

# 2014 Presidents' Forum

## 2014年主席论坛



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# AGENDA 目录

1.

Macro-economic Development in China  
中国经济总体态势

2.

Industrial Truck Market in China  
中国工业车辆市场形势

3.

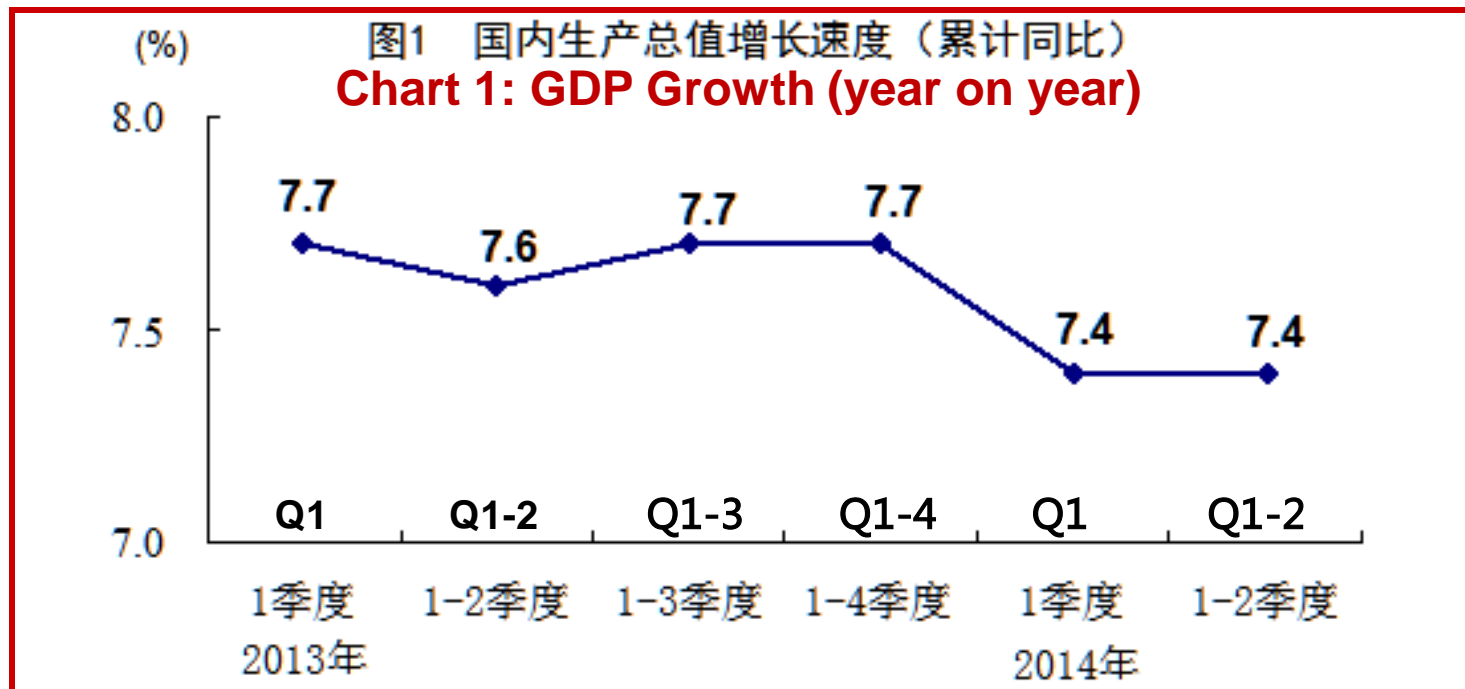
Development Trend of Industrial Trucks in China  
行业未来发展趋势



### 1. Overall economic - slow and steady growth 经济总体增速缓中趋稳

Since new government came into power, Chinese economy growth become more and more rational, slow and steady growth will be norm. (see chart 1)

