



AITO Presidents' Forum 2023

2023 AITO 主席论坛

S
Ernesto Dominguez

President 总统

FEM Industrial Trucks

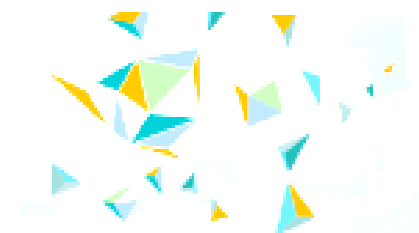
FEM工业车辆产品组主席

Presidents' Forum
27 October 2023, Kyoto, Japan
2023年10月27日



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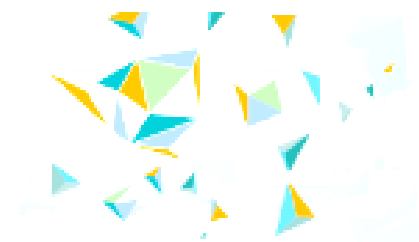
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 - (3) Economic Sentiment Indicator 经济景气指数
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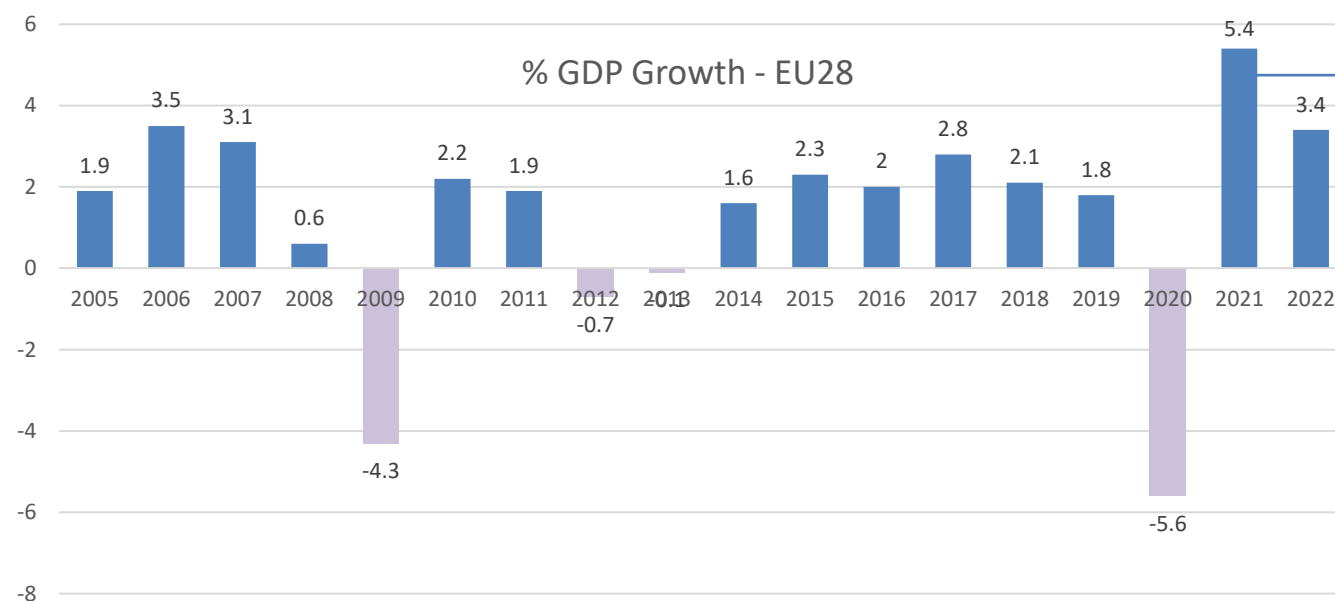
EU Macroeconomic Figures

