Alliance of Industrial Truck Organizations

世界工业车辆组织联盟

Presidents’ Forum

主席论坛

Chengdu, China

中国成都

Mr. Brett Wood
ITA Chairman of the Board of Directors
(Toyota – North America)
ITA 董事会主席（丰田北美）
September 26, 2017
Global Economic Outlook 全球经济概况

北美 North America
2016: 1.6%
2017: 2.6%

南美 Latin America
2016: -0.9%
2017: 1.3%

欧洲 Europe
2016: 1.8%
2017: 1.7%

中东/非洲 Middle East/Africa
2016: 1.9%
2017: 2.6%

亚洲 Asia
2016: 5.5%
2017: 5.5%

全球 GDP 增长 Global GDP Growth: 2016: 2.9% 2017: 3.4%
US Gross Domestic Product (GDP)

季度实际GDP增长

Real GDP: Percent change from preceding quarter

U.S. Bureau of Economic Analysis

Seasonally adjusted annual

季度调整后的年利率

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US Personal Consumption

Table 2.3.1. Percent Change From Preceding Period in Real Personal Consumption Expenditures by Major Type of Product

个人消费支出与上季度的变化

2Q: +2.8%

Source: U.S. Bureau of Economic Analysis

来源：美国商务部经济分析局

Personal consumption expenditures (PCE)
US Unemployment Data 美国失业数据

- 209,000 Jobs Added in July
  7月增加20.9万职位

- US Unemployment was steady at 4.3% in July
  7月美国失业率稳定在4.3%
United States Employment
Monthly change, seasonally adjusted

Net change in employment per month (1000s of jobs)


Jobs Created or Lost
US Unemployment Rate

增加或失去的工作数 美国失业率

Axis Title


percent Unemployment

4 4.5 5 5.5 6 6.5 7 7.5 8 8.5 9 9.5 10

-1000 -800 -600 -400 -200 0 200 400 600
US Unemployment Data 美国失业数据

Unemployment Rate 失业率

- 10% for Oct-10 (2010年10月)
- 4.3% for Jul-17 (2017年7月)
Durable Goods Orders Fell in July

Orders for durable goods decreased 6.8% in July 2017, the largest drop in three years.

2017年7月耐用品订单减少6.8%，这是过去三年最大的下跌
Transportation Equipment 运输设备
USA Import/Export 美国进出口

美国商品和服务的国际贸易（十亿美元，季节调整）

U.S. International Trade in Goods and Services
(Billions of Dollars, Seasonally Adjusted)

进口 Imports

出口 Exports

2017年6月
贸易差额
-436亿美金

June 2017
Trade Balance
-$43.6 Billion

Source: US Department of Commerce

美国商务部
Purchasing Managers Index (PMI)
采购经理人指数（PMI）

PMI
>50 indicates expansion >50 表示扩张
Source: Institute for Supply Management (ISM)
来源：ISM全美供应管理协会
US Automotive Market

北美轻型车辆销量

U.S. Light Vehicle Sales

Source: Ward's Automotive Research

Source: Ward's Automotive Research
US Housing Market 美国房市

美国独栋房屋开工率处于十年最好水平

Single-Family Housing Starts Remain Near Decade-Best Levels

Data: Census Bureau 美国人口普查局

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North American Lift Truck Industry
北美叉车市场

Historic Retail Orders 零售订单历史

Note: Includes U.S., Canada, Mexico and Government 含美国、加拿大、墨西哥和政府

Industrial Truck Association
Chengdu, China 2017
## North American Lift Truck Industry

### 北美叉车市场

<table>
<thead>
<tr>
<th>YEAR</th>
<th>ELECTRIC RIDER 电动乘驾 (Classes 1 &amp; 2)第1-2类</th>
<th>MOTORIZED HAND 电动步行式 (Class 3)第3类</th>
<th>INTERNAL COMBUSTION ENGINE 内燃发动机，第4-5类</th>
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Source: Industrial Truck Association, US Factory Shipments

来源：美国工业车辆协会，美国工厂订单
North American Lift Truck Industry
北美叉车行业

Factory Orders By Engine Type – Class 4 & 5 Combined
工厂订单 - 第4&5类

Note: Includes U.S., Canada, Mexico and Government 含美国、加拿大、墨西哥和政府
North American Lift Truck Industry
北美叉车行业

