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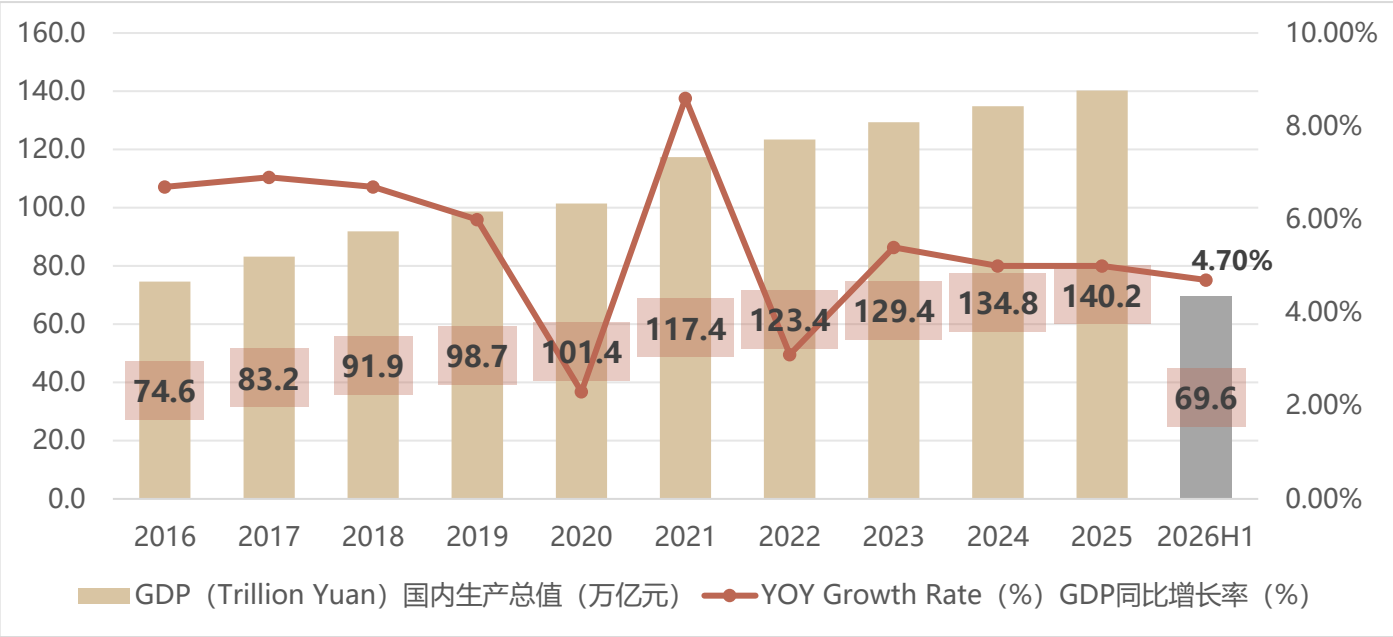
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01

