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01

The Trend of China's Economy in Recent Years

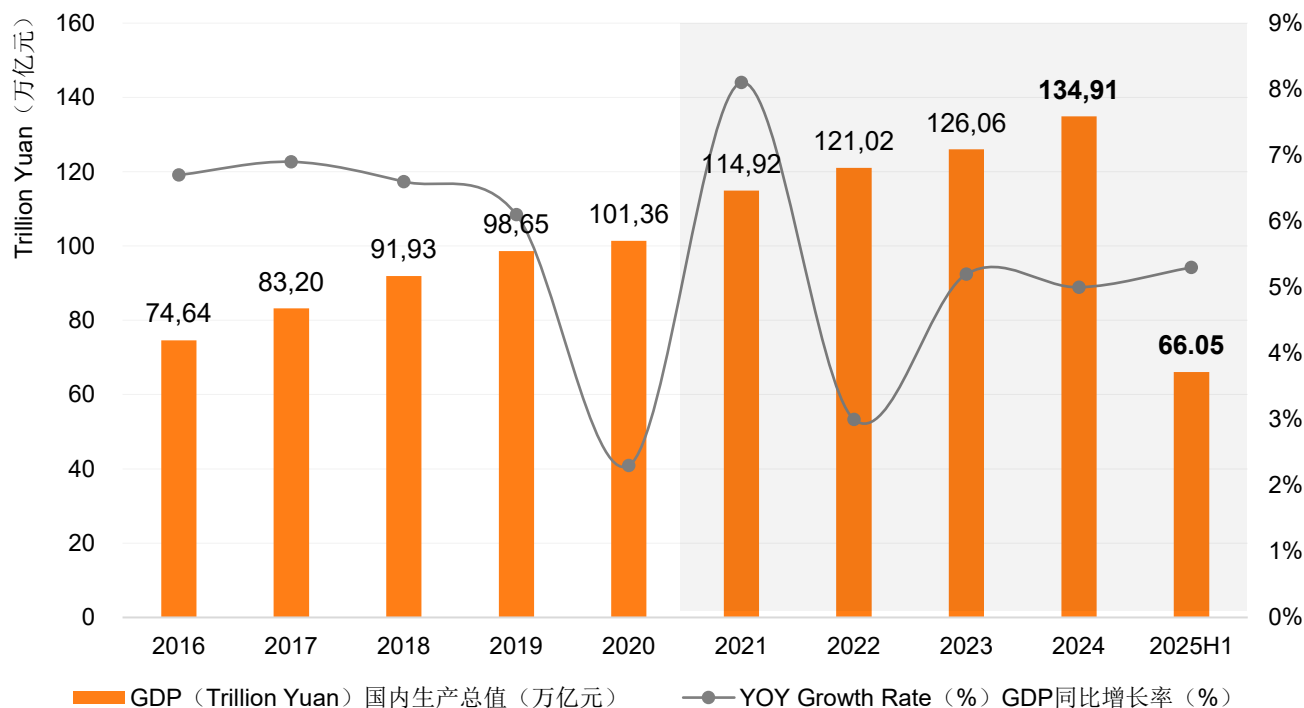
近 年 来 中 国 经 济 发 展 形 势

China's economy remains generally stable, and its GDP is projected to reach around 140 trillion yuan in 2025 中国经济运行总体平稳，预计2025年GDP将达到140万亿元左右



China's GDP and GDP Growth Rate (2016-2025H1)

2016-2025年上半年中国国内生产总值及同比增长率



- Since the launch of the 14th Five-Year Plan (2021–2025), China's economy has sustained steady expansion, with an average growth rate of 5.5%. In 2024, China's GDP exceeded 134 trillion yuan. In the first half of this year, China's GDP reached 66.05 trillion yuan, representing a year-on-year increase of 5.3%. The total economic expansion during the 14th Five-Year Plan period is projected to surpass 35 trillion yuan.
- “十四五”以来，中国经济总量持续稳步提升，经济增速平均在5.5%，2024年国内生产总值（GDP）突破134万亿元。今年上半年实现国内生产总值66.05万亿元，同比增长5.3%，“十四五”经济总量增量预计超35万亿元。

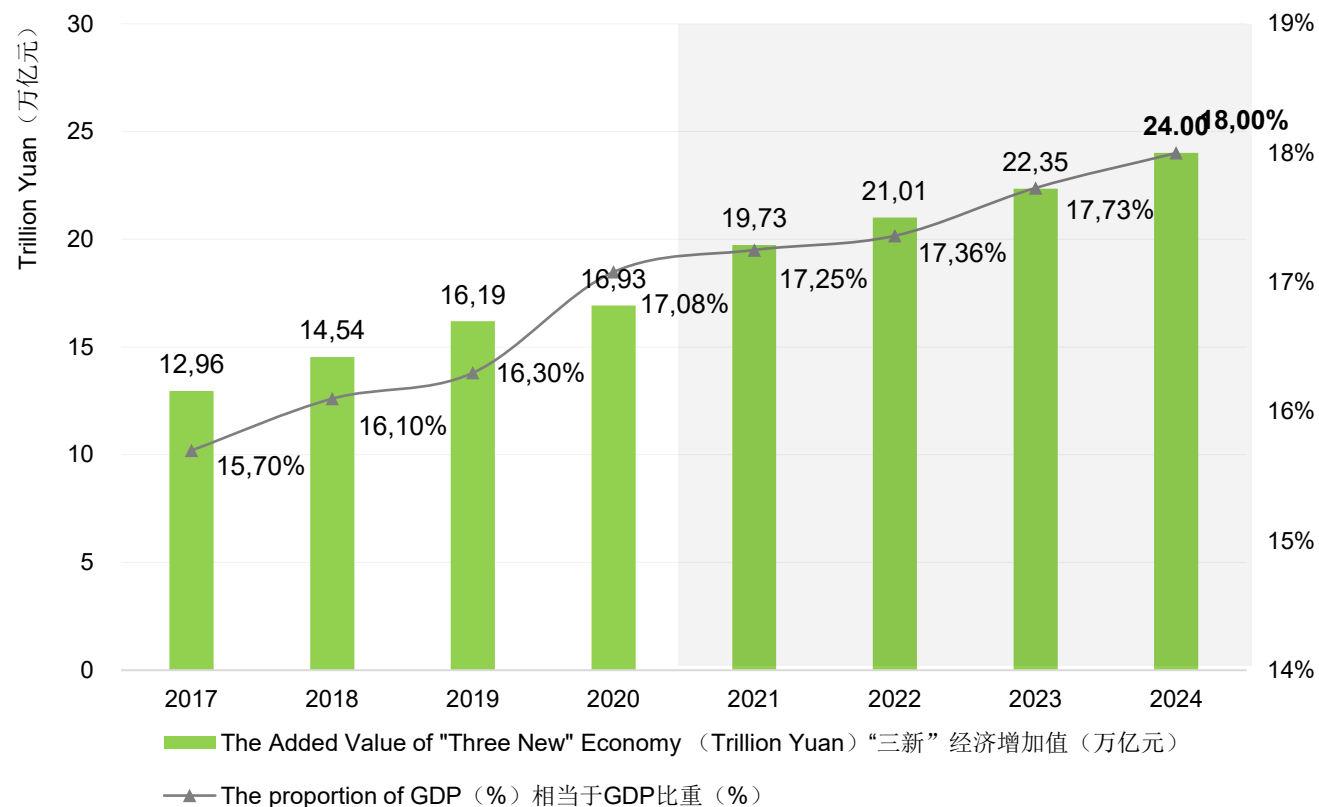
China's "Three New" economy is booming, with its value-added accounting for over 18% of GDP