新政府执政以来，中国经济增长越来越趋于理性，中低速的增长将成为常态（详见图1）。



Source: National Bureau of Statistics 注：具体数据源于国家统计局

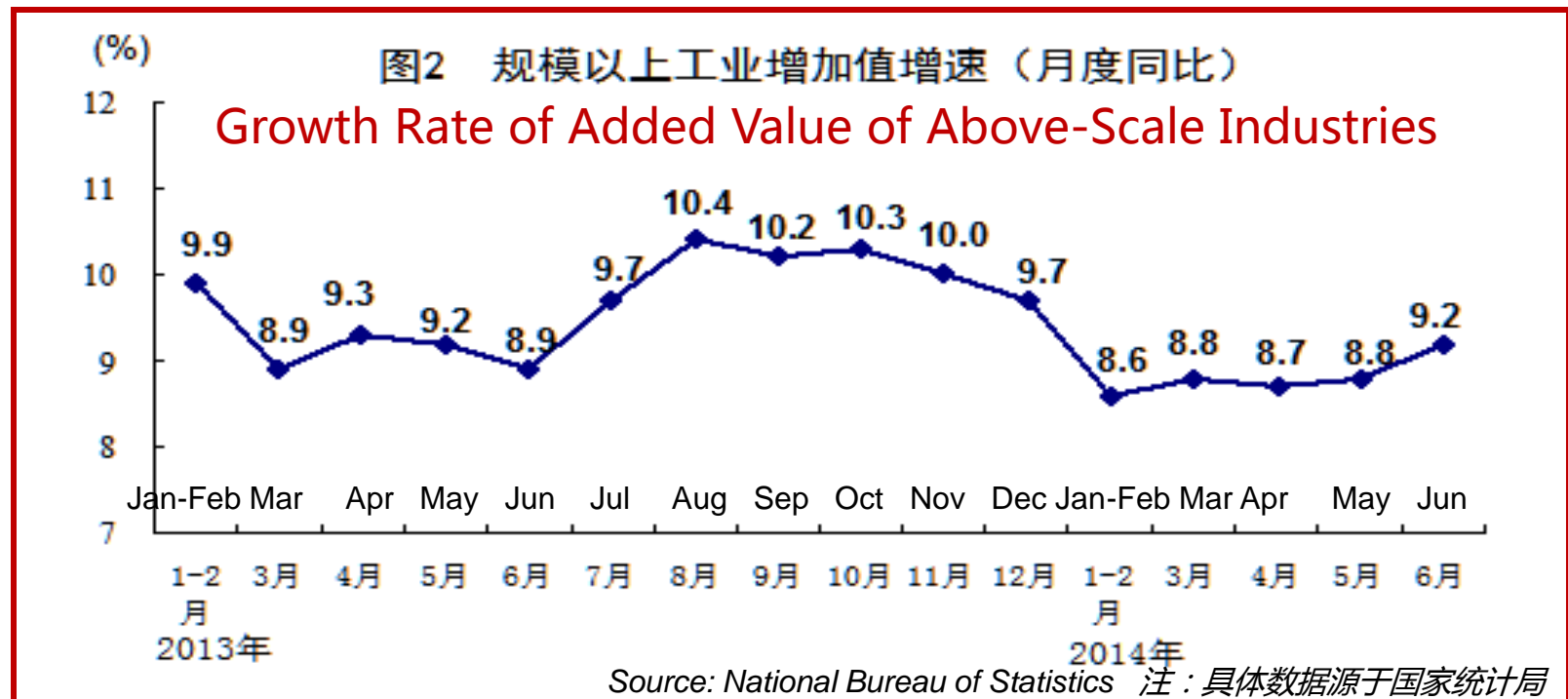


## 2. Overall industrial growth maintains steady growth

### 工业总体增速平稳

Transformation and upgrading gradually become the main power of Chinese industrial growth. Continuous, healthy, and steady growth has been the developing theme of more and more industrial enterprises. (see chart 2)

