



AITO Presidents' Forum 2025

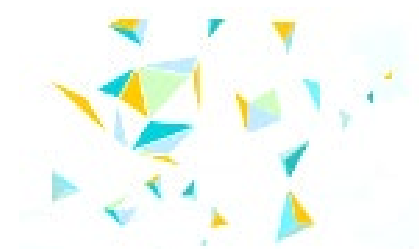
s
Ernesto Dominguez
President
FEM Industrial Trucks

Presidents' Forum
19 September 2025, Wiesbaden



Content

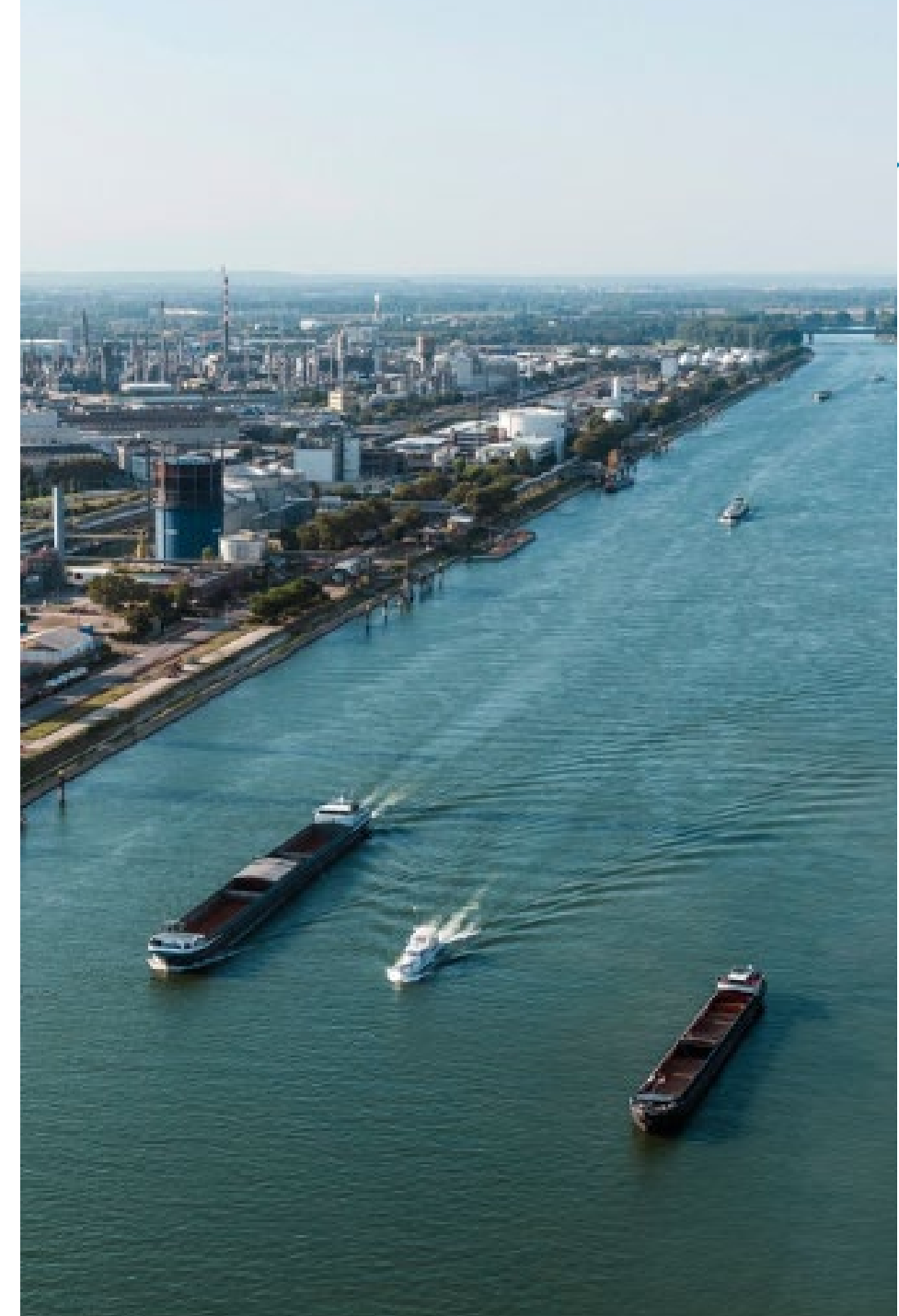
1. EU macroeconomic figures
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2. European Industrial Truck Market
 1. Country Trends
 2. Counterbalanced vs. Warehouse Trucks
 3. Electric CB vs. Internal Combustion CB Trucks
3. EU Outlook and challenges
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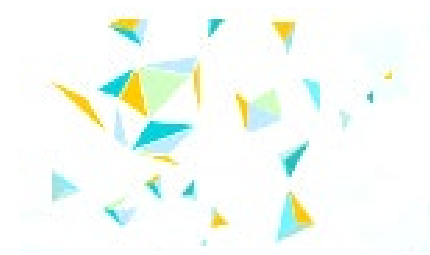
Economic Lifeline

