



# Alliance of Industrial Truck Organizations

## 世界工业车辆组织联盟

### Presidents' Forum

#### 主席论坛

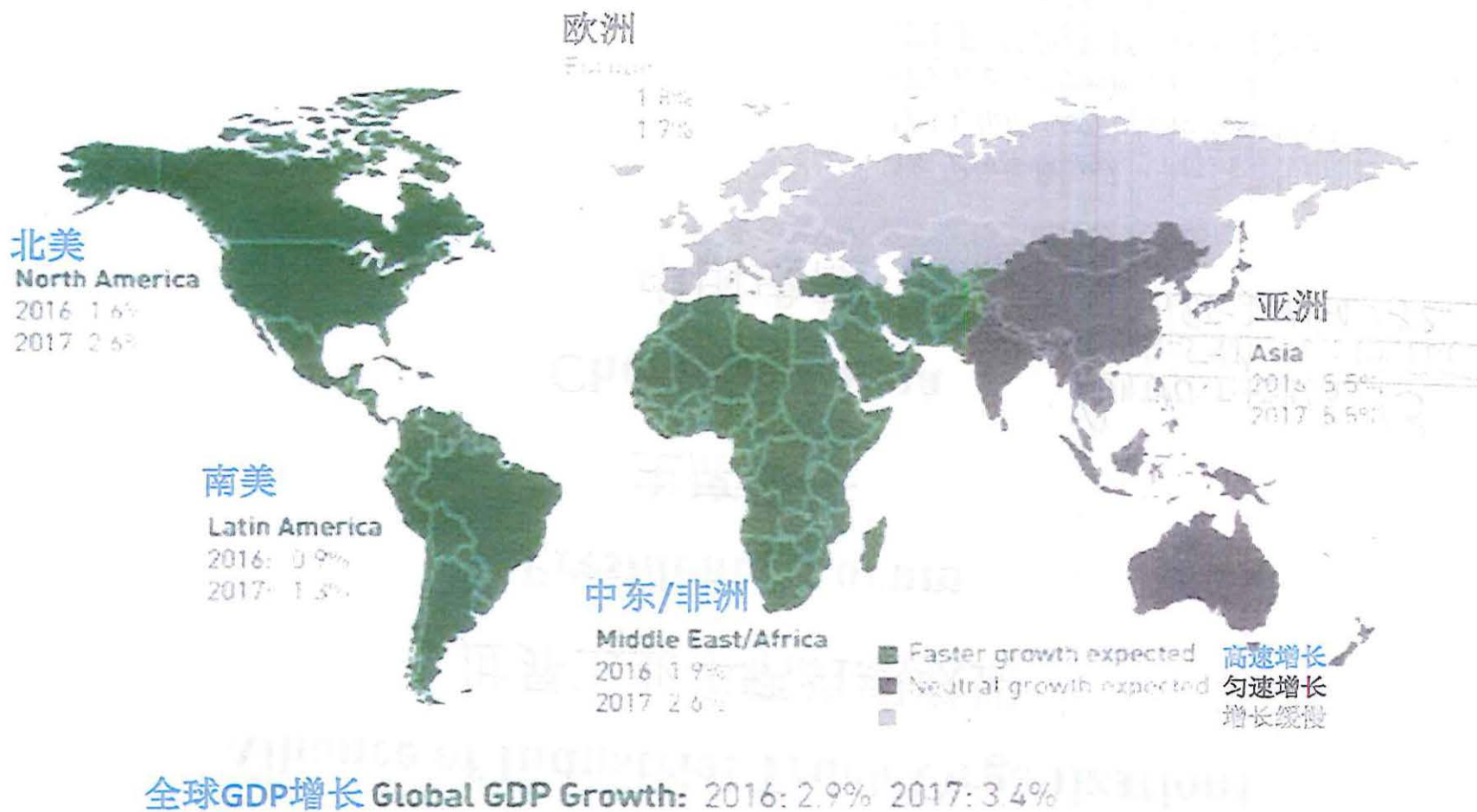
Chengdu, China

中国成都

*American* Exhibit No. 13  
Date 12-5-18 Reporter NT  
File No. ET-2018-0132

*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





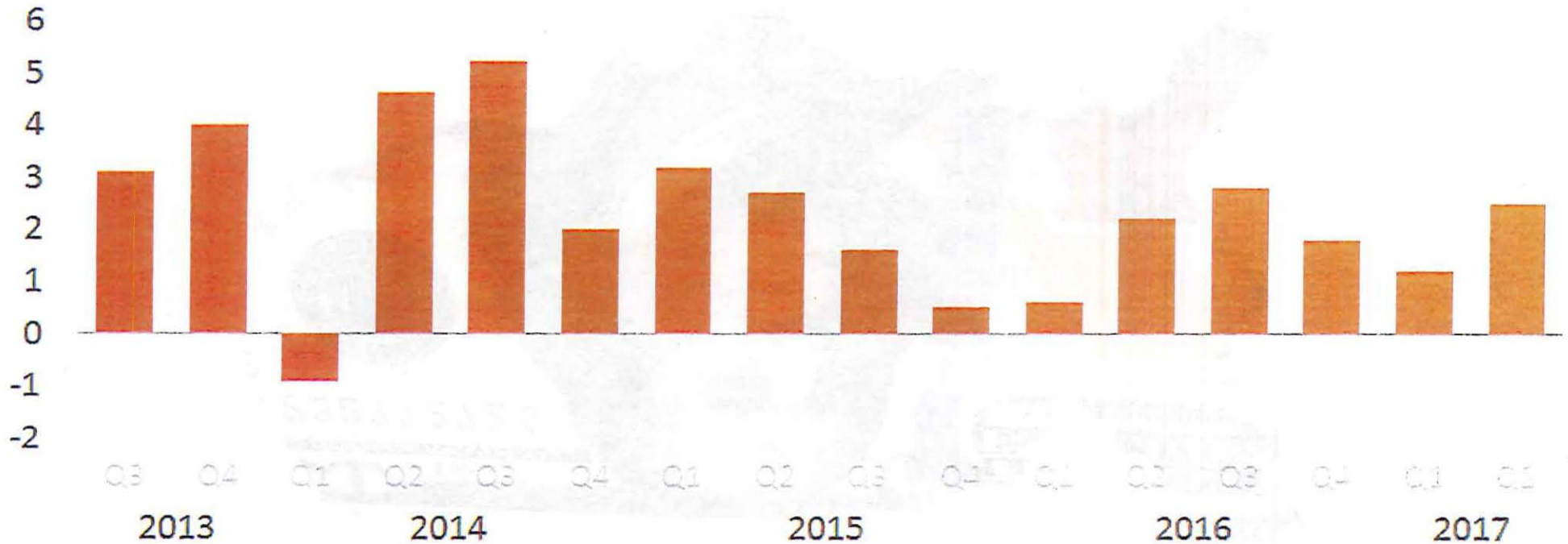


