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未来中国工业车辆行业发展趋势

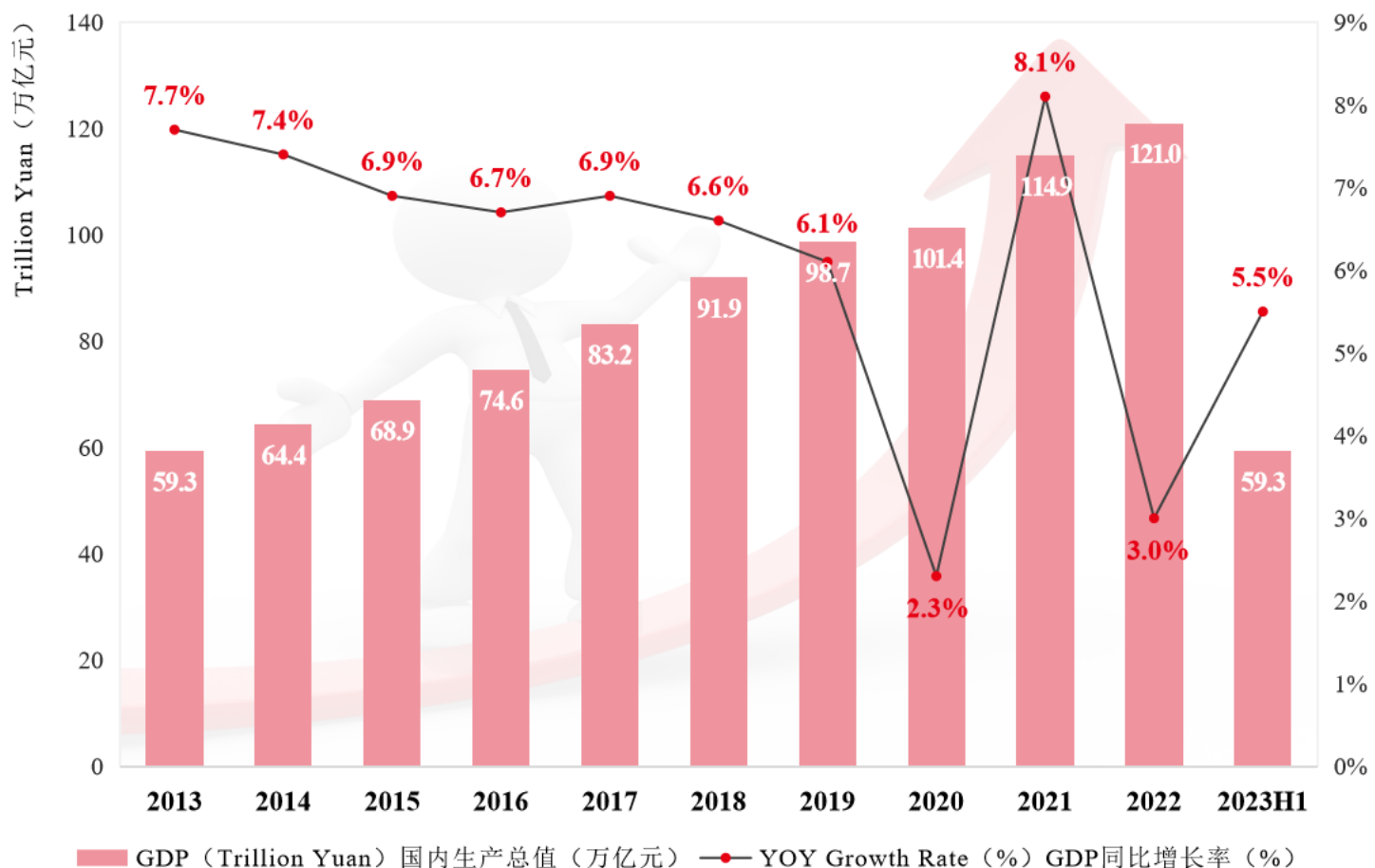
PART A

The Trend of China's Economy in Recent Years

近 / 年 / 来 / 中 / 国 / 经 / 济 / 走 / 势

1. China's GDP and GDP Growth Rate (2013-2023H1)

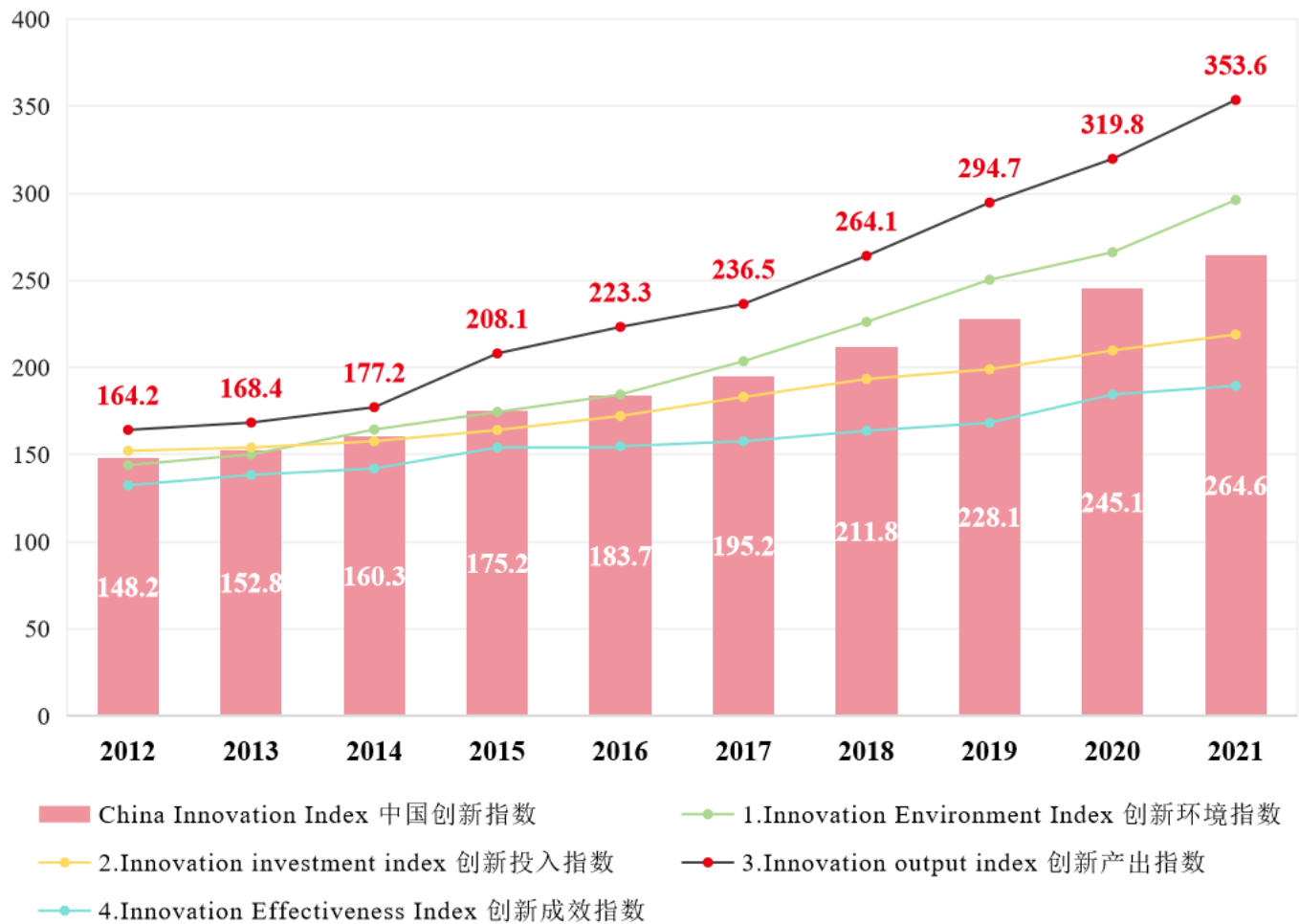
2013-2023年上半年中国国内生产总值及同比增长率



- In recent years, China's economy has entered a stage of high-quality development, with continuous growth in total volume and maintaining tremendous resilience and potential. The China's GDP reached 121 trillion yuan in 2022. In the first half of 2023, GDP grew by 5.5% year-on-year, and the annual GDP growth rate is expected to be around 5.6%.
- 近年来，中国经济进入高质量发展阶段，总量连续跃升，并保持巨大韧性和潜力。2022年实现国内生产总值121万亿元，2023年上半年GDP同比增长5.5%，全年预计GDP增长率为5.6%左右。