转型升级逐渐成为中国工业增长主要动力，追求持续、健康、平稳增长成为越来越多工业企业发展的主题（详见图2）。

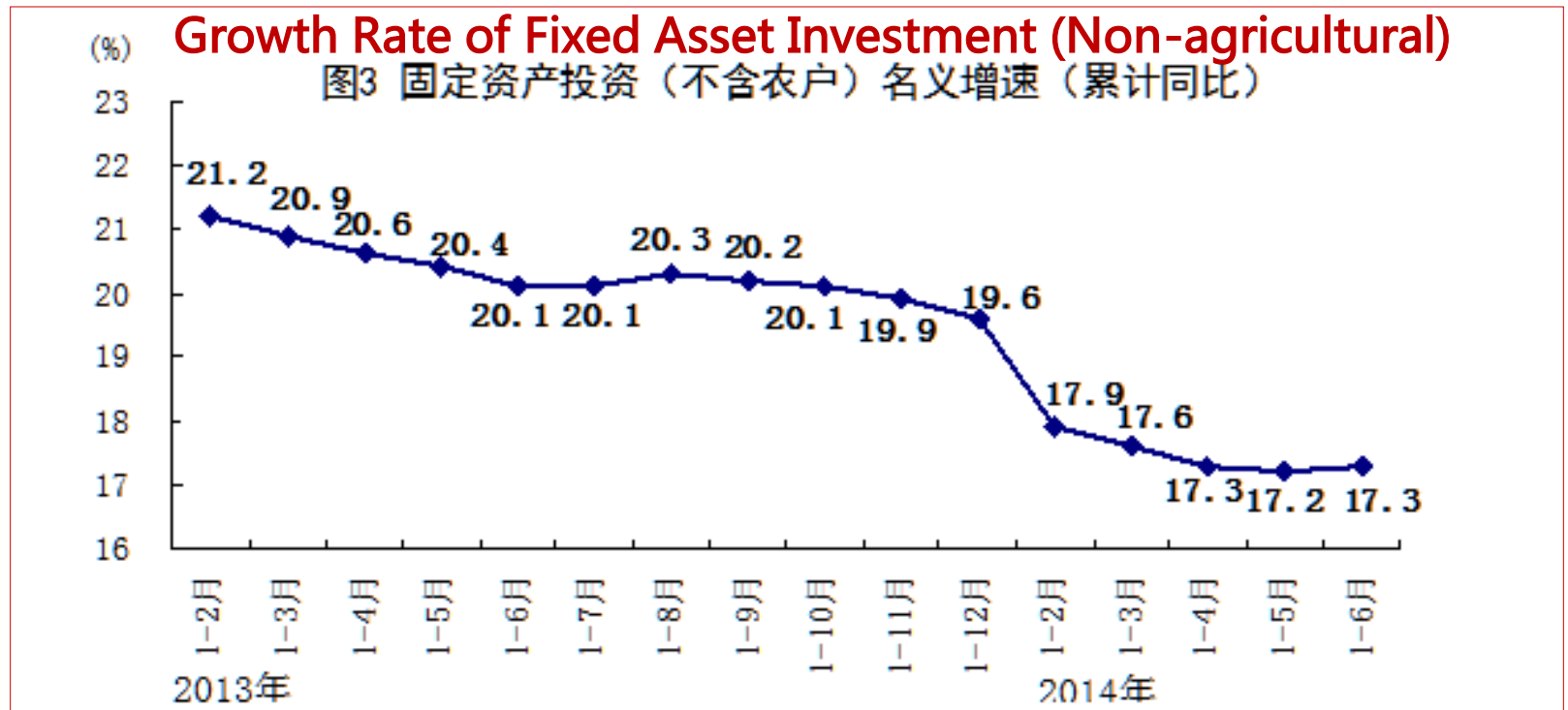


### 3. Growth of fixed investment slow down

#### 固定资产投资增速放缓

From year 2013, the value of Chinese domestic fixed investment were still in a high level, while, its growth rate continue to decline. (see chart 3)