中国“三新”经济蓬勃发展，最新“三新”经济增加值占GDP比重超过18%



The Added Value of China's "Three New" Economy (2017-2023)

2017-2024年中国“三新”经济增加值情况



During the 14th Five-Year Plan period (2021–2025), China has accelerated the development of new industries, new business forms, and new business models, with the value-added output of the “Three New” economy accounting for a growing share of GDP. In 2024, the value-added output of the “Three New” economy exceeded 24 trillion yuan, equivalent to the combined gross regional product of Beijing, Shanghai, and Guangdong.

“十四五”期间，中国新产业、新业态、新商业模式加速落地，“三新”经济增加值占GDP比重持续提高。2024年，“三新”经济增加值已突破24万亿元，相当于北京、上海、广东地区生产总值的总和。

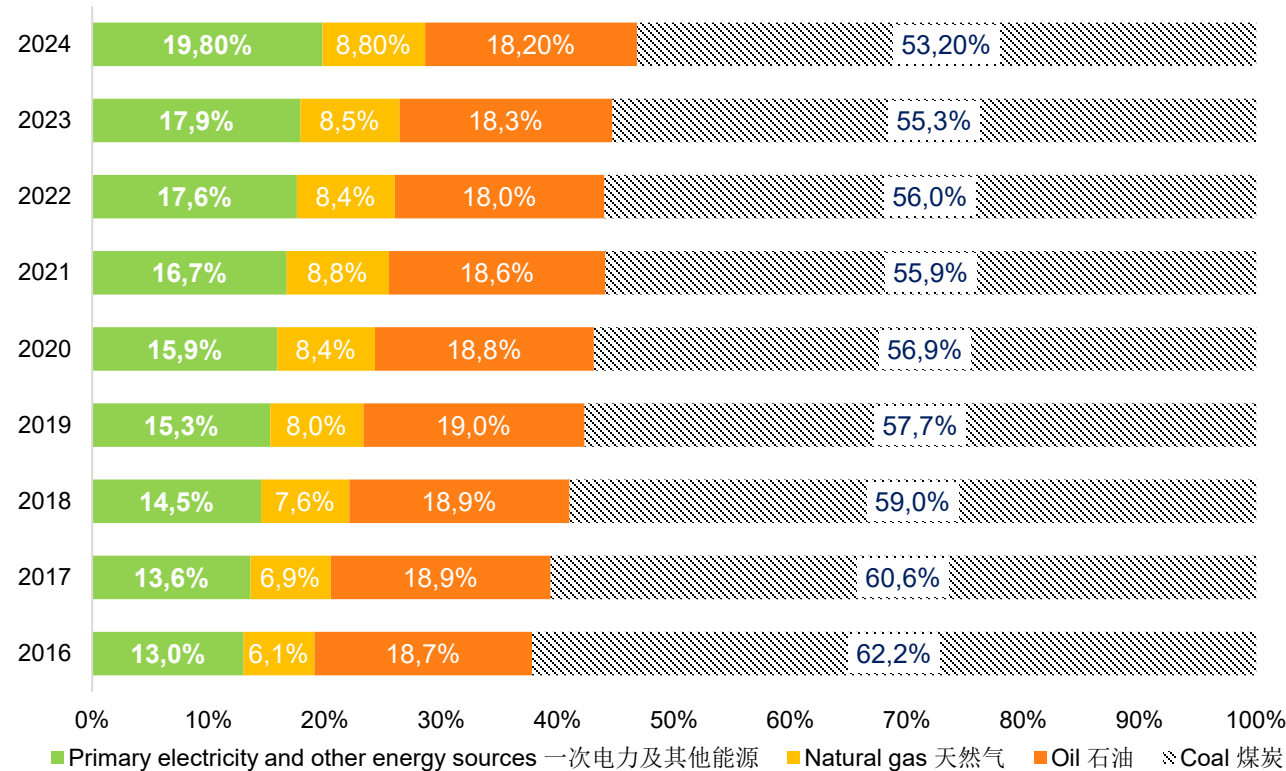


China accelerates green and low-carbon transition with non-fossil energy approaching 20% of consumption 中国绿色低碳转型步伐加快，非化石能源消费比重进一步提高至近20%



China's Energy Consumption Structure (2016-2024)

2016-2024年中国能源消费结构



- During the 14th Five-Year Plan period (2021–2025), China accelerated the establishment of a new energy system and continued to optimize its energy consumption structure. In 2024, the share of non-fossil energy consumption in China rose to nearly 20%; energy consumption per unit of GDP dropped by 11.6% compared with the end of the 13th Five-Year Plan period; and the resource productivity rate increased by approximately 12% over the same period.
- “十四五”期间，中国新型能源体系加快构建，能源消费结构持续优化。2024年，中国非化石能源消费比重进一步提高至近20%；单位GDP能耗比“十三五”末下降11.6%；主要资源产出率比“十三五”末提高约12%。

