

Presidents' Forum

2011年主席论坛



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中国工程机械协会工业车辆分会 会长

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AGENDA演讲内容

I. China's Macro-economic Situation under the New Circumstances 新形势下的中国宏观经济形势

II. Development of China's Industrial Truck Market 中国工业车辆发展状况

III. Development Trend of China's Industrial Truck Market 中国工业车辆发展趋势

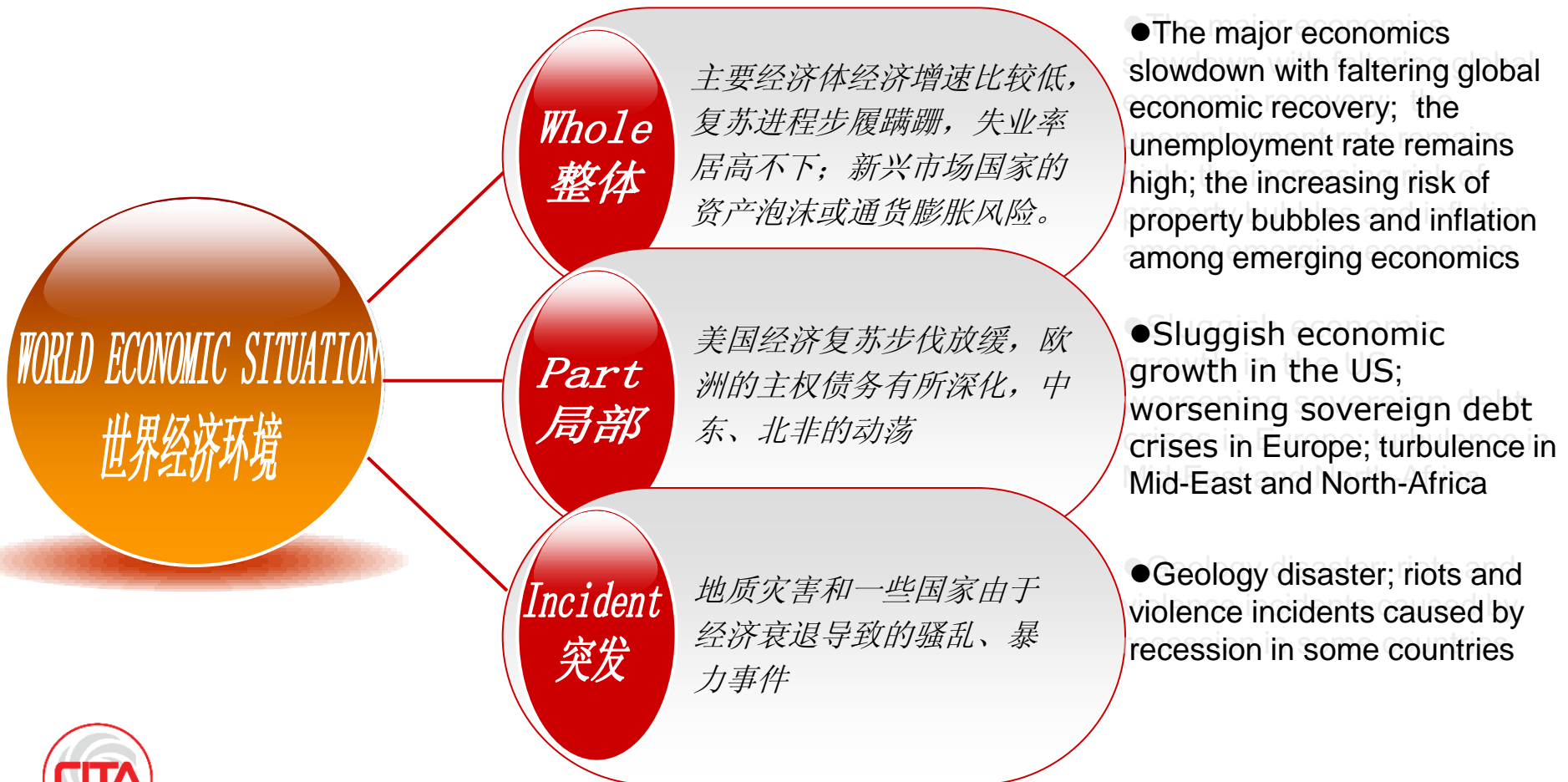


I. China's Macro-Economic Situation under the New Circumstances

新形势下的中国宏观经济形势

Complex world economic situation, and miscellaneous economic factors see slow recovery, with fluctuating curve.

