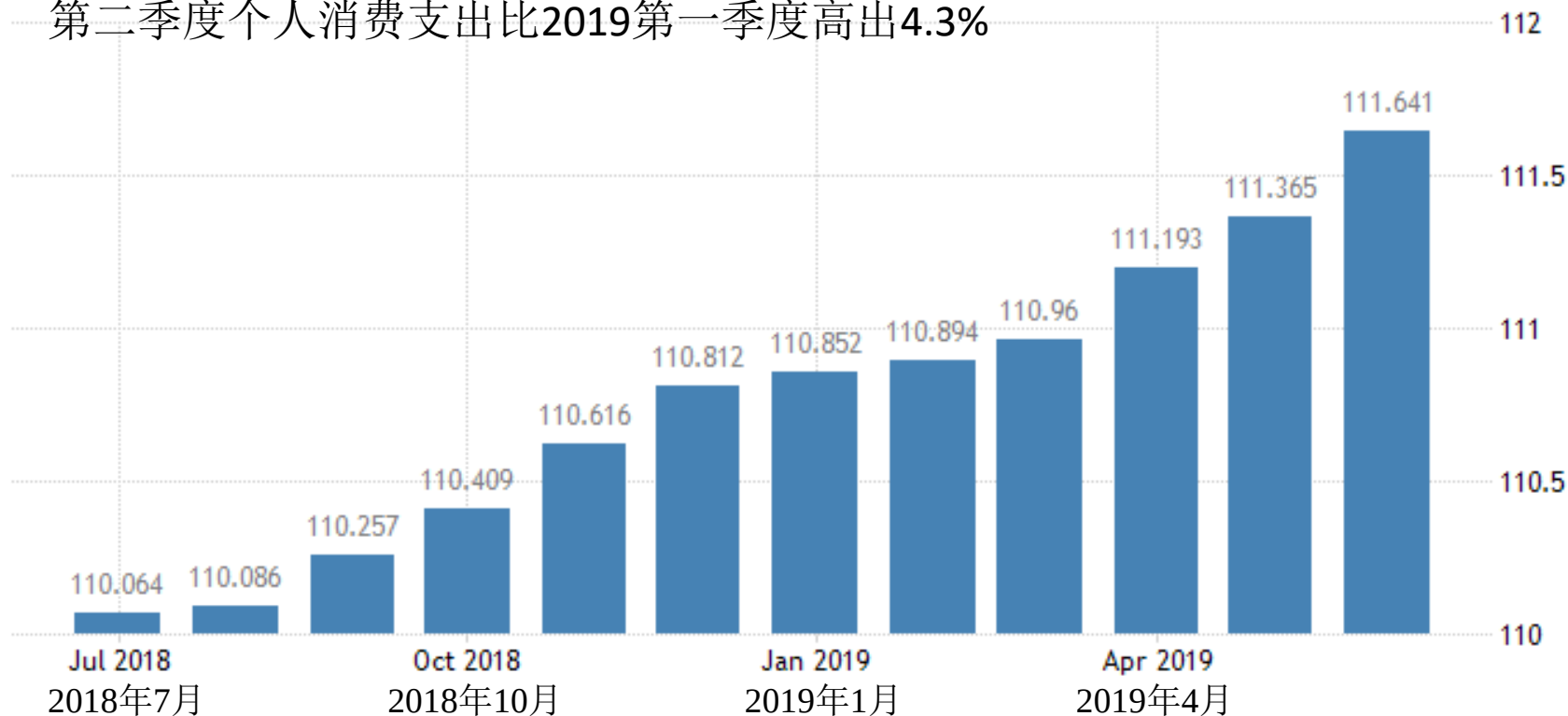
U.S. Bureau of Economic Analysis
美国经济分析局