欧洲宏观经济数据

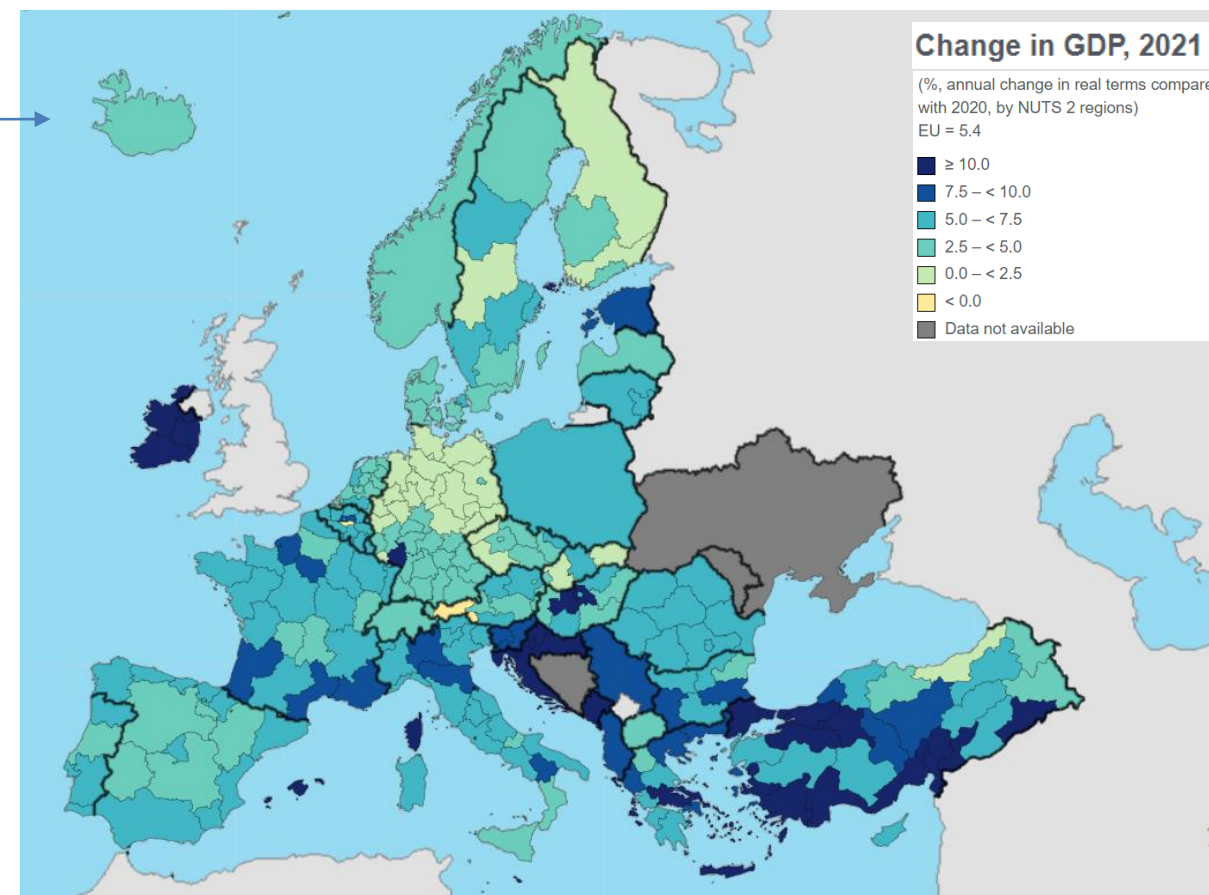


EU real GDP growth rate – Looking Back

欧盟历年实际国内生产总值增长率



Source: ec.europa.eu 来源