The Trend of China’s Economy in Recent Years
近年来中国经济发展形势

Economic expansion continues as growth stabilizes
经济总量持续扩大，增速趋于稳定

China's GDP and GDP Growth Rate (2016-2026H1)
2016-2026年上半年中国国内生产总值及同比增长率

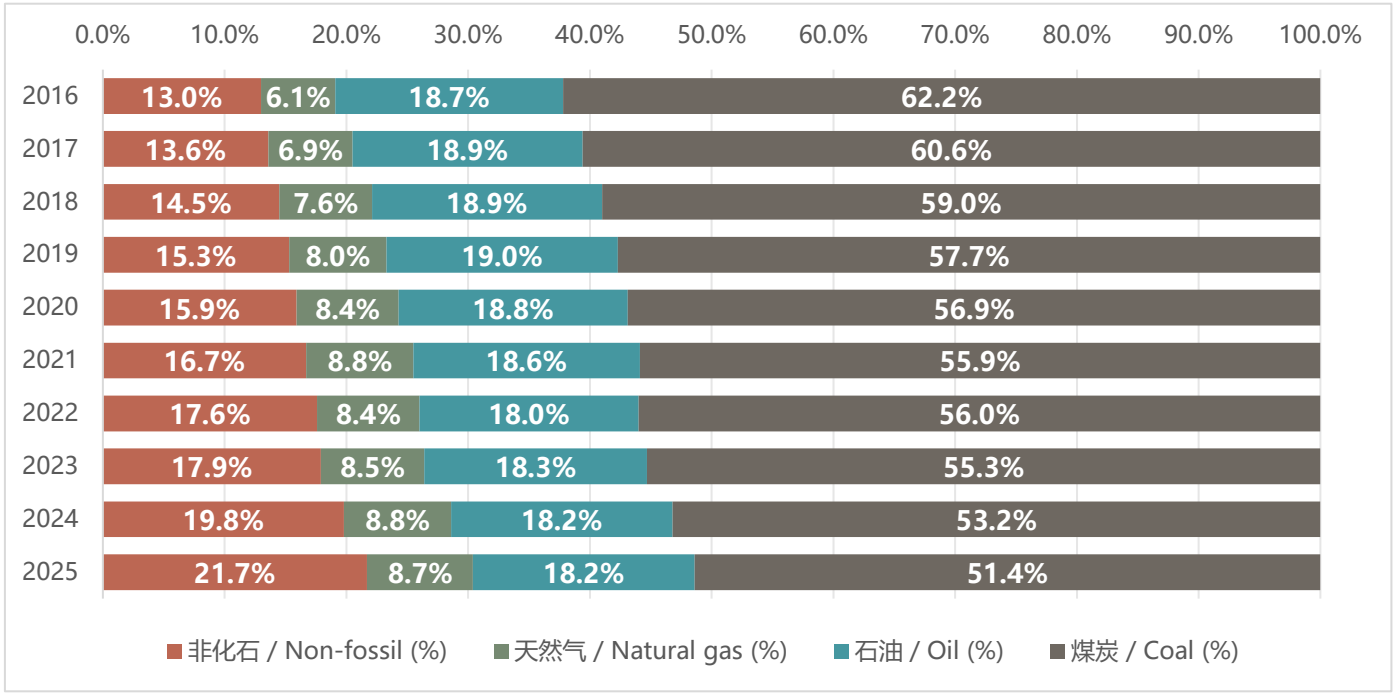


China's GDP increased from RMB 74.6 trillion in 2016 to RMB 140.2 trillion in 2025. Since 2023, real GDP growth has remained within a relatively narrow range of 4.7%–5.4%, standing at 4.7% year on year in H1 2026.

2016—2025年，中国GDP由74.6万亿元增至140.2万亿元。2023年以来实际增速保持在4.7%—5.4%的较窄区间，2026年上半年GDP同比增长4.7%。

Since 2024, non-fossil energy has remained China's second-largest energy source
自2024年起，非化石能源稳居中国第二大能源品种

China's Energy Consumption Structure（2016-2025）
2016-2025年中国能源消费结构



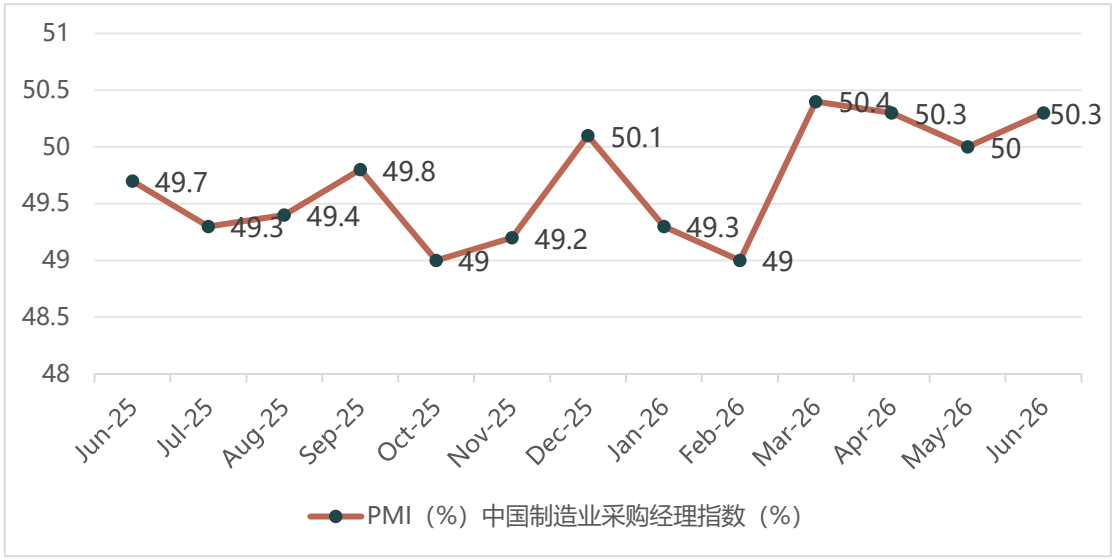
The non-fossil share rose from 13.0% in 2016 to 21.7% in 2025, while coal declined to 51.4%. The transition accelerated after 2021, with non-fossil energy moving ahead of oil from 2024.