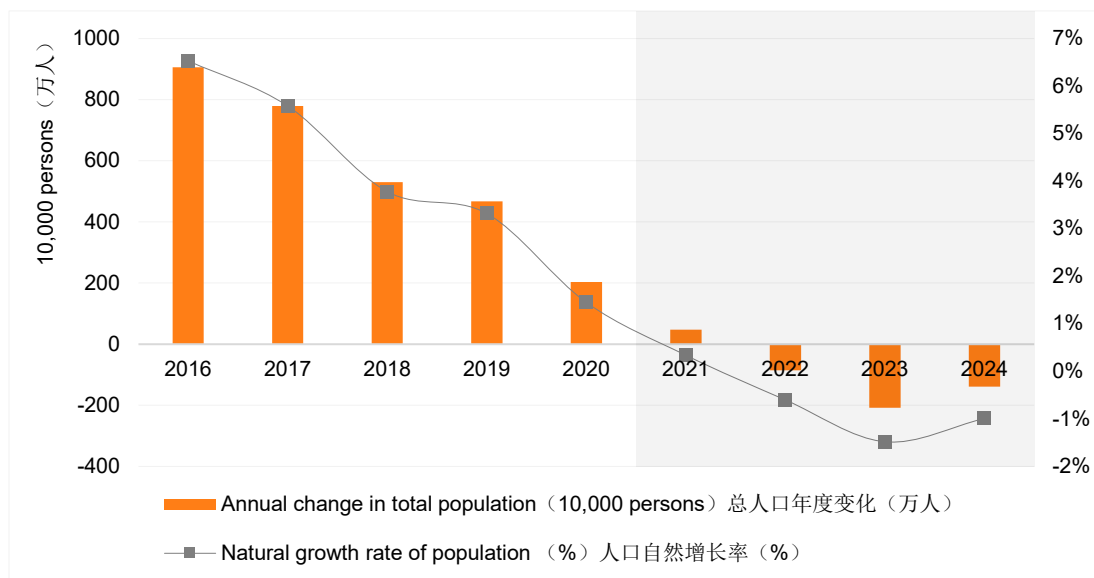
China's population has declined for three consecutive years, while the job market has remained stable

中国人口总量连续三年呈负增长态势，就业形势保持整体稳定



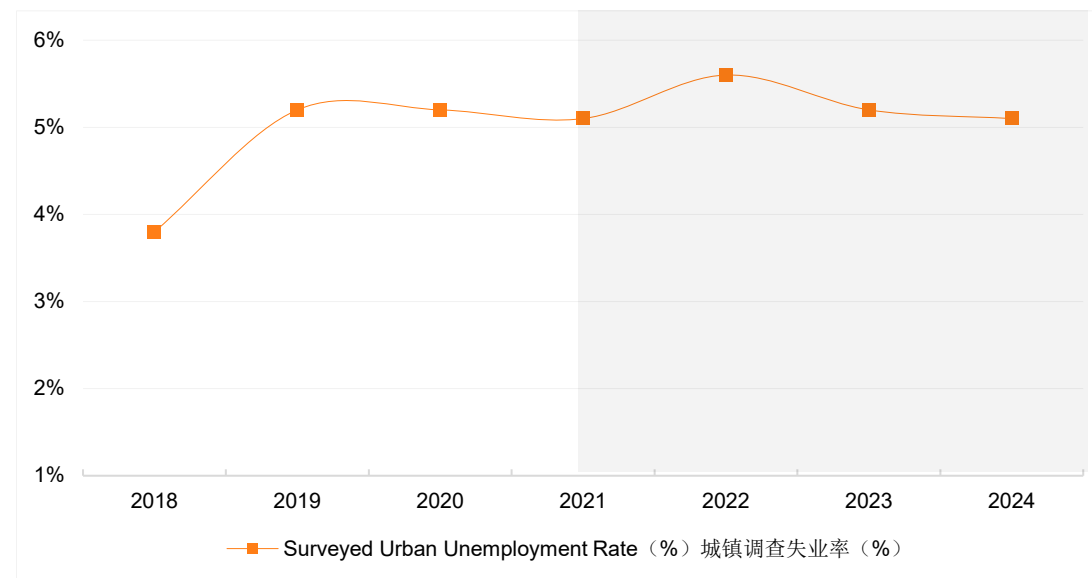
Annual Changes in China's Total Population (2016-2024)

2016-2024年中国总人口年度变化情况



Surveyed Urban Unemployment Rate (2018-2024)

2018-2024年中国城镇调查失业率



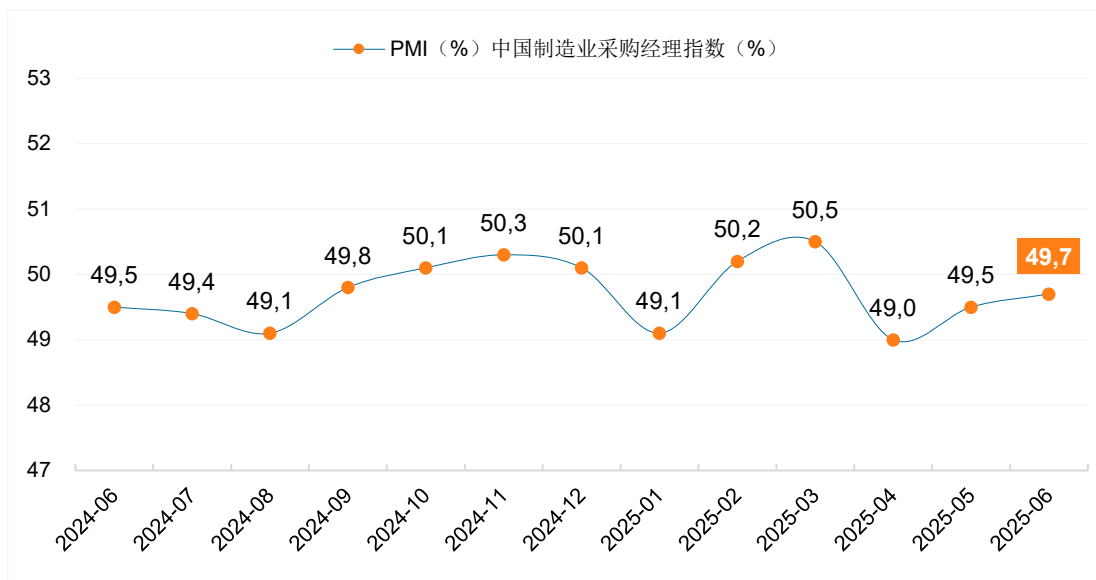
- During the 14th Five-Year Plan period (2021–2025), China's demographic development entered a phase of negative population growth, accompanied by an accelerating aging process. It is projected that the total population will fall below 1.4 billion by 2030. On the employment front, more than 12 million new urban jobs have been created annually, maintaining a relatively full employment situation.
- “十四五”时期，中国人口发展进入负增长阶段，人口老龄化加速到来。据测算，2030年总人口将降至14亿人以下。就业方面，每年城镇新增就业稳定在1200万人以上，实现了比较充分的就业。