INDUSTRIAL  
TRUCK ASSOCIATION

# US Gross Domestic Product (GDP) 美国GDP

季度实际GDP增长

Real GDP: Percent change from preceding quarter



U.S. Bureau of Economic Analysis

美国经济部分析局

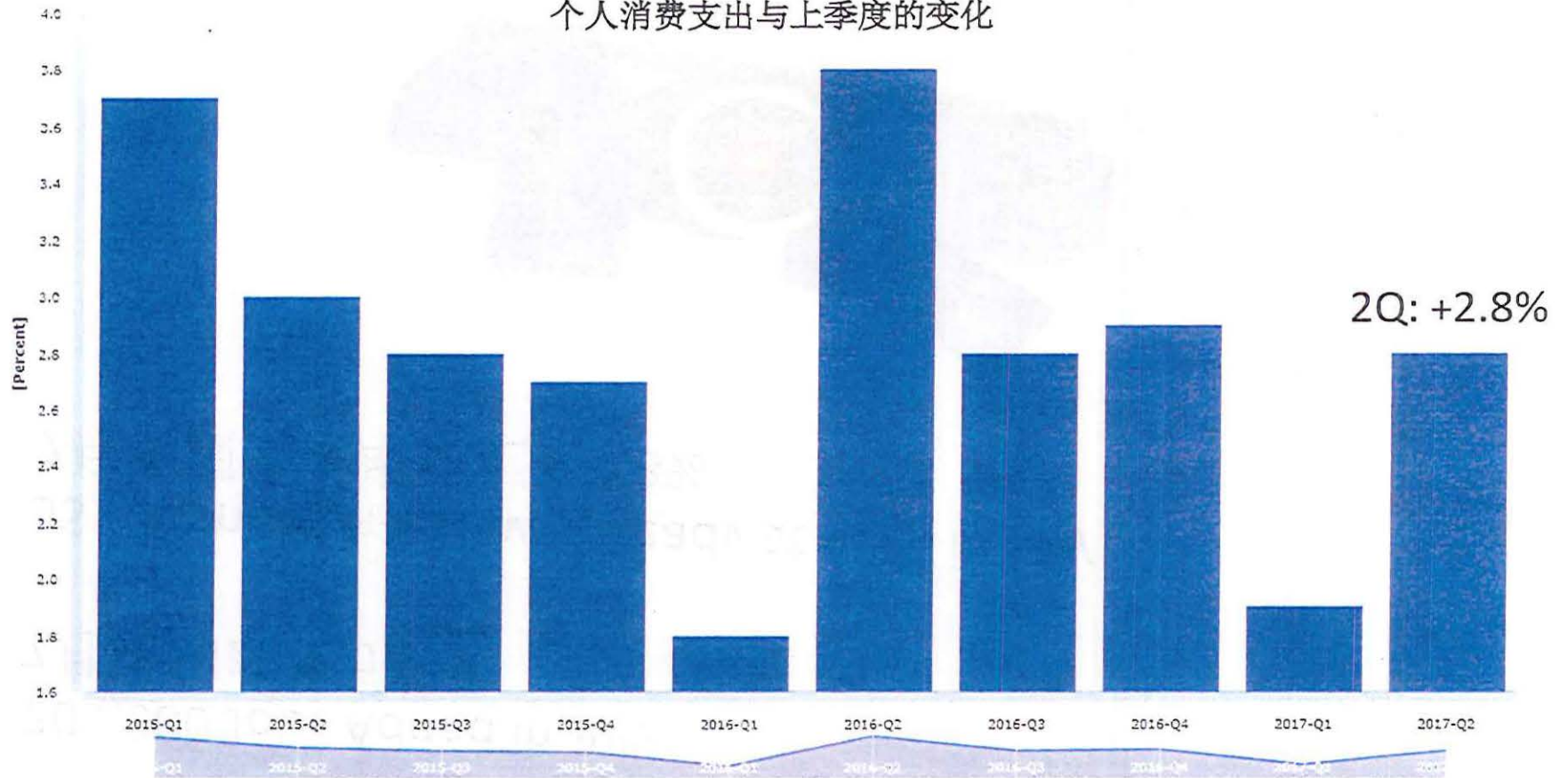
Seasonally adjusted annual

季节调整后的年利率

# US Personal Consumption 美国个人消费

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