今年世界经济运行形势非常复杂，诸多因素导致世界经济复苏缓慢，而且是波动曲折。





The economic development is now shifting to self-initiated growth from previous overheated expansion spurred by the economic stimulus
经济增长由前期政策刺激的偏快增长向自主有序增长转变。

The opportunity and challenge of China's economy

中国经济机遇与挑战并存

There are many advantages for the development, every participants engaged in works with highly motivated, for a economic development. Especially as the 1st year of the 12th Five Year Plan, every industry have strong desire to accelerate forward.

发展的有利条件较多，各方面发展的积极性很高，经济发展动力充沛，特别是‘十二五’开局之年各行业加快发展的愿望很强烈。

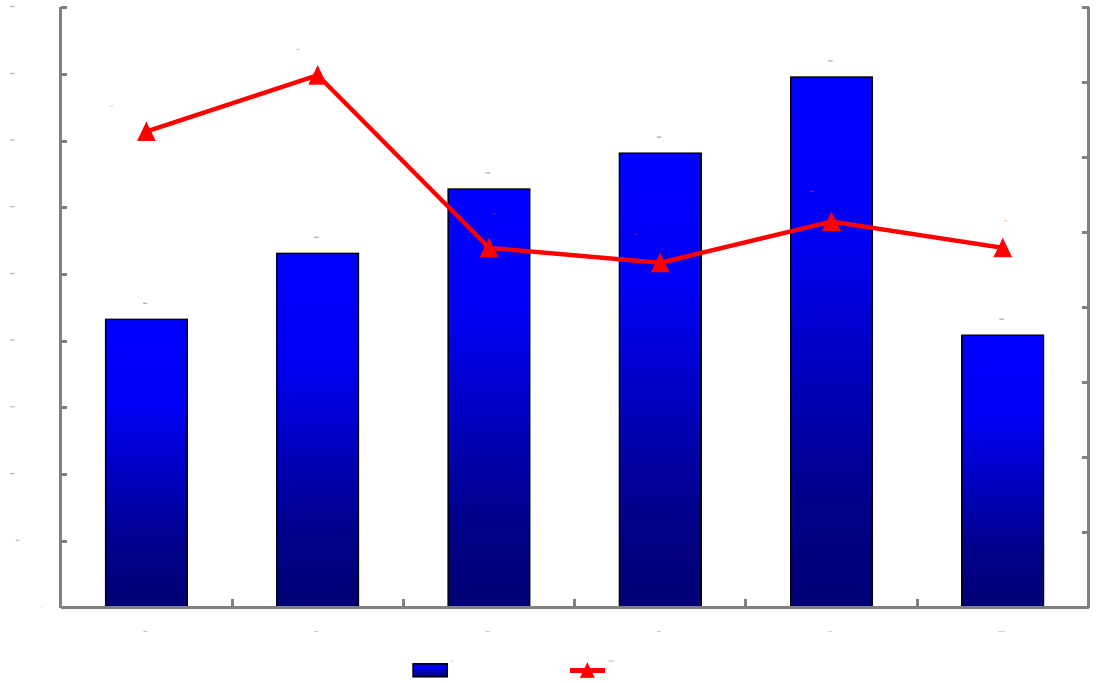
This year's economic policies - "two prevents": to hold down inflation, and to prevent the fast-growing economy from being overheated