非化石能源占比由2016年的13.0%升至2025年的21.7%，煤炭占比同期降至51.4%。结构调整在2021年后明显加快，非化石能源自2024年起超过石油。

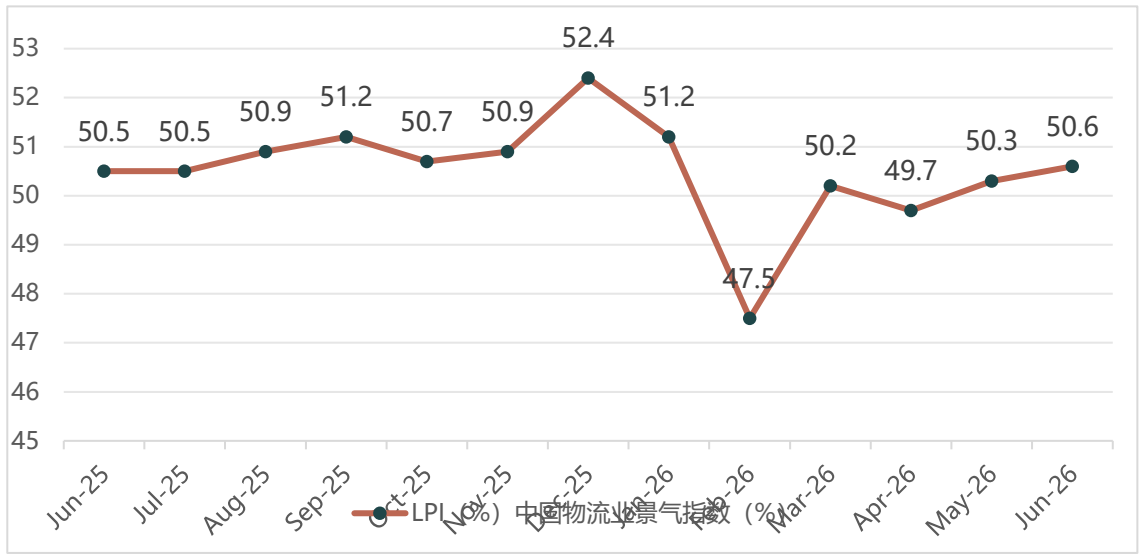
Manufacturing and logistics return to modest expansion
制造业与物流业景气度温和回升