2. China Innovation Index (CII) and sub-sector index (2012-2021)

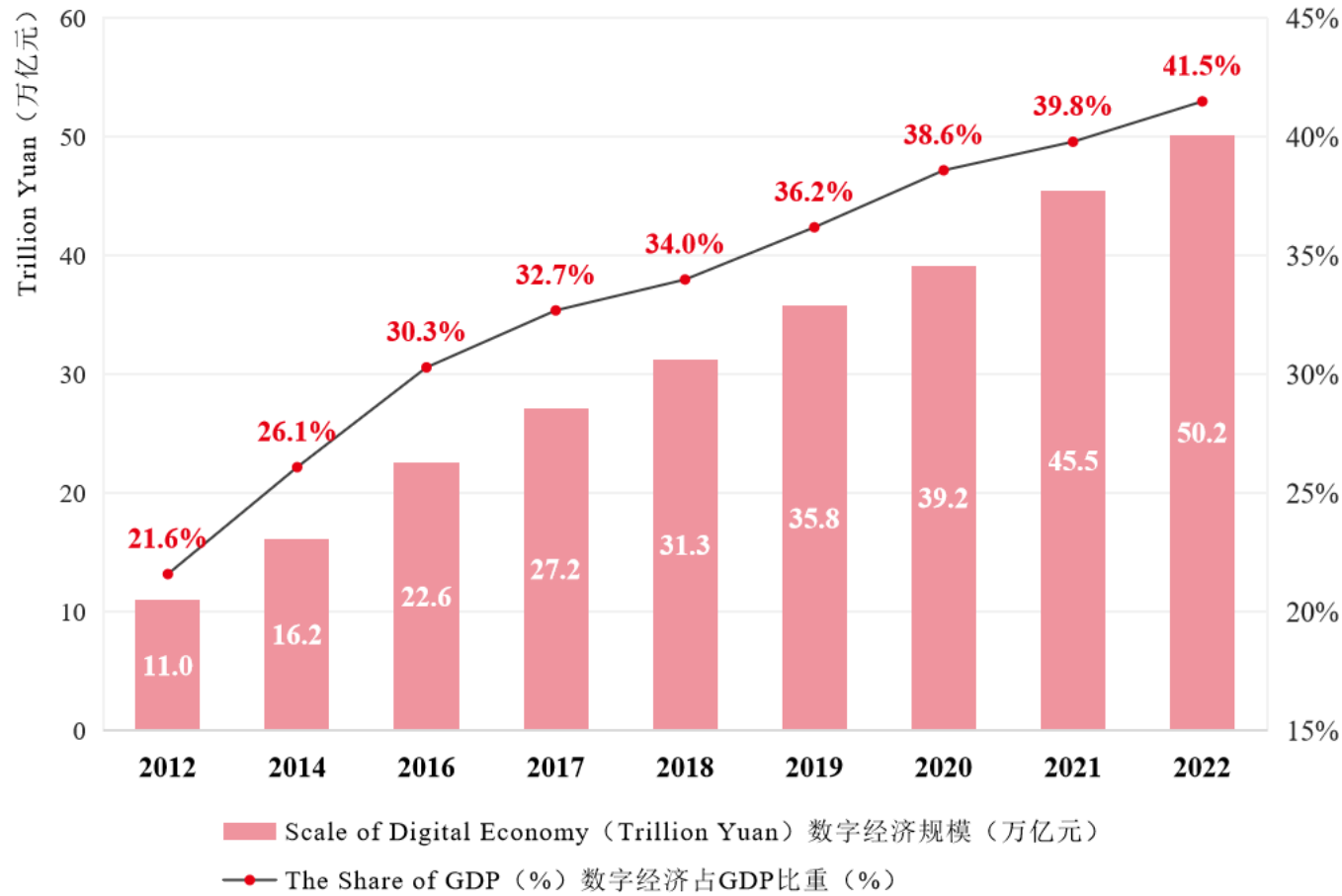
2012-2021年中国创新指数及分领域指数



- In recent years, the level of innovation-driven development in China has accelerated, and new drivers of innovation-driven development have been gathering momentum. In 2021, the CII reached 264.6 (compared to 100 in 2005), with a year-on-year increase of 8.0%, maintaining a growth trend for 16 consecutive years. In 2022, China ranked first among 36 middle- and high-income economies in the global innovation index.
- 近年来，中国创新发展水平加速提升，创新发展新动能加速聚集。2021年中国创新指数达到264.6（以2005年为100），同比增长8.0%，连续16年保持增长态势。2022年全球创新指数排名位居36个中高收入经济体之首。

3. The Scale of China's Digital Economy and its Share of GDP (2012-2022)

2012-2022年中国数字经济规模及其占GDP比重



□ In recent years, the vitality of China's digital economy has been continuously released, becoming an important engine for China's stable growth and transformation. In 2022, the scale of China's digital economy reached 50.2 trillion yuan, accounting for 41.5% of GDP. It is expected that the scale of China's digital economy will exceed 60 trillion yuan in 2025, accounting for more than 50% of GDP.

□ 近年来，中国数字经济发展活力持续释放，成为中国稳增长促转型的重要引擎。2022年中国数字经济规模达50.2万亿元，占GDP比重为41.5%。预计到2025年中国数字经济规模将超60万亿元，占GDP的比重也将超50%。

4. China's share of global green trade has increased by 2.3% in the past 10 years

10年间中国绿色贸易规模全球占比提升2.3个百分点

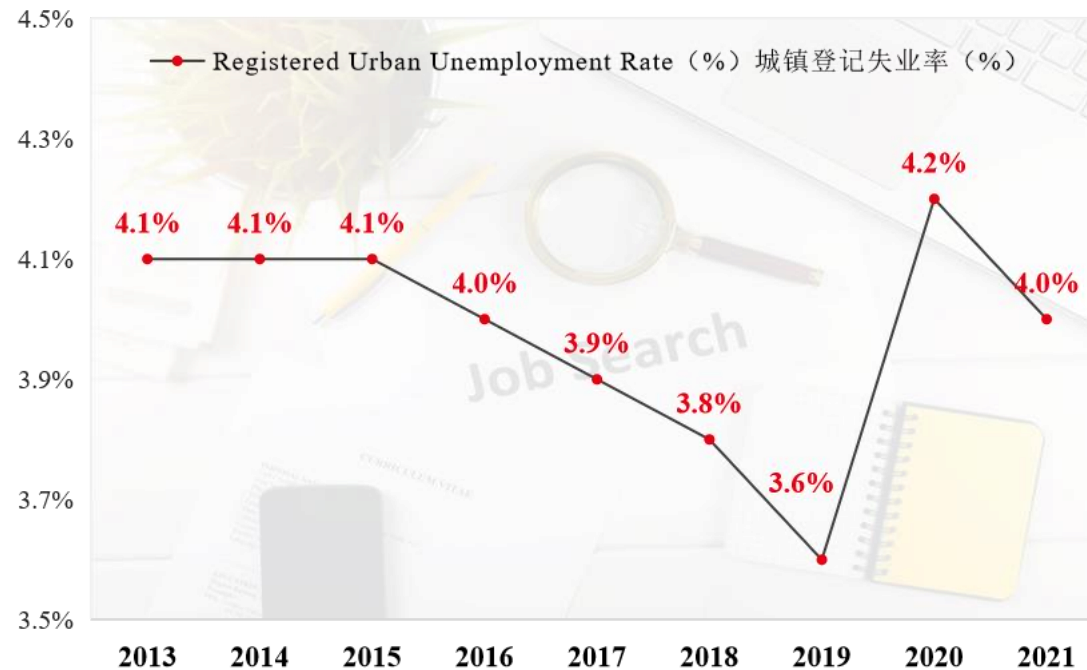


- 中国坚定不移走生态优先、绿色发展之路，积极推动经济社会发展全面绿色转型。近年来，中国绿色贸易规模持续增长，在全球绿色贸易总额中的占比呈逐年扩大趋势。
- 以电、光、锂“新三样”即电动汽车、光伏产品、锂电池的出口为代表，中国高技术、高附加值、引领绿色转型的产品成为出口新增长点。2022年，电动汽车、光伏产品、锂电池出口分别同比增长131.8%、67.8%、86.7%。

- China has firmly prioritized eco-environmental conservation and green development, promoted the comprehensive green transformation of economic and social development. In recent years, the scale of China's green trade has continued to grow, and its proportion in the total global green trade has been increasing year by year.
- High-tech, high-value-added and green products, which are now typically represented by “Three New Things” : Electric vehicles, photovoltaic products, lithium batteries, are now taking the lead of export growth. In 2022, China's exports of electric vehicles, photovoltaic products and lithium batteries increased by 131.8%, 67.8% and 86.7% year-on-year, respectively.