China's manufacturing activity level remains largely stable, while the logistics sector maintains expansion momentum 中国制造业景气度基本稳定，物流业景气度保持扩张

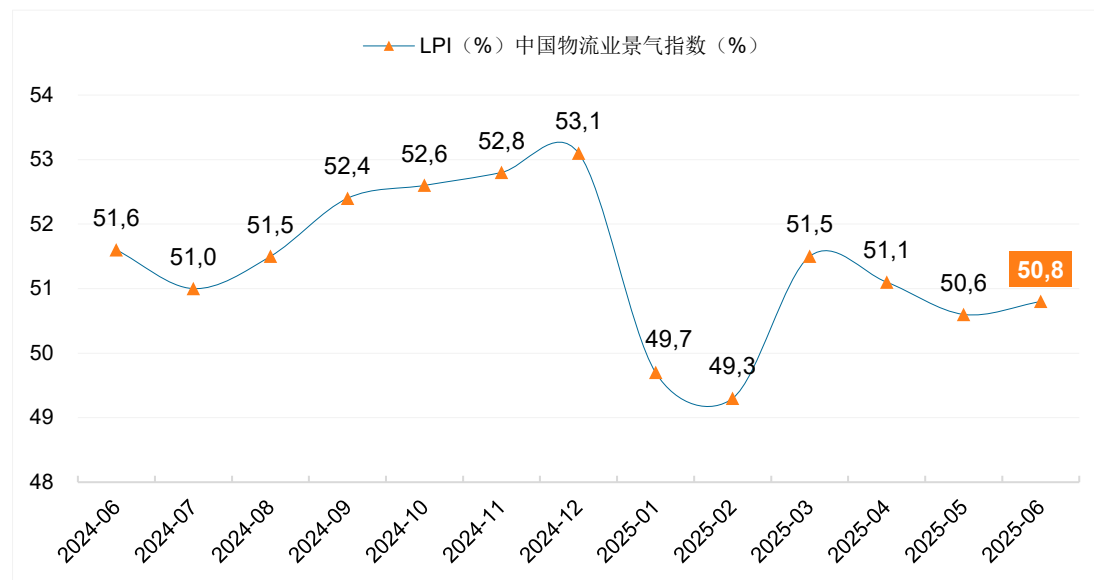
China's manufacturing PMI (2024.06-2025.06)

2024年6月-2025年6月中国制造业采购经理指数



China's Logistics Prosperity Index (2024.06-2025.06)

2024年6月-2025年6月中国物流业景气指数



- In June, China's Manufacturing Purchasing Managers' Index (PMI) stood at 49.7%, indicating continued improvement in manufacturing activity; meanwhile, the Logistics Performance Index (LPI) reached 50.8%, remaining in expansionary territory for the fourth consecutive month.
- 6月份，中国制造业采购经理指数（PMI）为49.7%，制造业景气水平继续改善；中国物流业景气指数（LPI）为50.8%，连续4个月运行在扩张区间。

02

Current Situation of Industrial Vehicle Industry in China

当前中国工业车辆行业发展现状

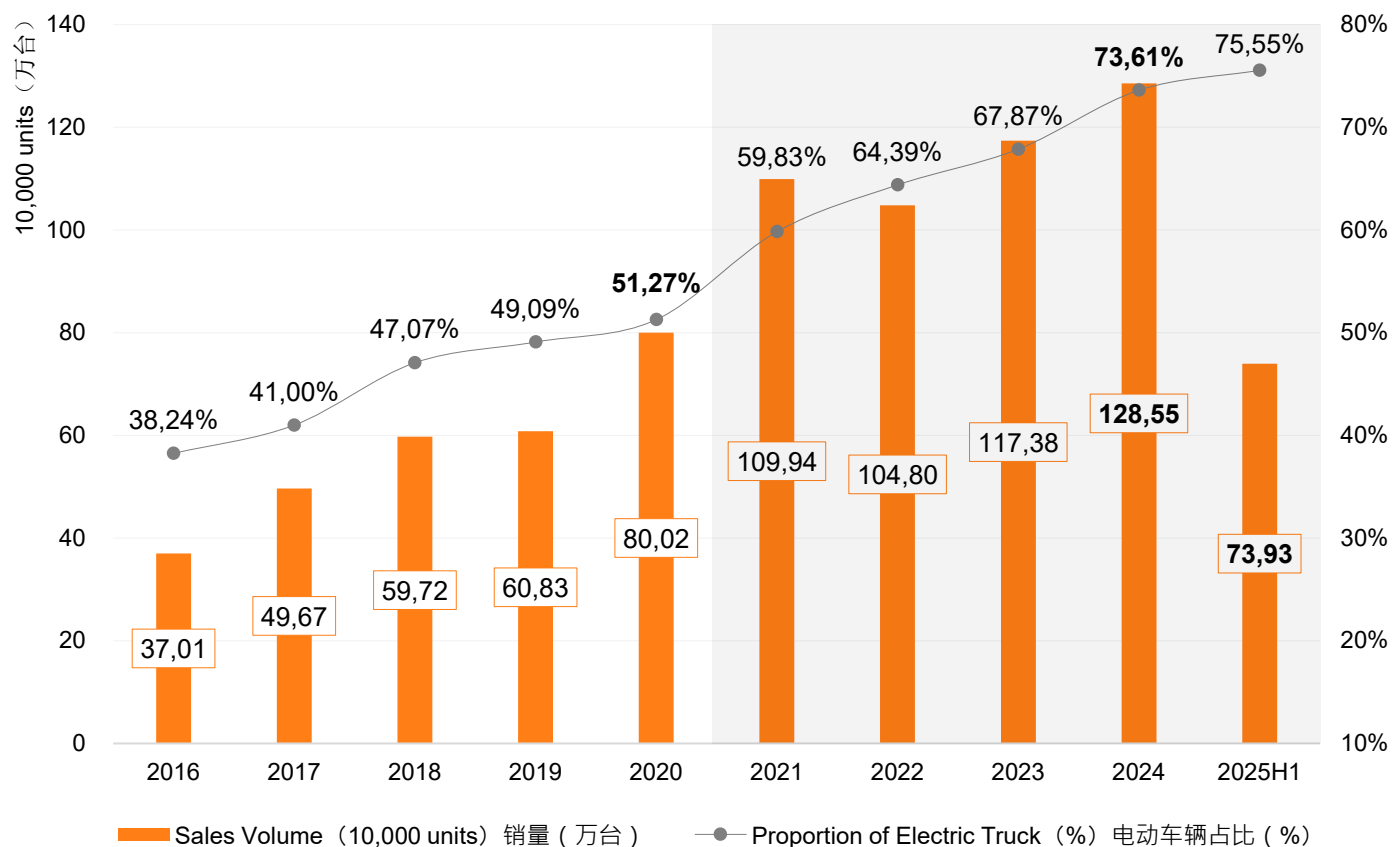


China's industrial vehicle sales maintain growth, electrification rate hits 73.61%