China’s manufacturing PMI（2025.06-2026.06）

2025年6月-2026年6月中国制造业采购经理指数



China’s Logistics Prosperity Index（2025.06-2026.06）2025年6月-2026年6月中国物流业景气指数

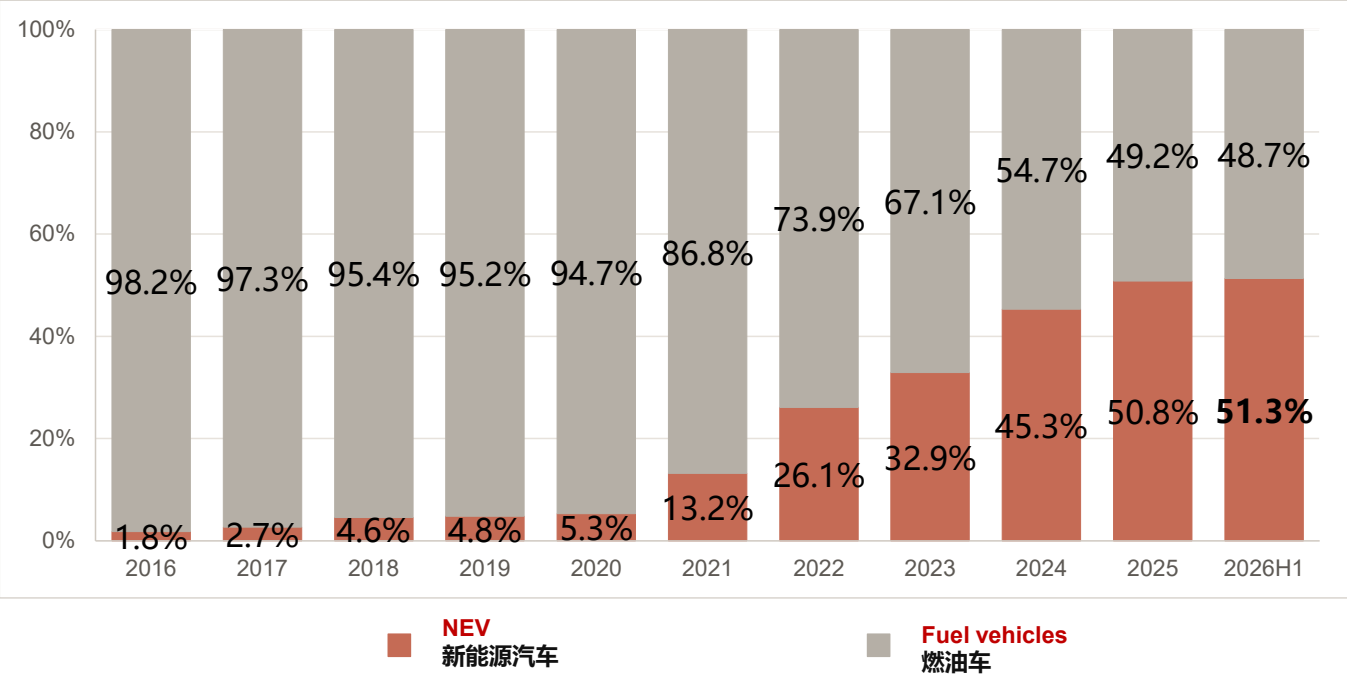


Manufacturing PMI rose above 50 in March 2026 and remained at or above 50 for four consecutive months. The LPI fell below 50 in February and April and rebounded to 50.6 in June.

制造业PMI于2026年3月升至50以上，并连续4个月保持在50及以上；物流业景气指数在 2月和4月低于 50,6月回升至 50.6。

NEVs exceed half of China’s domestic new-vehicle sales
新能源汽车占中国国内新车销量比重超过一半

NEV and Fuel-Vehicle Share of China’s Domestic New-Vehicle Sales (2016–2026 H1)
2016-2026年上半年中国国内新车销量中新能源汽车与燃油车占比



Source / 来源: CAAM; MIIT. Domestic shares for 2016–2024 and H1 2026 calculated from official sales/export data; 2025 directly reported.

Domestic NEV penetration rose from 1.8% in 2016 to 51.3% in H1 2026, gaining 38.1 ppt after 2021. Domestic NEV sales reached 13.87 million units in 2025, when penetration exceeded 50% for the first time.

国内新能源汽车渗透率由2016年的1.8%升至2026年上半年的51.3%，其中2021年后提高38.1个百分点。2025年国内新能源汽车销量达到1,387.5万辆，渗透率首次超过50%。