同时，控制通胀与保持经济平稳较快发展的“两难”问题是今年的主要问题。



GDP in China

100 Million RMB

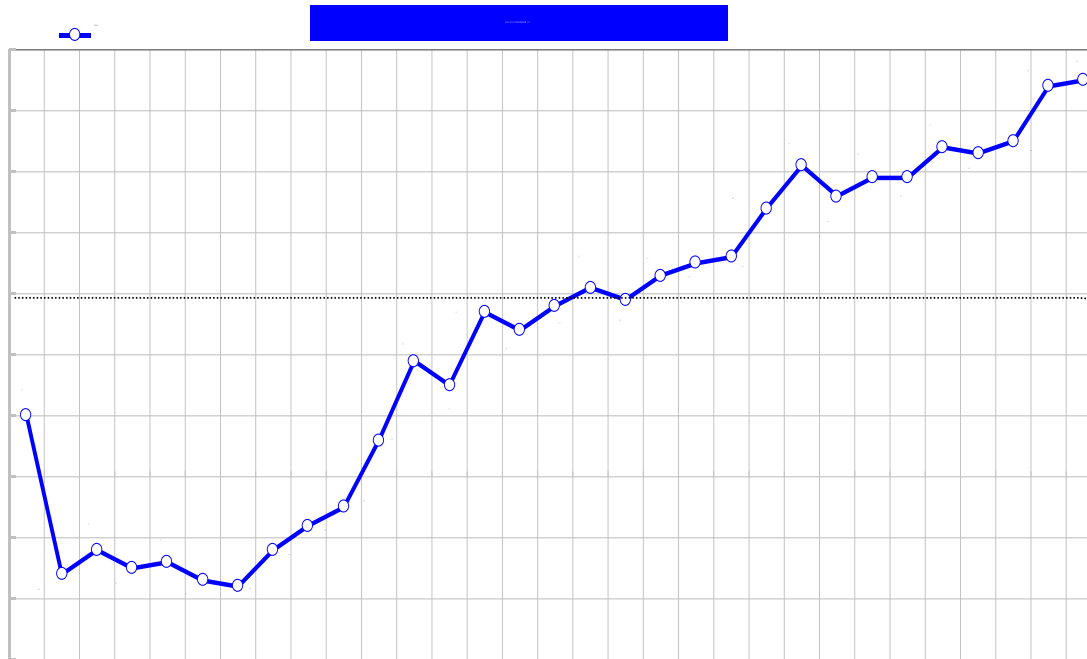


2011 H1

Growth Rate %



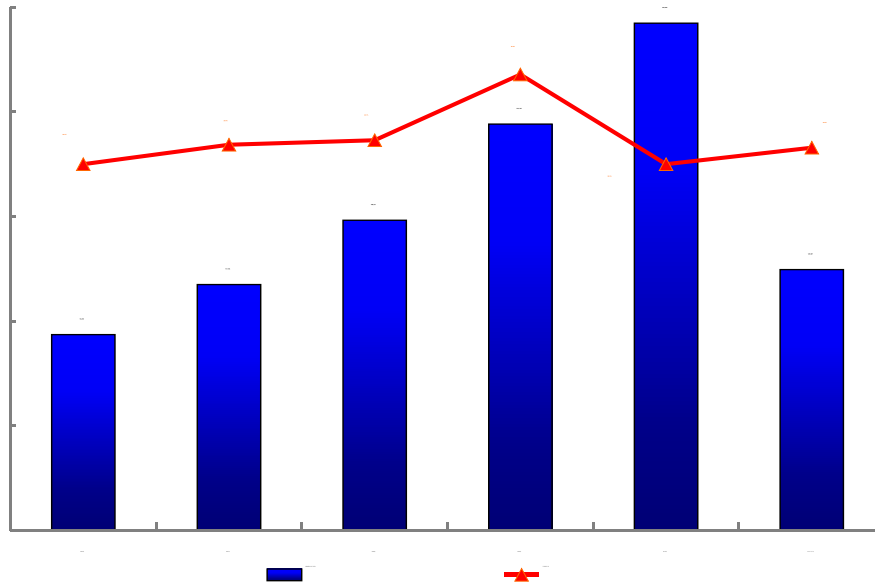
Consumer Price Index (CPI) 2009-July 2011