中国工业车辆行业销量持续增长，电动化率提升至73.61%

China's Sales Volume of Industrial Trucks and Proportion of Electric Truck (2016-2025H1)

2016-2025年上半年中国工业车辆行业销量及电动化率



- During the 14th Five-Year Plan period (2021–2025), China's industrial vehicle industry has sustained steady sales growth and entered a phase of widespread electrification. In 2024, the industry's sales surpassed 1.28 million units, representing a year-on-year increase of 9.52%. The product electrification rate rose from just over 50% in 2020 to 73.61% in 2024. In the first half of 2025, sales reached 739,334 units, reflecting an 11.66% year-on-year growth. The total sales expansion during the 14th Five-Year Plan period is projected to reach approximately 600,000 units.
- “十四五”以来，中国工业车辆行业销量持续增长，并进入电动化普及期。2024年，行业销量突破128万台，同比增长9.52%，产品电动化率由2020年的首次超过50%提升至73.61%。2025年上半年实现销量73.93万台，同比增长11.66%。“十四五”销量增量预计60万台左右。

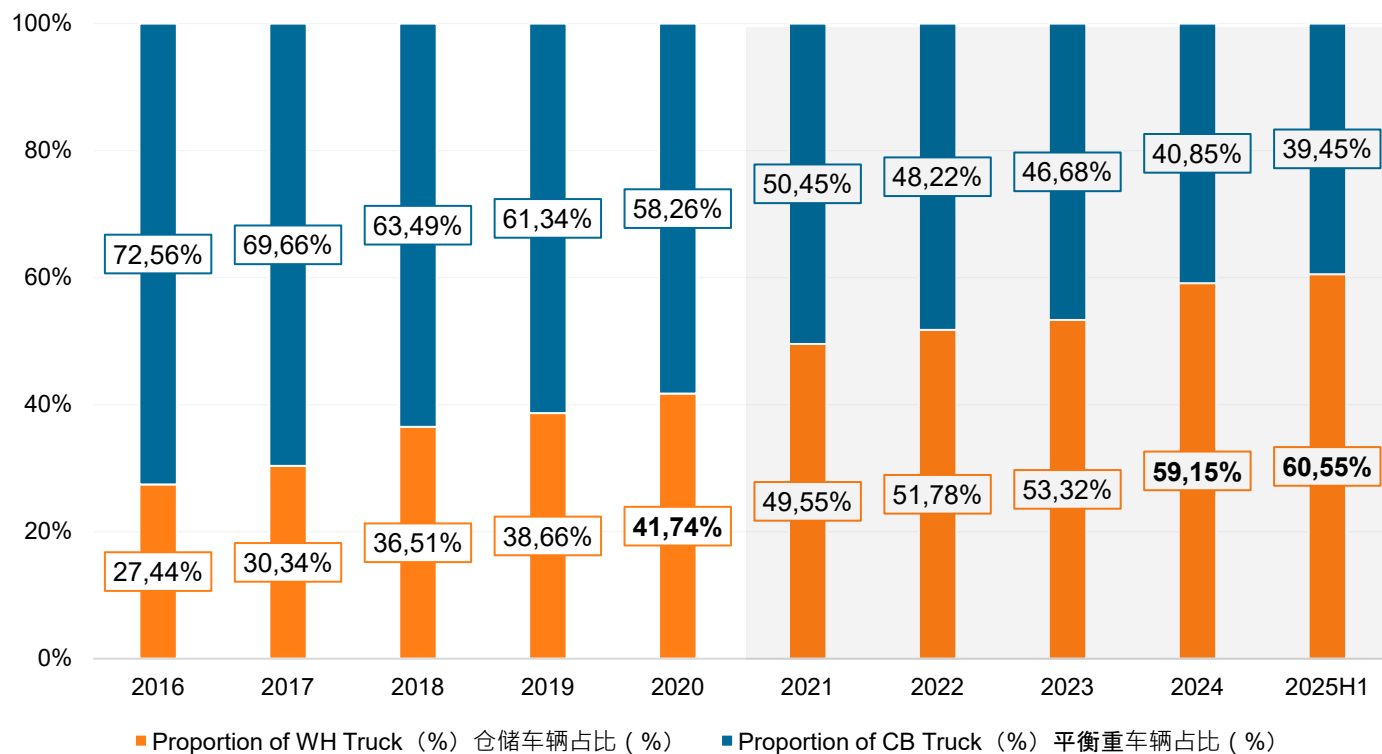


Warehousing vehicles gain deeper traction in China, penetration rate reaches 59.15%

中国仓储车辆应用日益深化，仓储车辆渗透率提升至59.15%

Proportion of CB Truck vs. WH Truck in China (2016-2025H1)

2016-2025年上半年中国市场平衡重车与仓储车比例变化情况



- During the 14th Five-Year Plan period (2021–2025), the penetration rate of warehousing vehicles in China has consistently increased. In 2024, they accounted for 59.15% of the total industrial vehicle market, representing an increase of over 17 percentage points compared to the end of the 13th Five-Year Plan period. In the first half of 2025, this penetration rate further exceeded 60%, marking a new phase of deepened application and expansion for warehousing solutions in China.
- “十四五”期间，中国仓储车辆渗透率不断提升。2024年，仓储车辆占比为59.15%，较“十三五”末提高了超 17个百分点。2025年上半年，这一数值进一步突破 60%，仓储应用进入深化拓展期。