02

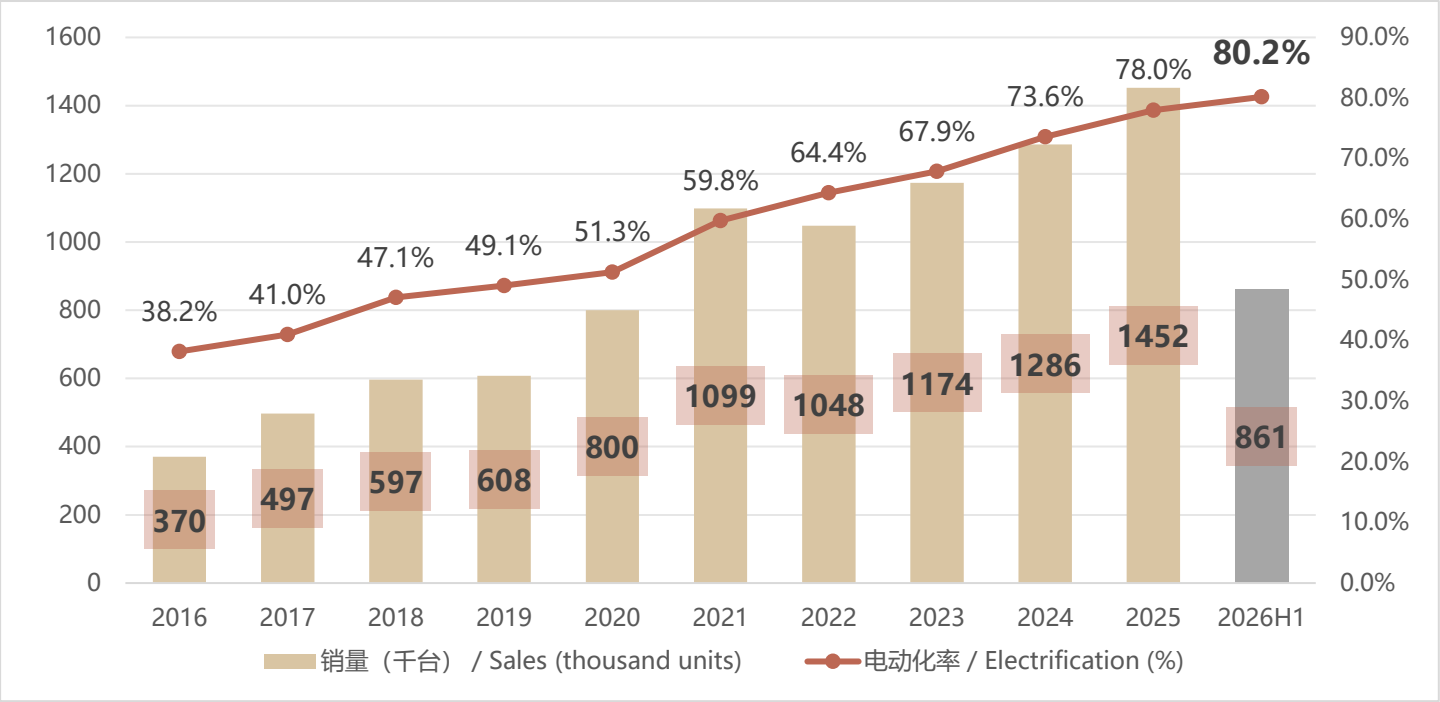
Current Situation of Industrial Vehicle Industry in China
当前中国工业车辆行业发展现状

Market reaches a new high as electrification exceeds 80%

市场规模创新高，电动化率突破80%

China's Sales Volume of Industrial Trucks and Proportion of Electric Truck（2016-2026H1）