The Rhine links German and Swiss industry with Rotterdam, Europe's biggest port





EU Macro Economy

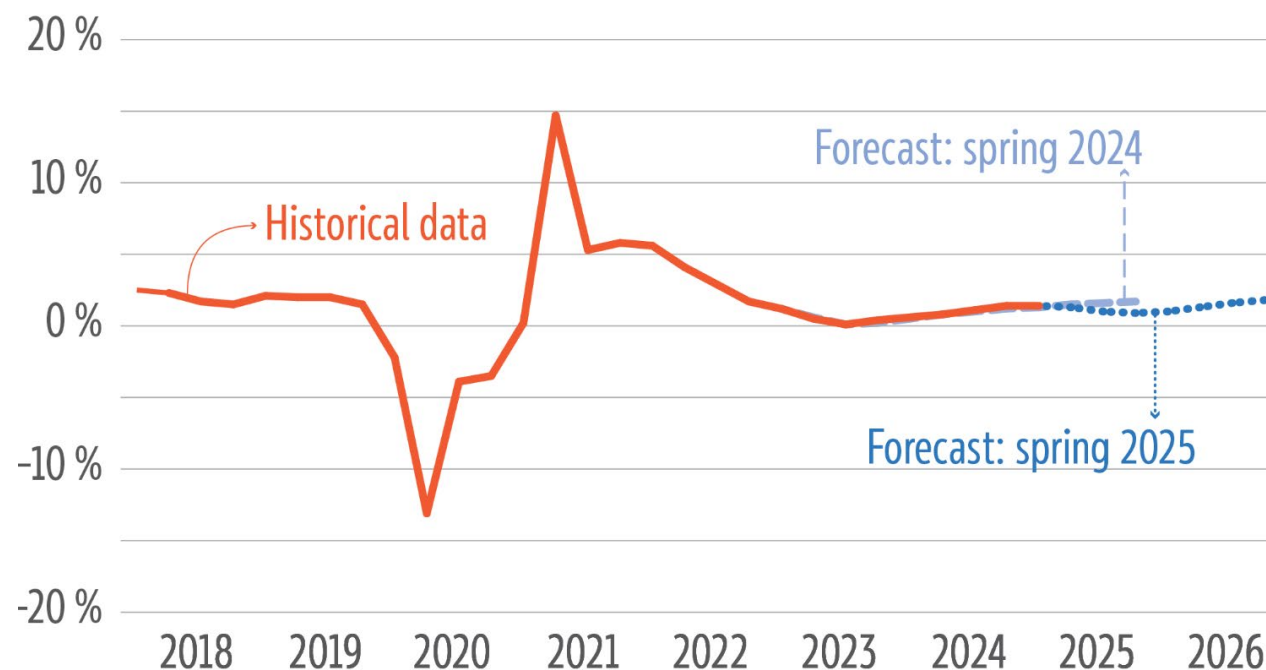


EU real GDP growth rate: below 1% and varied picture across Europe

Source: ec.europa.eu

GDP growth in the EU

Quarterly, % change compared to same period in previous year

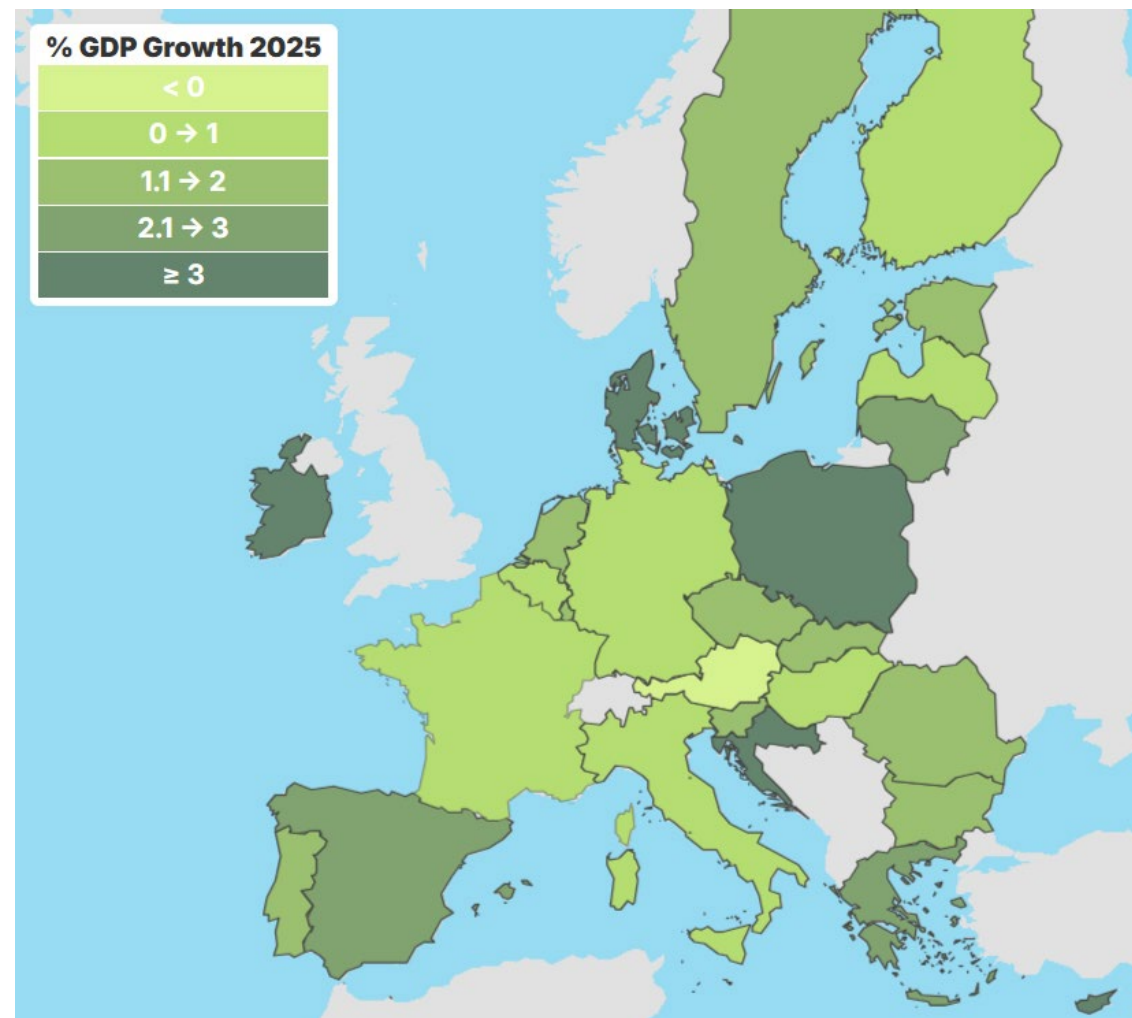


EPRS | European Parliamentary Research Service