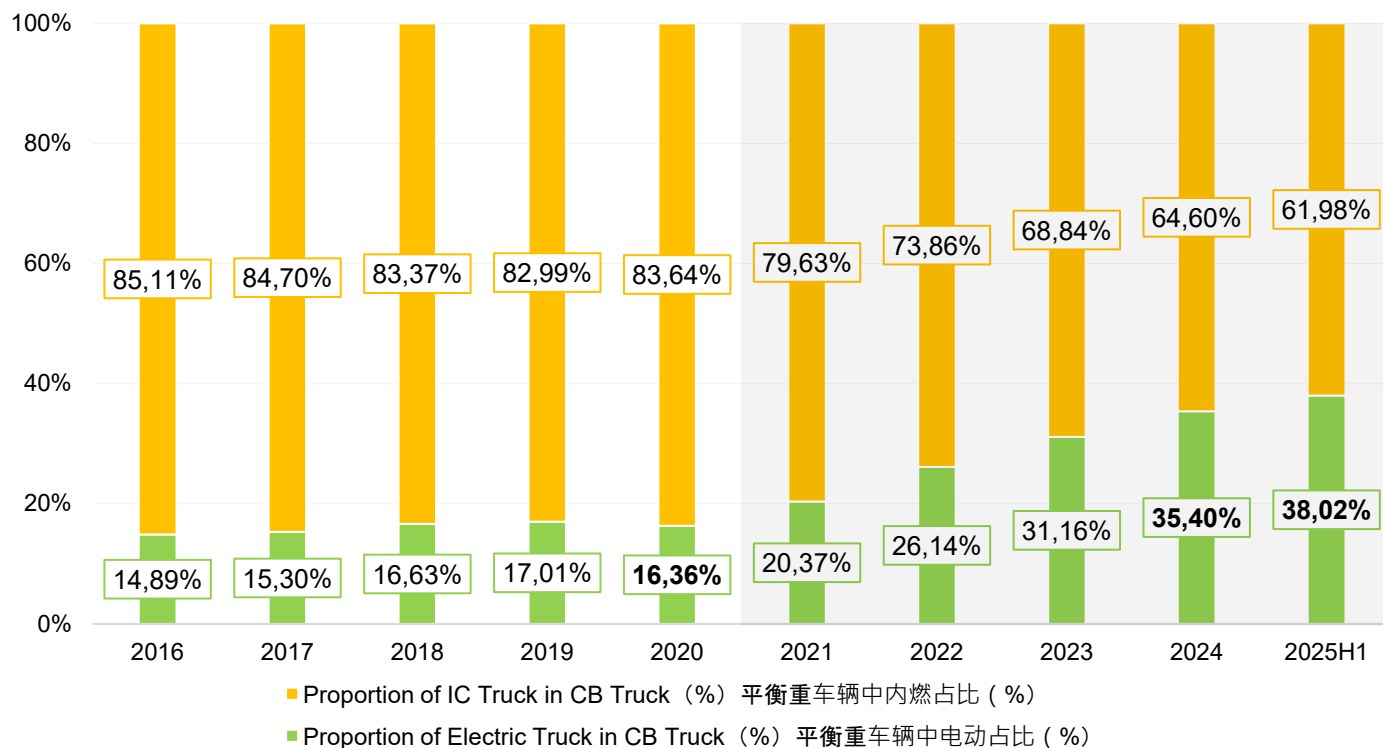


Steady electric transition for China's counterbalance trucks, rate reaches 35.4%

平衡重车辆电动替代稳步推进，平衡重叉车电动化率提升至35.4%

Proportion of IC Truck vs. Electric Truck in CB Truck in China (2016-2025H1)

2016-2025年上半年中国市场平衡重车中电动与内燃比例变化情况



- Throughout the 14th Five-Year Plan period (2021–2025), China has witnessed a steady transition toward electrification in counterbalance trucks. In 2024, the electrification rate of counterbalance forklifts rapidly increased to 35.4%, up by 19 percentage points from the end of the 13th Five-Year Plan period, with continued significant potential for further growth. In this evolving landscape, high-end innovation in internal combustion products has become crucial for enhancing competitiveness in the incremental market.
- “十四五”期间，中国电动平衡重式叉车稳步替代内燃叉车。2024年，平衡重式叉车电动化率快速提升至35.4%，较“十三五”末提高了19个百分点，并仍有较大提升空间。内燃产品高端化成为提升增量市场竞争力的关键所在。

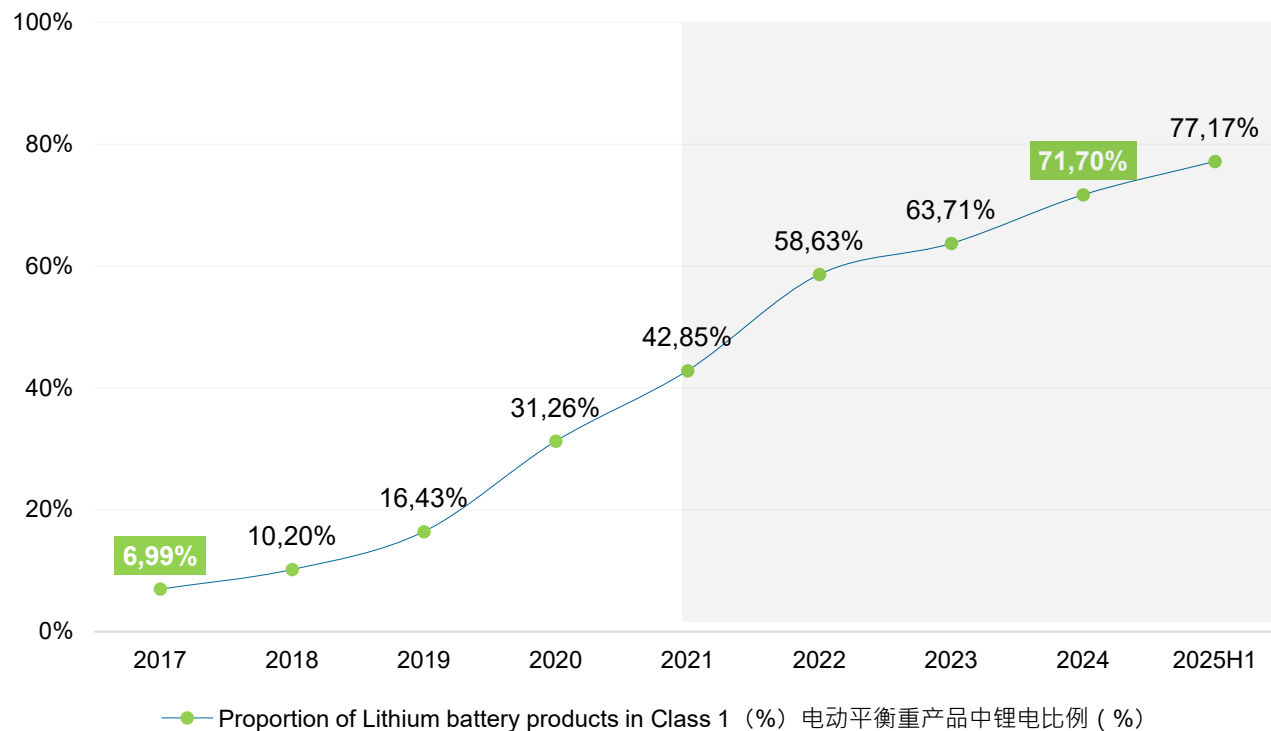


Lithium-ion adoption surges in China's electric forklifts, exceeding 70% in Class 1