2016-2026年上半年中国工业车辆行业销量及电动化率

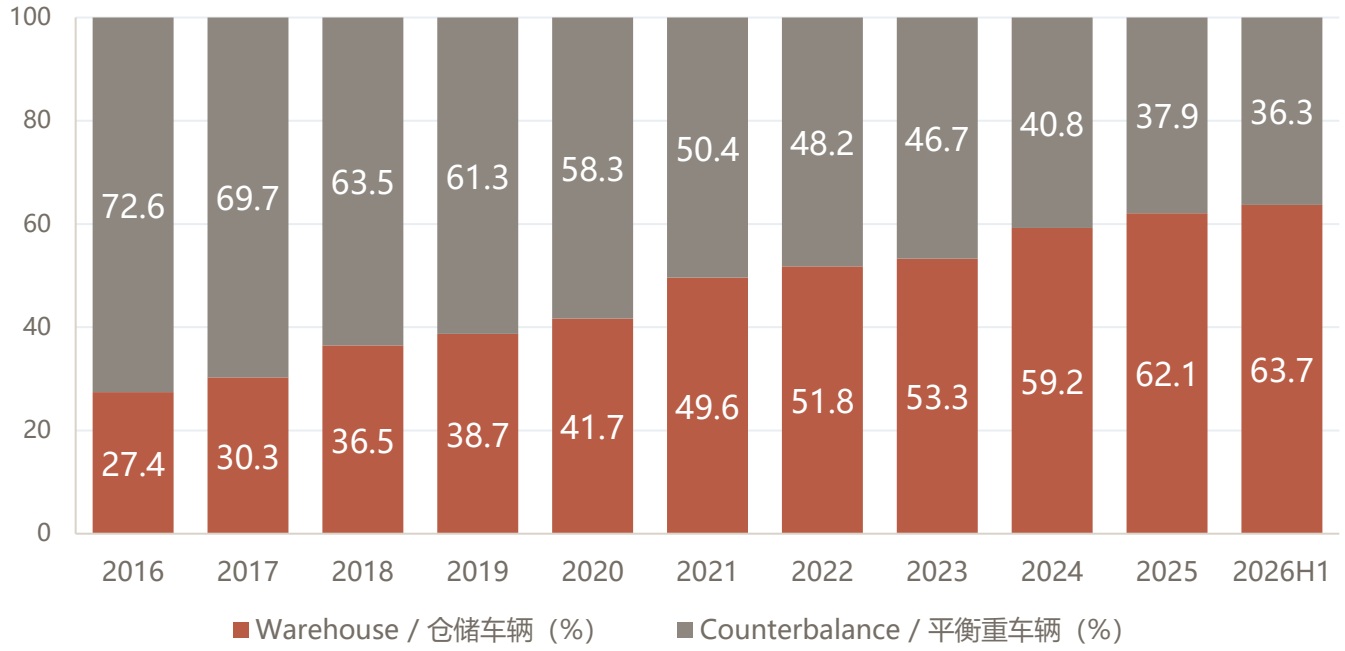


China's industrial-truck sales increased from 370,000 units in 2016 to 1.45 million in 2025, first exceeding one million units in 2021. Electrification passed 50% in 2020 and reached 80.2% in H1 2026.

2016—2025年，中国工业车辆销量由37.0万台增至145万台，并于2021年首次突破100万台。电动化率于2020年超过50%，2026年上半年进一步升至80.2%。

Warehouse trucks become the market's largest segment
仓储车辆成为市场主导品类

Proportion of Counterbalance vs. Warehouse Trucks in China （2016-2026H1）
2016-2026年上半年中国市场平衡重车与仓储车比例变化情况



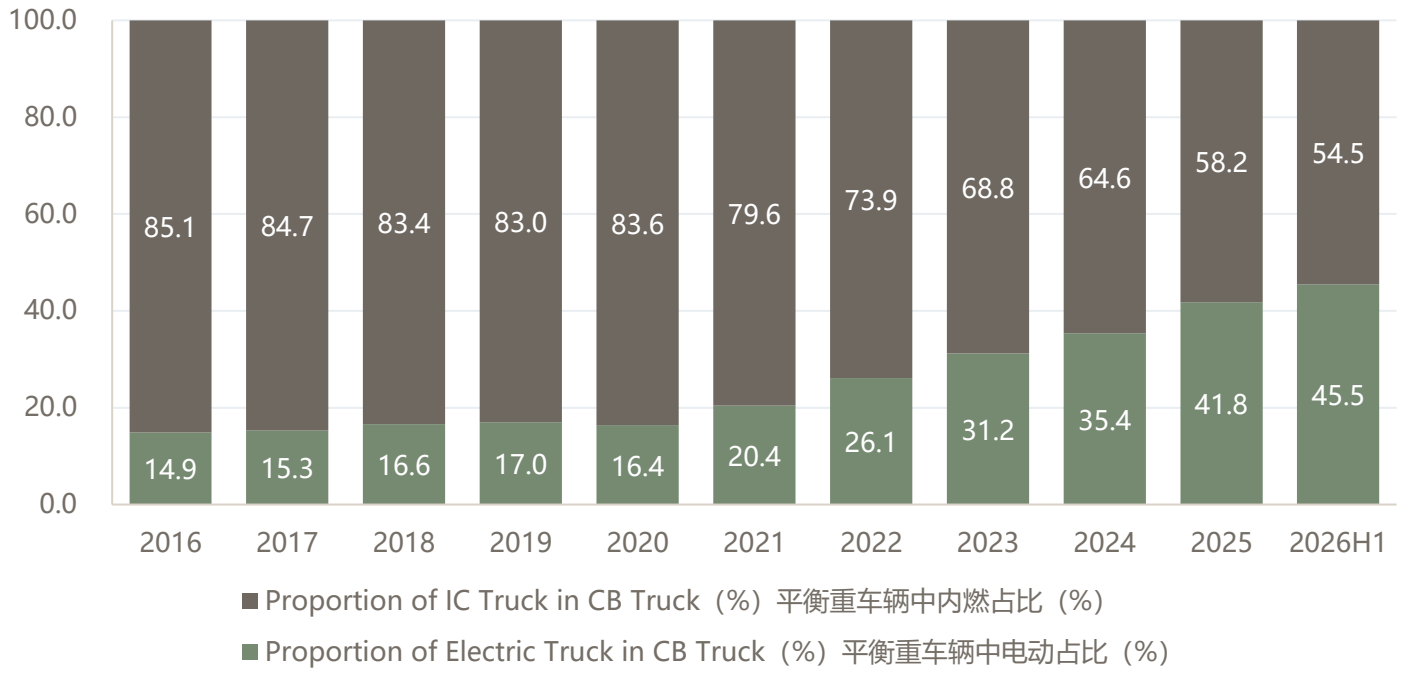
The share of warehouse trucks rose sharply in 2021 and exceeded counterbalance trucks for the first time in 2022. It reached 63.7% in H1 2026, marking a structural shift toward high-frequency logistics.