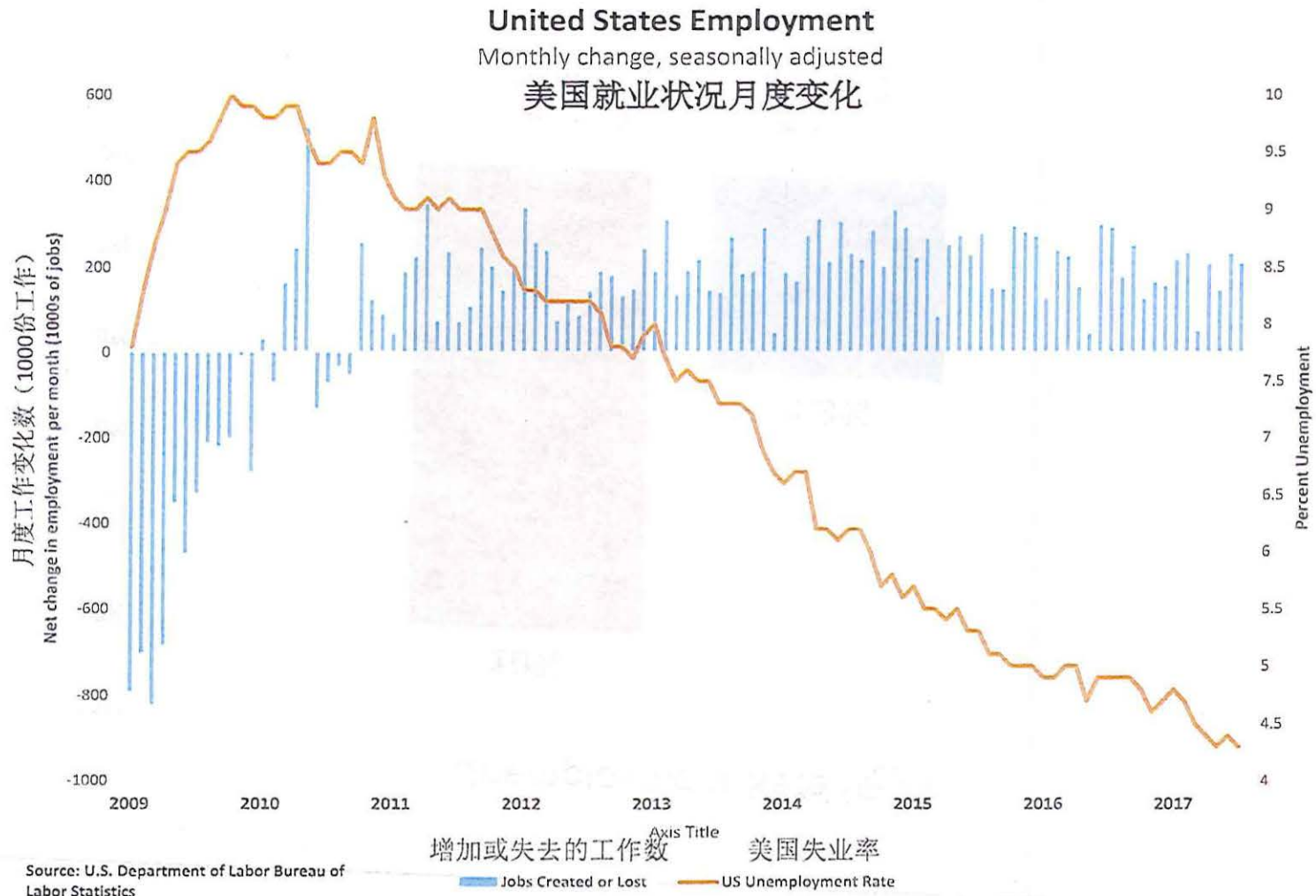
Source: U.S. Bureau of Economic Analysis 来源: 美国商务部经济分析局

■ Personal consumption expenditures (PCE)

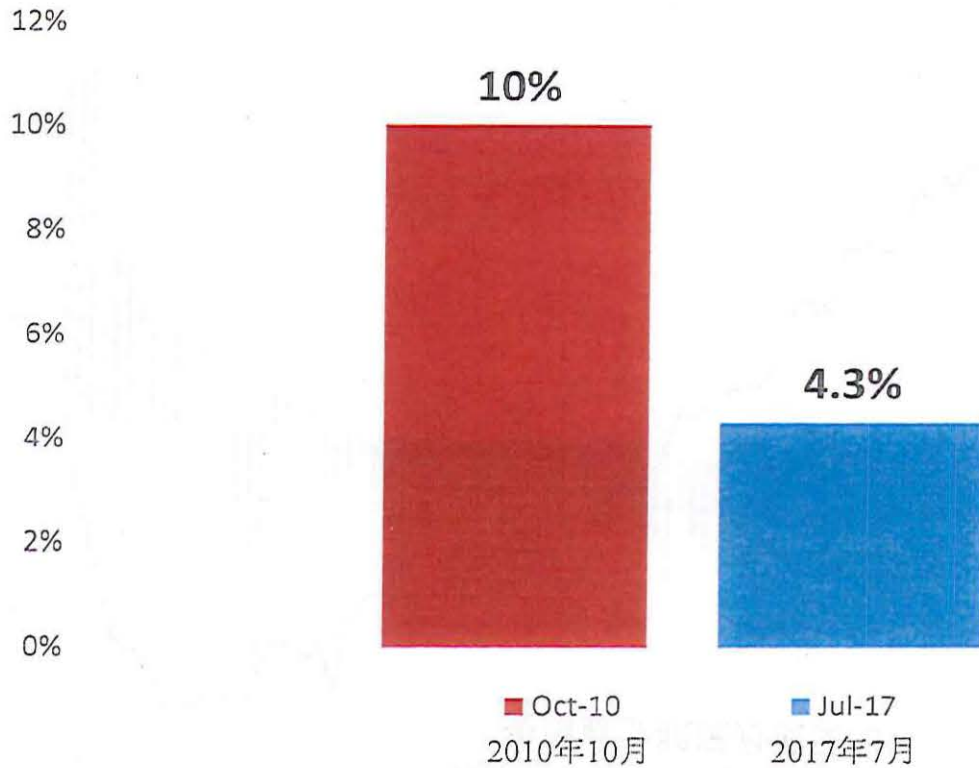
- 209,000 Jobs Added in July  
7月增加20.9万职位
- US Unemployment was steady at 4.3% in July  
7月美国失业率稳定在4.3%