5. China's Registered Urban Unemployment Rate (2013-2022)

2013-2022年中国城镇登记失业率

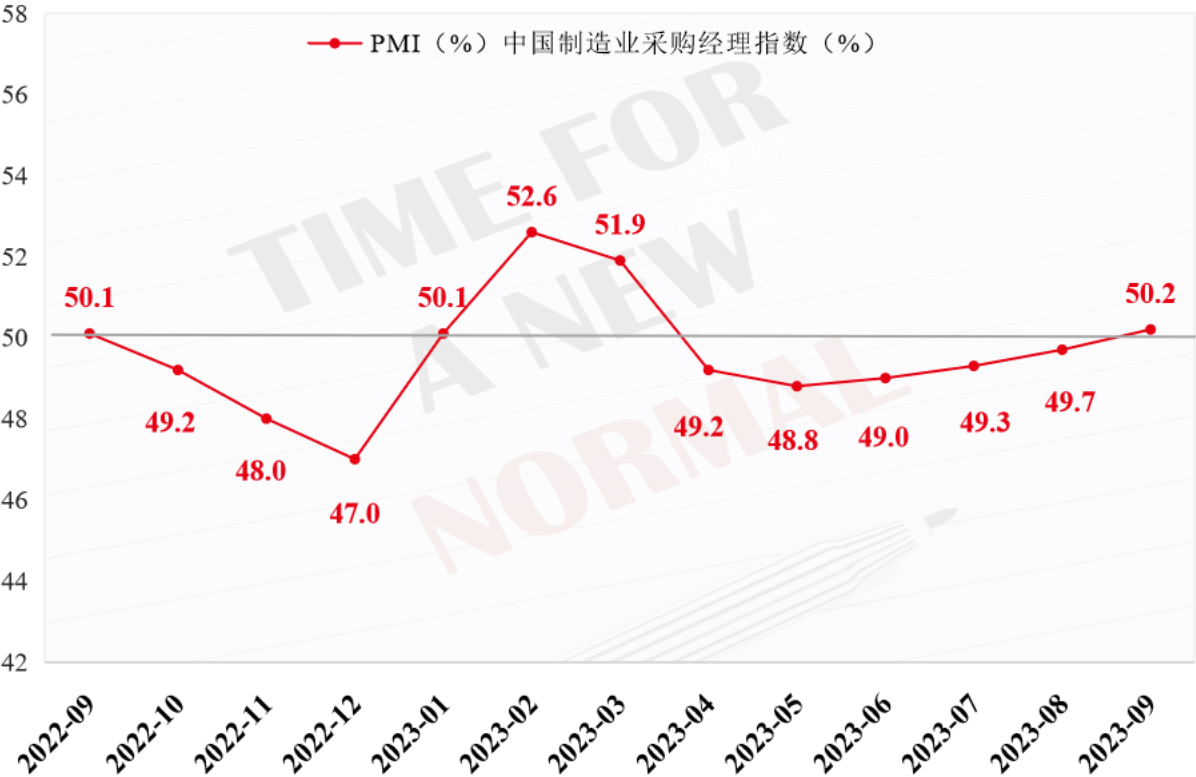


- The China's economy has strong resilience, great potential, and abundant vitality, the long-term sound fundamentals have created favorable conditions for long-term employment stability, while innovation and entrepreneurship also provide strong momentum, and new employment growth opportunity continue to emerge.
- In 2022, 12.06 million new jobs were created across the country, exceeding the target of 11 million new jobs expected at the beginning of the year, showing that employment situation remains stable.

- 中国经济韧性强、潜力大、活力足，长期向好的基本面为就业长期稳定创造了良好条件，同时创新创业也提供强大动能，新的就业增长点不断涌现。
- 2022年，全国城镇新增就业1206万人，超额完成1100万人的全年目标任务，就业形势总体保持稳定。

6. China Purchasing Managers' Index (PMI) (2022.09-2023.09)

2022年9月-2023年9月中国采购经理指数

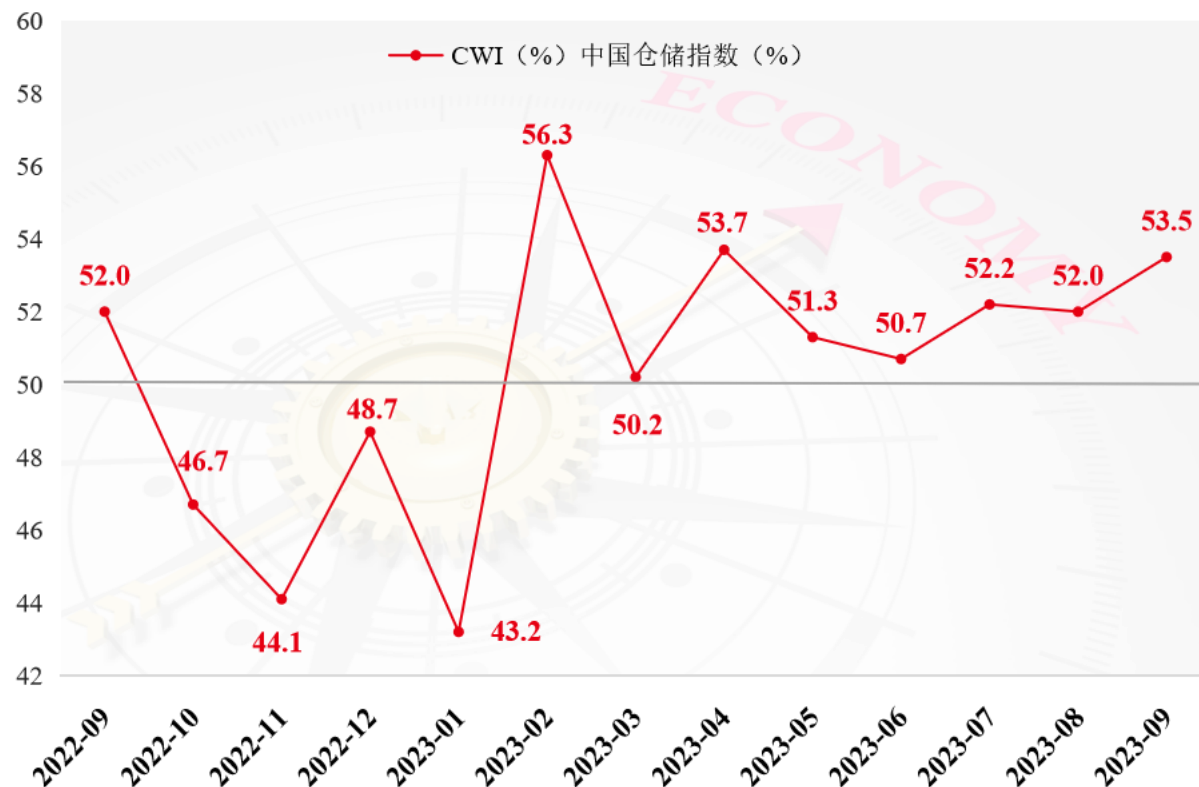


□ The China's PMI increased for the fourth consecutive month in September to 50.2%, with an increase of 0.5% from the previous month. Sub-indexes such as production, new orders also rose month on month, indicating a positive recovery in market supply and demand, and the momentum of economic recovery will be further consolidated.