电动叉车锂电化率提升迅速，电动平衡重产品中锂电占比超70%

Proportion of Class 1 Lithium battery products in China (2017-2025H1)

2017-2025年上半年中国市场电动平衡重产品锂电化率



- The adoption rate of lithium-ion batteries in China's electric forklifts has experienced remarkable growth since 2017. The sales volume of lithium battery products in electric counterbalanced forklifts increased from 3,699 units in 2017 to 133,314 units in 2024, with their share skyrocketing from 6.99% to 71.70%. With continuous advancements in lithium battery technology and improving cost efficiency, this major product segment has entered a phase of large-scale lithium-ion substitution.
- 2017年以来，中国电动叉车锂电化率提升迅速。电动平衡重叉车中锂电销量由0.37万台增长至2024年的13.33万台，锂电占比由 6.99%提升至71.70%。随着锂电池技术的不断进步和经济性的提升，电动平衡重产品迈入锂电规模化替代期。

03

Development Trend of Industrial Vehicle Industry in China

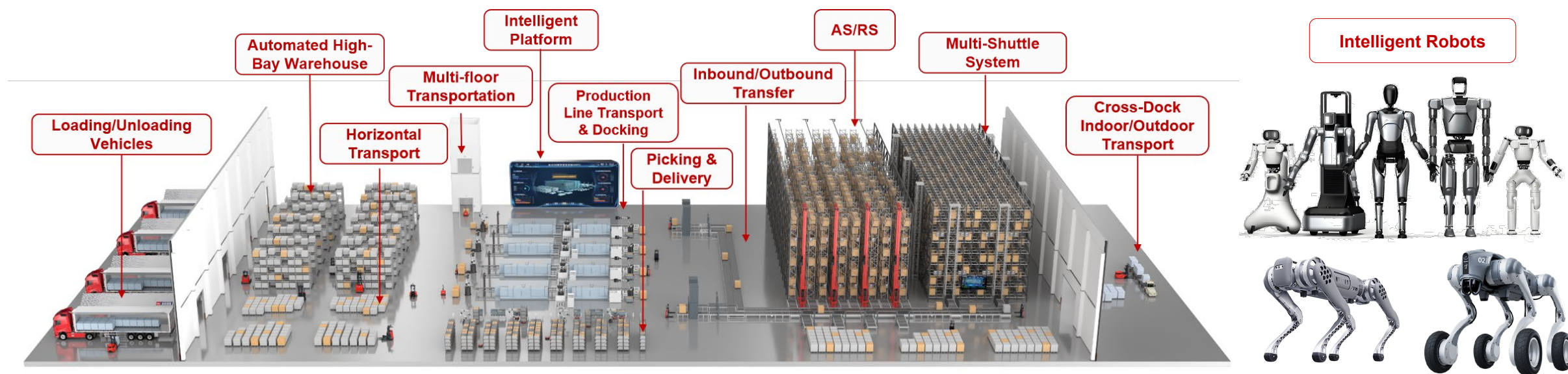
未 来 中 国 工 业 车 辆 行 业 发 展 趋 势



“Machine Replacement” accelerates, igniting an industry-wide intelligent boom

“机器替人”速度将进一步加快，行业进入智能化爆发期

- In recent years, the growing maturity of the AI and IoT in China is reshaping the industrial landscape. Coupled with quality economic development and shifting demographic trends, "Machine Replacement" is set to accelerate, fueling a comprehensive wave of intelligent transformation across the industry.
- 近年来，中国人工智能与物联网技术应用不断成熟。伴随着经济高质量发展和人口趋势变化，“机器替人”速度将进一步加快，未来行业将全面进入智能化爆发期。



“Scenario-Defined Products” take hold, compelling firms to bolster niche market capabilities

“场景定义产品”范式将进一步深化，企业加快提升细分市场产品力



- In response to increasingly fragmented logistics scenarios and rising demand for customization, the industry is shifting toward a scenario-defined product development model. This transition from standardized offerings to tailored solutions is driving rapid growth for specialized equipment in cold chain, narrow-aisle, high-level warehousing, and other specific applications.
- 基于物流场景的碎片化与定制化需求升级，未来行业将构建以用户场景为核心的产品开发范式，从标准化产品向场景化解决方案转型，冷链、窄巷道、高位仓储等特定场景专用车型迎来高速发展。