# US Unemployment Data 美国失业数据



Unemployment Rate 失业率

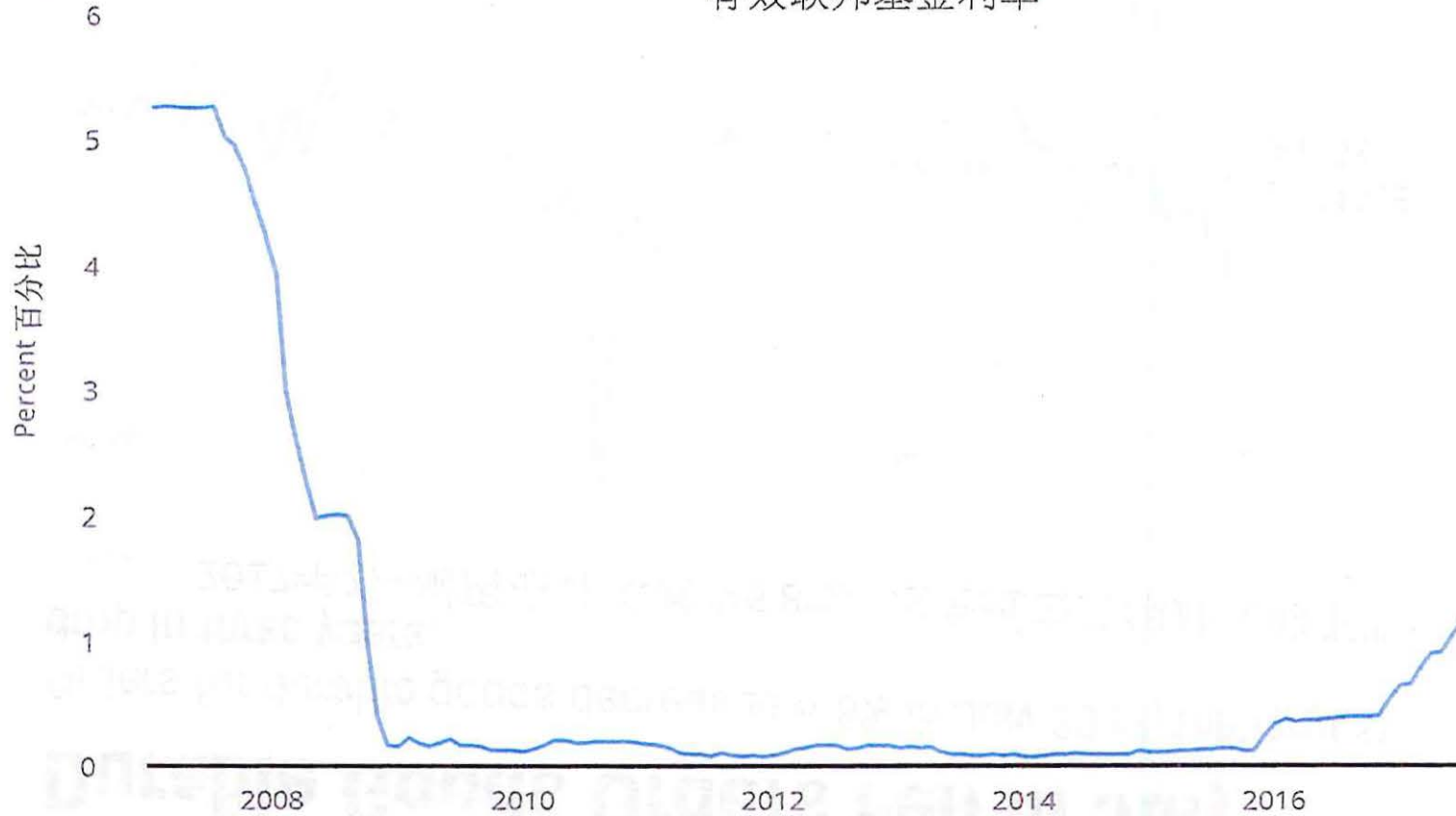




# Monetary Policy 货币政策

**FRED**

— Effective Federal Funds Rate  
有效联邦基金利率



Source: Board of Governors of the Federal Reserve System (US) 美国联邦储备系统理事会  
[fred.stlouisfed.org](http://fred.stlouisfed.org)

[myf.red/g/eSLE](http://myf.red/g/eSLE)