□ 9月份中国制造业采购经理指数为50.2%，较上月上升0.5个百分点，连续4个月上升。生产、新订单等分类指数也环比上升，市场供需回升向好，向后经济向好回升势头将进一步巩固。

7. China's Warehousing Index (2022.09-2023.09)

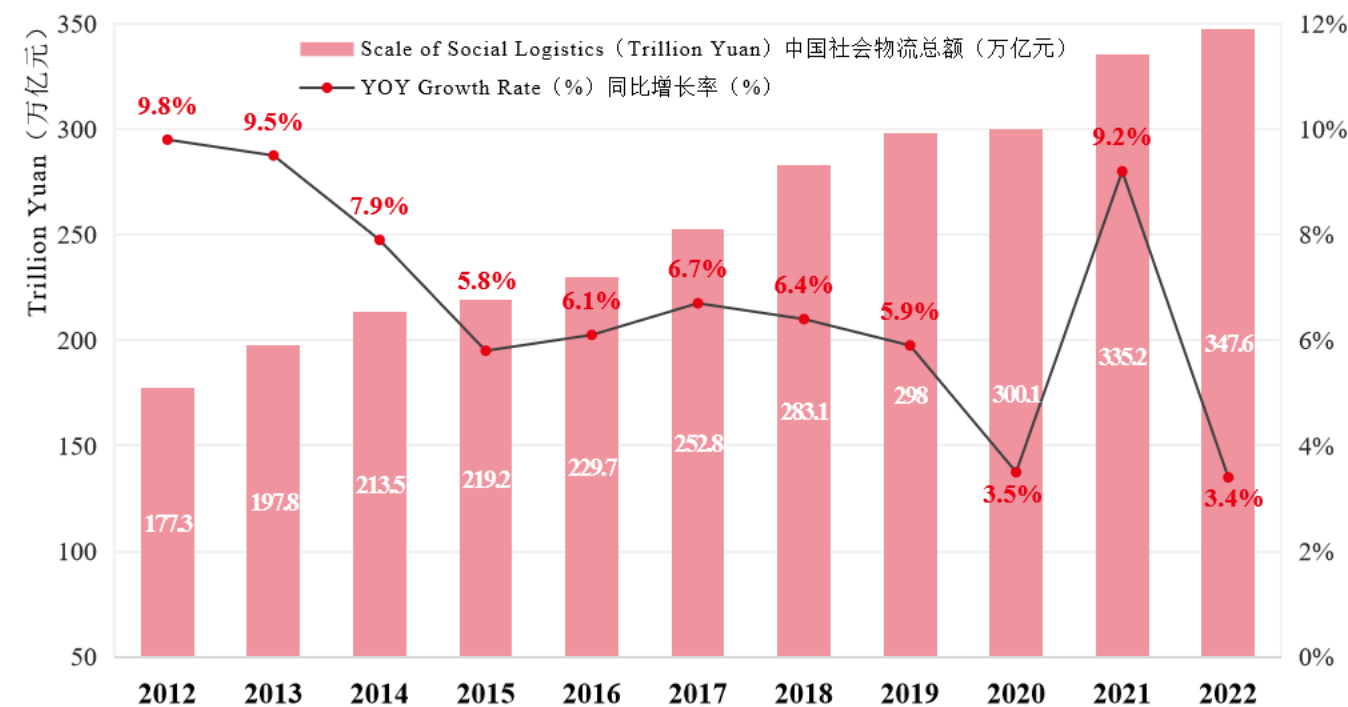
2022年9月-2023年9月中国仓储指数



- The China's Warehousing Index in September was 53.5%, maintaining an expansion range for eight consecutive months. Sub-indexes such as new orders, business volume have rebounded, indicating that the demand for warehousing business continues to pick up. The industry is expected to maintain a stable and positive trend.
- 9月份中国仓储指数为53.5%，连续8个月保持在扩张区间，新订单、业务量等指数均有回升，仓储业务需求持续回暖，行业将继续保持平稳向好运行态势。

8. The Scale of China's Social Logistics and its Growth Rate (2012-2022)

2012-2022年中国社会物流总额及同比增长率



- 作为国民经济产业链供需衔接和实体商品流通的重要基础，近年来中国物流需求规模持续稳定增长。2022年全国社会物流总额实现347.6万亿元，同比增长3.4%。
- 其中，工业物流需求对社会物流总额增长贡献率超过70%，发挥了“压舱石”作用。预计向后中国物流市场规模将保持较快增长，同步带动工业车辆行业蓬勃发展。

- As an important foundation for the connection of supply and demand in the industrial chain of the national economy and the circulation of physical goods, the scale of China's logistics demand has continued to grow steadily in recent years. In 2022, the total amount of social logistics in the country will reach 347.6 trillion yuan, a year-on-year increase of 3.4%.
- Among them, industrial logistics demand contributes more than 70% to the total growth of social logistics, playing the role of “ballast stone”. It is expected that the scale of China's logistics market will maintain rapid growth in the future and promote vigorous development to China's industrial vehicle industry.