2013年以来，中国境内固定资产投资增速持续下跌，实现高位放缓。（详见图3）。



Source: National Bureau of Statistics 注：具体数据源于国家统计局



### Economic outlook for the second half year

### 下半年经济形势展望

2014以来，中国改革发展深入推进，为稳增长、调结构、促改革注入了可持续性活力。综合积极因素与消极因素的影响，2014年中国经济仍然具备平稳运行的条件，预计下半年有望继续保持缓中趋稳的态势。

全面社会改革推进  
Promote comprehensive social reform

转型升级步伐加快  
Speed up the transformation and upgrading

反腐倡廉工作深入  
Grasp Anti-corruption work

Since 2014, China further deepen its reform step, inject sustainable vitality for stabilizing the growth, adjusting the structure and improving the reform.

In the co-influence of positive factors and negative factors, China's economy still has the condition of stable operation in 2014. It is expected to maintain stable while making slow progress in the second half of the year.

**GDP Growth: 7.5%**

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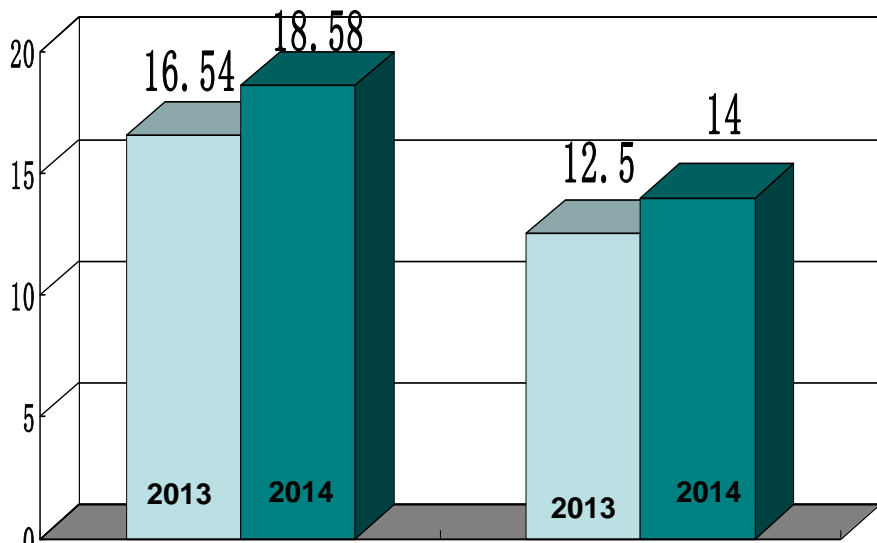
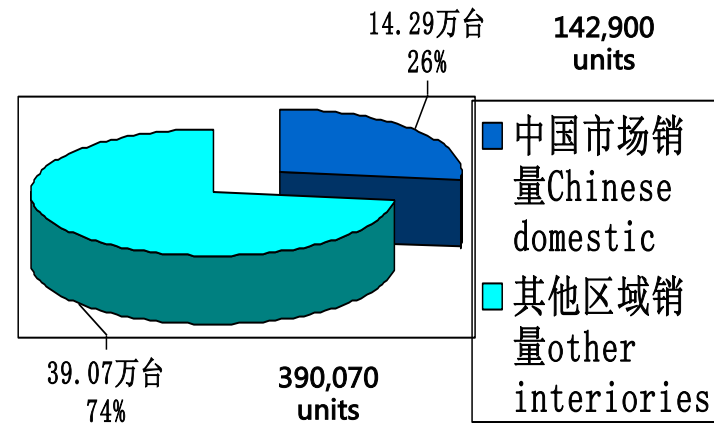


# Industrial Truck Market in China

## 中国工业车辆市场形势

According to the statistics of CITA, in 2014 H1, 185,824 units of FLT were sold, up 12.37% compared to the same period of last year, for comparison, 165,366 units were sold same period of last year.