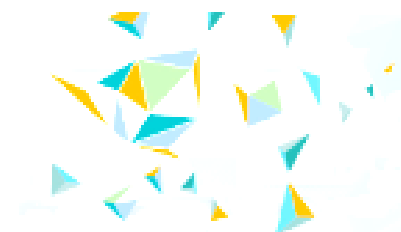
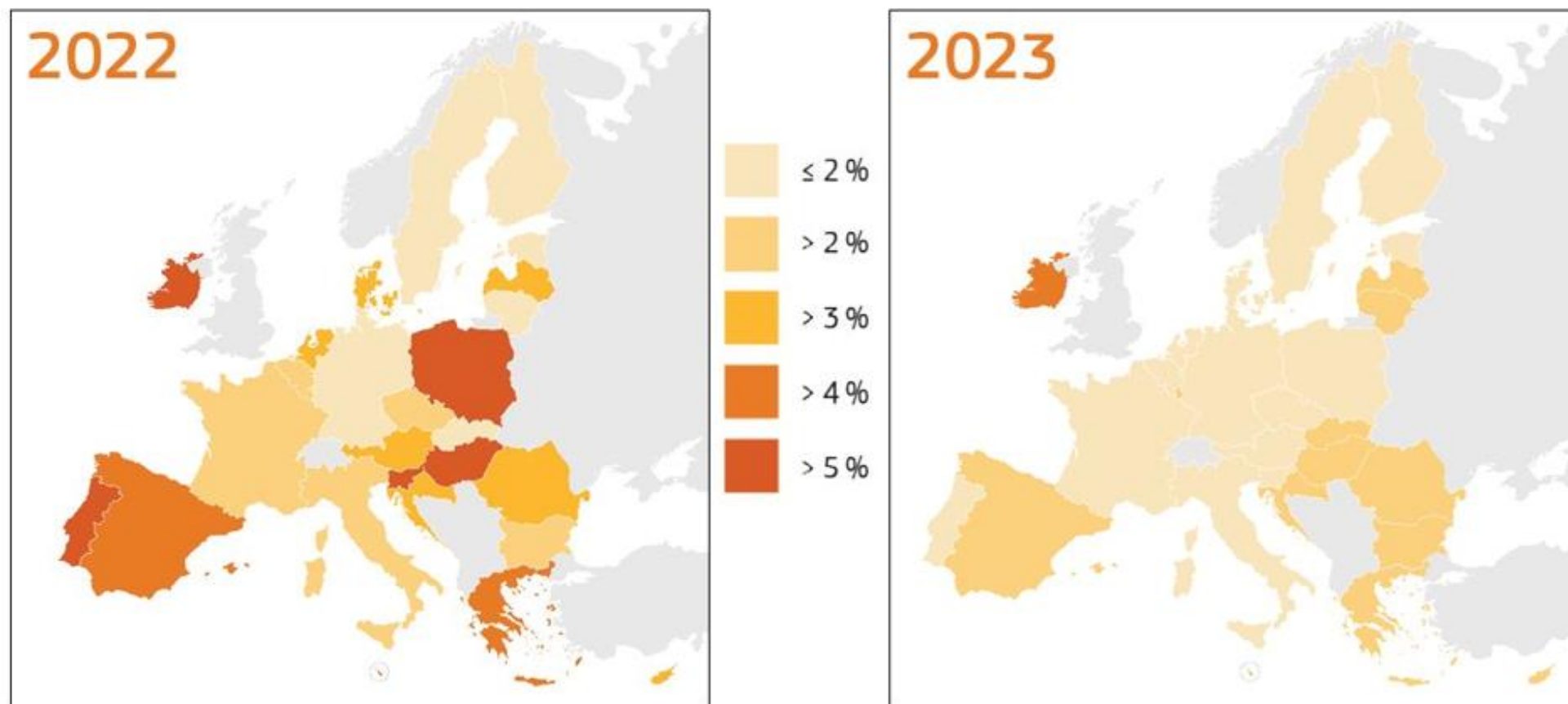
European
materials
handling
federation