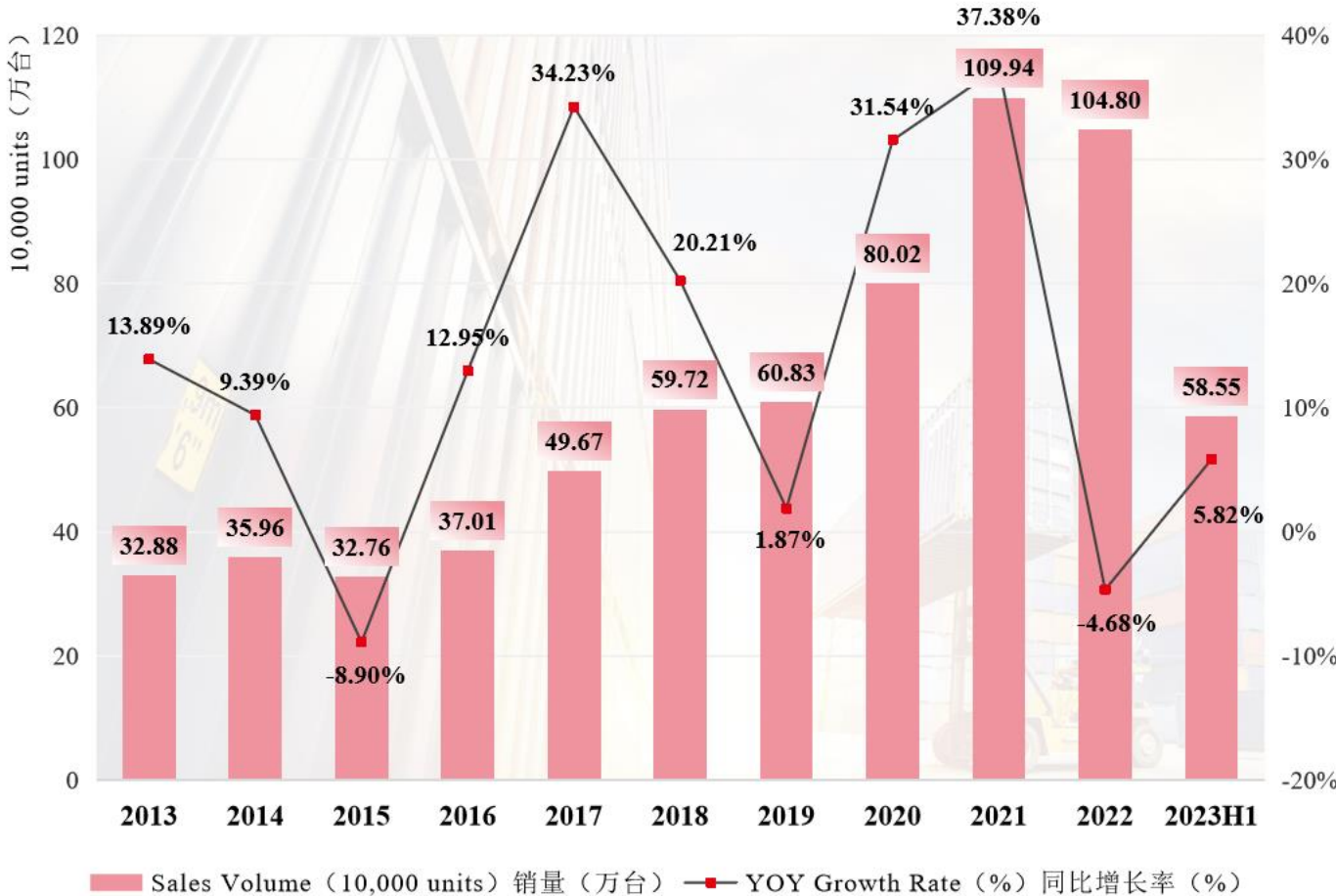
PART B

Current Situation of Industrial Vehicle Industry in China

当 / 前 / 中 / 国 / 工 / 业 / 车 / 辆 / 行 / 业 / 发 / 展 / 现 / 状

1. China's Sales Volume of Industrial Trucks (2013-2023H1)

2013-2023年上半年中国工业车辆销量

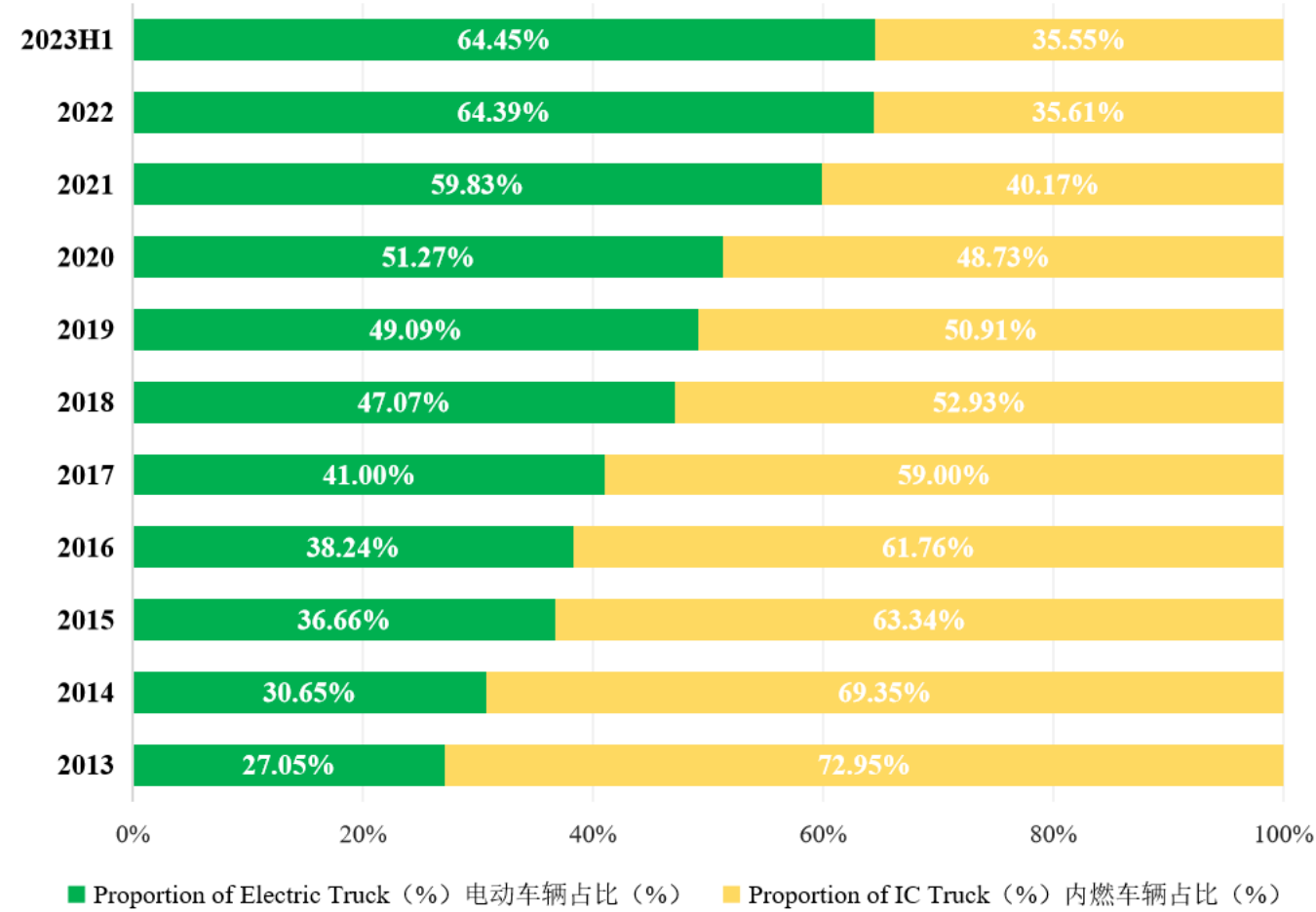


□ In recent years, the overall scale of China's industrial vehicle market has grown rapidly. In 2021, the industry's sales volume exceeded 1 million units for the first time. In 2022, the domestic market was in an adjustment period and the export market growth rate narrowed, causing industry's sales volume decreased by 4.68% year-on-year to 1.048 million units. In the first half of 2023, the industry trend turned from decreasing to increasing, with a year-on-year increase of 5.82%.

□ 近年来，中国工业车辆市场总体规模快速增长。2021年行业销量首破100万台大关，2022年国内市场处于调整期，出口市场涨幅收窄，行业销量同比下降4.68%至104.8万台。2023年上半年行业趋势由降转升，同比增长5.82%。