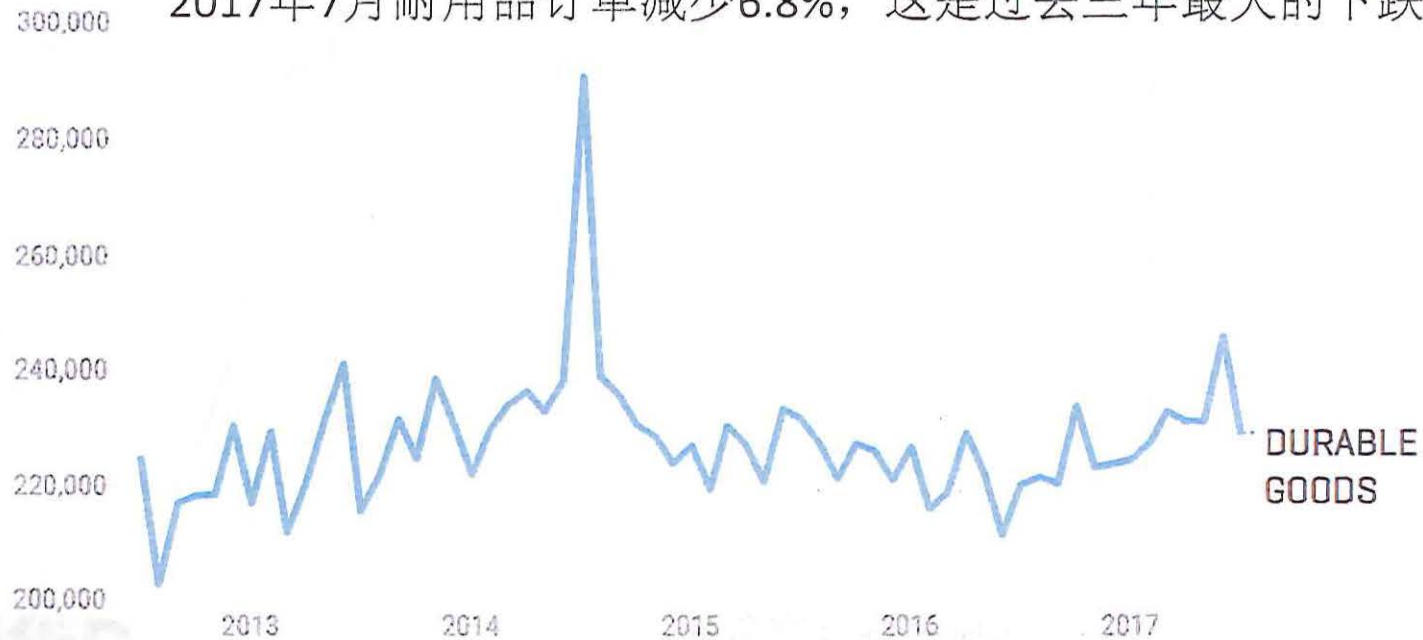
## Durable Goods Orders 耐用品订单

耐用品订单在7月下跌

# 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



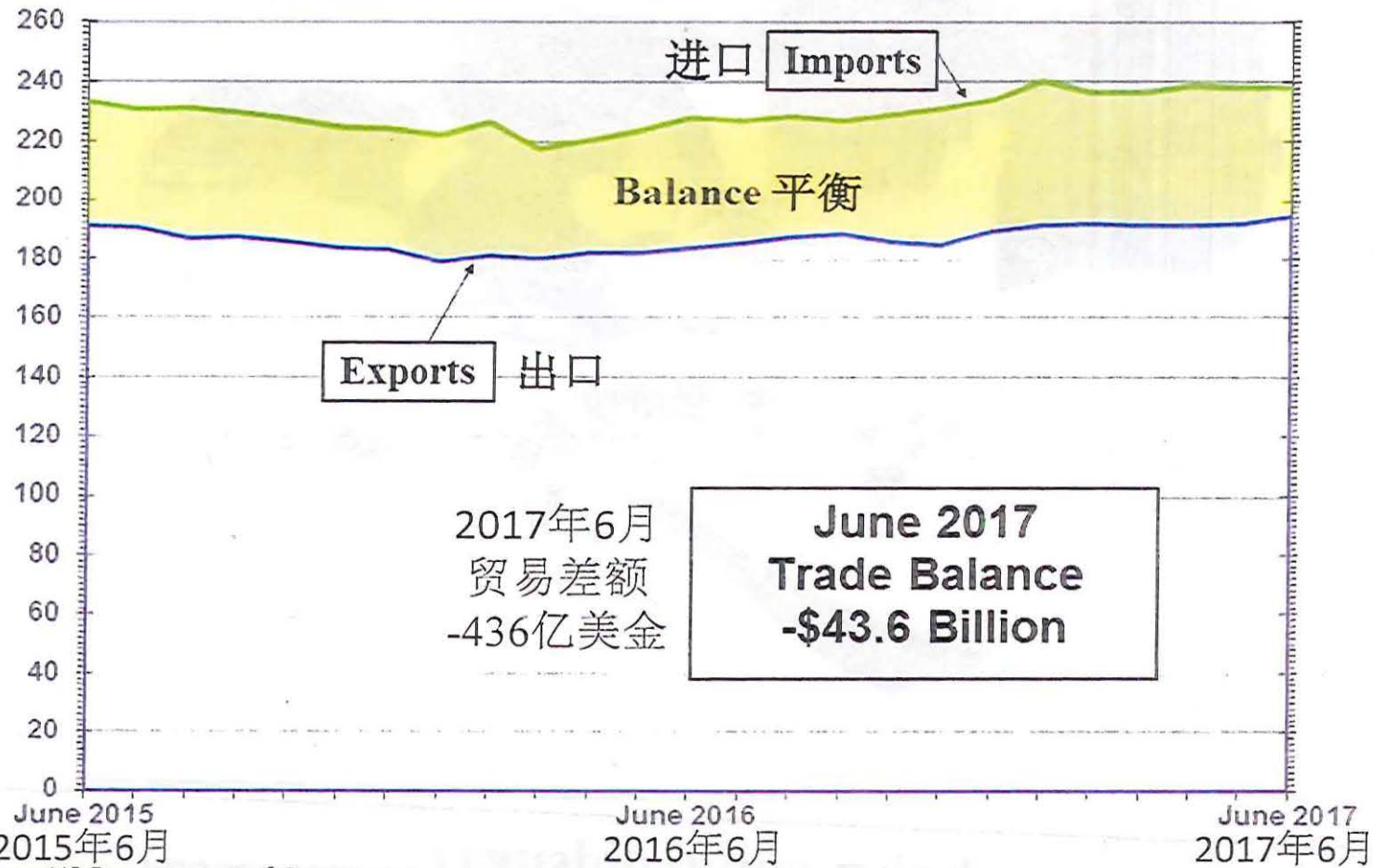
SOURCE: U.S. Census Bureau 美国人口普查局

FORTUNE



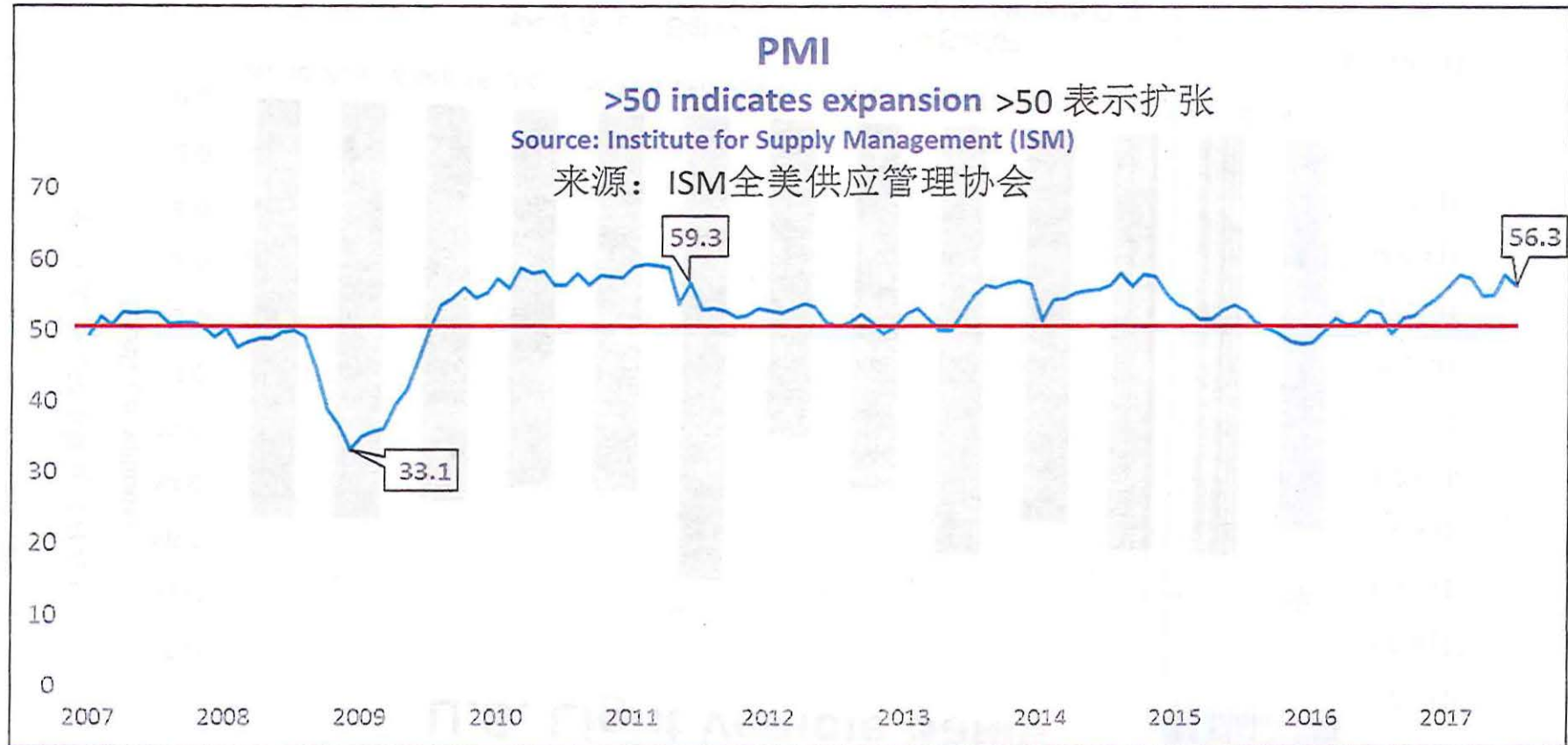
## US Import/Export 美国进出口

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)