China's Fixed Asset Investment in Urban Areas

中国城镇固定资产投资

100 Million RMB



China's Fixed Asset
Investment in Urban Areas

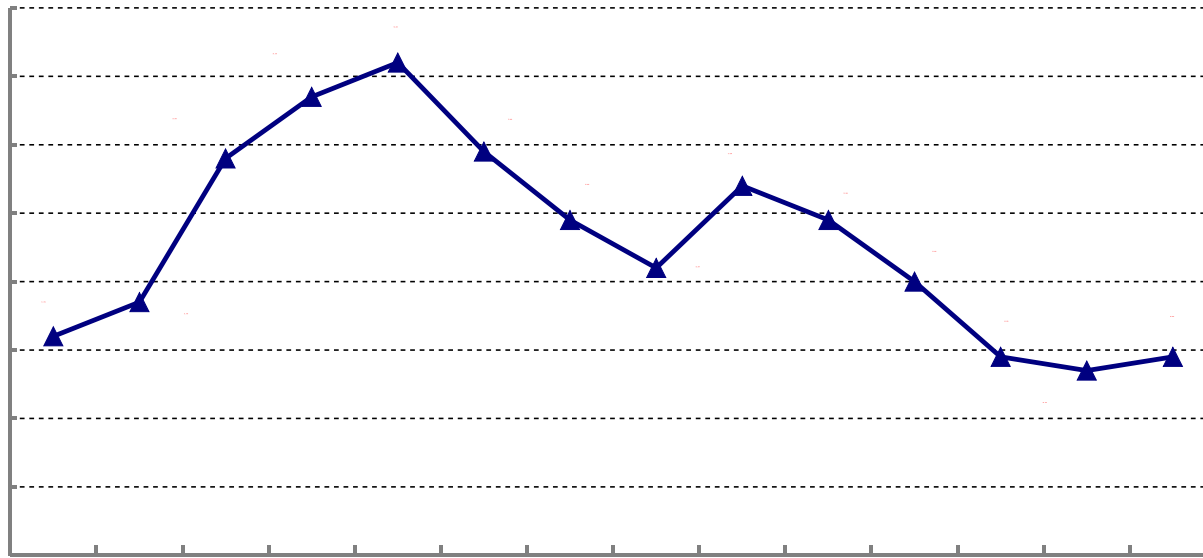
Growth Rate

2011 H1



China's Purchasing Managers' Index (PMI)

中国制造商采购经理指数 (PMI)



July 2010 Aug Sep Oct Nov Dec Jan 2011 Feb Mar Apr May June July Aug



China's Economic Growth Path

中国经济发展主要方向

Continue to and improve Macro-economic control, maintain sustainable implement a prudent fiscal policy and stable monetary policy to strengthen and rapid growth.

继续加强和改善宏观调控,实施积极的财政政策和稳健的货币政策,促进经济平稳较快发展

Strengthen the adjustment of the industrial structure, promote energy saving and emission reduction, raise the investment in the technology improvement and innovation, and realize sustainable development.

推进产业结构优化升级和节能减排,加大技术改造和技术创新投入力度,实现可持续发展

To keep the overall level of prices stable, protect and improve the resident's livelihood, and guarantee the harmonious and stable society.

着力稳定物价总水平,大力保障和改善民生,保障社会和谐稳定

Speed 速度
Structure 结构
Prices 物价



II. Development of China's Industrial Truck Market 中国工业车辆发展状况

Logistics enter a new stage of rapid development
物流业进入快速发展新阶段

Factors in Logistics Development
诸多因素促使物流业发展

1

需求增加

Increase in Demand

The rise in national economy volume, optimized economic structure, and better living conditions