Data source: Eurostat

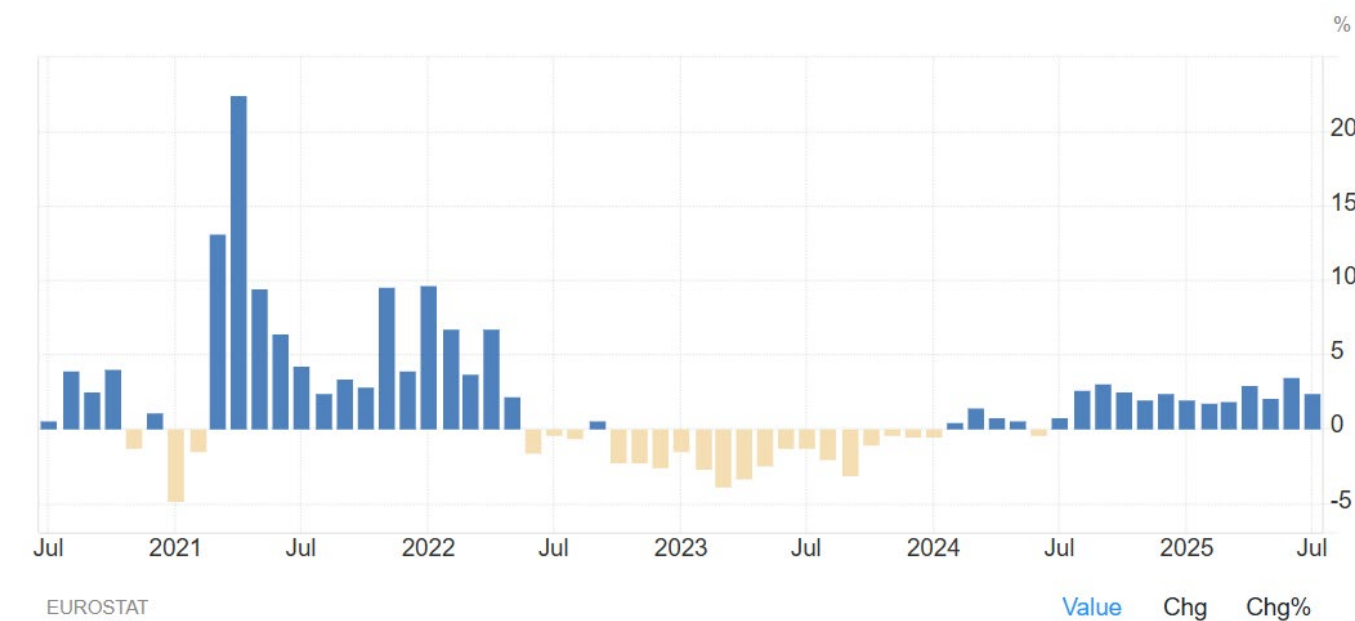


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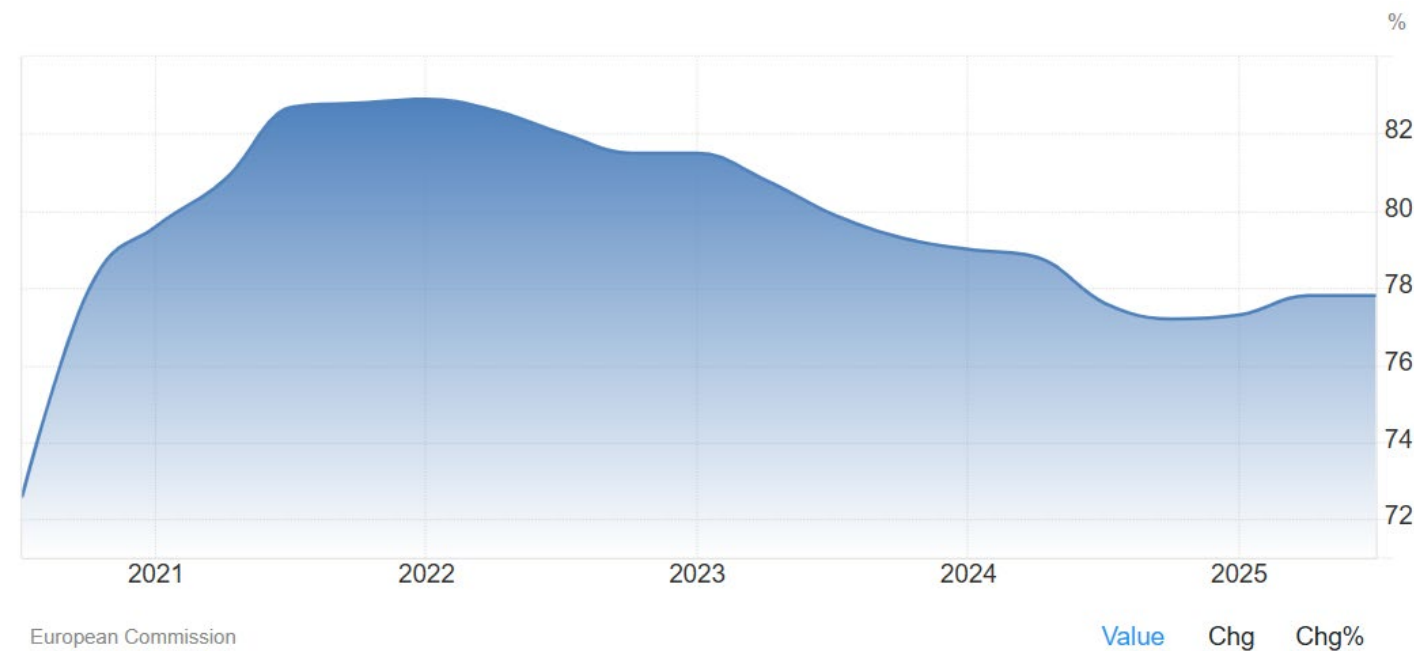
Retail sales picking up in this year



EUROSTAT

Value Chg Chg%

Capacity Utilization has slightly recovered but still below LT avg



European Commission

Value Chg Chg%



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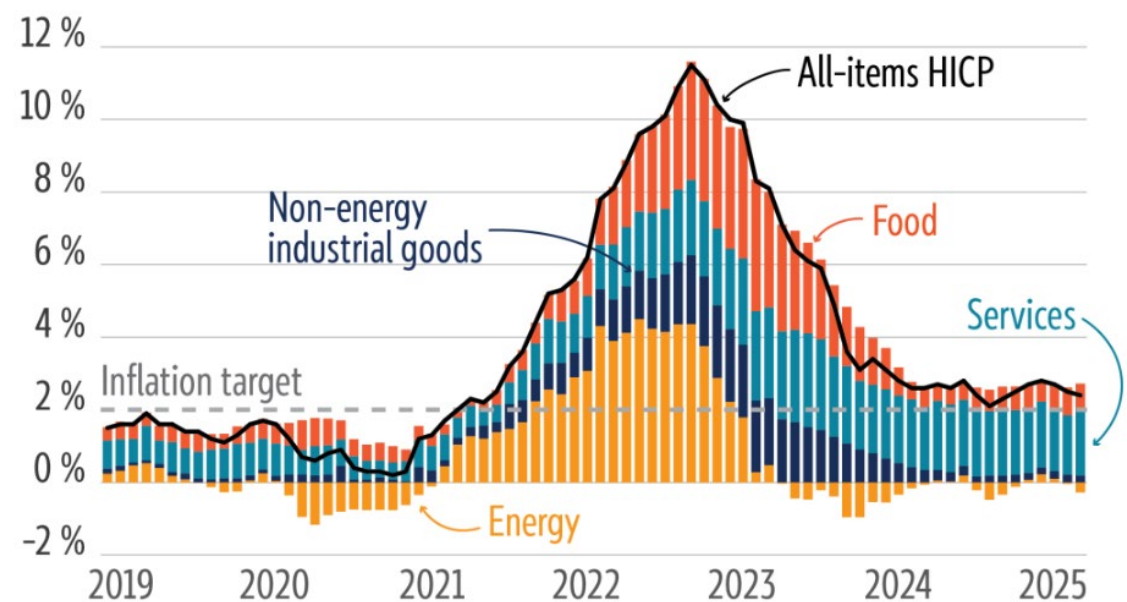