Source: US Department of Commerce 美国商务部

# Purchasing Managers Index (PMI) 采购经理人指数 (PMI)



# US Automotive Market 美国汽车市场

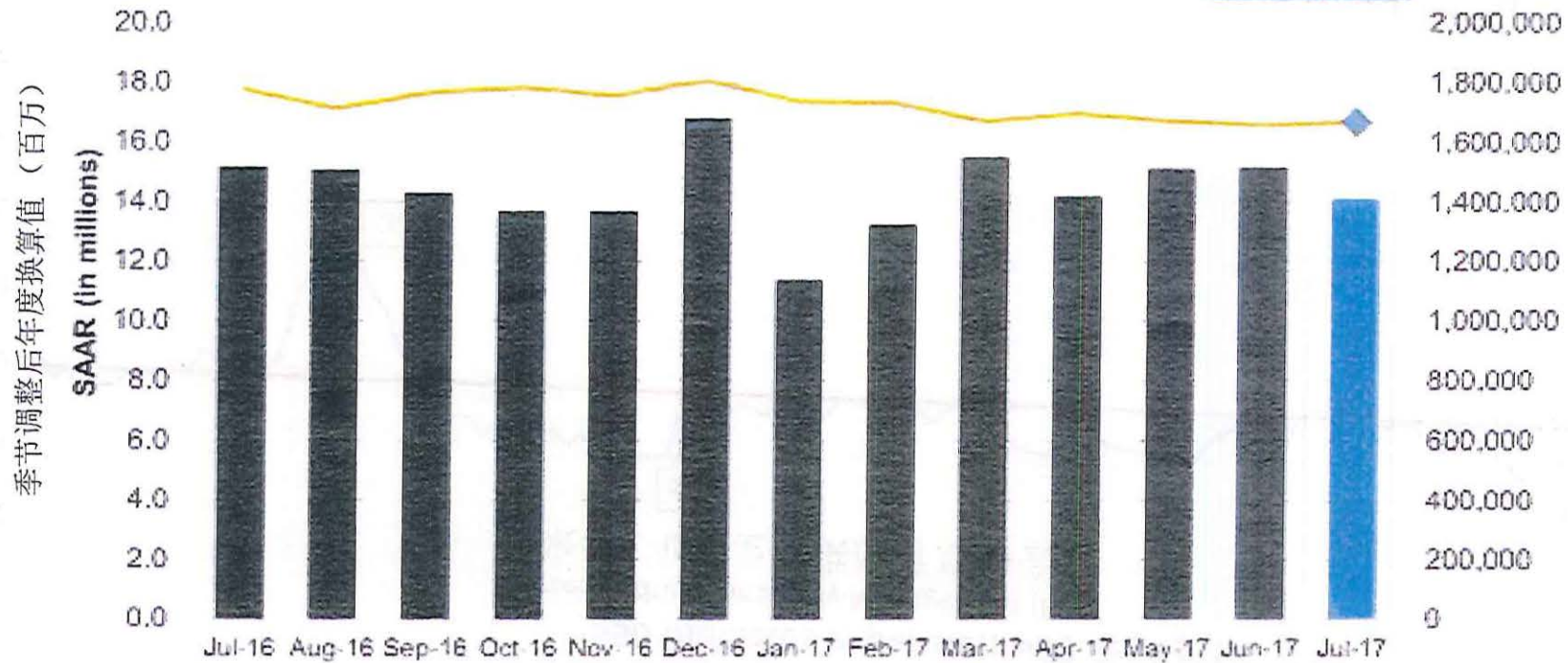
北美轻型车辆销量

1.669千万台  
季节调整后年度换算值

## U.S. Light Vehicle Sales

**16.69 MLN SAAR**

Sales



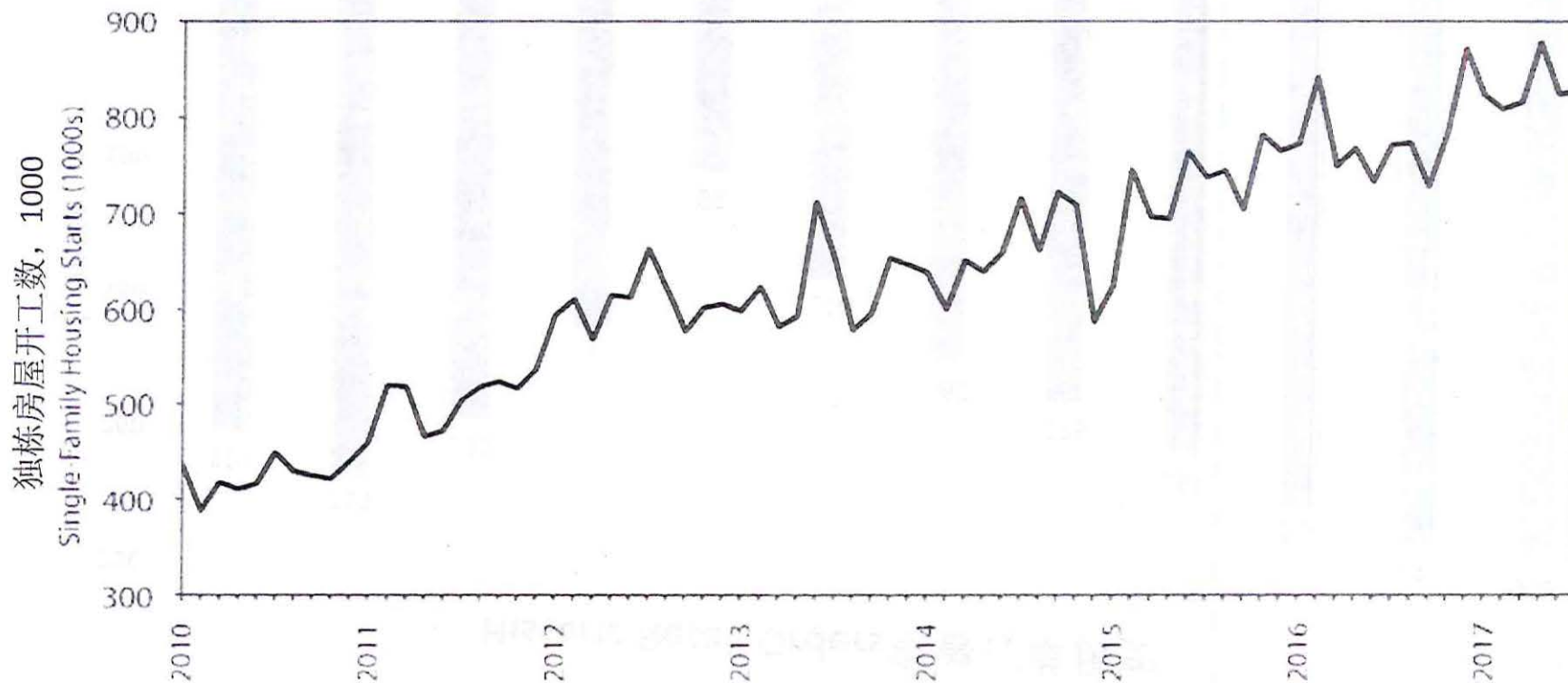
■ U.S. LV Sales  
美国轻型车辆销量

— SAAR  
季节调整后年度换算值

Source: Ward'sAuto

Source: Ward's Automotive Research 来源: Ward's汽车研究

### 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

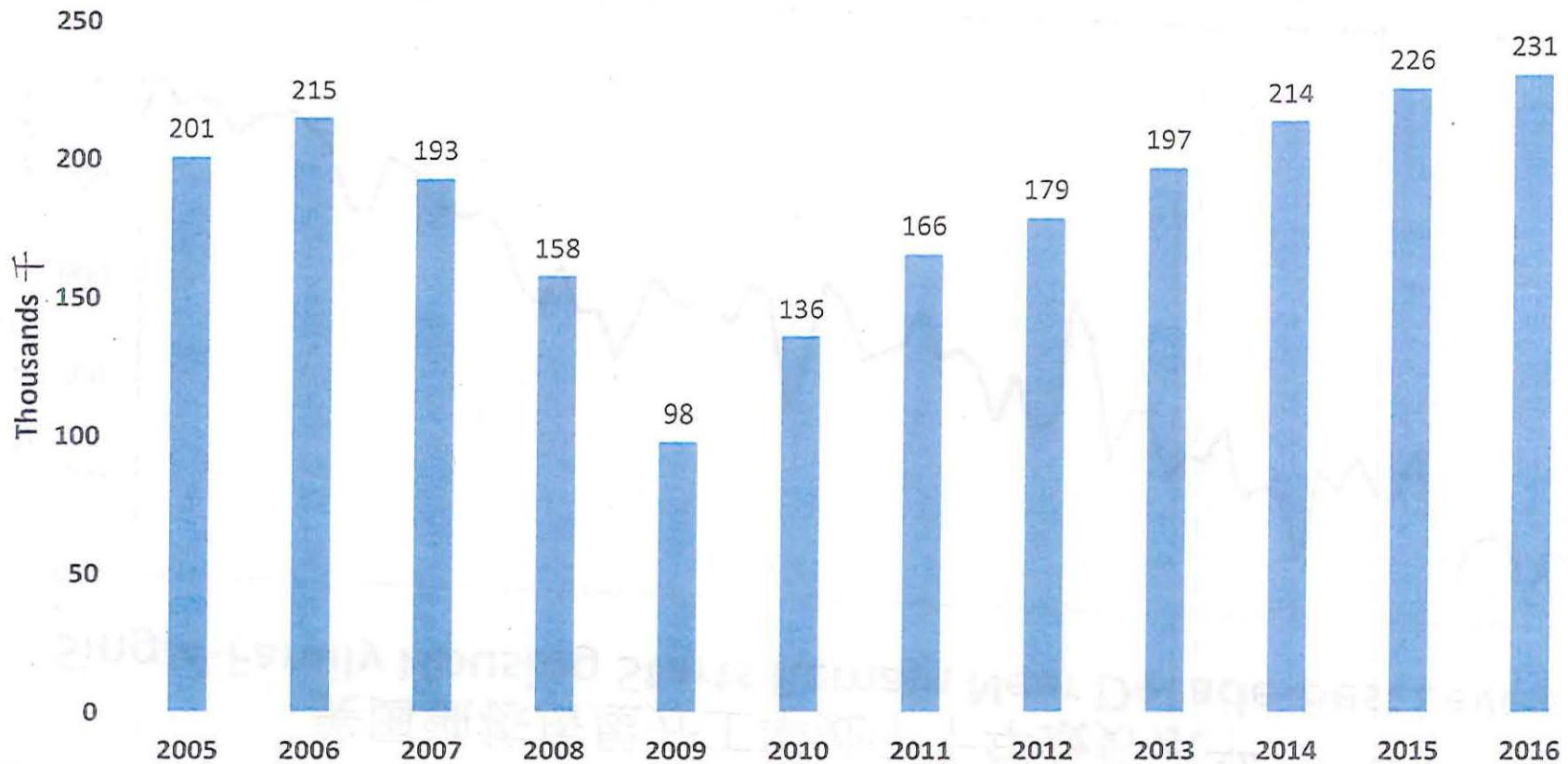


Data: Census Bureau

美国人口普查局