Chemicals 化工



Cold Chain 冷链



Beverage 饮料



Agriculture 农业



Stone & Marble 石材



Construction 建筑



Port Operations 港口



Warehousing & Logistics 仓储

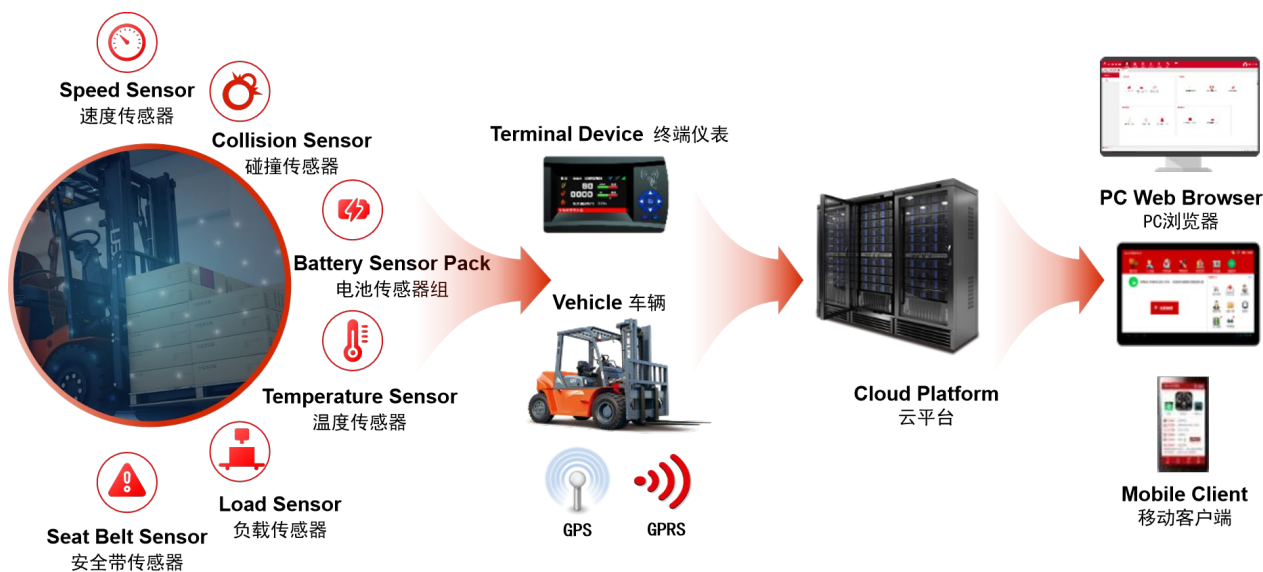




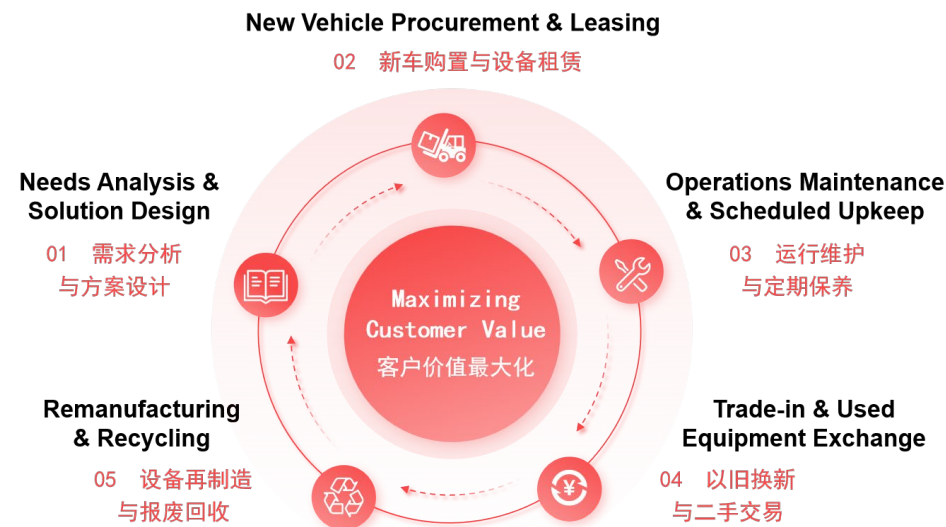
“Forklift-as-a-Service” gains traction, blurring lines between manufacturing and services

“叉车即服务”理念将进一步普及，制造业与服务业的边界加速融合

- As asset-light operations gain traction and aftermarket ecosystems reach evolving maturity, the industry will progressively reengineer business models through “Forklift-as-a-Service” (FaaS) offerings. This transition from equipment sales to full life-cycle service value delivery is continuously creating greater value for customers.
- 随着轻资产运营理念日益普及和后市场生态不断成熟，未来行业将持续通过“叉车即服务”重构商业模式，从设备销售转向“全生命周期服务”价值输出，持续为客户创造更大价值。



Internet of Vehicles (IoV) System
车联网系统架构



Full Lifecycle Service Model
全生命周期服务模式



“Sailing into Deeper Waters” gains momentum, expanding in both dimension and depth

“全球化驶向深海区”实践将进一步推进，全球化建设维度和深度不断拓展

- Despite the protectionist backlash triggered by the U.S. government's tariff policies, we remain firmly convinced that Chinese industrial vehicle companies will actively embrace change, expanding the scope and depth of their global strategies, as global industrial, supply, and value chains deepen their coordination. This includes shifting from “Product Export” to “Localized Manufacturing” and from “Ecological Expansion” to “Cultural Integration,” continuously improving localized service capabilities.
- 尽管美国政府的关税政策带来了保护主义逆流，但我们坚信，随着全球产业链、供应链、价值链体系协同深化，中国工业车辆企业将积极拥抱变化，推动从“产品出海”向“制造出海”，从“生态出海”向“文化出海”转变，不断提高本土化服务能力和水平。

Product Export

01 产品出海

全球渠道网络
服务体系搭建



Localized R&D

02 研发出海

技术本地化
海外研发中心



Localized Manufacturing

03 制造出海

生产本地化
供应链本地化



Ecological Expansion

04 生态出海

金融赋能
服务延伸
数字生态



Cultural Integration

05 文化出海

品牌建设
价值传播
深度本土化

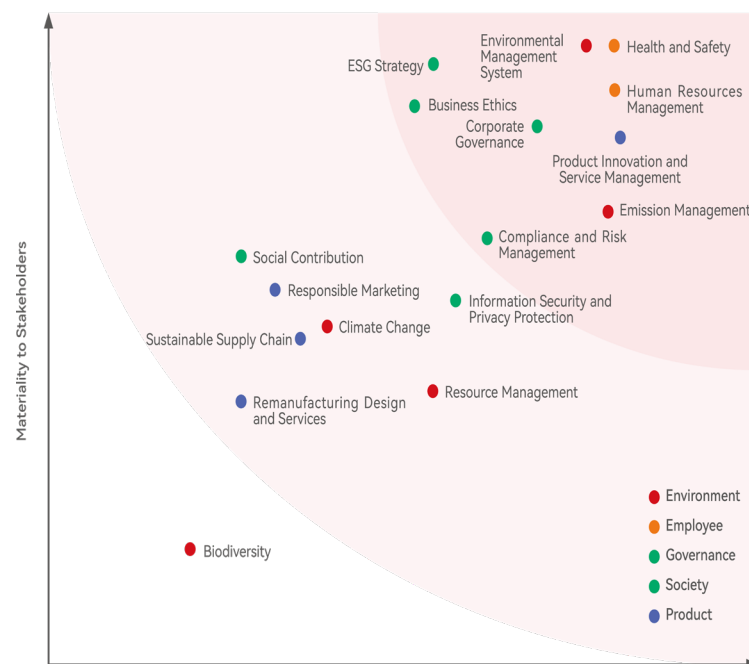


“Sustainable Development” practices multiply, contributing to a more resilient industrial future

“可持续发展”实践将进一步丰富，助力建设更加可持续的工业未来



- Aligned with the UN Sustainable Development Goals (SDGs), Chinese industrial vehicle enterprises will intensify efforts on key issues such as climate change, product innovation, health and safety, responsible supply chains, and corporate governance. Through advancing ESG practices, the industry is committed to fostering a new sustainable ecosystem and contributing to a more sustainable industrial future.
- 紧扣联合国可持续发展目标，中国工业车辆企业将聚焦气候变化、产品创新、健康与安全、责任供应链、公司治理等核心议题，持续推进ESG实践，共筑行业可持续发展新生态，助力建设更加可持续的工业未来。



Materiality to Anhui Heli's Sustainable Development





THANK YOU

谢谢