2. Proportion of Electric Truck vs. IC Truck in China (2013-2023H1)

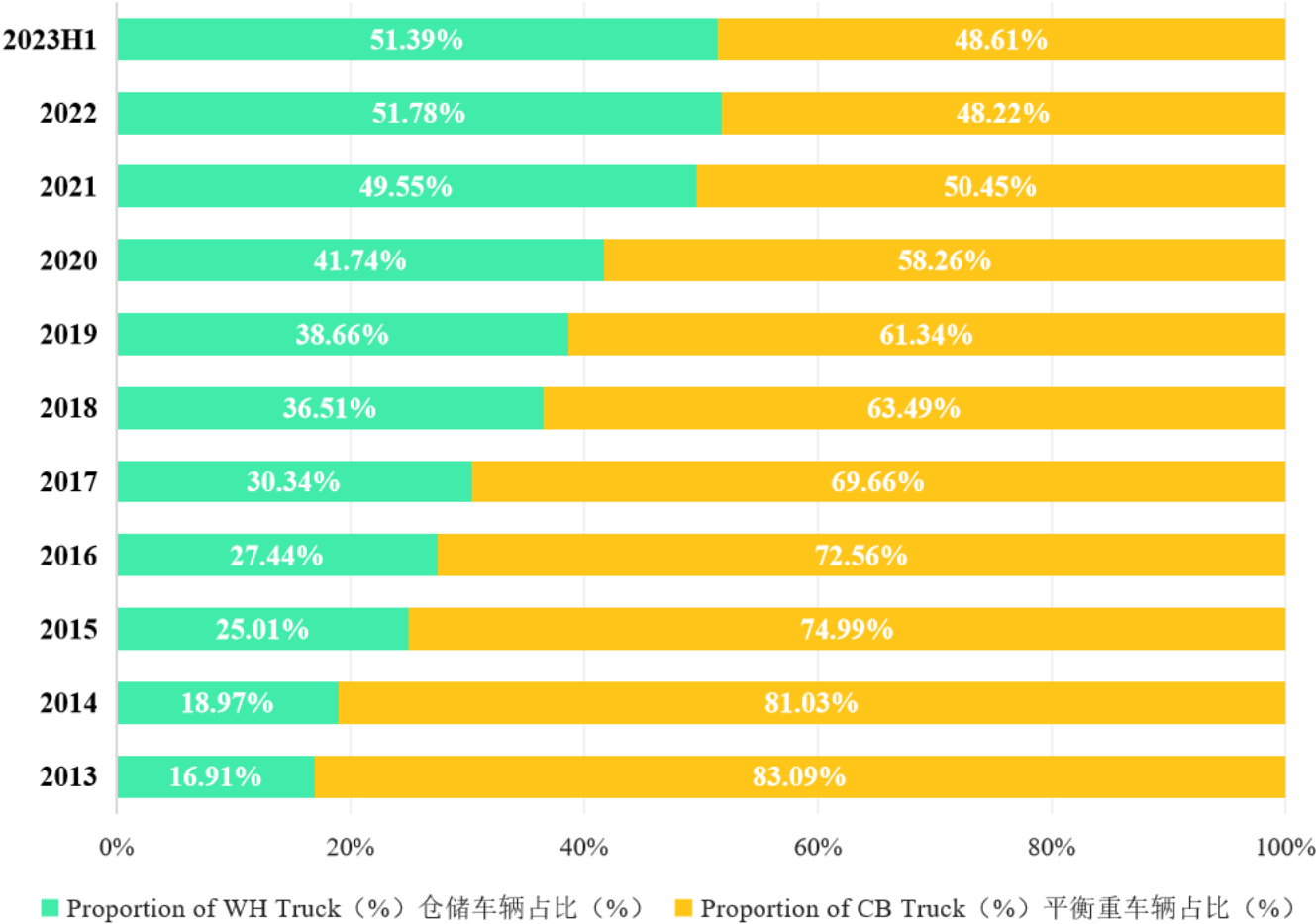
2013-2023年上半年中国市场电动车与内燃车比例变化情况



- In recent years, the electrification of China's industrial vehicle market has continued to advance, and the electrification rate of products has further increased from less than 30% in 2013 to 64% in 2022. The competitiveness of products represented by lithium battery forklifts (a type of new energy) and light and electric storage vehicles has been significantly improved.
- 近年来，中国工业车辆市场电动化进程持续推进，产品电动化率由2013年的不足30%进一步提升至2022年的64%。以新能源锂电池叉车、轻小型电动仓储搬运车为代表的车型竞争力明显提升，电动叉车尤其是新能源产品的出口竞争力提升迅速。

3. Proportion of CB Truck vs. WH Truck in China (2013-2023H1)

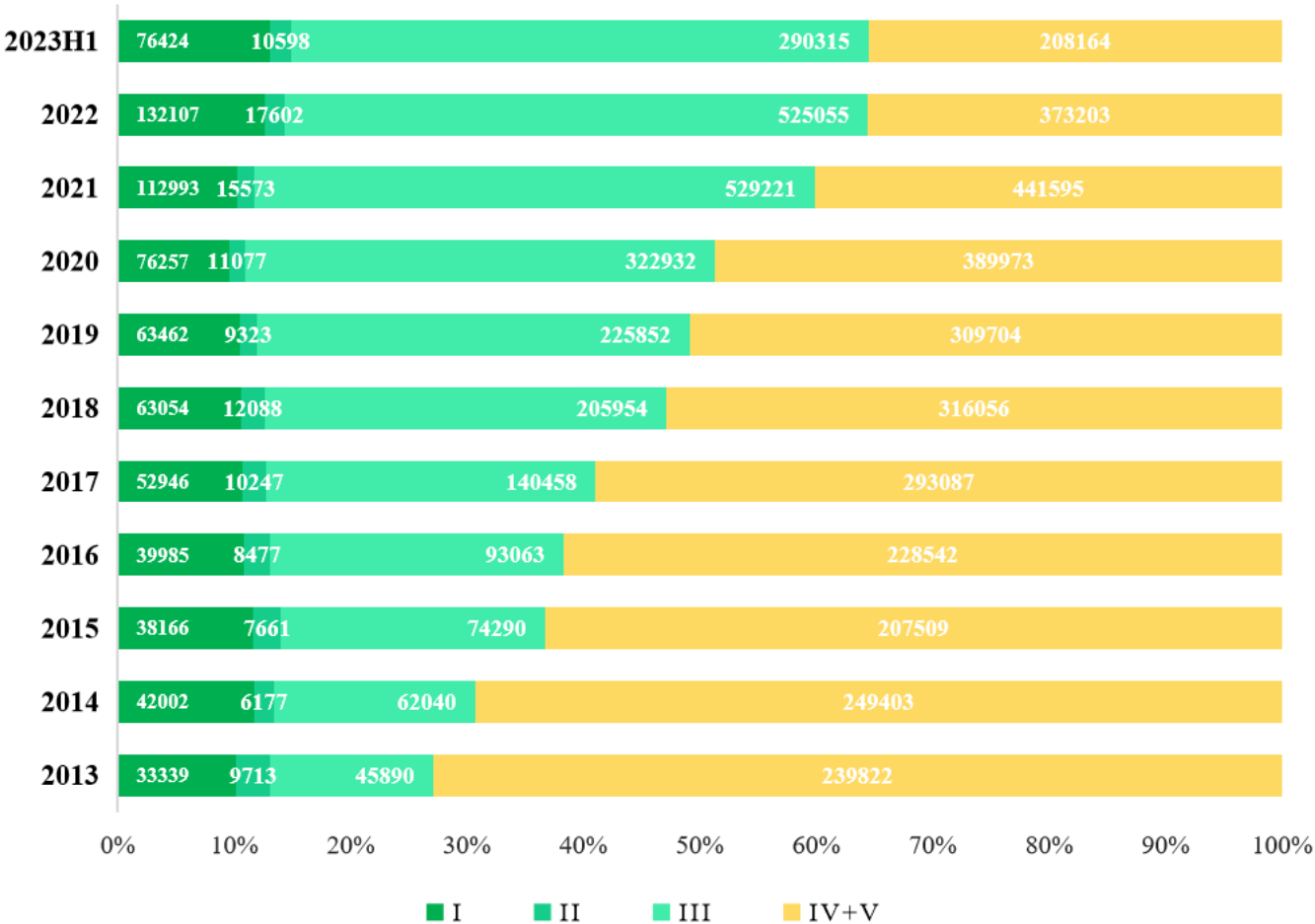
2013-2023年上半年中国市场平衡重车与仓储车比例变化情况



- In recent years, China's warehousing industry has continued to run well, and the penetration rate of warehousing vehicles has continued to increase, accounting for 51% in 2022 from 17% in 2013. With the continuous acceleration of China's urbanization process and the vigorous development of e-commerce, the demand for warehousing and logistics industry remains high. This will further expand and deepen the application of warehousing vehicles and accelerate the transformation towards digitalization and intelligence.
- 近年来，中国仓储行业持续良好运行，仓储车辆渗透率不断提升，占比由2013年的17%提升至2022年的51%。随着中国城市化进程的不断加快和电子商务的蓬勃发展，仓储物流行业需求旺盛，仓储车辆应用将进一步拓展深化，并向数字化智能化方向加速变革。

4. Sales of Five Types of Industrial Trucks in China (2020-2023H1)

2013-2023年上半年中国工业车辆市场各类车型销售情况

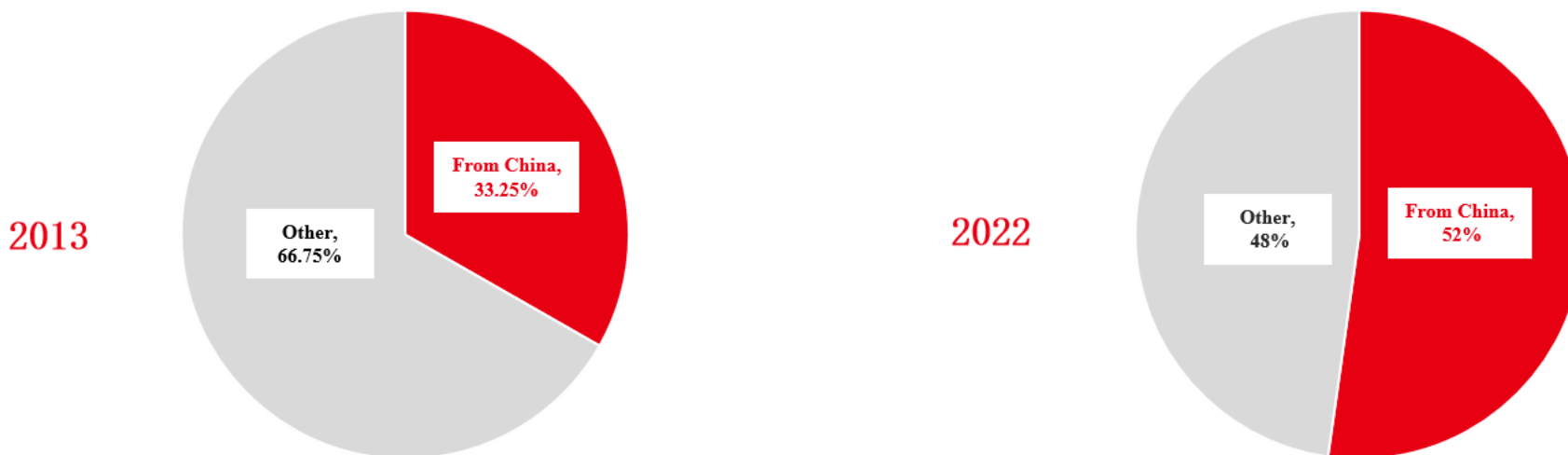


□ In recent years, China's industrial vehicle market has also developed more evenly in terms of structural level. The proportion of electric counterbalanced vehicles exceeds 25%. The sales volume of light and small electric storage vehicles market beyond expectation. The scale of internal combustion vehicles market remains high, in which the competitiveness of high-end products in the incremental market is significant.