TheMortgageReports.com

## 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





# North American Lift Truck Industry

## 北美叉车市场

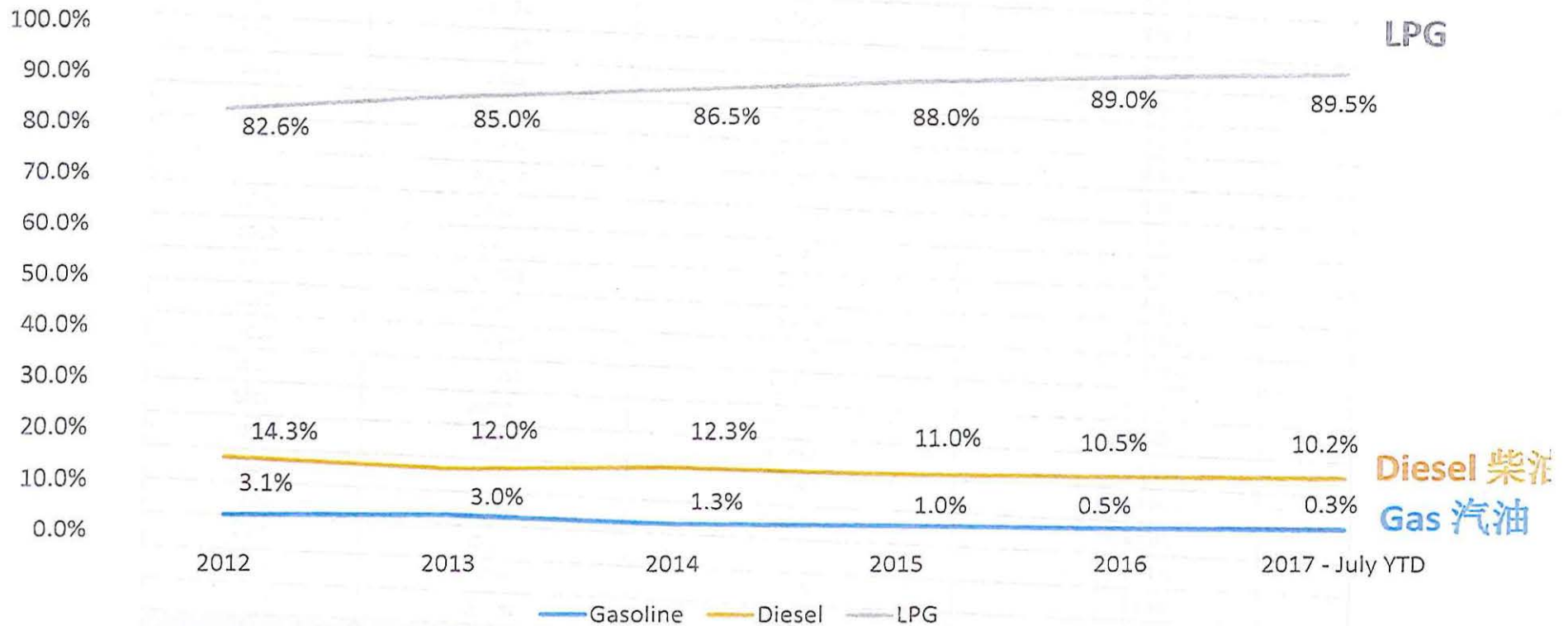
YEAR	ELECTRIC RIDER 电动乘驾 (Classes 1 & 2) 第1-2类	MOTORIZED HAND 电动步行式 (Class 3) 第3类	INTERNAL COMBUSTION ENGINE (Classes 4 & 5) 内燃发动机 · 第4-5类
1994	36,747	34,127	65,027
1995	44,087	37,746	72,685
1996	42,263	35,375	60,287
1997	42,675	38,538	64,946
1998	48,923	40,428	80,554
1999	49,843	41,899	74,994
2000	56,090	49,121	85,993
2001	45,980	37,210	61,507
2002	39,235	36,445	55,928