EU real GDP growth rate - Current

2022/2023 年欧盟实际 GDP 增长率

Source: ec.europa.eu

来源



Euro Area Inflation and Unemployment Rate

欧元区通货膨胀率和失业率

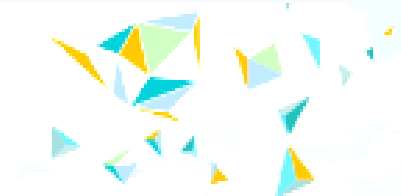
HICP overall Inflation



Unemployment rate



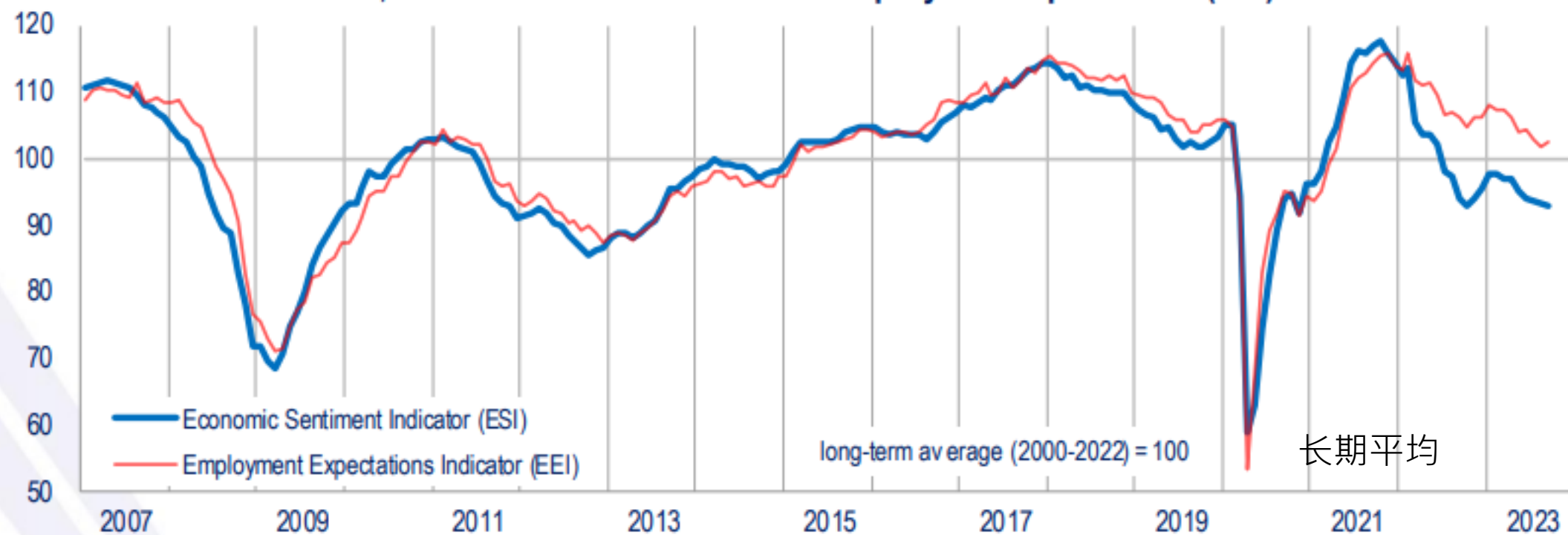
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EU Economic Sentiment Indicator 欧盟经济景气指数

Graph 1: EU Economic sentiment & Employment expectations (s.a.)

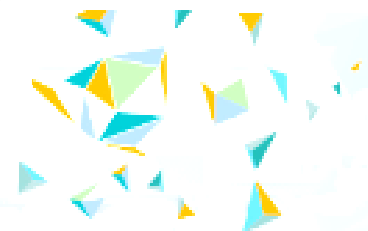


source: European Commission services

来源: 欧盟委员会



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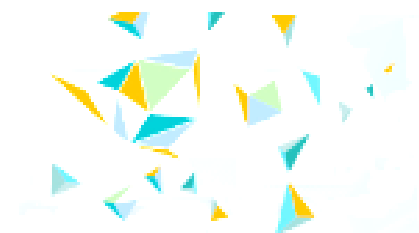


European Industrial Truck Market

欧洲工业车辆市场



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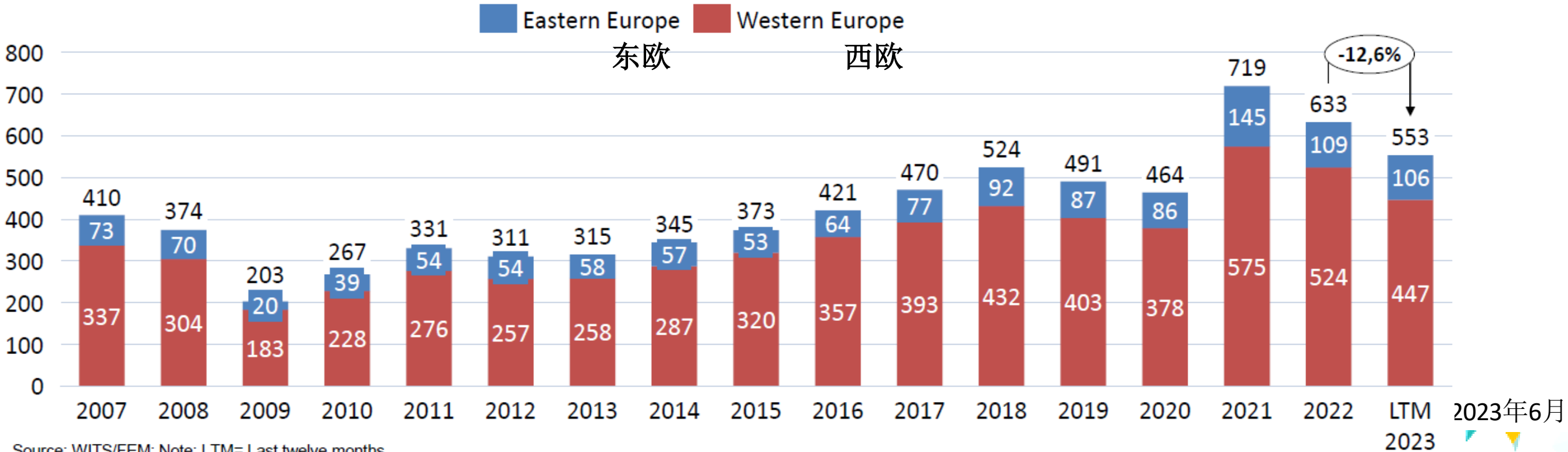