Among the total, 142,900 units of FLT were sold in Chinese market, growth by 10.34%. 2014年上半年，国内工业车辆行业市场情况是：参加中国工业车辆分会统计的机动工业车辆制造企业共销售185,824台，与上年同期的165,366台相比，上升了12.37%。中国市场区域销售额超过14.29万台，同比增长10.34%。



同比增长12.37%  
Year on year growth

同比增长10.34%  
Year on year growth

	World 全世界	Asia 亚洲	China 中国	China/ World	China/ Aisa
<b>2014 H1</b> 2014上半年	533,566	233,776	142,910	26.78%	63.86%
<b>2013H1</b> 2013上半年	488,471	195,339	124,874	25.56%	63.93%
<b>Growth</b> 同比	9.23%	14.56%	14.44%		





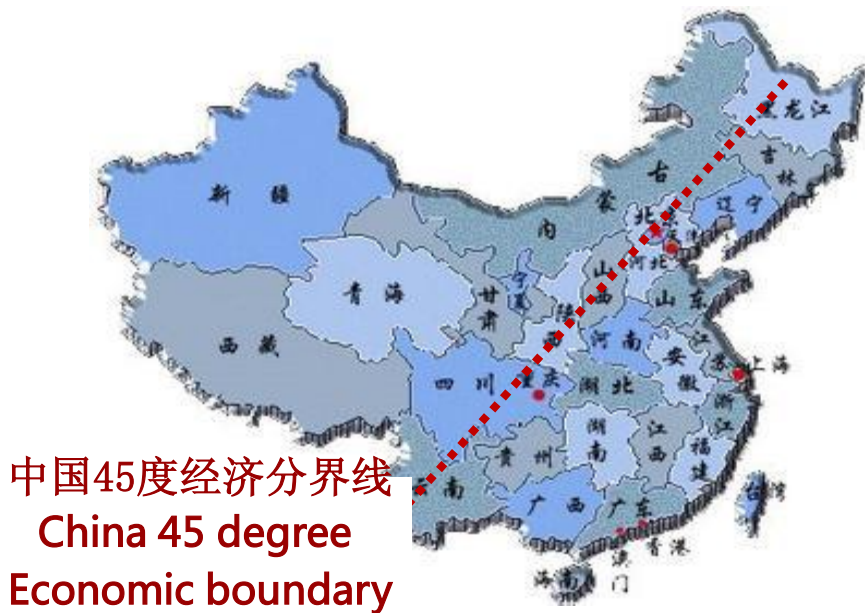
### The features of current Chinese industrial trucks market

#### 当前中国工业车辆市场呈现出的一些特点

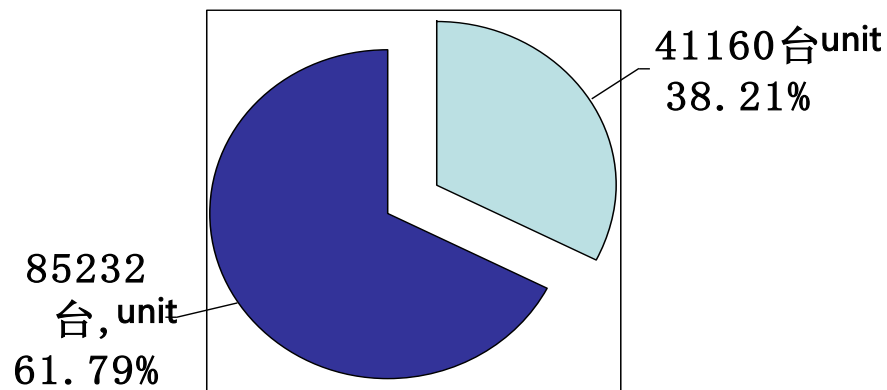
1. Main sales zone: focused on the east coast areas, the right side of the 45 degree economic boundary 销售区域重点：主要销售市场集中在东部沿海省份，以中国45度线为界；
2. Manufacturing enterprises structure: over 100 manufacturers, mainly are small and medium-sized enterprises, the concentration of FLT industry has been continuously strengthened 制造企业格局：企业数超100家，以中小企业为主，但行业集中度较高