IC vs. Electric Trend 内燃和电动趋势

IC
内燃

Electric
电动

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<td>2016</td>
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Industrial Truck Association
Chengdu, China 2017
Industrial Truck Association

North American Lift Truck Industry
北美叉车行业

Warehouse vs. Counterbalance Trend
仓储和平衡重趋势

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<td>2016</td>
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Recession

2012 - 2015

Industrial Truck Association
Chengdu, China 2017
Retail Orders Monthly vs. Prior Year 月度零售订单及去年同期 (thousands) 千

Note: Includes U.S., Canada, Mexico and Government 含美国、加拿大、墨西哥和政府

Industrial Truck Association  Chengdu, China 2017
North American Lift Truck Industry
北美叉车行业

Retail Orders Forecast 零售订单预测

Note: Includes U.S., Canada, Mexico and Government 含美国、加拿大、墨西哥和政府

Industrial Truck Association Chengdu, China 2017
ITA Priorities 协会重点工作

• International cooperation on:
  • standards development
  • statistical information
  • free/fair trade

开展标准的发展、统计信息、自由/公平贸易等方面的国际合作

• Engineering practices: advance development of engineering practices that promote safety of the products of members

工程实践：以推进成员的产品安全为目标发展的工程实践

• Statistical information: collection and dissemination of statistical information relating to the industrial truck marketplace

统计信息：搜集和发布关于工业车辆市场的相关统计信息

• Industry communications & networking

行业关系及联络

• OSHA Compliance Officer Training

职业安全与健康标准协调人员培训
National Forklift Safety Day

- Spotlight the safe use of powered industrial trucks
  聚焦工业车辆的安全使用

- Educate customers, policy makers, administration, etc. on forklift best safety practices
  客户培训、政策制定、行政管理，如叉车安全操作最佳范例

- National Forklift Safety Day – June 13, 2017
  全国叉车安全日 2017年6月13日
National Forklift Safety Day 2017
2017年全国叉车安全日
National Forklift Safety Day 2017
2017年全国叉车安全日
Media Results = +60 Million
媒体报道结果=超过60,000,000

The Denver Post  The Columbus Dispatch

Indiana Business Journal

Houston Chronicle

CBS MoneyWatch

The Star: The Kansas City Star

The Sacramento Bee

Star Tribune

The Miami Herald

Newsday
Industry Profile Content

- High level summary overview of the current state of the industry
  高水平总结行业现状
- Direct, indirect & induced contributions to national GDP
  对GDP的直接、间接影响
- Employment figures
  就业数据
LIFTING AMERICA
The Economic Impact of Industrial Truck Manufacturers, Distributors and Dealers

$5.3 BILLION
paid in local, state and federal taxes annually

Market of over
1 MILLION
unit sales worldwide annually

INDUSTRIAL TRUCK MANUFACTURERS MAKE A WIDESPREAD CONTRIBUTION THROUGHOUT THE US ECONOMY.

$25.7 BILLION
contribution to US GDP annually

$10.8 BILLION
direct contribution

$7.3 BILLION
indirect contribution

$7.6 BILLION
induced contribution

100 YEARS
The industrial truck manufacturing sector has been an important and active part of the American economy for 100 years.

STATES WHERE INDUSTRIAL TRUCK FIRMS GENERATED THE HIGHEST ECONOMIC IMPACT
In terms of GVA (gross value added)

ILLINOIS $3.5 billion
TEXAS $2.7 billion
OHIO $2.4 billion

ORDERS FOR INDUSTRIAL TRUCKS HAVE DOUBLED SINCE 2009
Since the end of the Great Recession in 2009, annual orders for industrial trucks have climbed sharply, doubling from a half million units to one million units worldwide to over 200,000 units in the US.

540,000+
More than 540,000 industrial truck operators currently employed in the US.

For each worker directly employed by the industrial truck sector, a further 2.5 jobs are supported in the wider economy.

OCCUPATION PROFILE OF INDUSTRIAL TRUCK MANUFACTURING

Production 58.1%
Office & Administrative Support 11.5%
Architecture & Engineering 10.4%
Management 9.8%
Installation, Maintenance & Repair 6.0%
Sales & Related 4.5%
Business & Financial Operations 4.4%
Transportation & Material Moving 3.4%
All Other 3.0%

(Source: Bureau of Labor Statistics – BLS)
ALLIANCE OF INDUSTRIAL TRUCK ORGANIZATIONS

1997 - 2017
THANK YOU