Inflation to drift below 2%

EU inflation

Harmonised index of consumer prices (HICP) monthly data, annual rate of change %

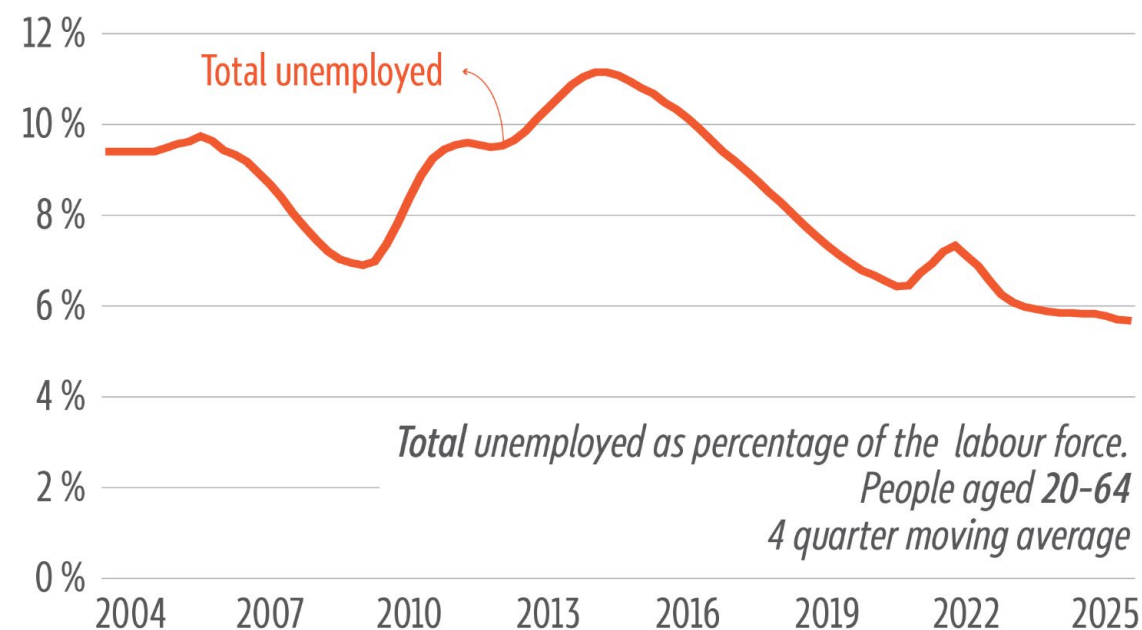


EPRS | European Parliamentary Research Service

Data source: Eurostat

Unemployment rate is near an all-time low

Total unemployment rate in the EU

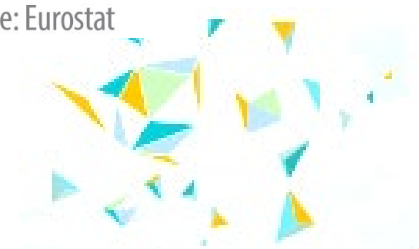


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Data source: Eurostat



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Key figures



GDP

EU:

2024: **1.0%**

2025: **1.1%**

2026: **1.5%**



Inflation

EU:

2024: **2.6%**

2025: **2.3%**

2026: **1.9%**



Deficit

EU:

2024: **-3.2%**

2025: **-3.3%**

2026: **-3.4%**



Unemployment

EU:

2024: **5.9%**

2025: **5.9%**

2026: **5.7%**

US tariff Hikes



Defence Spending



Germany fiscal Reform

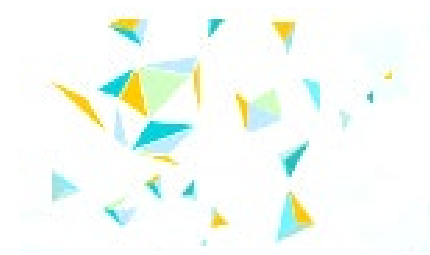


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European Industrial Truck Market