□ 近年来，中国工业车辆市场在结构层次方面发展也更加均衡。平衡重车辆中电动应用比例超过了25%；轻小型电动仓储车市场销量超预期增长；内燃车辆存量市场仍具规模，增量市场高端内燃产品竞争力优势显著。

5. The Proportion of China's Industrial Vehicle Sales to World Sales (2013 vs. 2022)

2013-2022年中国工业车辆销量占世界销量比重变化情况



- ❑ After 70 years of technology precipitation and market expansion, China's industrial vehicle industry has become more profound in technology innovation, more abundant in product range, more vital in industry market. At present, there are more than 100 industrial vehicle manufacturing enterprises, domestic and foreign-funded enterprises share industry resources to build a benign ecology. The industry sales volume has ranked first in the world for 14 consecutive years, and more than half of the world's total sales in 2022 comes from China.
- ❑ 经过70年的技术沉淀与市场拓展，中国工业车辆技术创新更加深刻，产品种类更加丰富，市场活力不断提升。目前中国工业车辆制造企业超100家，内外资企业共享行业资源共建良性生态，行业销量连续14年位居世界第一，2022年世界总销量中超一半来自中国

PART 3

Development Trend of Industrial Vehicle Industry in China

未 / 来 / 中 / 国 / 工 / 业 / 车 / 辆 / 行 / 业 / 发 / 展 / 趋 / 势

1. Targeting high-end, intelligent, and green technologies, the industry will accelerate its progress from “quantity improvement” to “quality leap”

以高端化、智能化、绿色化为发展关键词，加速从“量的提升”向“质的飞跃”迈进



- After more than 40 years of rapid development, the foundation of China's manufacturing industry from large to strong has become more solid.

经过40多年的快速发展，中国制造业由大到强的基础更加坚实。

- The national industrial policy of “support the development of Specialized and Sophisticated enterprises, and promote the high-end, intelligent and green development of the manufacturing industry” has pointed out the direction and provided fundamental guidance for accelerating the high-quality development of the manufacturing industry.

“支持专精特新企业发展，推动制造业高端化、智能化、绿色化发展”的中国国家产业政策，为加快推进制造业高质量发展指明了方向、提供了根本遵循。

- In the future, China's industrial vehicle industry will focus on the aspect of high-end, intelligent and green, continuously improve development advantages, innovate development momentum, optimize development ecology.

未来，中国工业车辆行业将聚焦高端化、智能化、绿色化方向，不断提升发展优势、创新发展动能、优化发展生态。



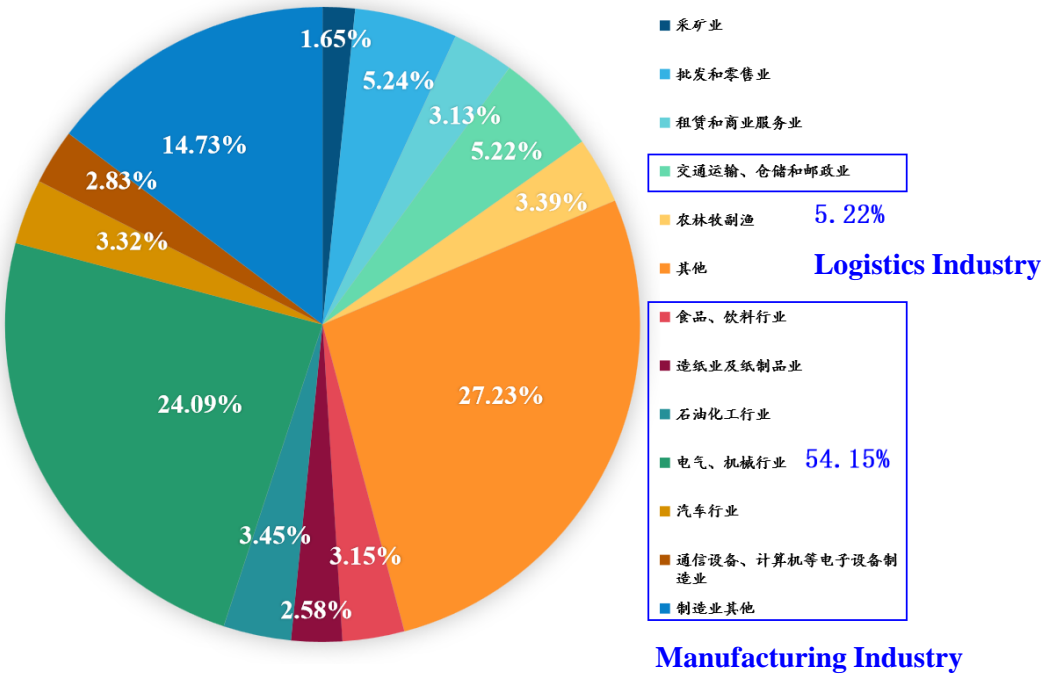
2. With the deepening of economic recovery and the long-term trend of “machine replacement”, the industry’s growth is stronger than cyclicality

景气复苏深化叠加长期“机器换人”确定趋势，行业成长性强于周期性



Industrial vehicle demand from manufacturing and logistics industries accounted for nearly 60% in 2022

2022年制造业和物流业工业车辆需求占比近60%



Since the beginning of this year, China’s national economy has continued to recover and positive factors have been accumulating. It is expected that the China’s industrial vehicle industry will usher in a new round of growth in the short term due to the recovery of the manufacturing and logistics industries.

今年以来，中国国民经济运行延续恢复向好态势，积极因素不断累积，短期有望随制造业、物流业景气复苏迎来新一轮增长。

2. With the deepening of economic recovery and the long-term trend of “machine replacement”, the industry’s growth is stronger than cyclicality

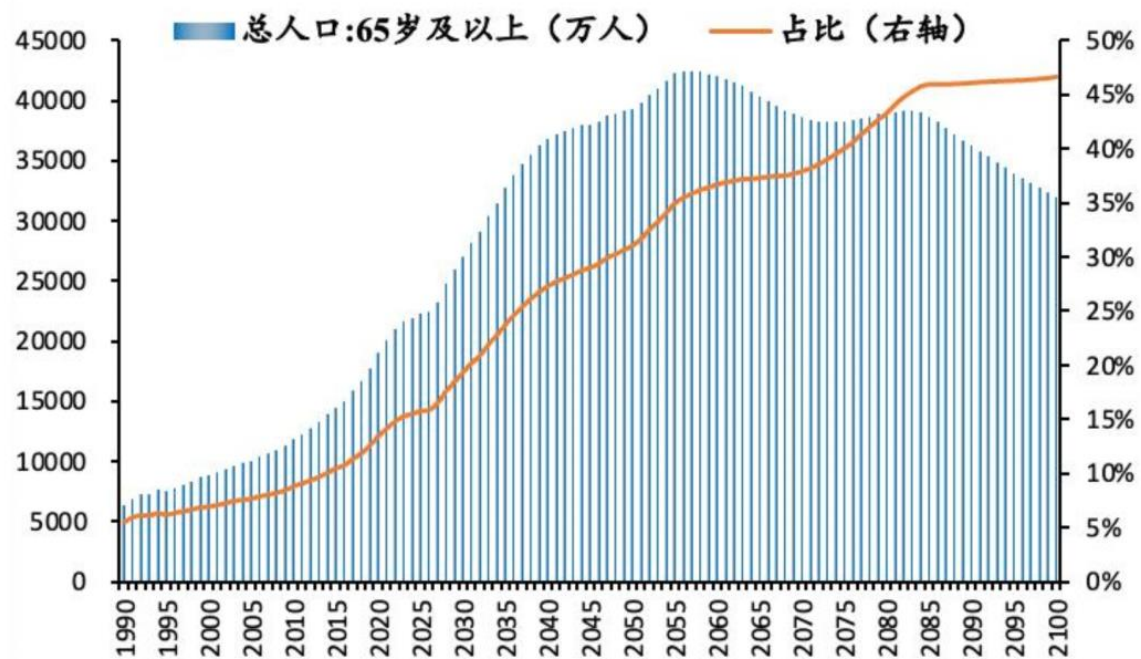
景气复苏深化叠加长期“机器换人”确定趋势，行业成长性强于周期性



The speed of population aging in China is constantly accelerating

中国人口老龄化速度加快

The population: Aged 65 or older (10000 people) Proportion in the total population (%)