Seasonally adjusted at annual rates
经季节性调整的年率

US Personal Consumption Expenditures 美国个人消费支出

Q2 PCE up 4.3% over Q1 2019

第二季度个人消费支出比2019第一季度高出4.3%



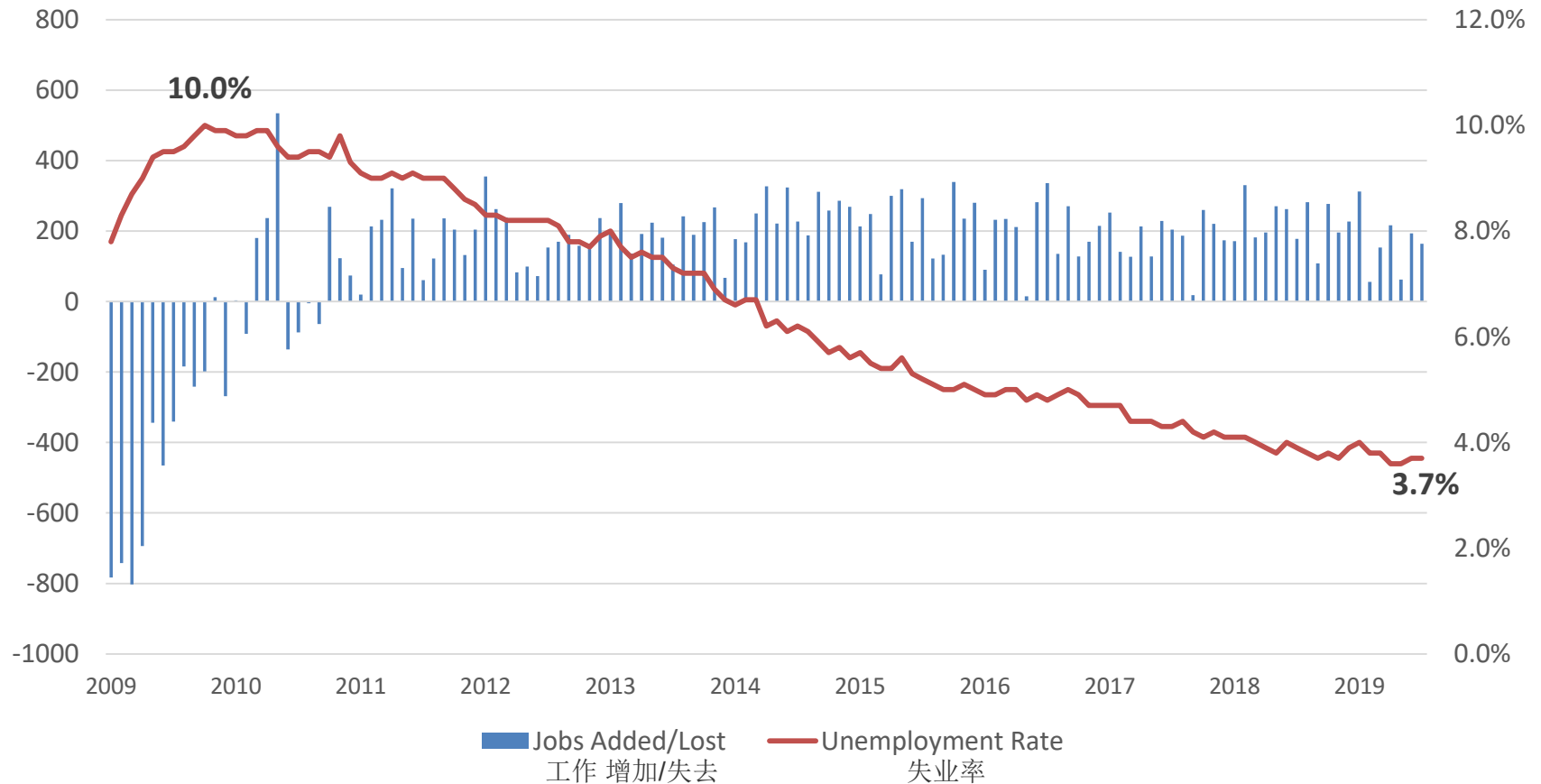
SOURCE: TRADINGECONOMICS.COM | U.S. BUREAU OF ECONOMIC ANALYSIS

美国经济分析局

US Employment Data 美国就业数据

United States Employment Situation 美国就业状况

Monthly change, seasonally adjusted 月度变化, 季节性调整



Source: Bureau of Labor Statistics 来源: 劳工统计局

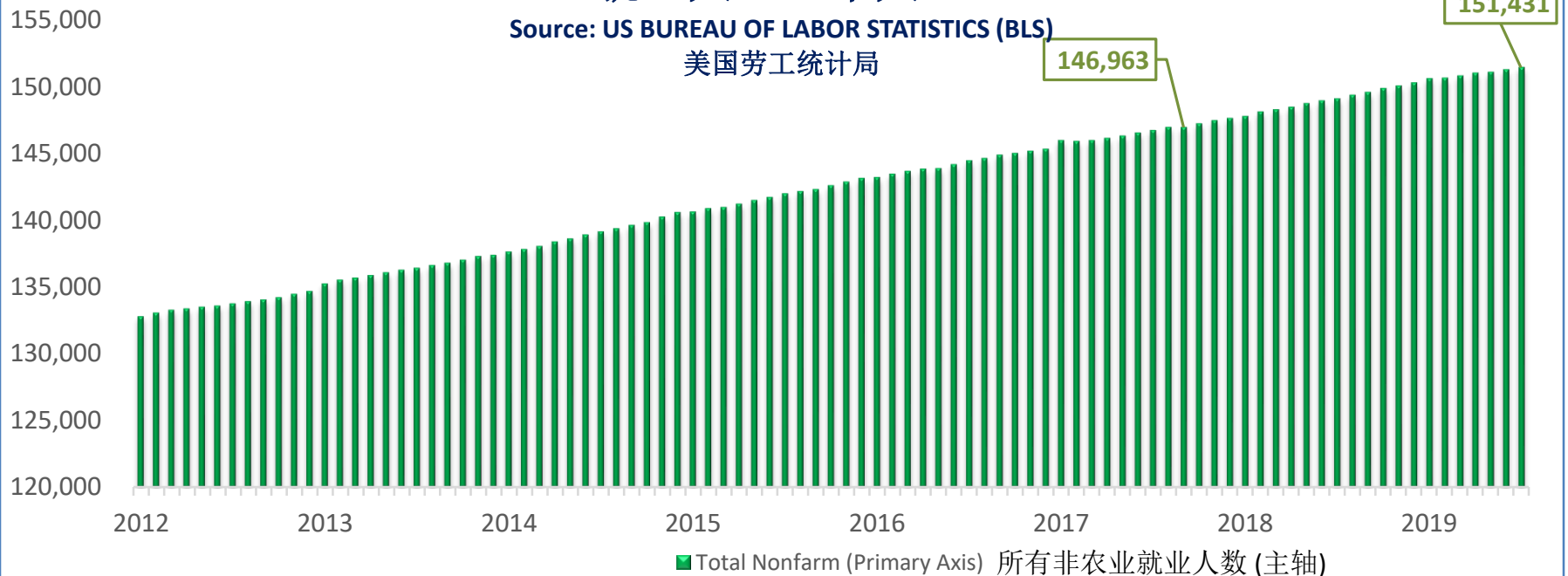
US Employment Data 美国就业数据

Payroll Employment (000's)

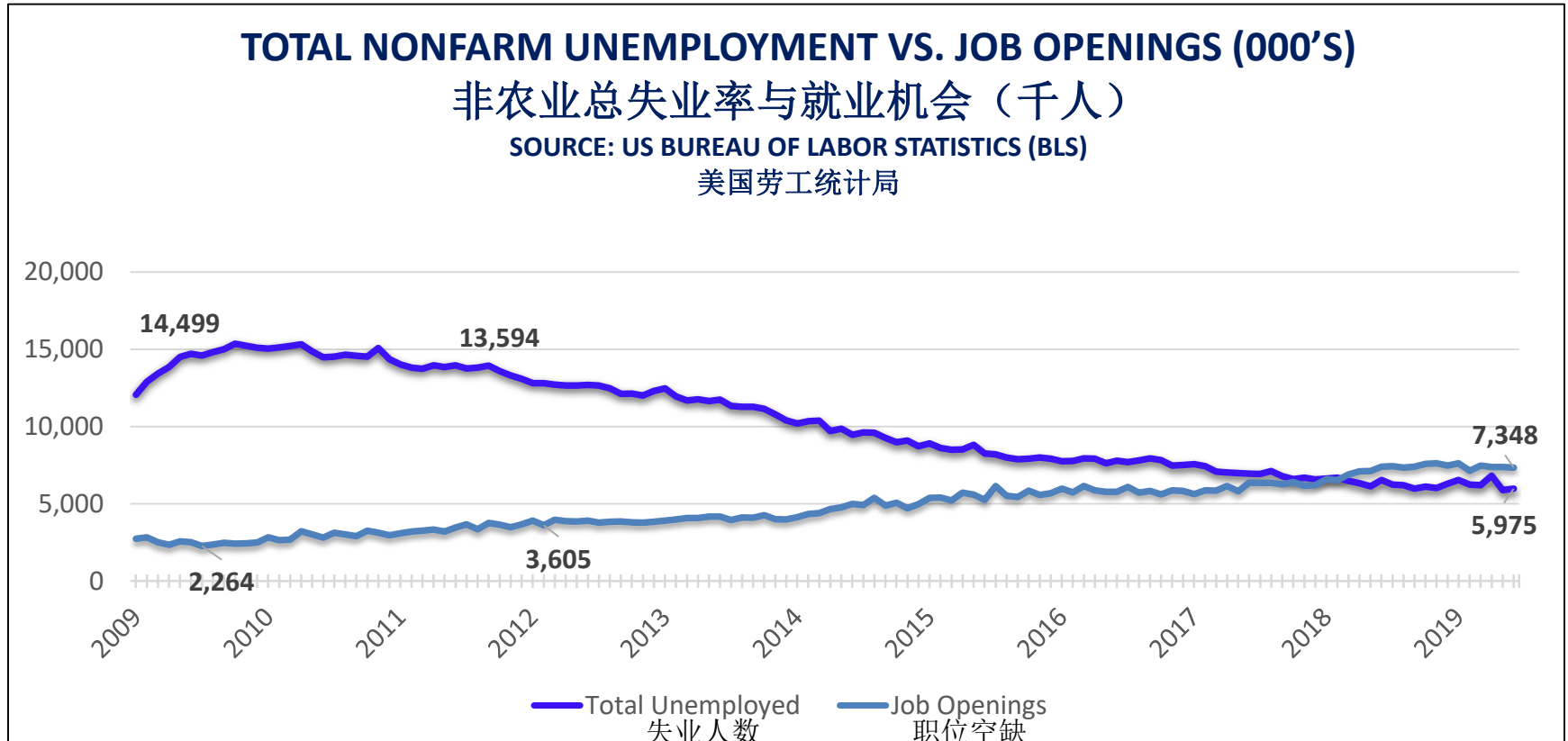
就业人口（千人）

Source: US BUREAU OF LABOR STATISTICS (BLS)