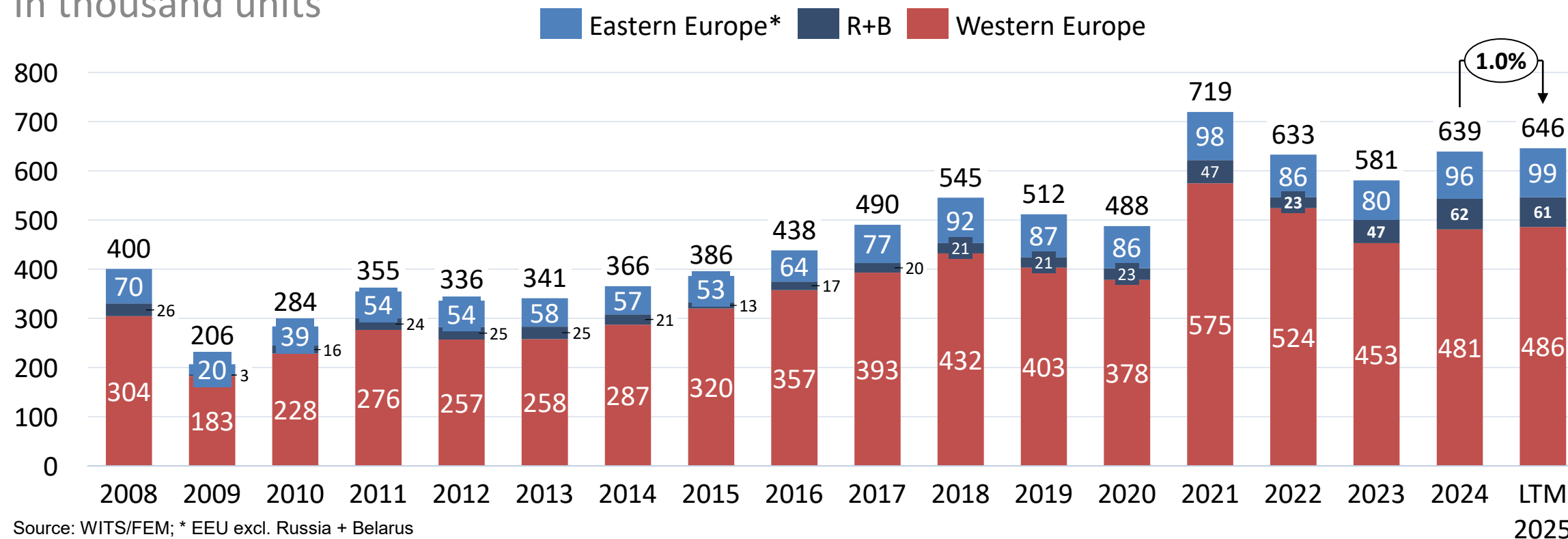


Europe – Industrial Truck Market

Historic Order Development 2008 – 5/2025

Status: May 2025

In thousand units



Source: WITS/FEM; * EEU excl. Russia + Belarus



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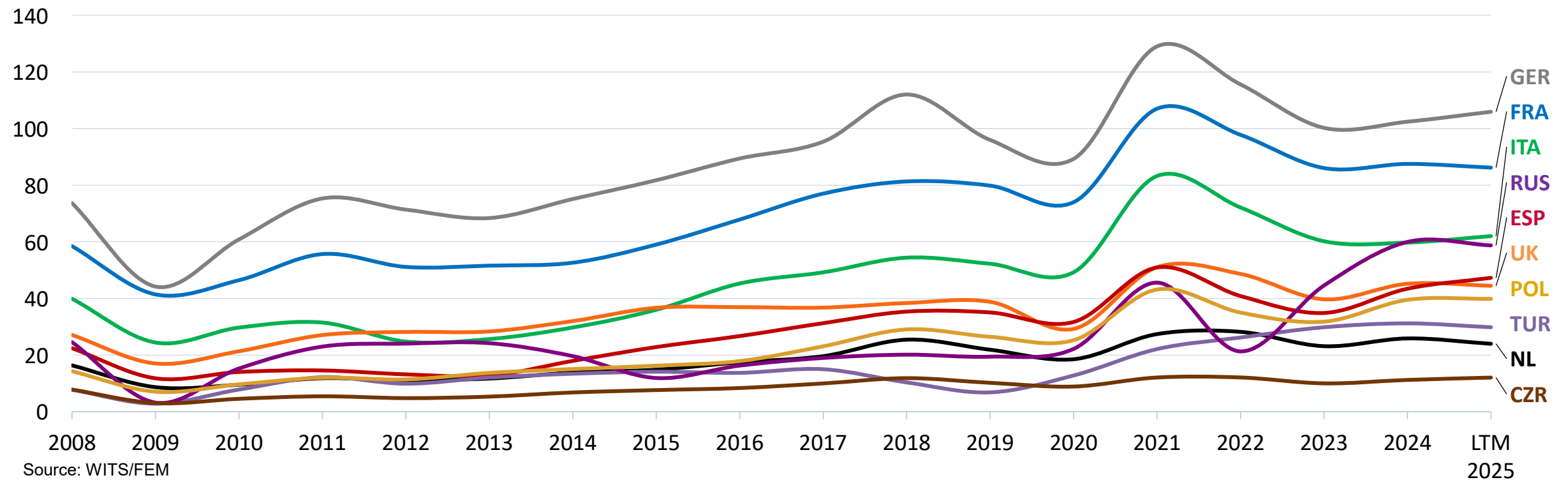