- ❑ China’s population has been negative growth since 2022, which will accelerate an aging society. “Machine substitution” is a long-term driving force for the industry to transform and upgrade, which is also a definite trend that will further accelerate the industry to move towards automation, intelligence and high-end.
- ❑ 中国人口自2022年开始负增长，社会老龄化加速到来，“机器换人”是推动行业转型升级的长期驱动力，也是确定性趋势，将进一步加速行业向自动化、智能化、高端化方向迈进。

3. Aiming at the carbon peaking and carbon neutrality goals, the industry will accelerate the green and low-carbon transformation, and the application of green products will be more extensive

瞄准“双碳”目标，行业加速推进绿色低碳转型，绿色产品应用更加广泛



- ❑ “Lucid waters and lush mountains are invaluable assets”. Under the dual-carbon goal, the industry actively practices the concept of green high-quality development, unswervingly takes the professional development path of Eco-first, green and low-carbon, vigorously promotes application of electric new energy products and green transformation of the social economy. It is expected that in the next five years, the category and number of new energy-powered industrial vehicles will grow explosively, and the electrification rate is expected to exceed 80%.
- ❑ “绿水青山就是金山银山”。双碳目标下，行业积极践行绿色高质量发展理念，坚定不移走生态优先、绿色低碳的专业化发展道路，大力推进电动新能源产品应用，促进社会经济全面绿色转型。预计未来5年，新能源动力工业车辆的品类和数量将呈现爆发式增长，行业电动化率有望超过80%。



4. Deepen the integration of new-generation information technology and manufacturing industry, accelerate digital transformation and upgrading

深化新一代信息技术与制造业融合发展，加快数字化转型升级步伐



- With the rapid development and application of new generation information technologies such as cloud computing, Internet of Things, new generation mobile communication (5G), artificial intelligence (AI), and digital twins, enterprises closely focusing on the main industry of industrial vehicles and the smart logistics industry, accelerate the pace of intelligent factory construction, increase resource investment in the intelligent logistics sector, plan to build an industrial vehicle Internet platform with growth, provide first-class digital supply chain solutions based on vertical markets, promote the deep integration of informatization and industrialization, and accelerate the comprehensive transformation of digitalization.
- 随着云计算、物联网、新一代移动通信（5G）、人工智能（AI）、数字孪生等新一代信息技术快速发展并转入应用，紧紧围绕工业车辆主业、智慧物流产业，加快智能工厂建设步伐，加大智能物流板块资源投入，规划打造具有成长性的工业车辆互联网平台，提供一流的基于垂直市场的数字化供应链解决方案，促进信息化和工业化的深度结合，加快数字化全面转型。

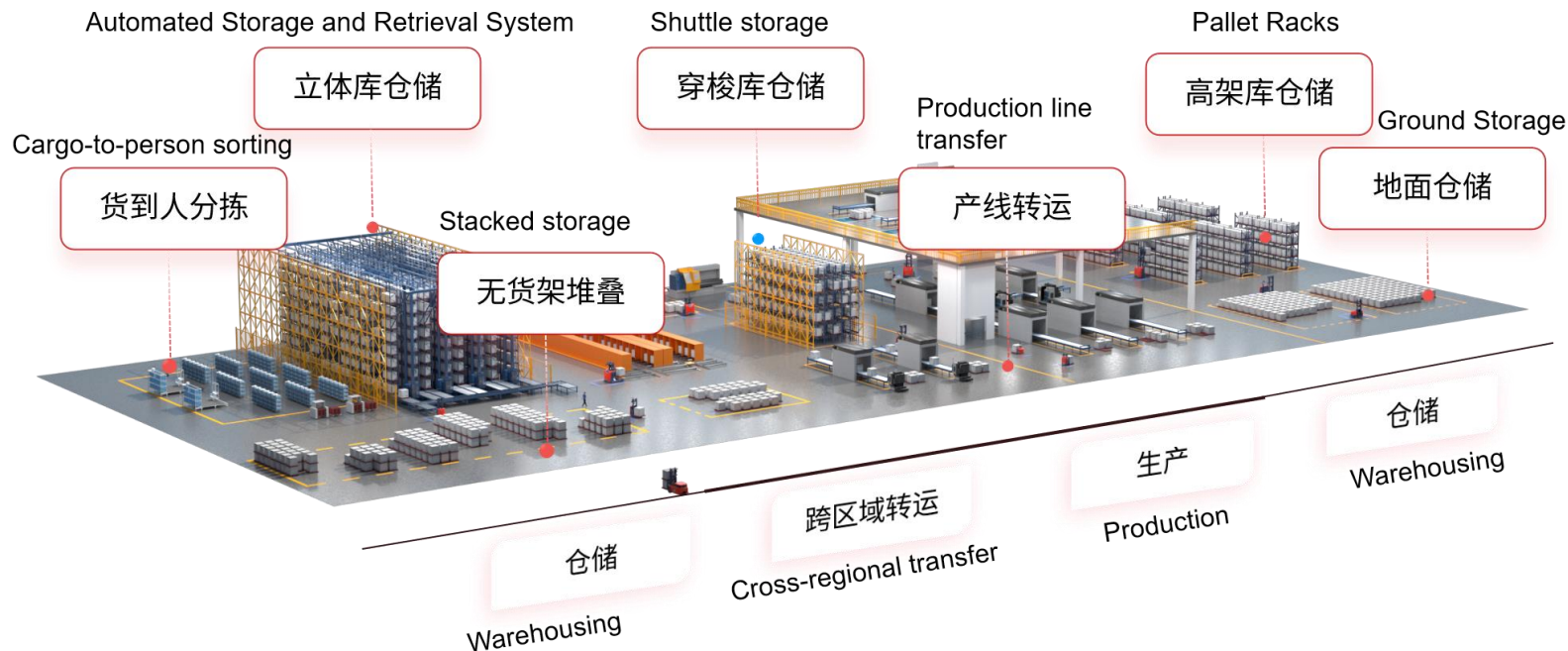


5. Accelerate the construction of “software and hardware integration” intelligent logistics solutions, moving from “Internet of Things” to “Intelligent Logistics”

加快打造“软硬件一体化”智能物流整体解决方案，从“万物互联”迈向“智慧物流”



- As the industrial system changes from “equipment-centered industry” to “software-defined industry”, the comprehensive innovation of “software and hardware integration” will shape new competitive advantages. In the future, the trend of intelligent, digital and systematic industry will be further accelerated, and “product intelligence” will be fully integrated into the “overall solution of automated logistics”, and different industries, different ecosystems and different customers will move from customized “solutions” to standardized “intelligent logistics”.



- 随着工业体系从“以装备为核心的工业”向“软件定义的工业”转变，“软硬件一体化”的全面创新将塑造新的竞争优势。未来行业智能化、数字化、系统化趋势将进一步加快，“单机智能”全面融入“自动化物流整体解决方案”，不同行业、不同生态、不同客户将从定制化“解决方案”向标准化“智慧物流”迈进。

6. The concept of sustainable development has gained popularity, and the industry is moving towards a new journey towards being more sustainable

可持续发展理念更加深入人心，行业共赴绿色可持续发展新征程



- With the transformation of the global economy to low-carbon, technological and healthy development, enterprises have a deeper understanding of the connotation of sustainable development, integrated the concept of sustainable development into the construction of governance structure and business management activities, explored the construction of ESG management and practice system with Chinese characteristics, and expanded the new situation of sustainable development of the industry with joint construction, co-governance and sharing.
- 随着全球经济向更低碳、科技、健康发展转型，企业对可持续发展内涵的理解更加深刻，纷纷把可持续发展理念融入治理架构建设和经营管理活动，探索构建具有中国特色的ESG管理与实践体系，以共建、共治、共享拓展行业可持续发展新局面。





THANK YOU

谢 谢