仓储车辆占比在2021年明显跃升，并于2022年首次超过平衡重车辆。2026年上半年占比达到63.7%，仓储应用进入深化拓展阶段。

Counterbalance electrification accelerates
平衡重车辆电动化明显提速

Proportion of Electric vs. IC Trucks in China's Counterbalance Segment (2016-2026H1)

2016-2026年上半年中国市场平衡重车中电动与内燃比例变化情况

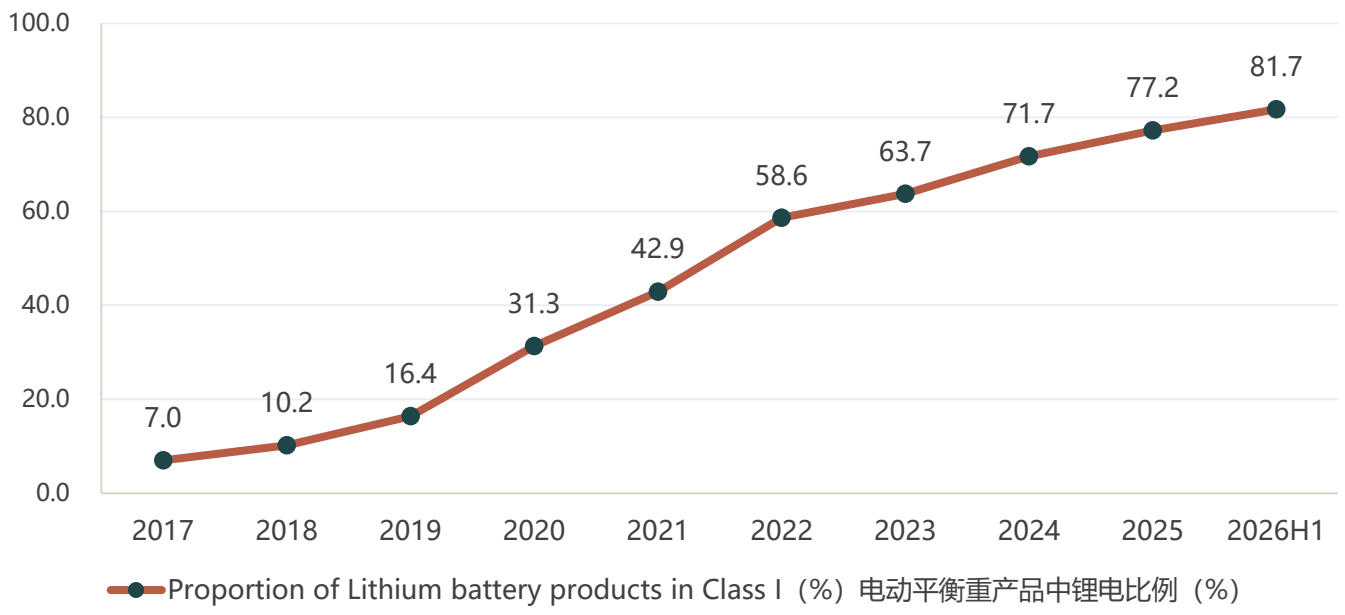


Electric counterbalance penetration remained at approximately 15%–17% from 2016 to 2020. It accelerated after 2021 and reached 45.5% in H1 2026, nearing 50% of the segment.

2016—2020年，平衡重车辆中的电动占比基本保持在15%—17%。2021年后持续加速，2026年上半年升至45.5%，已接近一半。

Lithium-ion penetration in Class I trucks exceeds 80%
I类电动平衡重车辆锂电化率突破80%

Proportion of Class I Lithium battery products in China（2017-2026H1）
2017-2026年上半年中国市场电动平衡重产品锂电化率



Lithium-ion penetration in Class I electric counterbalance trucks rose rapidly from 16.4% in 2019 to 58.6% in 2022. It reached 81.7% in H1 2026 and continued to increase from a high base.