Europe – Industrial Truck Market

Country Trends

Status: May 2025

In thousand units



Source: WITS/FEM



ation: Internal



Europe – Industrial Truck Market

Product Trends – ICB vs ECB vs WH

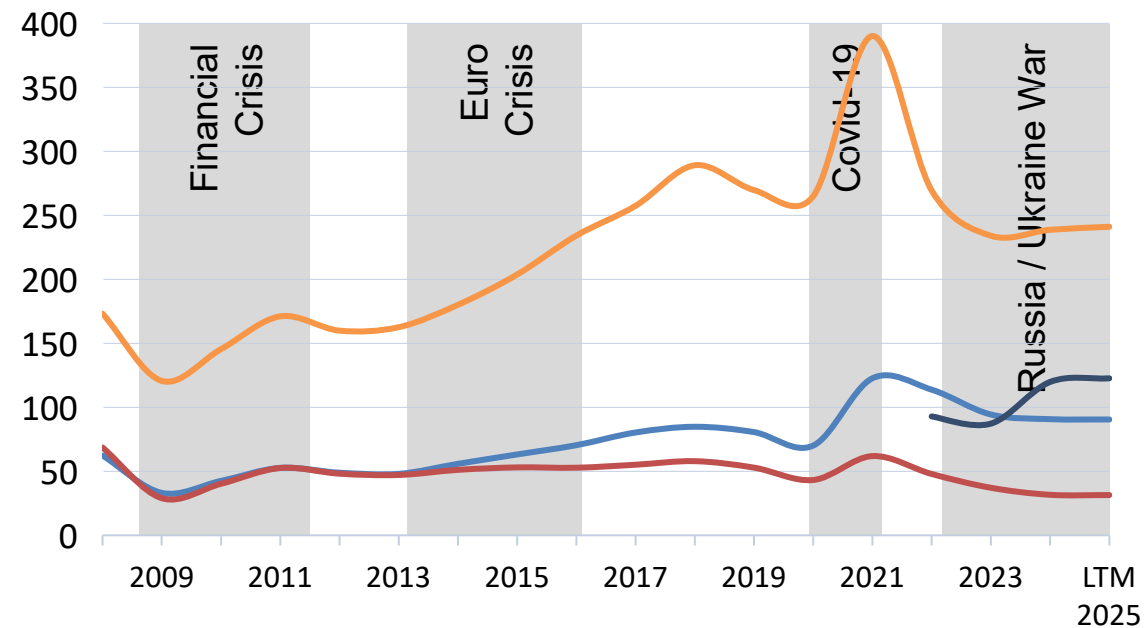
In thousand units

Status: May 2025

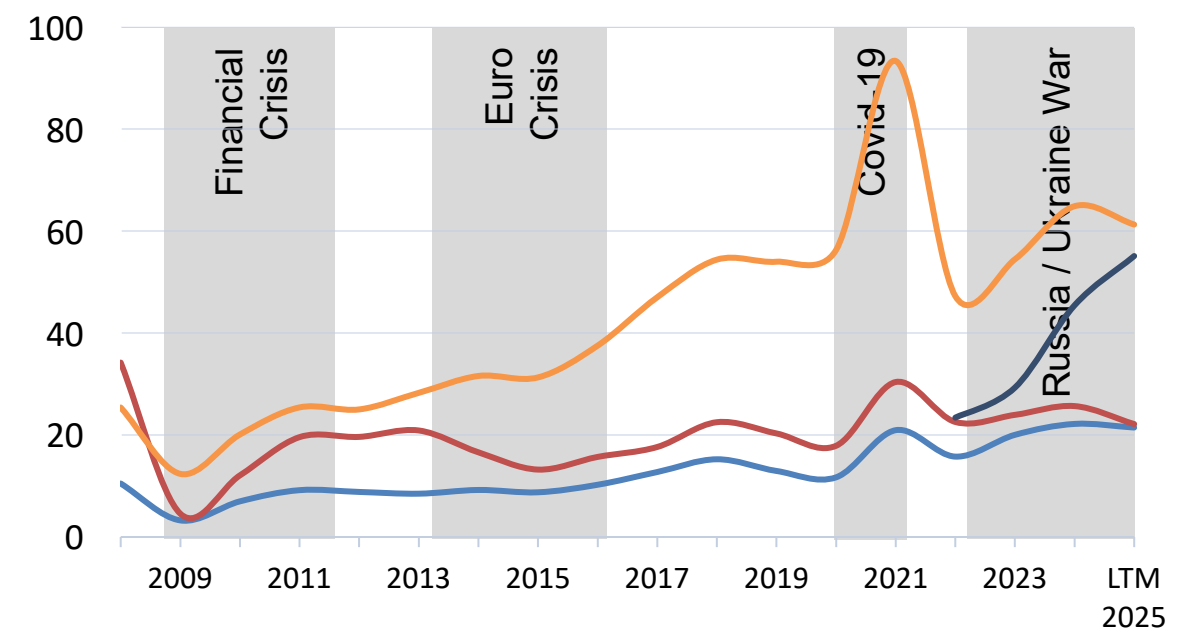
— ECB — WH 3.1
— ICB — WH *

— ECB — WH 3.1
— ICB — WH *

Western Europe



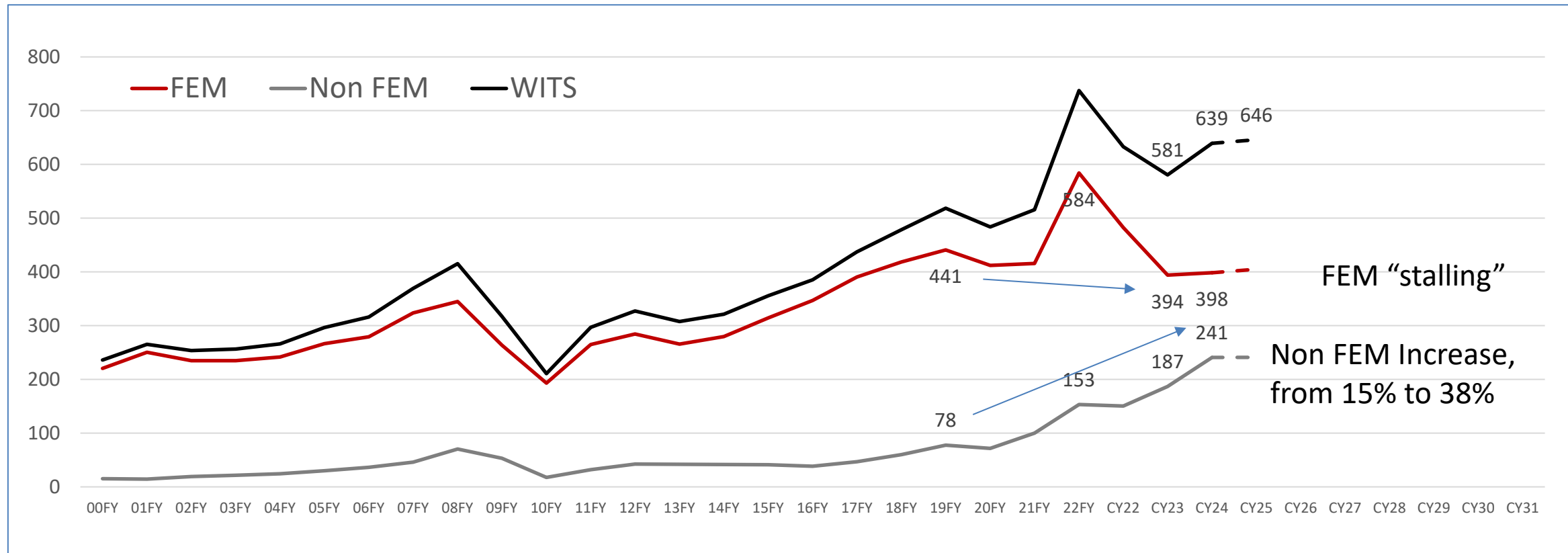
Eastern Europe



Source: WITS/FEM; * WH excl. CI 3.1 from 2020



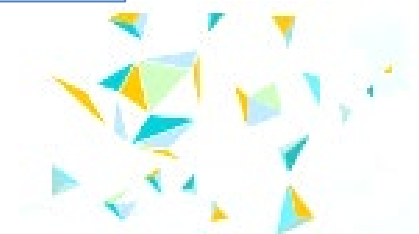
Europe – Industrial Truck Market



Source WITS/FEM orders Europe

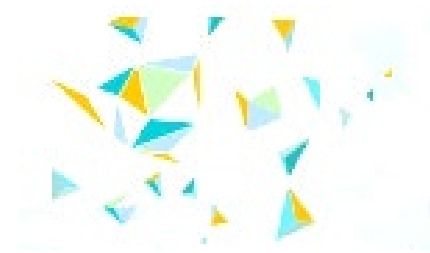


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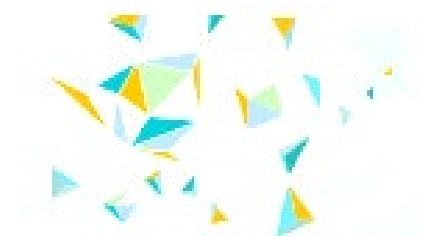
EU Outlook and Challenges



Europe – Outlook

(Annual percentage changes unless specified)						
	2023	2024	2025	2026	2027	2028
GDP	0.7	0.9	1.2	0.8	1.6	1.7
Private consumption	0.6	1.1	1.4	1.5	1.8	1.7
Fixed investment	2.2	-1.9	2.2	0.5	2.5	3.2
Government consumption	1.6	2.5	1.2	1.1	1.3	1.1
Exports of goods and services	-0.7	0.8	1.1	-0.1	1.4	1.7
Imports of goods and services	-1.5	-0.2	2.3	0.9	1.9	2.1
Industrial production	-1.6	-3.0	1.3	0.6	2.2	2.3
Consumer prices	5.4	2.4	2.1	1.6	2.2	2.1
Unemployment rate (%)	6.6	6.4	6.2	6.2	6.0	5.9
Current a/c balance (% of GDP)	1.6	2.6	2.0	2.0	1.9	1.7
Government balance (% of GDP)	-3.5	-3.1	-3.0	-3.0	-3.0	-3.0
Bank's deposit rate (% EOP)	4.0	3.0	1.8	2.0	2.0	2.0
10-yr govt. bond yield, EZ avg (% EOP)	2.8	3.0	3.1	3.3	3.4	3.4
Exchange rate (US\$ per euro, EOP)	1.11	1.04	1.16	1.16	1.16	1.16
Exchange rate (euro per £, EOP)	0.87	0.83	0.87	0.87	0.87	0.87