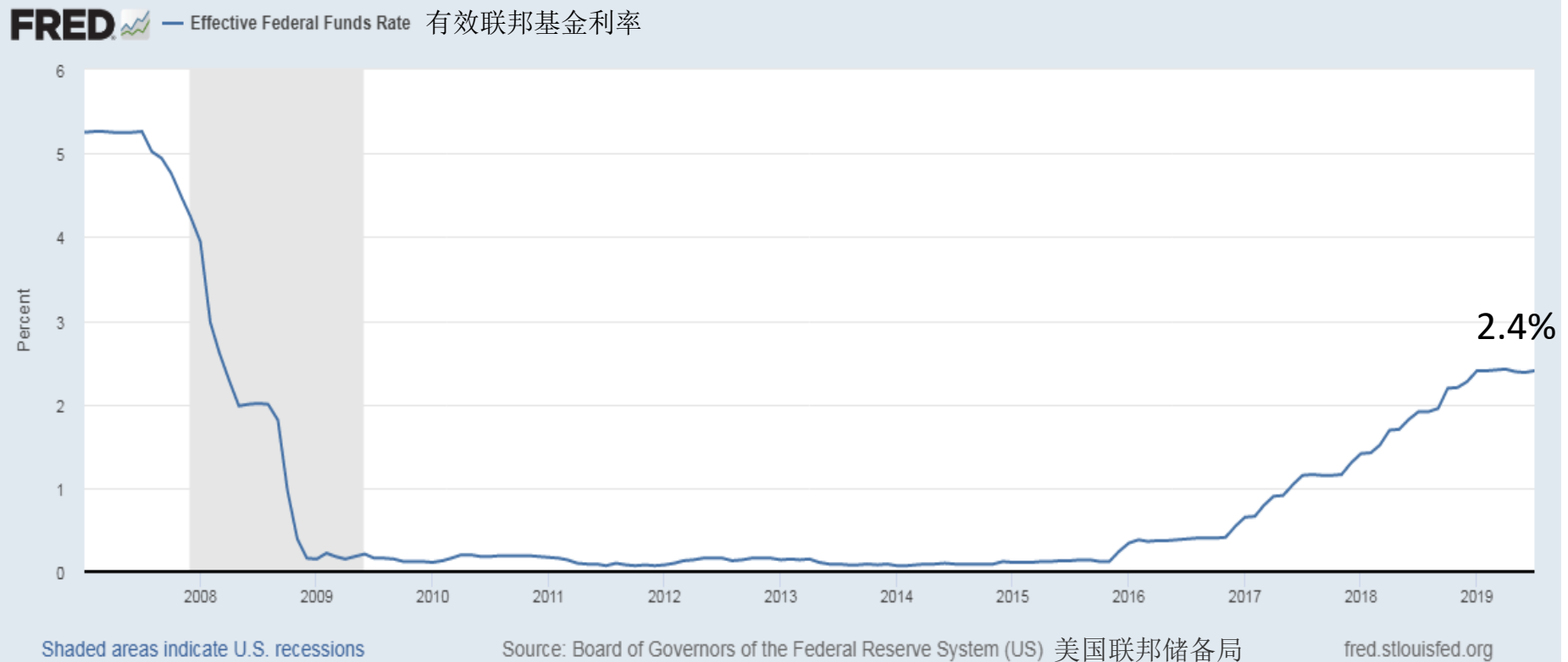
美国劳工统计局



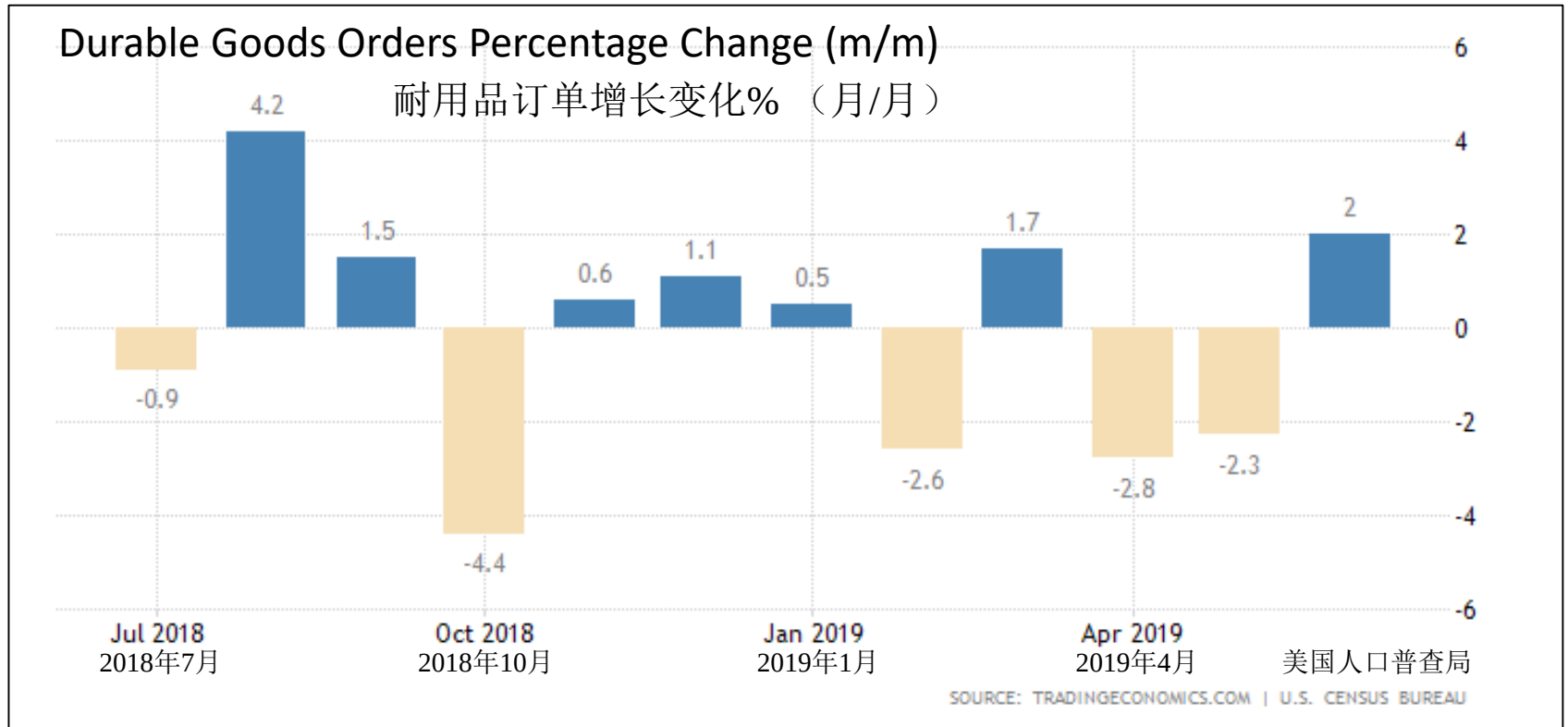
US Employment Data 美国就业数据



Monetary Policy 货币政策



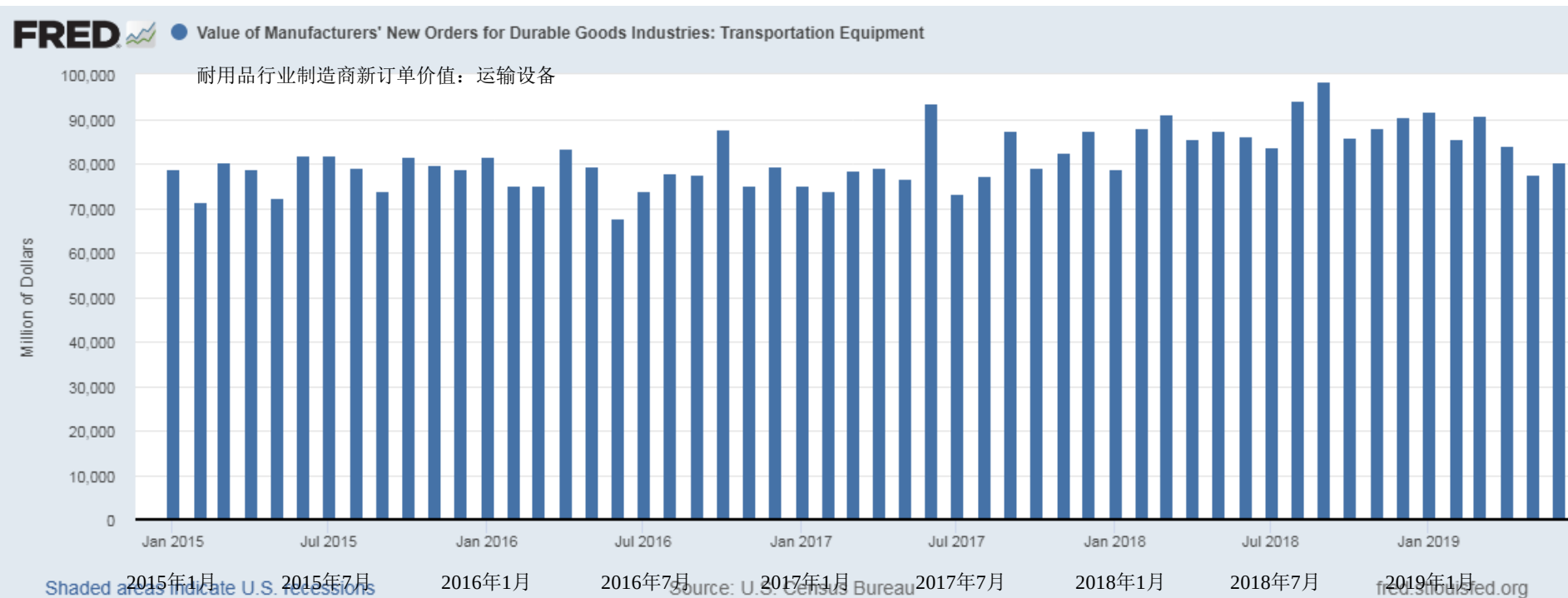
Durable Goods Orders 耐用品订单



Transportation Equipment 运输设备

- New orders for transportation equipment increased 3.8% during June to \$80.5 billion

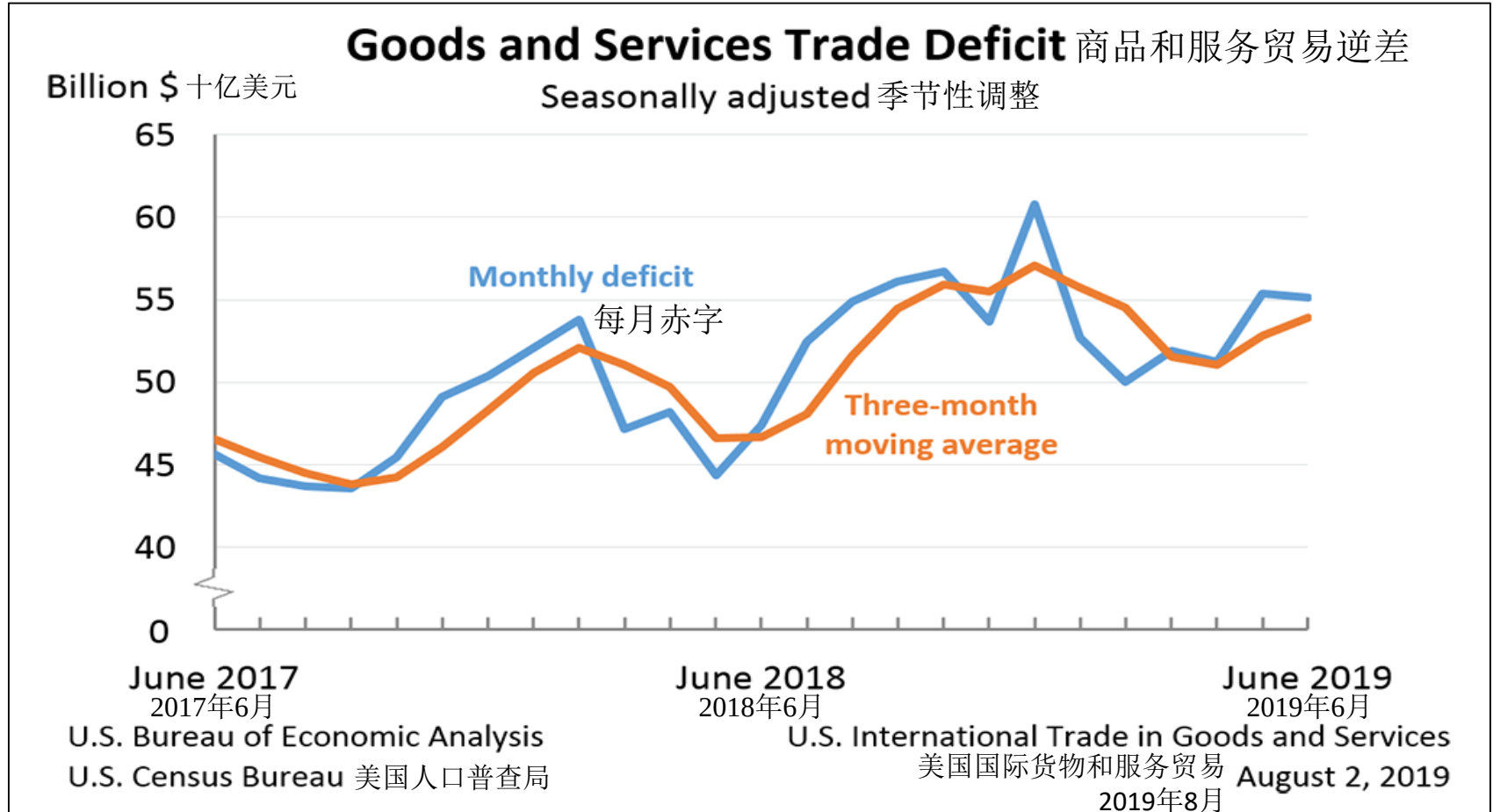
6月运输设备新订单增加3.8%，达到805亿美元。



来源：美国人口普查局

US International Trade 美国国际贸易

The goods and services trade deficit was \$55.2 billion for June.
6月份商品和服务贸易逆差为552亿美元。