I类电动平衡重车辆锂电占比在2019—2022年快速提升，由16.4%升至58.6%。2026年上半年达到81.7%，在较高基数上继续增长。

03

Development Trends of Industrial Vehicle Industry in China
未来中国工业车辆行业发展趋势

Trend 1: Heavy-duty electrification and lifecycle decarbonization

趋势一：高压锂电突破重载工况，构建全生命周期脱碳闭环

01 Heavy-duty Expansion / 重载工况拓展

Electrification is moving beyond indoor light-duty trucks into high-tonnage, port, heavy-duty and harsh outdoor operations. Mature high-voltage platforms with fast charging can now match internal-combustion performance in power and refueling.

新能源化正从室内轻载向大吨位、港口码头、重工况及恶劣户外工况渗透。成熟的高压平台与大倍率快充，已可在动力与补能效率上替代内燃机。

02 Lifecycle Decarbonization / 全生命周期脱碳

Driven by China's dual-carbon goals and global ESG requirements, decarbonization now extends from zero tailpipe emissions to green materials, low-carbon manufacturing, and regulated battery cascade use and recycling, creating lifecycle carbon-footprint management.

在双碳目标与全球ESG规范驱动下，减碳已从使用端零尾气延伸至绿色原材料、低碳制造、电池梯次利用与规范回收，逐步形成全生命周期碳足迹管理。

GB/T 47933-2026 · China's national standard for industrial-truck carbon footprint · Published in Jul 2026 · Effective in Feb 2027
GB/T 47933-2026《温室气体 产品碳足迹量化方法与要求 工业车辆》· 2026年7月发布 · 2027年2月实施



Trend 2: Practical intelligence for smart trucks and connected operations

趋势二：聚焦单机智能与车联网运营的务实数智化

01 Single-truck Intelligence / 单机智能

Smart trucks with visual perception, anti-collision and driver assistance are spreading fast. They require no site retrofit, work plug-and-play in mixed human-machine operations, and improve safety and efficiency at a lower entry barrier.

搭载视觉感知、主动避障与辅助驾驶的智能叉车正快速普及。无需改造现场，即买即用，以更低门槛提升人机混行安全与效率。

02 Telematics / 车联网

Telematics adoption is gaining rapid popularity across model segments, with steadily expanding functionalities—spanning real-time asset tracking, remote diagnostics, battery health management, proactive fault alerts, and smart fleet optimization.

车联网配置在各类车型中日益流行，承载功能日益丰富，涵盖设备定位、远程监控、电池健康管理、故障预警与诊断以及车队调度优化等多元化场景。



Trend 3: From equipment sales to rental and lifecycle operations
趋势三：从单一设备销售走向专业租赁与全生命周期运营

01 Professional Rental / 专业租赁

To improve cash-flow flexibility and reduce costs, customers are shifting from outright purchase to long- and short-term rental, rental as an alternative to purchase, and pay-per-use models. Professional asset operators are growing quickly.

在现金流弹性与降本增效需求驱动下，客户正从买断转向长短租、以租代售和按需付费。专业资产运营服务商快速崛起。

02 Lifecycle Value / 全生命周期价值闭环

Competition is shifting from new-truck pricing to used-equipment circulation, certified refurbishment, and battery asset management (BaaS/residual value management). These services smooth hardware-sales cycles and support the circular economy.

行业竞争正从新车性价比转向二手设备流通、规范化翻新再制造与电池资产化运营（车电分离/残值管理），以平抑周期波动并契合循环经济理念。



Trend 4: Two-Way Integration & Global Ecosystem Synergy
趋势四：双向奔赴与全球产业生态协同

01 Deeper Industrial Synergy / 深层次产业协同

Global OEMs expand collaboration with China across OEM/ODM, JVs, and core sourcing—sharing scale and tech dividends to bolster supply chain resilience.

欧美日主流主机厂持续深化与中国产业生态合作，广泛涵盖OEM/ODM、股权投资、合资合作为及核心部件采购，全球伙伴共享规模与技术红利，提升全球供应链的交付韧性与竞争力。

02 From Export to Deep Localization / 从产品出海到“深度本土化”

Chinese enterprises accelerate global localization via regional hubs, spare parts, and manufacturing—co-growing with local dealers to create skilled jobs and tax value.

中国企业全面推进海外本土化运营、本地备件仓储、技术服务中心及本土生产基地建设，坚持与海外本土经销商、供应链长期共生，为当地创造长期税收与技术就业。



THANK YOU
谢谢