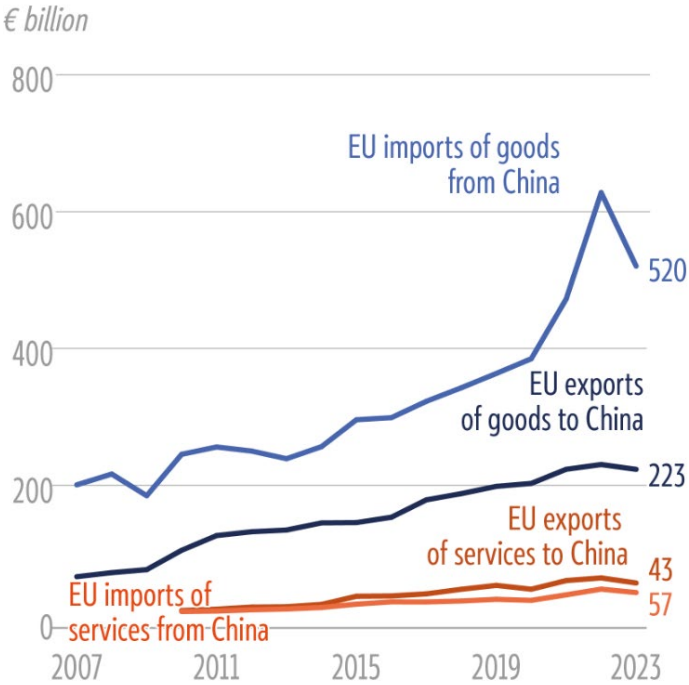
Potential growth around 1%
But trade worries and political risks
remain a threat





Trade from China will further increase, EU manufacturing composition will change

EU trade with China



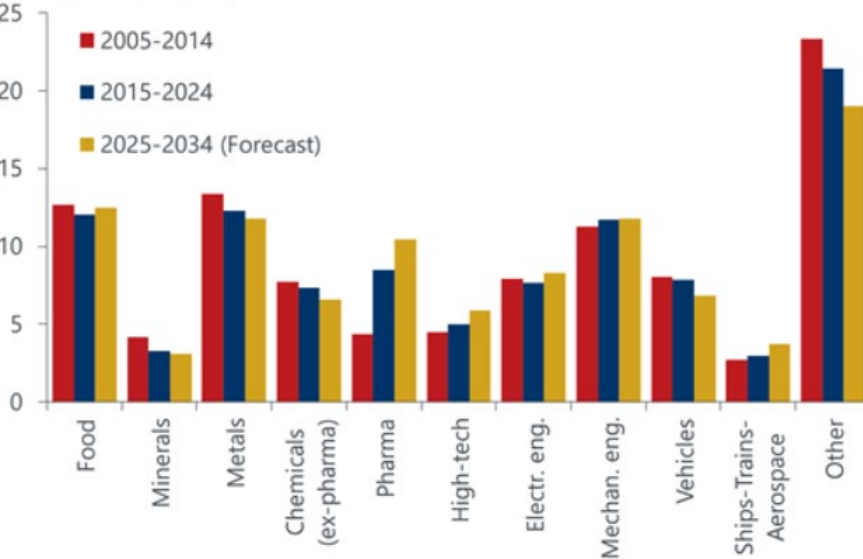
Data source: Eurostat.

EPRS | European Parliamentary Research Service
EUI | European University Institute

Chart 5: Eurozone manufacturing composition will change towards pharma and high-tech

Eurozone: Sectoral share of manufacturing output

Share of output (in %)



Source: Oxford Economics/Haver Analytics



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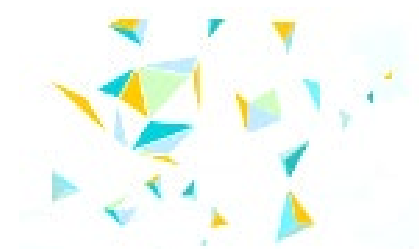


The EU will scale up the manufacturing of clean technologies in the EU

- boosting the **competitiveness** of EU industry
- creating quality **jobs**
- supporting the EU's efforts to become **energy independent**

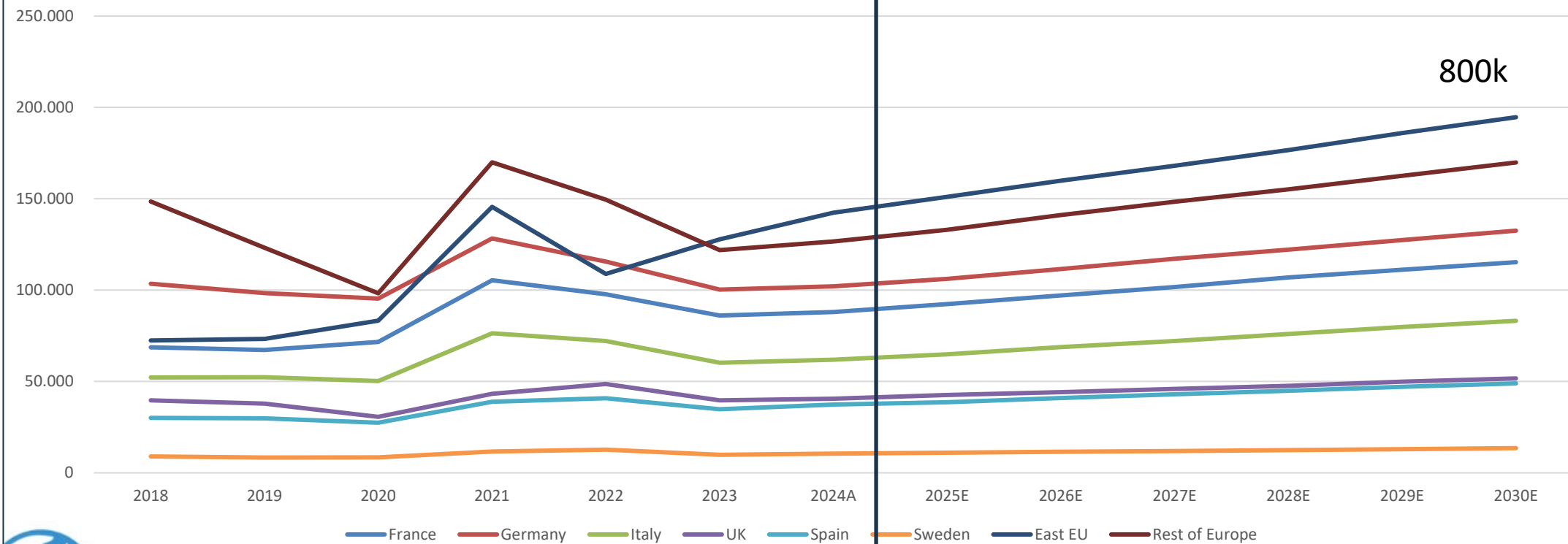


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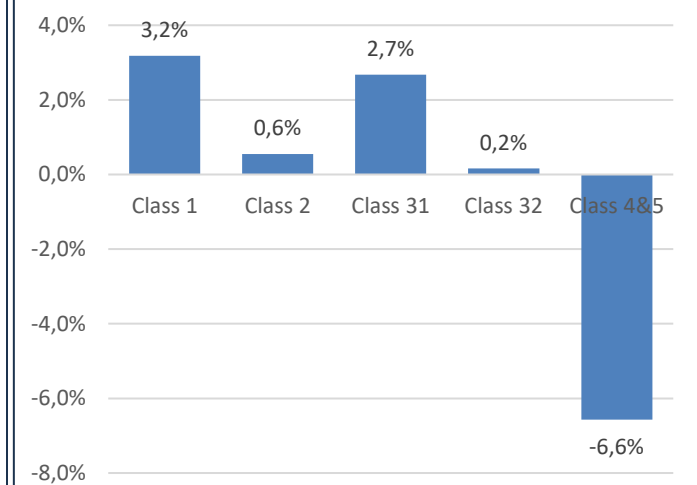