国民经济总量的增长、经济结构的优化和人民生活水平的提高,

2

政策驱动

Policy-driven

2009: 《Revitalization Planning for Logistics Industry 物流业振兴规划》

2011: 《Eight Measures to Boost Logistics 推动物流业发展的八项措施》

3

提高水平

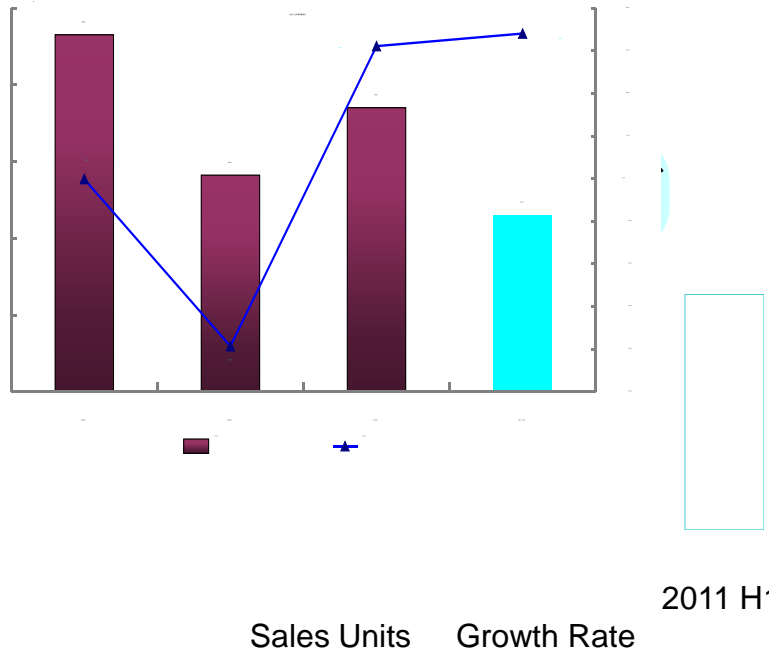
Level-up

Still in the primary stage of development, which cannot totally satisfy the requirement for national economy development. Still far away from the developed countries. Need to find our way out.

仍然处于初级阶段, 还不能够完全适应国民经济发展的需要, 与经济大国差距很大, 函待解决。



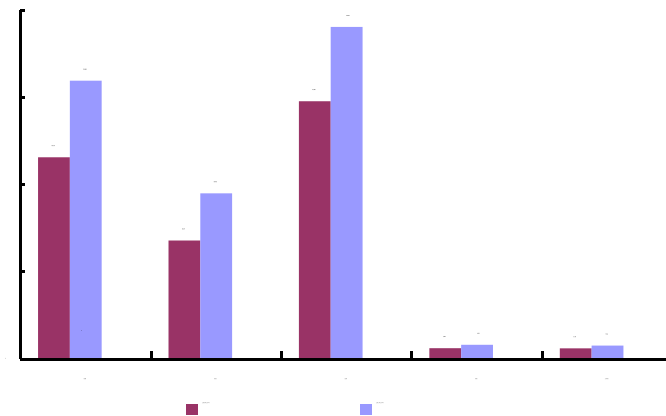
Sales of Industrial Trucks in Global Market



The sales of world industrial trucks has been recovered since 2010, and maintains the increasing trend in 2011