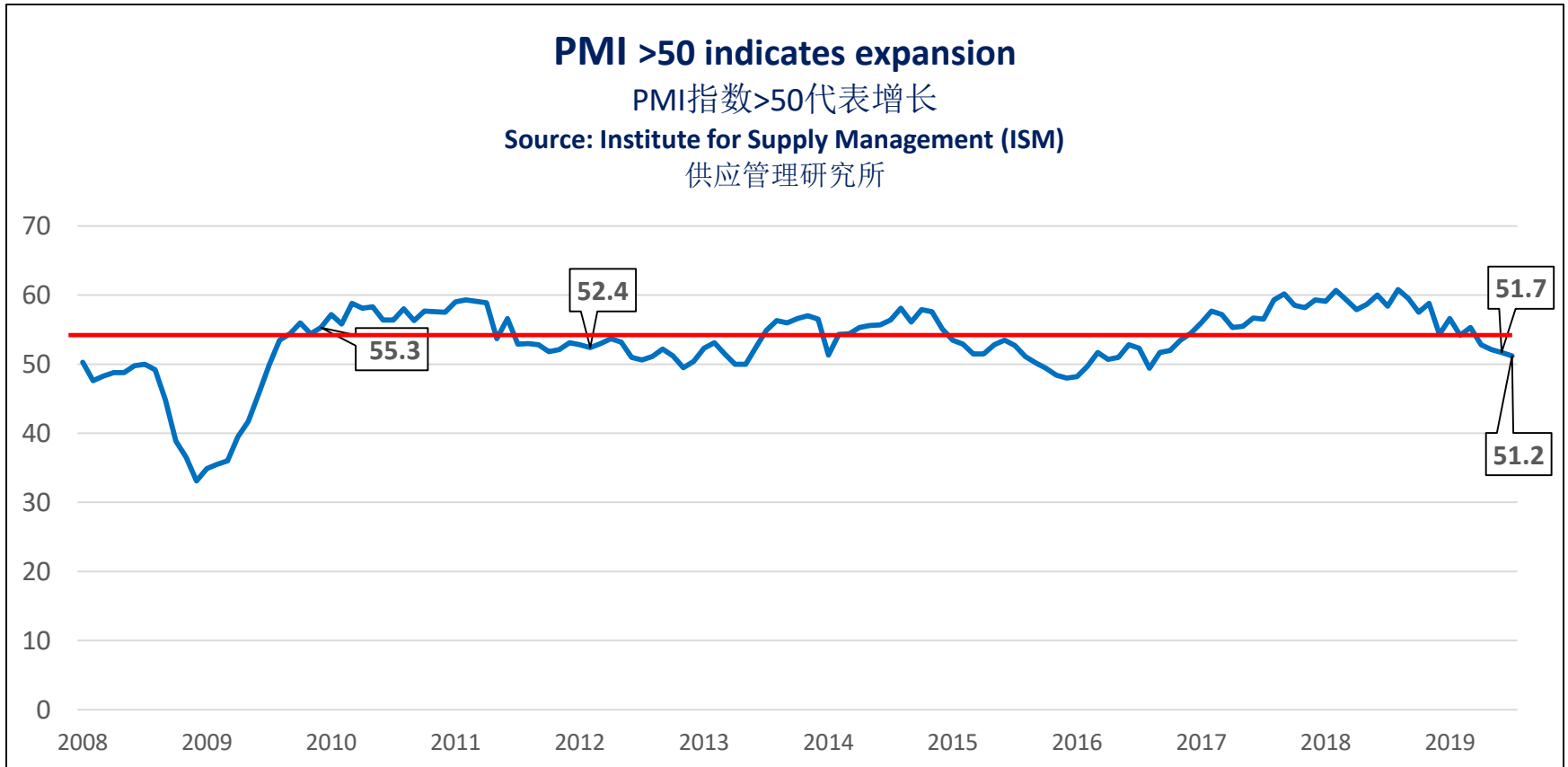


- **U.S. Goods Exports 美国商品出口**
 - **FH 2019 shows a 2 percent decline over 2018**
与2018年相比2019年上半年下降2%
 - **Automotive vehicles and parts 汽车及零部件** ↓
 - **Consumer goods 消费品** ↓
 - **Non-automotive capital goods 非汽车资本货物** ↓
- **U.S. Goods Imports 美国商品进口**
 - **Industrial supplies and materials** ↓
工业用品和材料
 - **All other major categories** ↓
所有其他主要类别

