

## 1.

大家好，我是来自杭叉集团股份有限公司的陈伟强，第一次参加主席论坛，与行业内的主要企业领导人相聚在棕榈海滩，共话经济和行业发展，非常高兴。

I am Chen Weiqiang from Hangcha Group, it is my first time to participate the presidents' forum, it is my great honor to be here with our industry peers in Palm Beach, taking this opportunity to communicate on the economic and industrial development.

## 2.

今天我与大家分享三个方面的内容：1.中国宏观经济形势；2.中国工业车辆发展状况；3.中国工业车辆发展趋势。

Today, I would hope to share with you the following 3 parts:

1. Macro-economic Development in China
2. Industrial Truck Market in China
3. Development Trend of Industrial Trucks in China

## 3

中国经济发展步入新常态，增长速度换挡

**A “new normal” of China's economy emerges; the growth speed has been shifted**

宏观经济方面，from Macro economic side:

1. 中国经济上半年 GDP 增长 7%，世界经济仍处于深度调整期、中国经济正处于“三期叠加”的特定阶段，增长速度换挡，经济发展步入新常态。

In 2015H1, China's GDP grew by 7.0% on a year-on-year basis. The global economy is still in deep readjustment. In this current stage of development, China has to deal simultaneously with the slowdown in economic growth, make difficult structural adjustments, and absorb the effects of previous economic stimulus policies

2. 加快转变发展方式，从主要追求数量速度，拼规模、拼消耗的粗放增长，转向数量质量效益并

重

The transformation of the pattern of economic development will be accelerated, from the pursuit of quantity and speed, as well as the extensive growth in the competition of scale and consumption, to equal attention to quantity, quality and benefit.

3. 中国服务业已超过制造业成为第一大产业，以节能环保、新一代信息技术、高端装备制造、新能源新材料等为代表的战略性新兴产业，呈现出良好的发展势头

In China, the service industry has become the largest industry over the manufacturing industry. The strategic emerging industries have staged a sound momentum of development, particularly in energy-saving and environmental protection, next generation information technology, high-end equipment manufacturing, new energy and new materials, etc.

4. 传统的“三驾马车”消费、投资、出口都出现了新的变化，经济增长的动力处在深刻的转换之中  
Innovative changes have been shown in the traditional “Troika”, that is, consumption, investment and export. The motivation of economic growth is in the profound transformation.

## 4

进入 2015 年，顺着“稳增长”主基调的展开，中国采取了一系列措施缓解经济增速下行的压力，其中包括：

**Since 2015, with the amplification of the main tone “stabilized growth”, China has taken a series of measures to relieve the stress of slowdown in economic growth, including:**

- 1、继续实行积极的财政政策和稳健的货币政策，从多方面给实体企业减税和财政资金的支持。  
Continuing a pro-active fiscal policy and a prudent monetary policy, reducing taxes and supporting with financial funds for entity enterprises in multiple ways
- 2、鼓励大众创业、万众创新。Encouraging innovation, and business startup
- 3、连续三次降低法定存款准备金率和存贷款基准利率，既缓解实体企业的资金紧张状况，又降低实体企业的资金成本。

Reducing reserve requirement ratio and deposit and lending rates three times, which helps relieve the stress of tight budgets in entity enterprises, and reduce the cost of their funds

- 4、进一步发挥消费在推进经济增速方面的基础性作用和投资在推进经济增速方面的关键性作用

Furthering on the fundamental role of consumption in accelerating economic growth and critical role of investment in accelerating economic growth

- 5、积极扩展全国大中城市的基础设施改造、以“一带一路”、京津冀协同发展和长江经济带发展等契机，努力扩大投资规模，缓解产能过剩压力，推进经济质量和经济效益的提高。

based on the invested projects, providing opportunities for infrastructure reconstruction in large and middle-size cities in China, “One Belt And One Road” project, joint development of Beijing, Tianjin and Hebei, and development of Yangtze River Economic Belt, etc., expanding investment scales, relieving the stress of excessive production capacity, and boosting the economic quality and economic benefit.