Source: WITS / as of June 2023
来源: WITS 2023年6月

Historic Order Development 订单变化历史

In thousand units



Source: WITS/FEM; Note: LTM= Last twelve months

LTM = 过去的12个月



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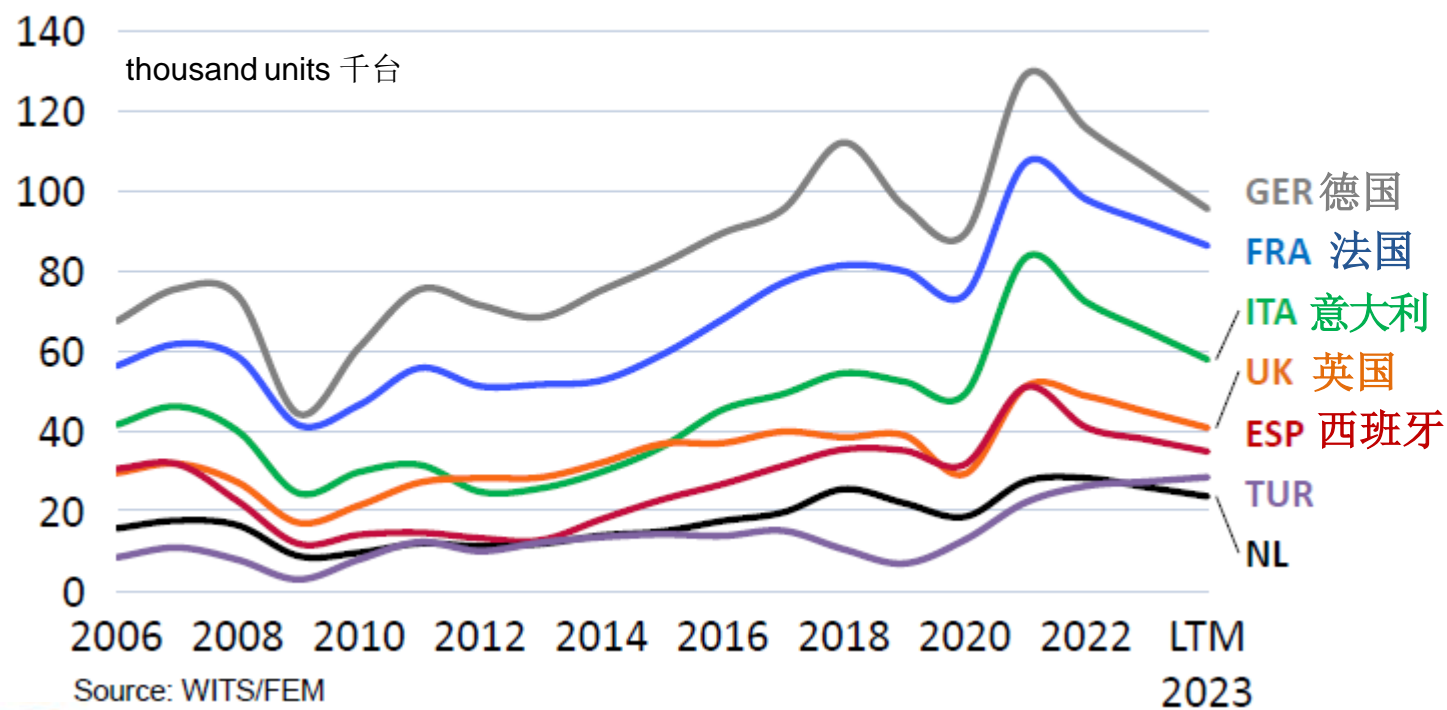