Source: National Association of Manufacturers

来源：全国制造商协会

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

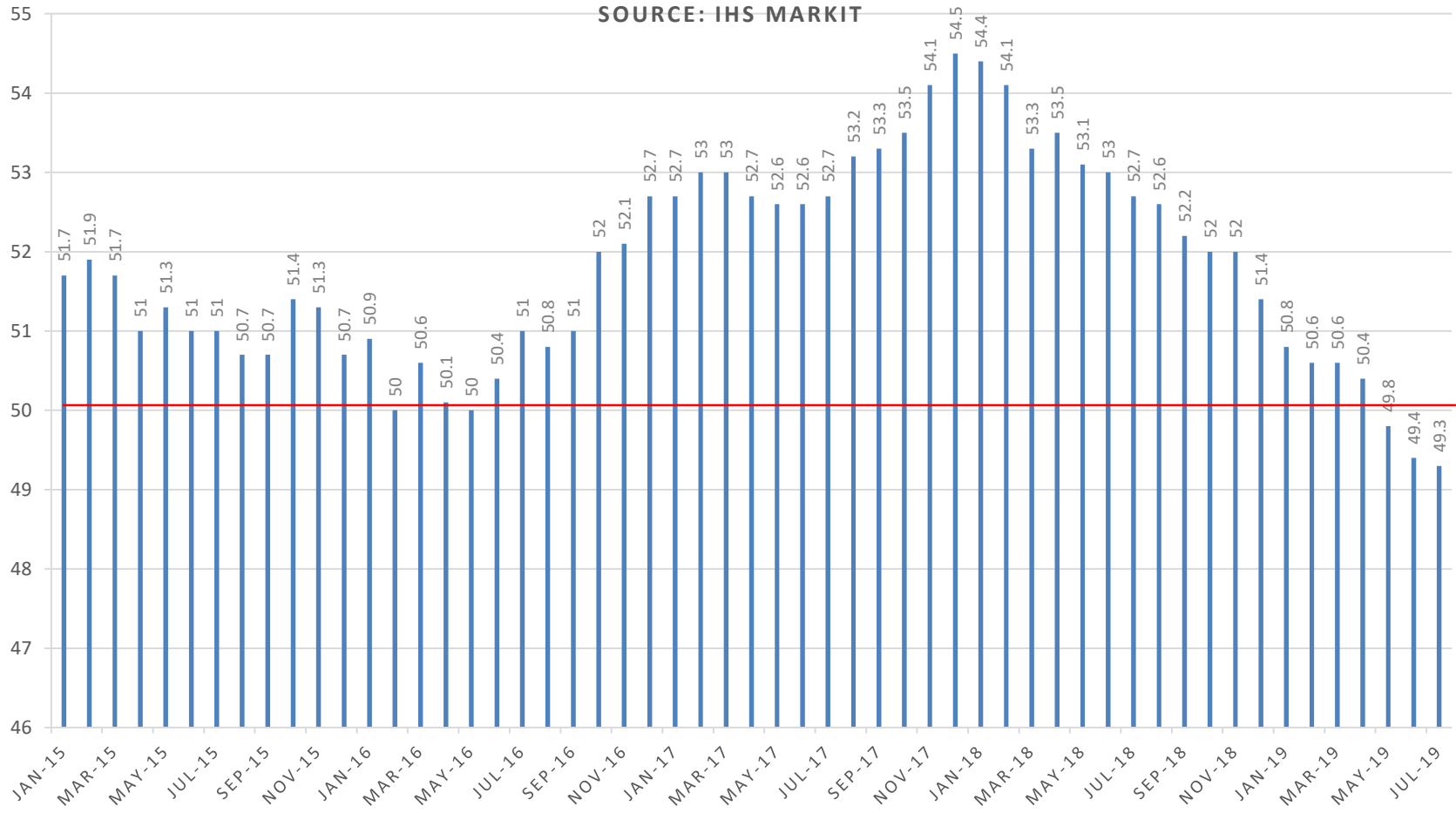


Global PMI 全球PMI

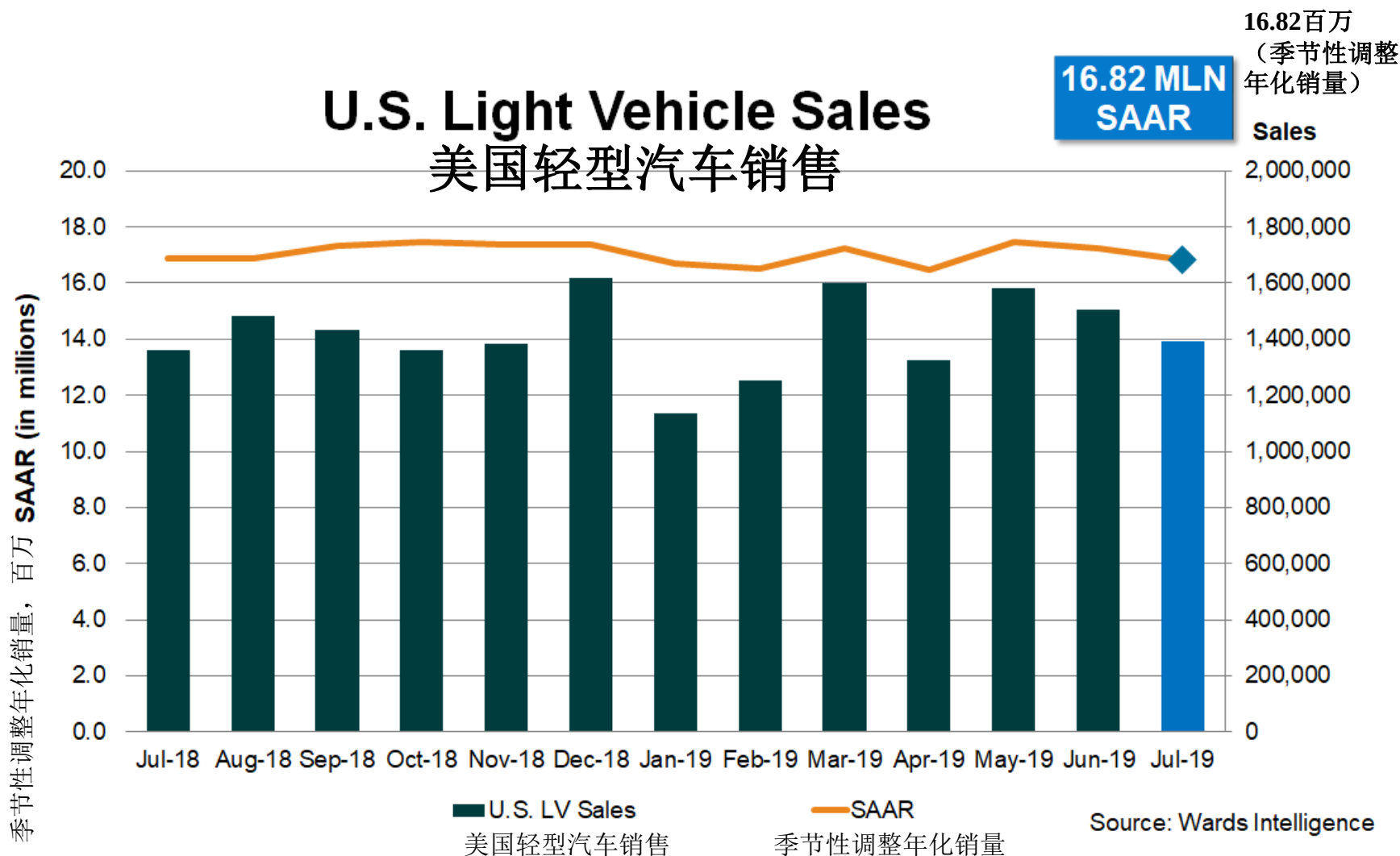
JP MORGAN GLOBAL MANUFACTURING PMI

摩根大通全球制造业采购经理人指数

SOURCE: IHS MARKIT



US Automotive Market 美国汽车市场



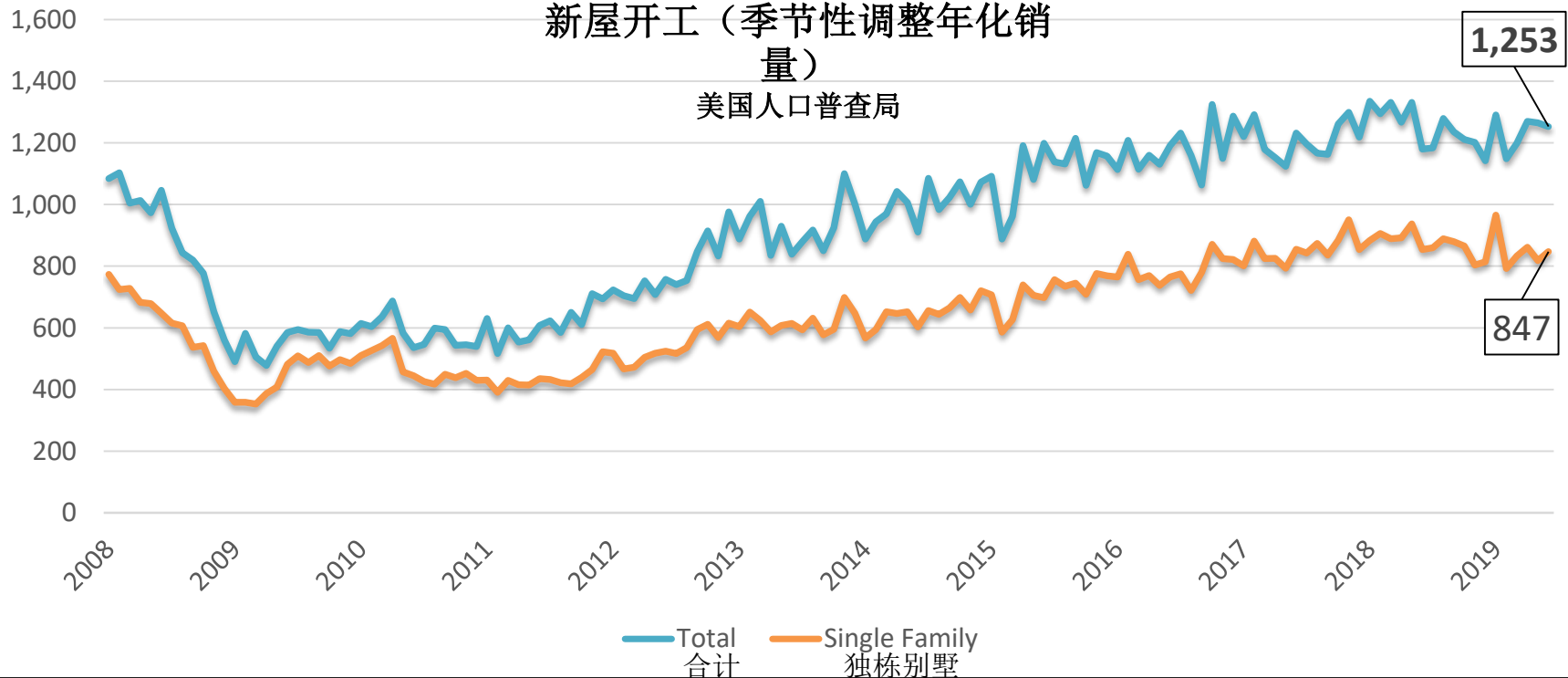
US Housing Market 美国住房市场

Single family housing starts helped to offset the softening of overall housing starts during June. 独栋别墅的开工数抵消了6月整体新屋开工的疲软

Housing Starts (000's SAAR)