2014年上半年中国内燃平衡重叉车前三企业销售额占比图

2014 H1 CHN ICCB TOP 3 sales M. S.



中国45度经济分界线  
China 45 degree  
Economic boundary





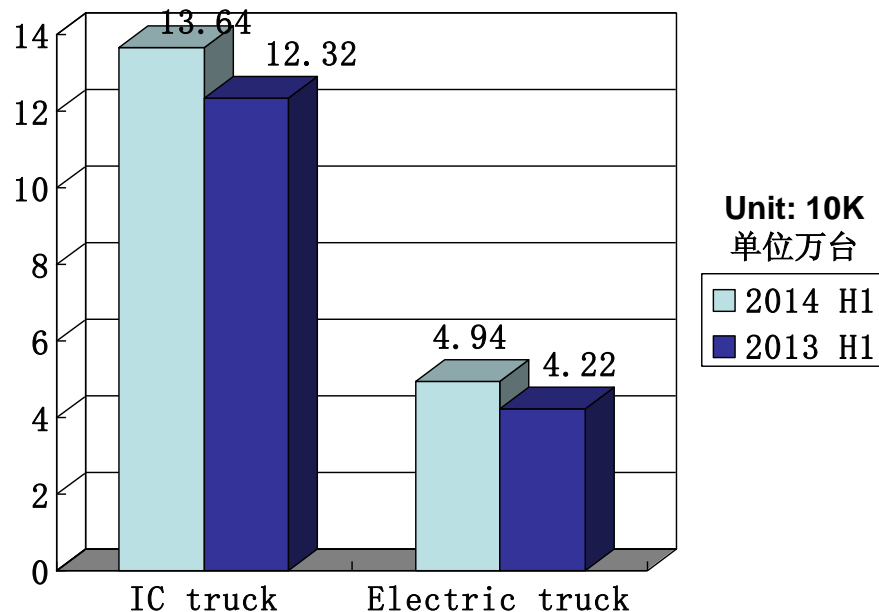
3. Main FLT products in market: the main products are low-middle end, with low price and homogenized products. ICCB still retains high market share;

市场主导产品:

市场销售以中低端价位产品为主，低价同质化现象严重，内燃平衡重叉车比例较高；

### 中国叉车行业产品销售类别增长情况

#### Sales growth of Chinese FLT industry



4. After sales market - a big potential: after service, spare parts, attachments, and leasing business have huge expansion space.

后市场潜力大：售后服务、配件、属具以及租赁等业务市场拓展空间巨大

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- ◆ **The growth of 2014 China industrial truck market is expected to reach 10%.**  
2014年中国工业车辆行业将实现10%左右增长。
- ◆ **The competition structure will not change much, but the product structure and company positioning of the industry may be different.**  
中国工业车辆行业竞争格局不会有太大变化，但行业产品结构和厂家定位正在发生变化；
- ◆ **Chinese government and society will have more strictly requirements on safety and environmental protection.**  
中国政府和社会对产品和企业环保安全的要求越来越高；
- ◆ **The competition of Chinese industrial trucks market will change from product homogenization to comprehensive products and service mode.**  
中国工业车辆行业从同质化的单纯产品竞争向产品、服务等综合比拼模式转型；
- ◆ **Electric and environment friendly warehouse trucks will be the highlight of the development in next-stage.**  
电动等环保节能叉车及仓储类产品将是下一轮发展的重点

**Thanks for your attention**  
**感谢各位的聆听**