MH Market Outlook: growth in all markets but shift in Products

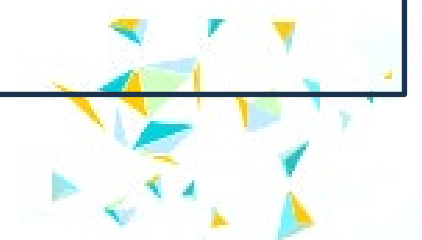
Interact Analysis 2025 Projection - WITS



2030 vs 2024



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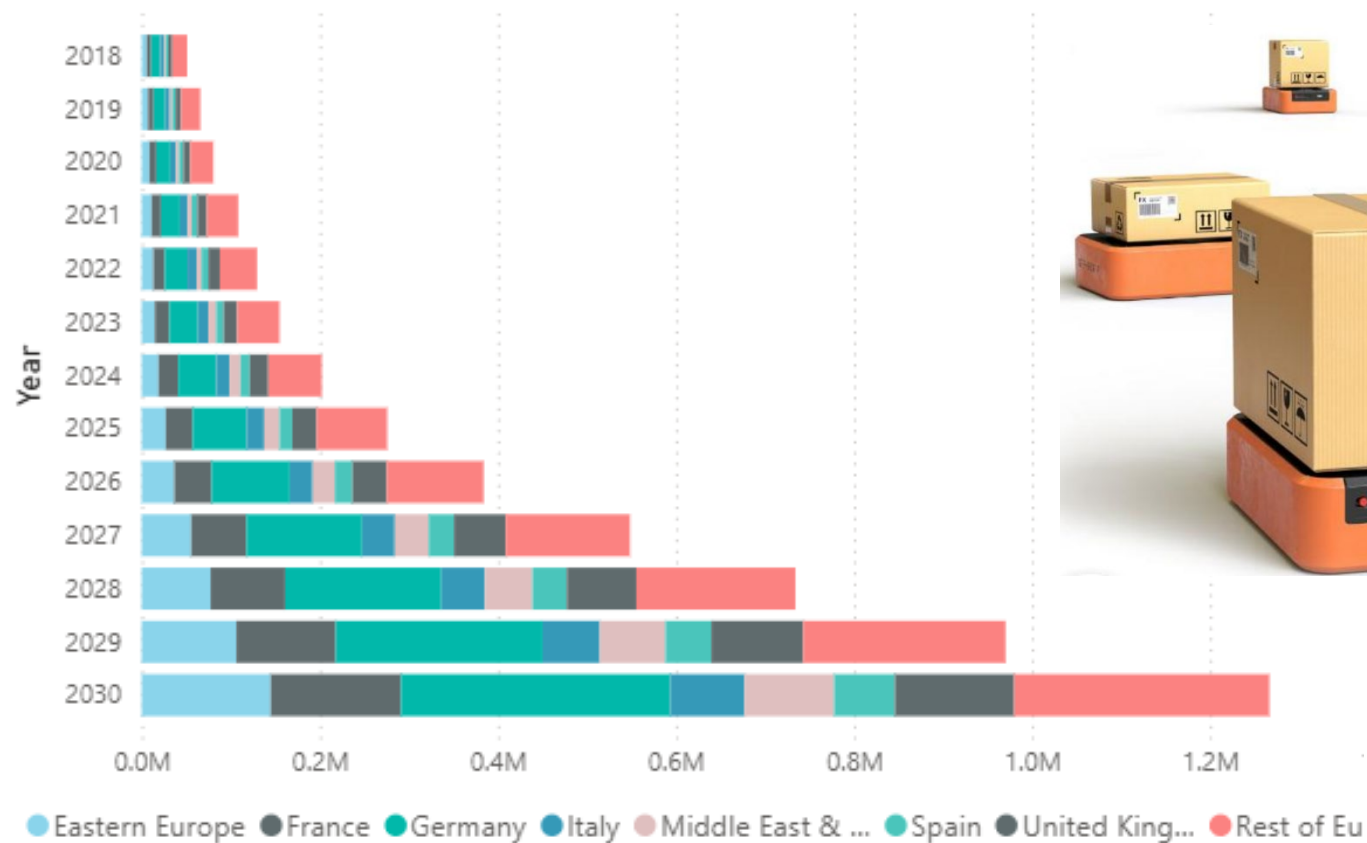




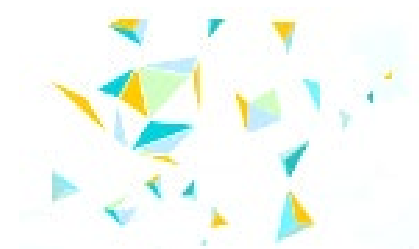
Material Handling Market Outlook

Automated-Autonomous-Mobile robots growth

Shipments By Country



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FEM AIV group

Your European platform on
Autonomous Intralogistic Vehicles



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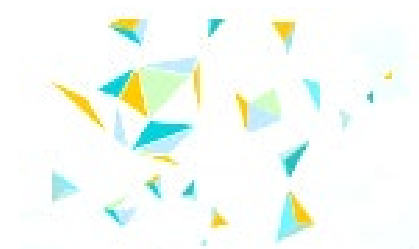


To foster technical cooperation and information exchange, FEM is launching a group dedicated to autonomous intralogistic vehicles. The **FEM AIV Group** will be the largest European platform for AIV manufacturers.

The FEM AIV Group is open to manufacturers of technological solutions for intralogistics flows: Automated Guided Vehicles (AGV), Autonomous Mobile Robots (AMR), Autonomous Case Robots (ACR), Autonomous Intelligent Vehicles (AIV), Self-Guided Vehicles (SGV), etc.



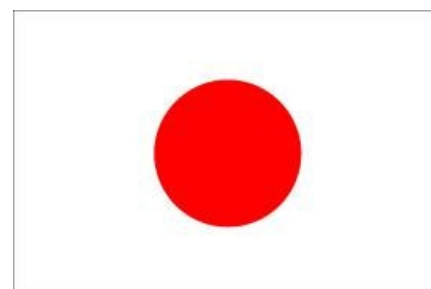
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Closing remarks

THANK YOU



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