Source: US Census Bureau

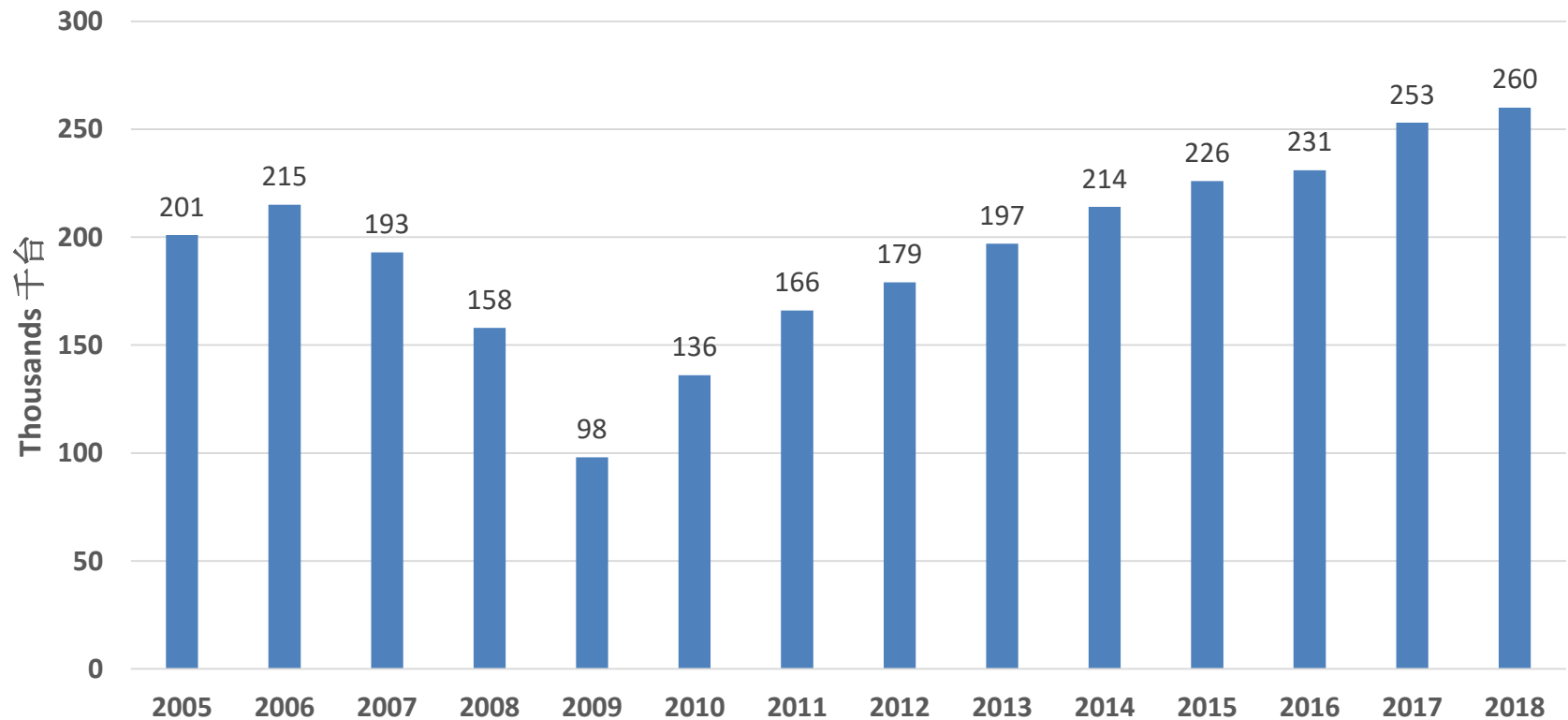
新屋开工（季节性调整年化销量）
美国人口普查局





North American Lift Truck Industry 北美工业车辆行业

Historic Retail Orders 零售订单历史



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

North American Lift Truck Industry

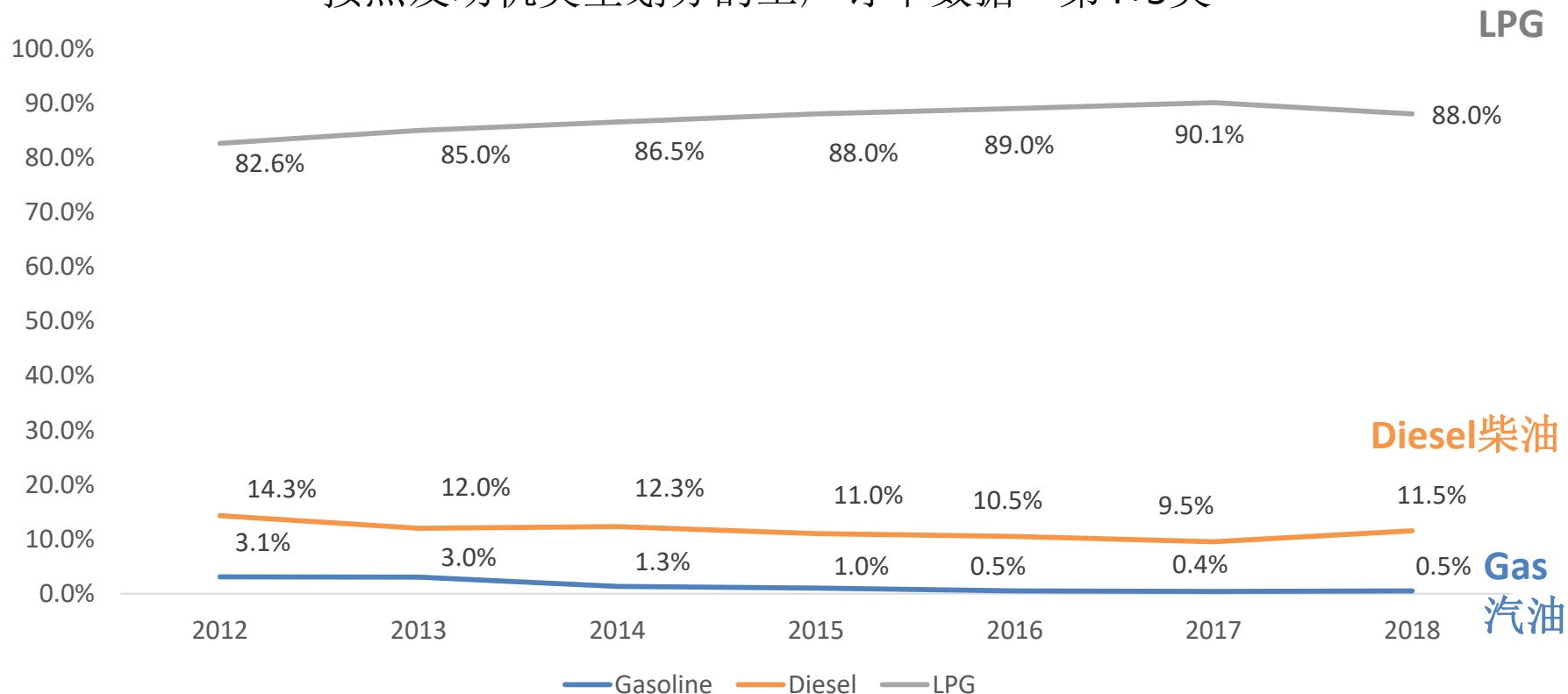
北美工业车辆行业

YEAR 年	ELECTRIC RIDER (Classes 1 & 2) 电动乘驾	MOTORIZED HAND (Class 3) 电动步行	INTERNAL COMBUSTION ENGINE (Classes 4 & 5) 内燃叉车
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
2017	71,547	63,412	77,043
2018	75,446	68,979	87,271