## 5

上半年，国内生产总值 296868 亿元，增长 7.0%。分季度看，一季度同比增长 7.0%，二季度增长 7.0%。

The GDP in the first half year reached 29,687 billion RMB, increased by 7.0%. In Quarter 1, it increased by 7.0%, for Q2, it also increased by 7.0%.

上半年，固定资产投资 237132 亿元，增长 11.4%，增速有所回落。

Fixed asset investment reached 23,713 billion RMB, grew by 11.4%, the growth speed has slow down.

## 6

上半年，工业增加值增长 6.3%，增速比一季度回落 0.1 个百分点。

The added value of industry increased by 6.3%, the growth speed slowed down by 0.1 percentage point.

上半年，居民消费价格基本稳定，居民消费价格上涨 1.3%，涨幅比一季度扩大 0.1 个百分点。

The consumer price index maintain in a stable range, the index up by 1.3%, the growth speed increase by 0.1 percentage point.

## 7

2015 年 6 月份，中国制造业采购经理指数（PMI）为 50.2%，连续四个月高于临界点，制造业持续小幅扩张。

The purchasing manager index in June 2015 reached 50.2%, it is the four consecutive months above the critical point, the manufacturing sector continued to expand slightly.

## 8

这是对上半年中国经济半年报的一个总结。

This chart concludes the 1<sup>st</sup> half year's China economic situation.

## 9

首先，经济保持在合理区间运行，GDP 连续 2 个季度运行在 7%。企稳态势明显，国民经济出现积极变化，经济发展活力增强。CPI 多个月在 12-15 波动，基本平稳

Firstly, economic performance remained within proper range, GDP remained at 7% in the past 2 quarters, shows a steady growth trend. CPI kept among 12-15, which is also in a steady growth curve.

## 10

民生持续改善，居民收入增长 7.6%“跑赢”GDP，城乡居民收入差距继续缩小

The living standard of people continued to improve, the growth rate of residential income run faster than GDP, the income gap between urban area and rural area continue to shrink

## 11

调结构经济持续优化。第三产业占比上升到历史新高，排在第一，下降的行业集中在高耗能、高污染领域，上升的产业有高科技、中高端制造业及民生产业。上半年单位 GDP 能耗均比下降 5.9%

Continuously adjust and optimize the economic structure, the proportion of 3rd industry in

total GDP surged to a record high. The decreasing section includes high energy consumption, high pollution industries, and the increasing part consists of high technology, mid-high end manufacturing and livelihood industries.

## 12

大众创业、万众创新，是中国经济持续发展的动力之源，广阔前景值得期待。

Encourage people to do business creatively and drive innovation, it would be the source of motivation to the sustainable development of China's economy; we expect to see its broad prospects.

## 13

经济趋势展望：

### **Future economic trends**

在国家层面上，利好政策加码，加速产业发展：

At the national level, the increasing favorable policies have speed up the industrial development.

2015 年 5 月 8 日，国务院公布《中国制造 2025》，提出重点发展新一代信息技术、高档数控机床和机器人、航空航天装备、海洋工程装备及高技术船舶、先进轨道交通装备、节能与新能源汽车、电力装备、新材料、生物医药及高性能医疗器械和农业机械装备，指明了未来十年，大部分战略性新兴产业发展的重点和方向。

On May 8th, 2015, the State Council announced "Made in China 2025". Ten sectors have been identified as priorities, including new generation information technology, high-end numerically-controlled machine tools and robotics, aerospace equipment, ocean engineering equipment and ships with high technology, advanced railway traffic equipment, energy saving and new energy vehicles, power equipment, new materials, biological medicine and high-performance medical devices, and agricultural production machinery, which indicate the development priorities and direction for most strategic emerging industries in the next 10

years.