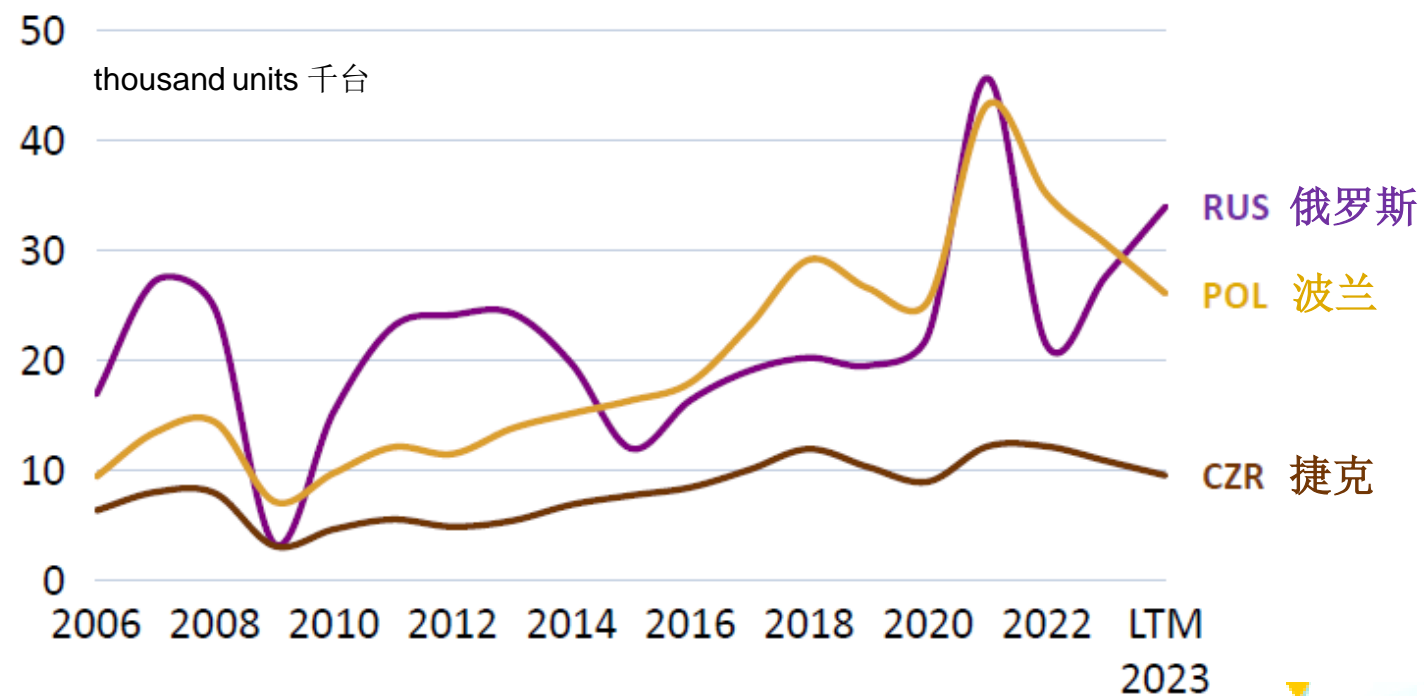
Source: WITS / as of June 2023
来源: WITS 2023年6月

Europe Country Trends 分国家趋势变化

Western Europe 西欧



Eastern Europe 东欧



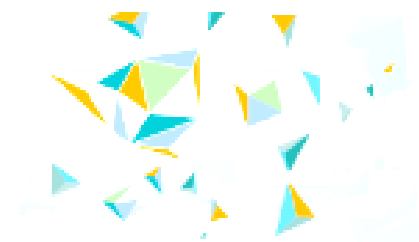
Note: LTM= Last twelve months
LTM = 过去的12个月