Source: Industrial Truck Association, US Factory Shipments 来源：美国工业车辆协会、美国工厂发货

Factory Orders By Engine Type – Class 4 & 5 Combined

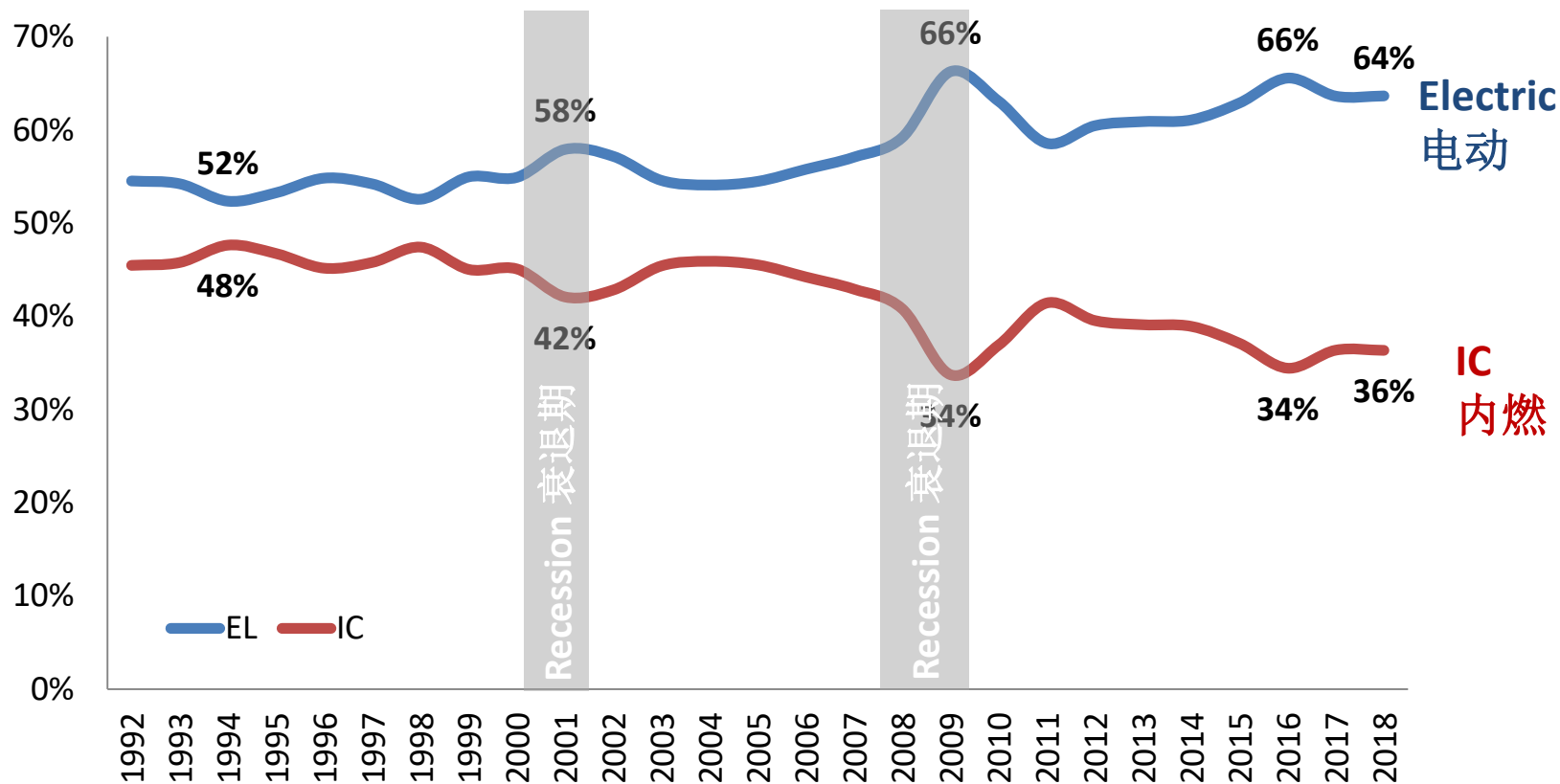
按照发动机类型划分的工厂订单数据 – 第4+5类



Note: Includes U.S., Canada, Mexico and Government
包含美国、加拿大、墨西哥及政府

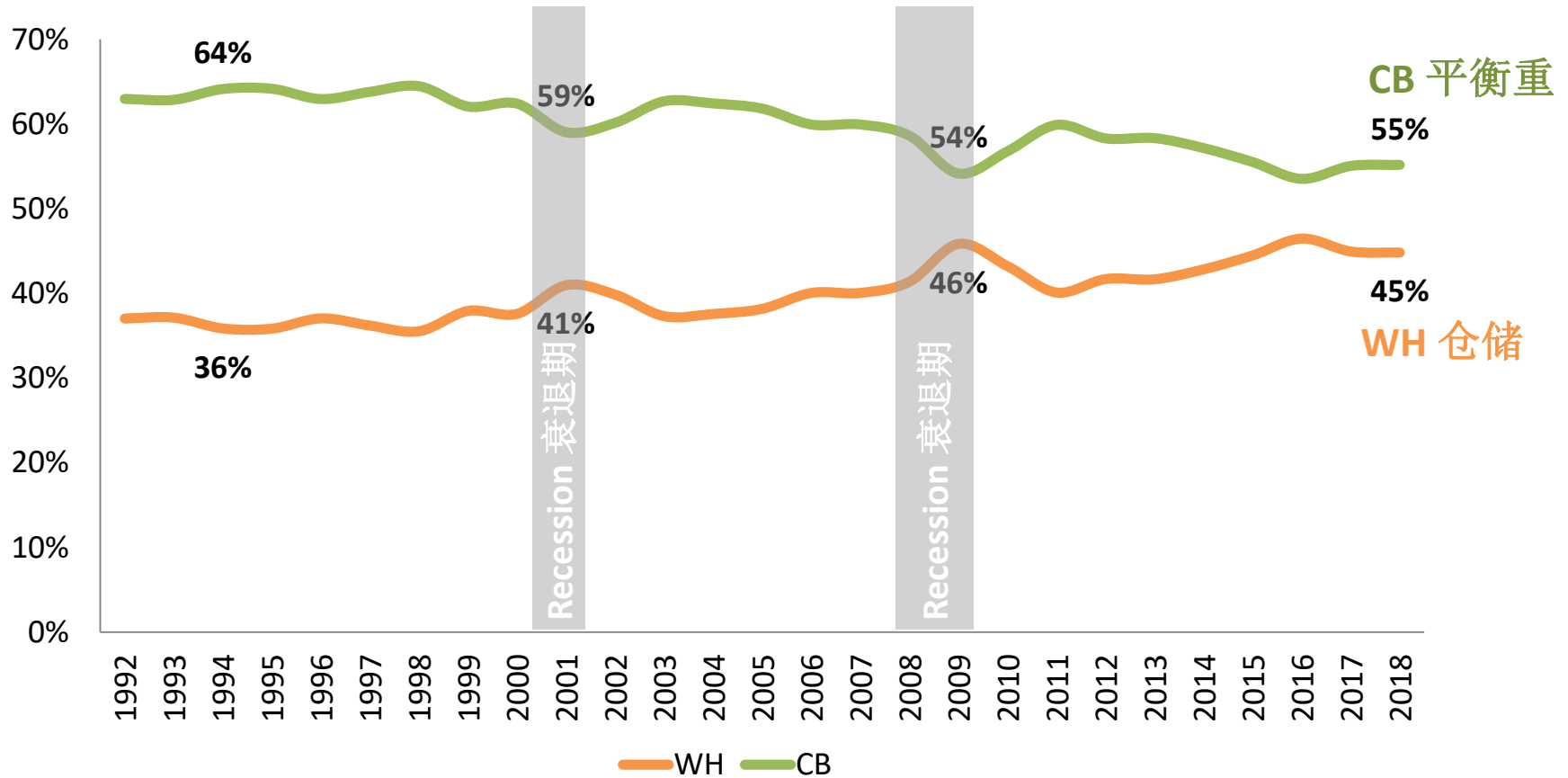
North American Lift Truck Industry 北美工业车辆行业

IC vs. Electric Trend 内燃车及电动车趋势



North American Lift Truck Industry 北美工业车辆行业

Warehouse vs. Counterbalance Trend 仓储及平衡重趋势

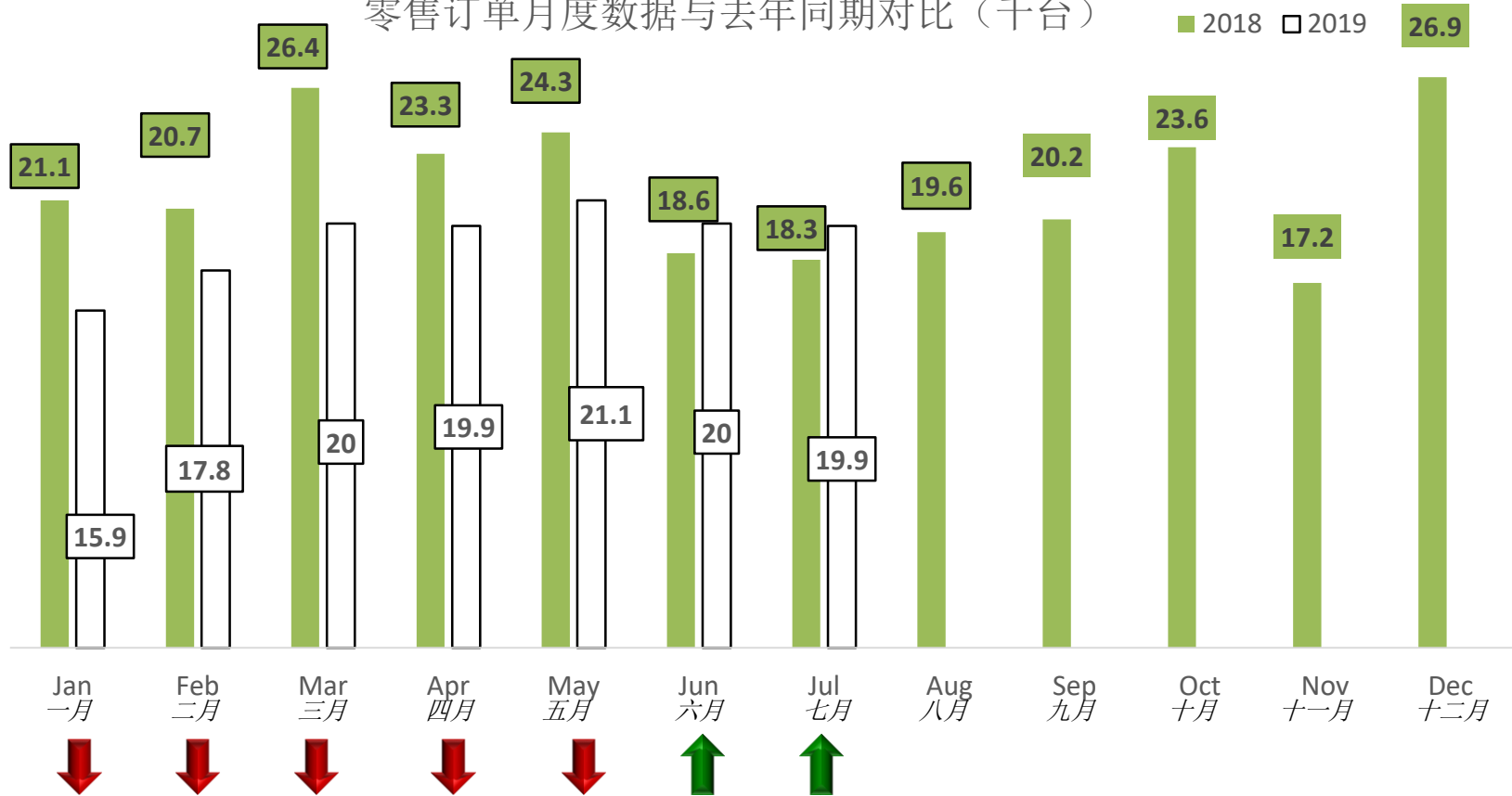


North American Lift Truck Industry

北美工业车辆行业

Retail Orders Monthly vs. Prior Year (thousands)