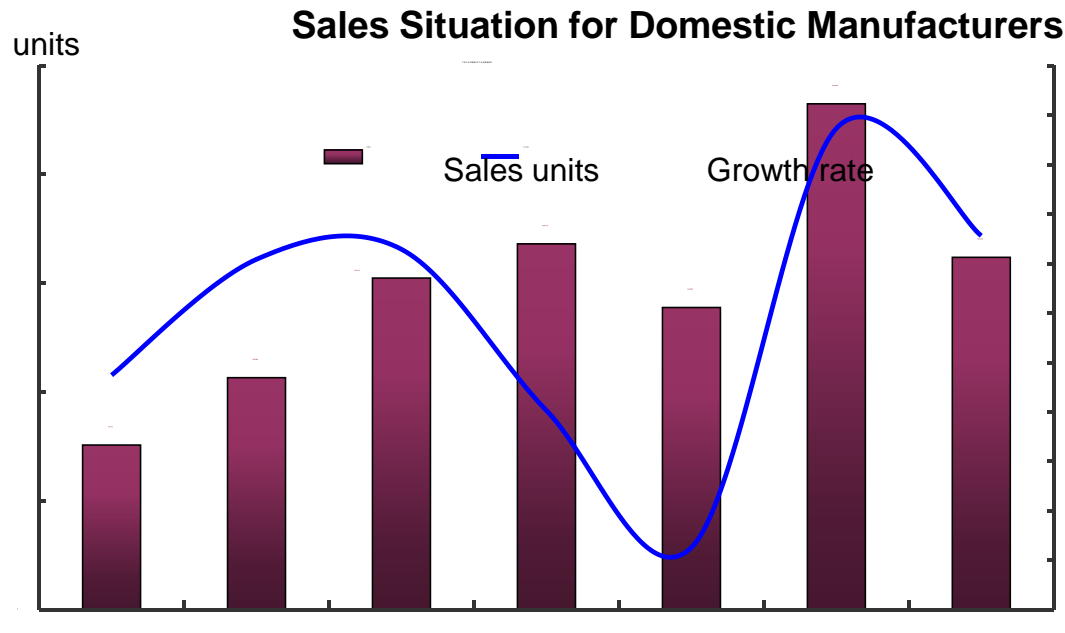
世界工业车辆的销量，2010年开始恢复，2011年保持了增长。

Sales of Industrial Trucks per Continent (2010 H1 & 2011 H1)