Eurozone Economic Outlook

欧元区经济展望





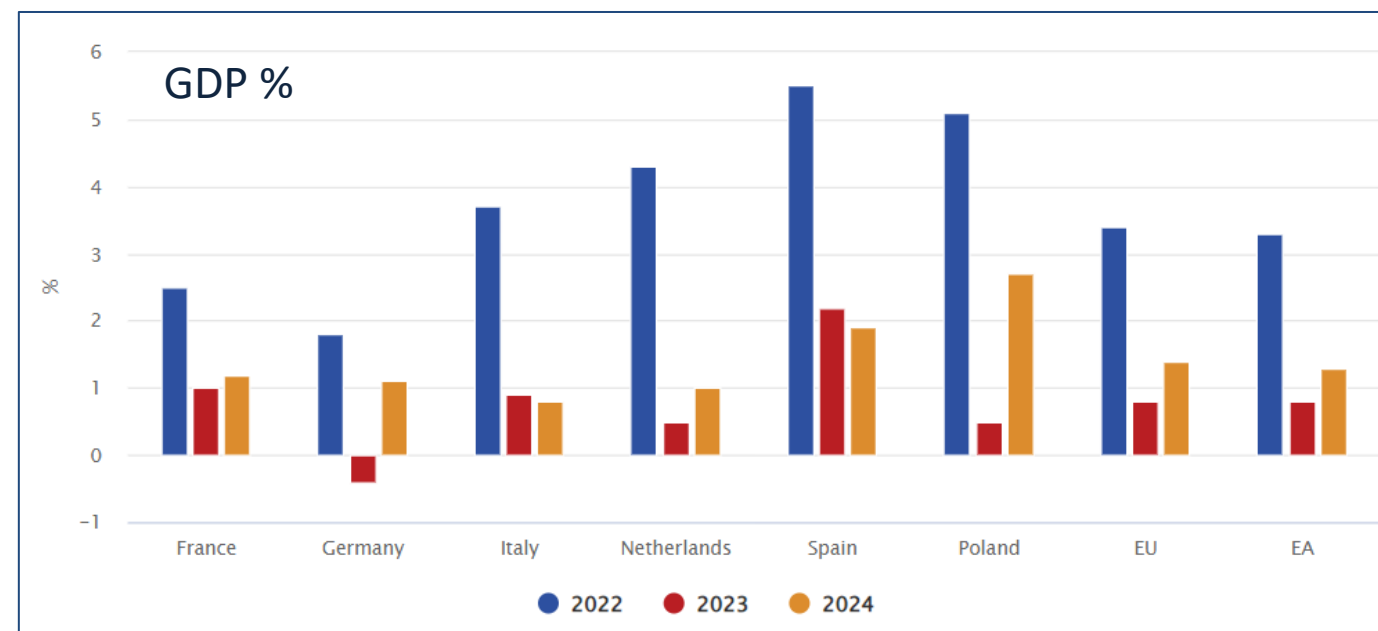
Eurozone Outlook

未来预测（欧盟-2023 年度夏季预测）

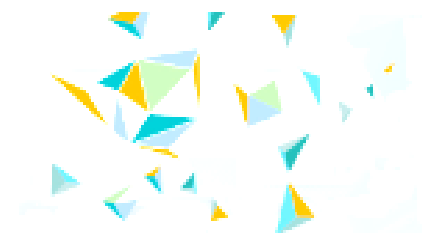
Source: Oxford Economics; EU commission

来源：欧盟

(Annual percentage changes unless specified)						
	2021	2022	2023	2024	2025	2026
GDP	5.6	3.4	0.5	0.8	1.7	1.9
Private consumption	4.1	4.3	0.4	1.4	2.0	2.0
Fixed investment	3.6	2.9	0.7	0.9	3.2	3.0
Government consumption	4.1	1.4	0.0	0.7	0.7	0.7
Exports of goods and services	8.7	8.1	-0.5	2.4	3.1	2.5
Imports of goods and services	11.0	7.2	0.6	2.4	2.8	2.5
Industrial production	8.8	2.1	-1.5	0.5	2.6	2.3
Consumer prices	2.6	8.4	5.6	2.0	1.0	1.5
Unemployment rate (%)	7.7	6.7	6.5	6.6	6.5	6.4



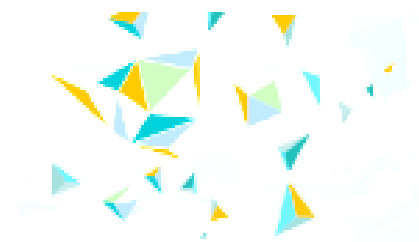
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EU Outlook: Automation, Energy and Sustainability

欧盟展望： 自动化、能源和可持续性







BT levio

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EU Green Deal – A tsunami of new legislation

欧盟绿色交易--海啸般的新立法

EU Green Deal aims to transform Europe into a
Net Zero & Circular Economy

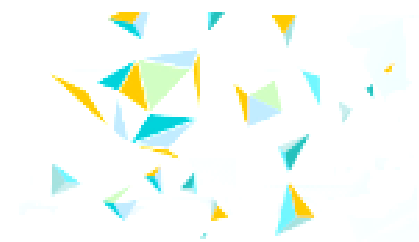
Accelerated pace & scope

- 100 new EU laws identified since 2020, over 50 identified potentially impacting TMHE
- > 3,000 pages of new legislation

Business models will have to change due to:

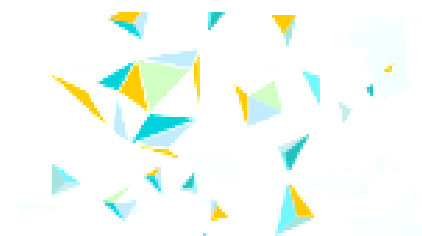
- radical transparency at company & product level
- customers obliged to do due diligence on suppliers
- new carbon taxes for customers, operations & suppliers
- significant fines (e.g. 5% of revenues in Germany)
- 1 trillion EU funding available

Mandatory reporting on “**material sustainability issues**”



Key sustainability related EU Regulations analyzed in the regulatory assessment 监管评估中分析的与可持续性相关的主要欧盟法规

The regulatory assessment covers EU regulations that will require TIE sustainability reporting and the establishment of a sustainability due diligence process at the Group level. It also covers related regulations impacting specific subsidiaries that may require a degree of Group level oversight and coordination, given their likely close links to sustainability topics on which TIE will be disclosing.



EU Green Deal – Legislation classified according to European Sustainability Reporting Standards structure 欧盟绿色交易--根据《欧洲可持续发展报告标准》结构分类的立法 (1)

E : Environment	S: Social	G: Governance
ESRS E1: Climate change Energy Efficiency Directive (EED) Energy Taxation Directive (ETD) Renewable Energy Directive (RED) Alternative Fuels Infrastructure Regulation (AFIR) Carbon Border Adjustment Mechanism (CBAM) Climate Law (CL) Emissions Trading System (ETS) ETS for Buildings & Transport (ETSBT) Refuel Aviation Directive (RAD) Fuel Maritime Initiative (FMI) Industrial Emissions Directive (IED) Key actions of the EU Hydrogen Strategy	ESRS S1: Own workforce Just Transition Plan European Works Council (EWC) Framework Agreement on Teleworking (FAT) H&S at Work Framework Directive (HSFWFD) International Labour Organization (ILO) Personal Protective Equipment Directive (PPE) Pay Transparency Directive (PTD)	ESRS 1: General Principles
ESRS E2: Pollution Persistent Organic Pollutants Regulation (POPS) REACH regulation (Registration, Evaluation, Authorization, Restriction of Chemicals) Restriction of Hazardous Substances Directive (ROHS) Packaging and Packaging Waste Directive (PPWD) Packaging and Packaging Waste Regulation (PPWR) Waste Electrical & Electronic Equipment Directive (WEEE) Waste Framework Directive (WFD)	ESRS S2: Workers in the value chain Conflict Minerals (CM) Due Diligence Guidance for Responsible Supply Chains of Minerals (CM OECD) Forced Import Labor Regulation (FLIR) Sectoral Social Dialogue (SSD)	ESRS 2: General Strategy, governance, materiality assessment & disclosure requirements Corporate Sustainability Reporting Directive (CSRD) Taxonomy Directive (TAX) Corporate Sustainability Due Diligence Directive (CSDDD) Non-Financial Reporting Directive (NFRD) Criteria Against Greenwashing and Misleading Environmental Claims (CAGMEC) Better Regulation (BREG)



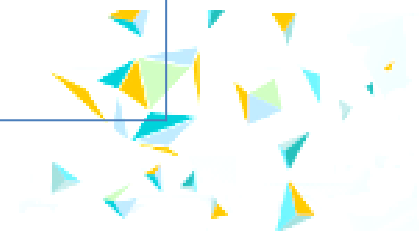
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EU Green Deal – Legislation classified according to European Sustainability Reporting Standards structure 欧盟绿色交易--根据《欧洲可持续发展报告标准》结构分类的立法 (2)

E : Environment	S: Social	G: Governance
ESRS E3: Water and marine resources	ESRS S3:Affected communities	
ESRS E4: Biodiversity & ecosystems Regulation on deforestation-free products (RDFP) EU Habitats Directive (EUHD)	ESRS S4: Consumers & end-users General Data Protection Regulation (GDPR) Machinery Directive (MD) Safety of Industrial Trucks (EN1175)	ESRS G1: Governance, risk management, and internal control Whistleblowers Directive (WD) Network & Information Security Directive (NIS) Network & Information Security Directive 2 (NIS2) Sustainable Finance Package 2023 (SFP23)
ESRS E5: Resource use & circularity Battery Directive (BD) Battery Regulation (BR) Circular Economy Action Plan (CEAP) Critical Raw Materials Act (CRMA) End-of Life Vehicles Directive (ELV) Ecodesign for Sustainable Products (ESPR) Rules promoting the repair of goods (RPRG) Ecodesign Directive (EDD)		





Closing remarks 结束语

THANK YOU
谢谢