零售订单月度数据与去年同期对比（千台）

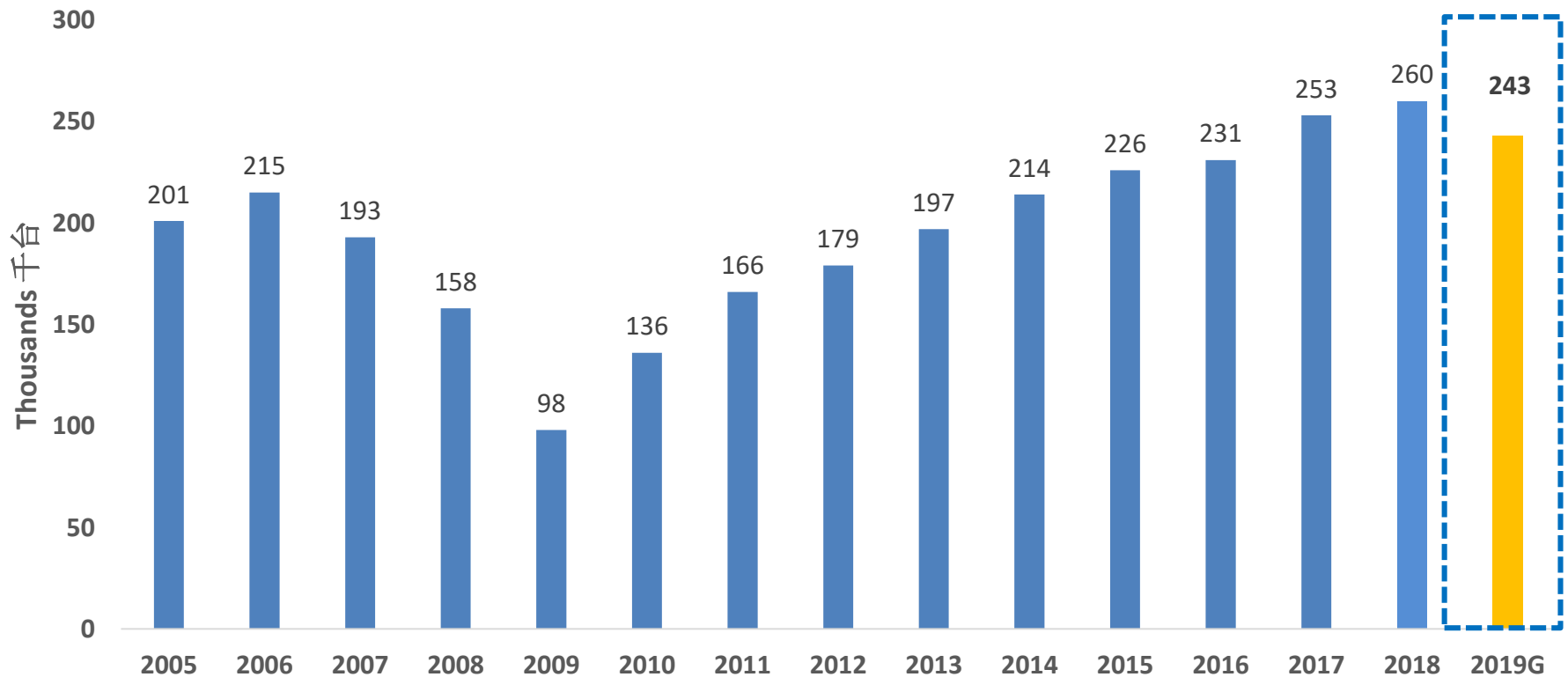


Note: Includes U.S., Canada, Mexico and Government
 包含美国、加拿大、墨西哥及政府

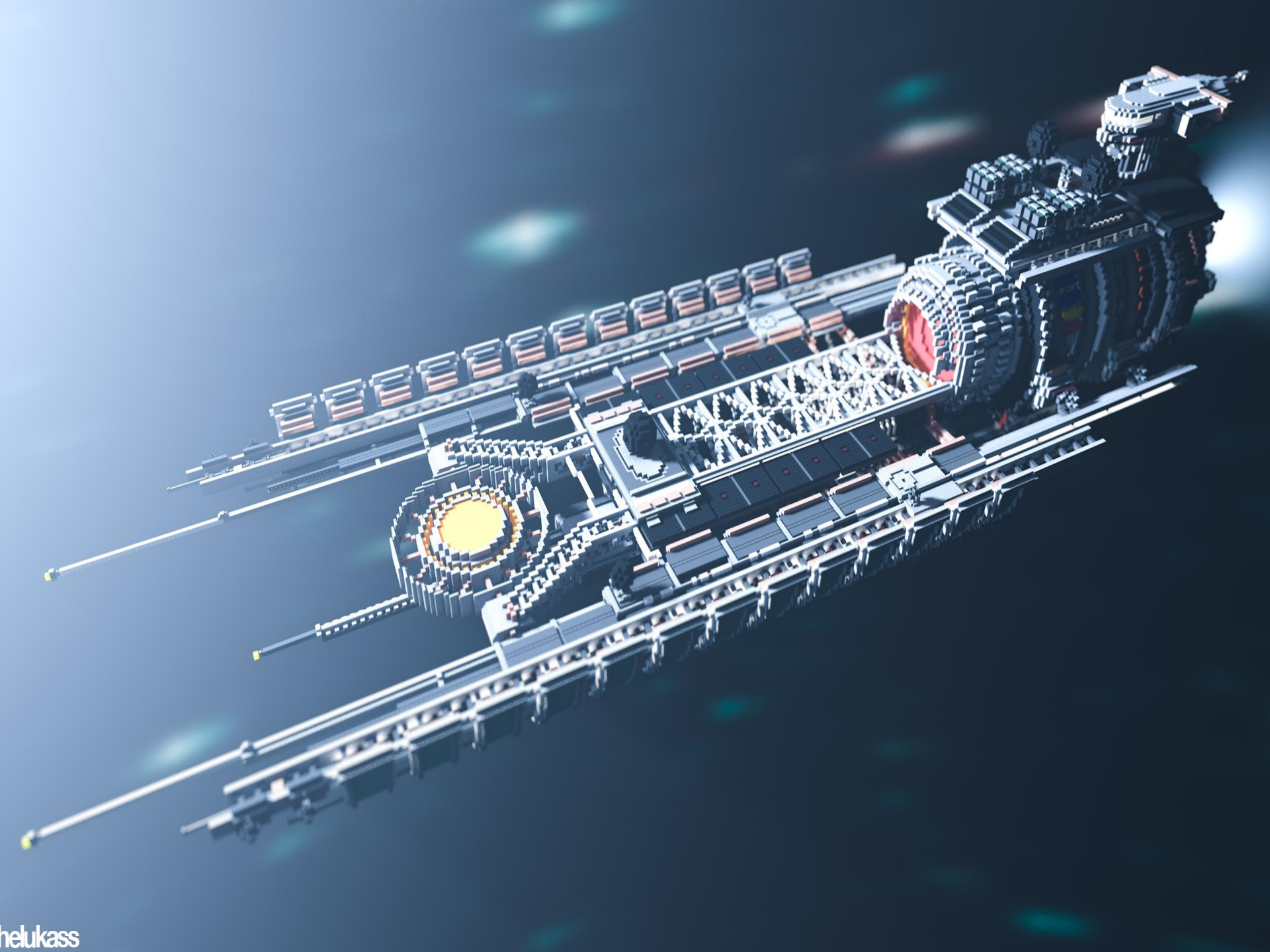
North American Lift Truck Industry 北美工业车辆行业

Retail Orders Forecast 零售订单预测

guesstimate 预测



Note: Includes U.S., Canada, Mexico and Government
包含美国、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

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 11, 2019
- 全国叉车安全日2019年6月11日
- National Forklift Safety Day – June 9, 2020
- 全国叉车安全日2020年6月9日

**NATIONAL
FORKLIFT
SAFETY DAY**





NATIONAL
FORKLIFT
SAFETY DAY

JUNE
11
2019

NATIONAL
FORKLIFT
SAFETY DAY

NATIONAL
FORKLIFT
SAFETY DAY

2019年6月11日全国叉车安全日

NATIONAL **FORKLIFT SAFETY DAY**

JUNE 11, 2019

**NATIONAL PRESS CLUB
WASHINGTON, DC**





Media Results = ~90 Million
媒体报道结果=超过9千万

THE DENVER POST The Columbus Dispatch

INDIANAPOLIS
BUSINESS JOURNAL

KUSI
NEWS
SAN DIEGO'S NEWS CHANNEL

HOUSTON★CHRONICLE

The★Star.
THE KANSAS CITY STAR



THE SACRAMENTO BEE

StarTribune

MODERN
MATERIALS HANDLING®

The Miami Herald

Newsday

ALLIANCE OF INDUSTRIAL TRUCK ORGANIZATIONS



China Industrial Truck Association (CITA)



Federation Europeenne
de la Manutention (FEM IT)



Japan Industrial Vehicles Association (JIVA)



Industrial Truck Association (ITA)

THANK YOU
谢谢