Europe 2010 H1 2011 H1 Africa Oceania
 America Asia

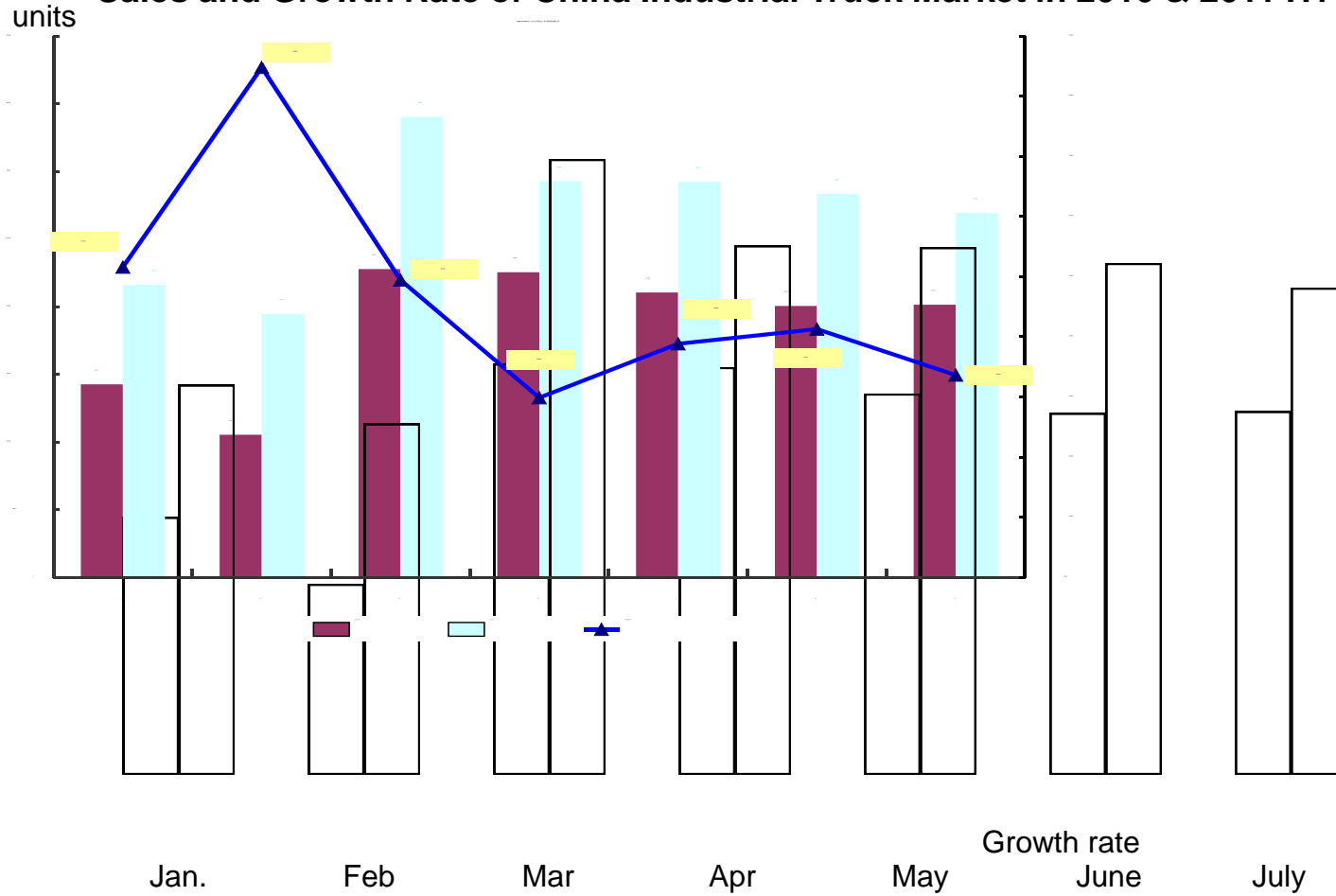




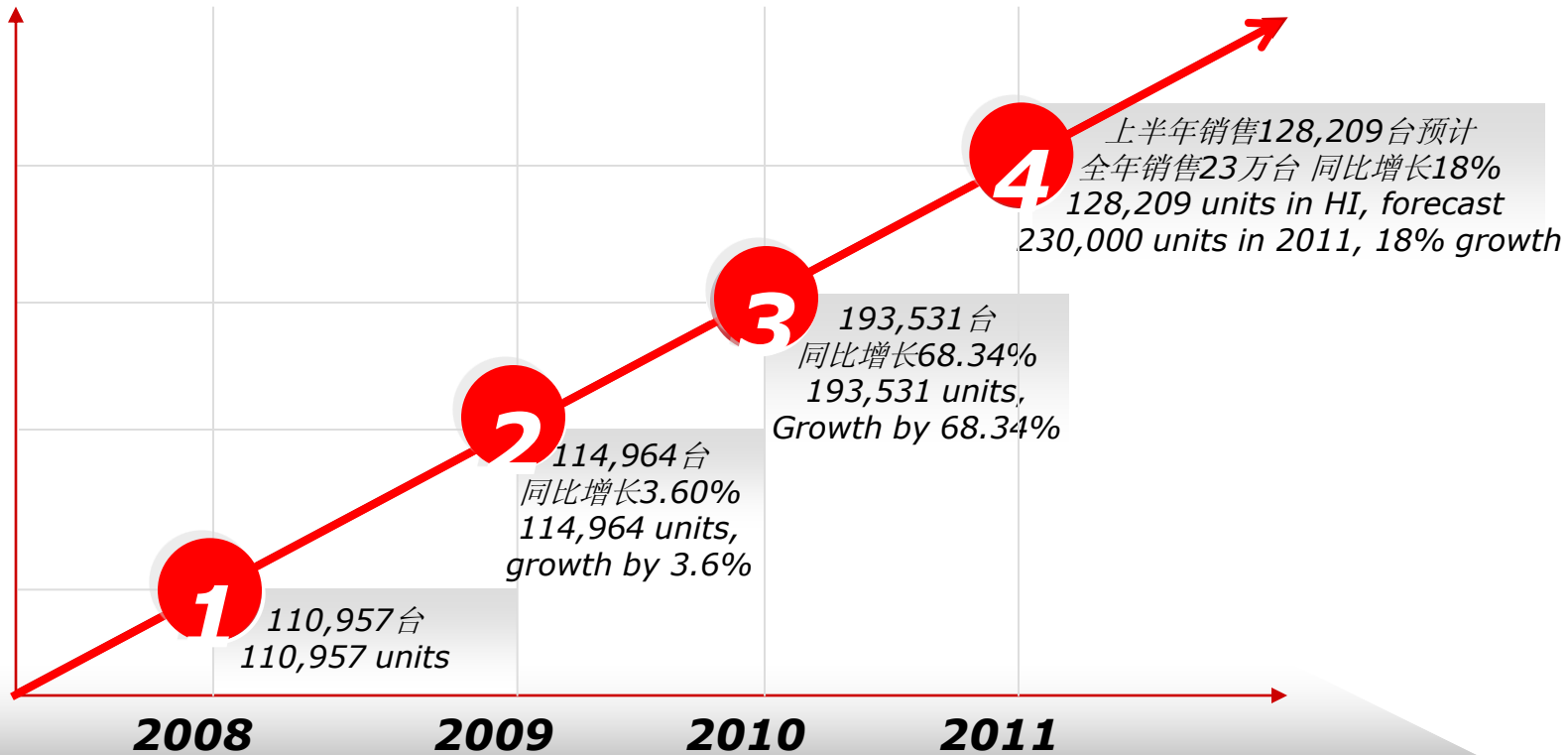
2011 H1



Sales and Growth Rate of China Industrial Truck Market in 2010 & 2011 H1



中国工业车辆市场销售情况
Sales Situation in China Market



After global financial crisis, the sales of domestic market created new historical records in two successive years, the supporting to the underdeveloped areas and manufacturing industry gather to cluster in western China...all these show the strong demands for the industrial trucks in China market.

金融危机后国内市场销量连续两年创历史记录，欠发达地区发展、制造业向西部转移。。。。决定了中国市场对工业车辆的需求仍然强劲。



The Old and New Problems for China's Forklift Truck Industry

中国工业车辆行业发展存在的老问题和出现的新问题

Old Problems 老问题	New Problems 新问题
<p>The over-rapid growth makes the duplicated construction and homogeneous competition even worse;</p> <p>增长速度过快，加剧了重复建设和同质化竞争；</p>	<p>The competitiveness is weakened, owing to the up price of raw materials, RMB's appreciation, and the increase of labor force cost.</p> <p>原材料价格上涨、人民币升值、人工成本上涨，竞争力有所减弱；</p>
<p>The technology improvement is not synchronized with the output development. The product structure adjustment and upgrade should be further strengthened;</p> <p>技术进步与产量发展不同步，结构调整和升级还需进一步加强；</p>	<p>Due to years of severe homogeneous competition, there is no basis of technology development and innovation. We are still far away from the advanced world levels.</p> <p>连续多年的同质化竞争使得技术、创新没有发展的土壤，与世界先进水平仍然保持较大的差距；</p>