## 14

持续性基础设施建设投入：

### **Sustainable infrastructure construction will be invested.**

- 实施了信息电网油气网络、生态环保、清洁能源、粮食水利、交通运输、健康养老服务、能源矿产资源保障等 7 大类重大工程包。已累计完成投资 3.3 万亿元。

- 正在积极筹划新兴产业、增强制造业核心竞争力、现代物流、城市轨道交通 4 类新的工程包。

消费潜力正激发并加快释放

### **Stimulate and accelerate consumption capacity**

- 以互联网++为核心的消费理念深入推广与普及，以及房地产政策放宽，正在成为推动消费扩张的动力

Relaxation of real estate policy

“大众创业、万众创新”

Encourage people to do business creatively and drive innovation

- 创业创新政策带动民间投资趋向活跃，将构成未来我国经济增长新引擎

## 15

接下来我们看下中国工业车辆发展情况

Now, here we will look at the industrial truck market in China

## 16

这是 2001 年到 2015 年中国国内叉车市场销售情况，2015 年上半年中国叉车市场的销售量达到 128,836 台，与 2014 年上半年的 142,910 台相比，下降了 9.85%，预计全年总销售量在 24 万台左右，低于 2013 年的销量。

This chart shows the China domestic FLT market sales situation from 2001 through 2015. In

2015 H1, 128,836 units of FLT were sold in China, for comparison, 142,910 units were sold

same period of last year, decreased by 9.85%. We expect the sales in 2015 to reach 240,000 units, which is less than 2013.

## **17**

在各种车型中，电动平衡重乘驾式叉车增长 0.61%，电动仓储叉车增长 18.97%，内燃平衡重式叉车下跌 15.69%。

Among different truck types, Electric Counterbalance Trucks grew by 0.61%, Electric Warehouse Trucks increased by 18.97%, while Internal Combustion Counterbalance Trucks drop by 15.69%

## **18**

在中国整个机动工业车辆销售中，电动叉车占比呈现上涨的态势、仓储叉车占比呈现上涨的态势

Within the whole sales of China forklift truck market, The proportion of electric trucks is under a increasing trend; The proportion of WH trucks is increasing as well

## **19**

- 国内市场整体销售量下跌，但电动叉车，尤其是仓储叉车继续保持增长，而内燃叉车下降超过 15%。  
Although the overall sales decreased in the domestic market, the sales of electric forklifts, especially warehouse forklifts kept increasing, while the sales of diesel forklifts decreased by over 15%.

### **主要原因: Main reasons**

1. 经济增速放缓，原来需求较大的制造业等行业需求下滑，而仓储物流的需求明显提升  
The economic growth has been slowed down, the demands from industries like manufacturing have been decreased, however the demands for warehouse logistics have been increased significantly.
2. 国内非道路移动机械排放要求进一步提高，电动叉车替代内燃叉车的趋势已经显现。  
The emission standards of non-road mobile machinery in China have been raised,

thus electric forklifts hold a significant advantage over the diesel forklifts.

- 出口虽然继续保持增长，但内资品牌出口增长动力不足，在华外资品牌出口每年保持两位数增长。

Although the export keeps increasing, the domestically-invested brands lack enough growth motivations in export, while the foreign-invested brands in China keep a double-digit growth in export.

## **20**

最后讲一下中国工业车辆发展趋势。

At last, let's look at the development trend of China forklift truck market.

## **21**

1. 产品类型覆盖更加全面 Product types are more comprehensive
2. 市场竞争激烈，企业收购兼并加快 Market competence is severe and enterprise merger and acquisition are speed up
3. 产品转型升级已经开始呈现 Product transformation and upgrade have appeared
4. 工业车辆租赁、后市场服务等进展明显,已成为新的利润增长点 Industrial vehicle rental and post-sales service, etc. have been developed obviously and become a new profit growth points

## **22**

排放标准提高 Increasing emission standards:

非道路移动机械国三排放标准实施，北京等地制定更高的地方排放标准，电动叉车和新能源叉车在总销量中的比例将继续提高

State's Third Phase emission standards of non-road mobile machinery have been carried on. Some regions such as Beijing have made higher local emission standards. Under these circumstances, the sales of electric forklifts and new-energy forklifts will take a higher



percentage in the gross sales.

仓储车需求加大 large market demands for WH:

物流配送范围由城市向乡村发展、仓储智能化管理、电子商务等因素加大了仓储车的市场需求量，未来仓储车会继续是增长最快的车型

Some factors helps warehouse forklifts stay in large market demands, such as logistics distribution scales from urban areas to rural areas, intellectual warehouse management, e-commerce, etc. The warehouse forklifts will remain the fastest growing model in future.