<p>The key components are still relying on import;</p> <p>关键零配件还是依赖进口；</p>	<p>The domestic manufacturers face many difficulties in the export caused by trade protection and trade barrier.</p> <p>贸易保护和贸易壁垒使企业出口遇到诸多困难</p>
<p>Lack of professional experts in this industry.</p> <p>专业型人才短缺。</p>	



Development Trend of China's Industrial Truck Market 中国工业车辆发展趋势

1

The improvement of logistics efficiency, labor force to be replaced by machine, the development of the western regions and the acceleration of urbanization process, etc.
物流业效率提升、机器代替人工、西部开发、城市化进程等等

The demand for FLT will be further increased
工业车辆的市场需求量还会增加

2

low-carbon and environment protection, the development in warehousing industry.
低碳环保、仓储业发展

The proportion of Electric Trucks will higher year after year
电动叉车比例会逐年提高

3

Local market: the increasing user requirement for the operating environment and product performance
International market: The Competitiveness is weakened, owing to the up price of raw materials, RMB's appreciation, and the increase of labor force cost.
国内市场：用户对使用环境、产品性能的要求提升；
国际市场：原材料价格上涨、人民币升值、人工成本上涨，竞争力有所减弱

The production structure in the domestic manufacturers must be adjusted
国内生产企业需要产品结构调整势在必行