2003	40,463	36,659	63,365
2004	46,886	44,308	74,228
2005	50,604	46,206	83,725
2006	53,806	50,950	85,038
2007	50,260	48,615	76,664
2008	45,361	43,716	62,104
2009	28,409	28,635	28,740
2010	31,759	36,637	36,896
2011	44,720	42,213	58,483
2012	49,126	47,339	56,618
2013	52,834	52,766	66,473
2014	57,543	52,396	75,040
2015	65,042	57,329	76,075
2016	70,242	65,764	71,455

207,461

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

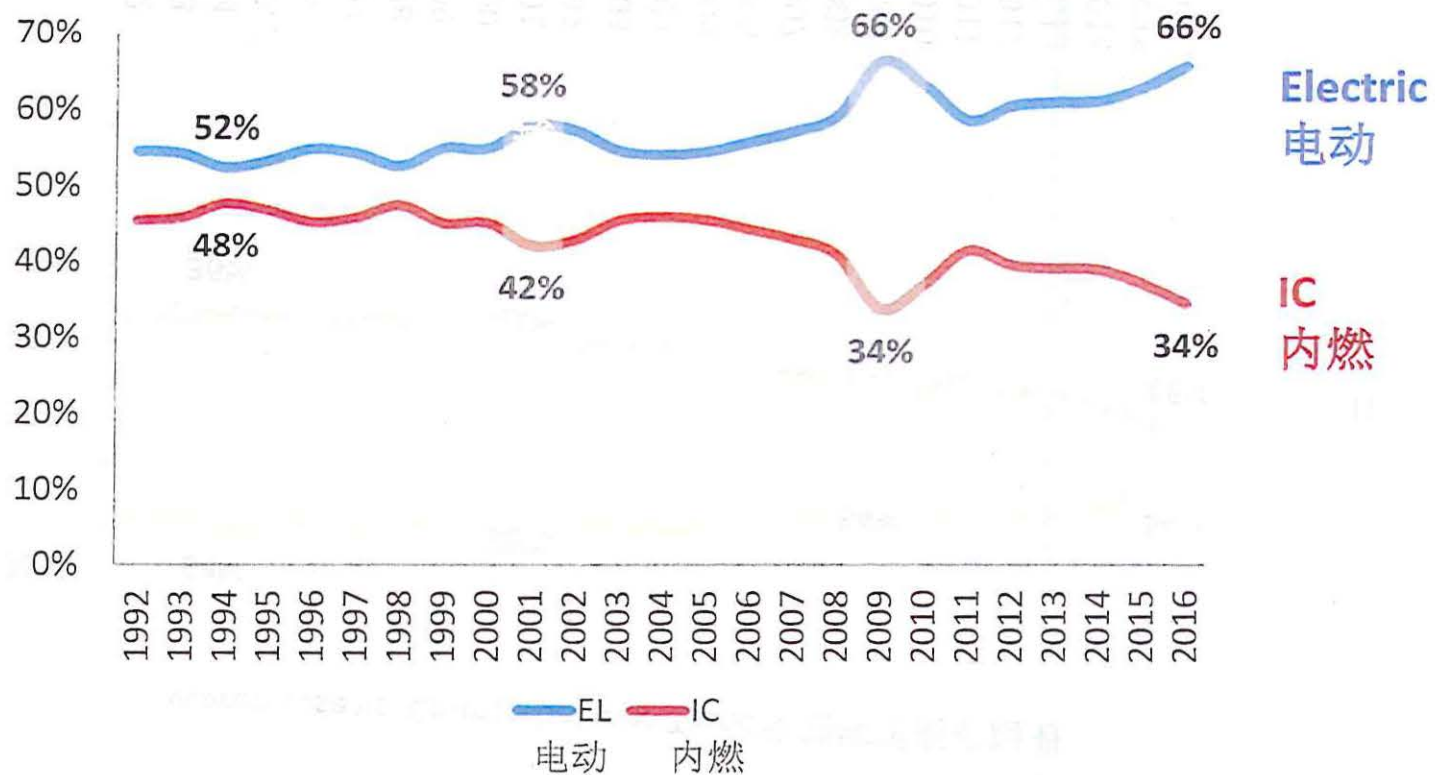
Factory Orders By Engine Type – Class 4 & 5 Combined  
工厂订单 - 第4&5类



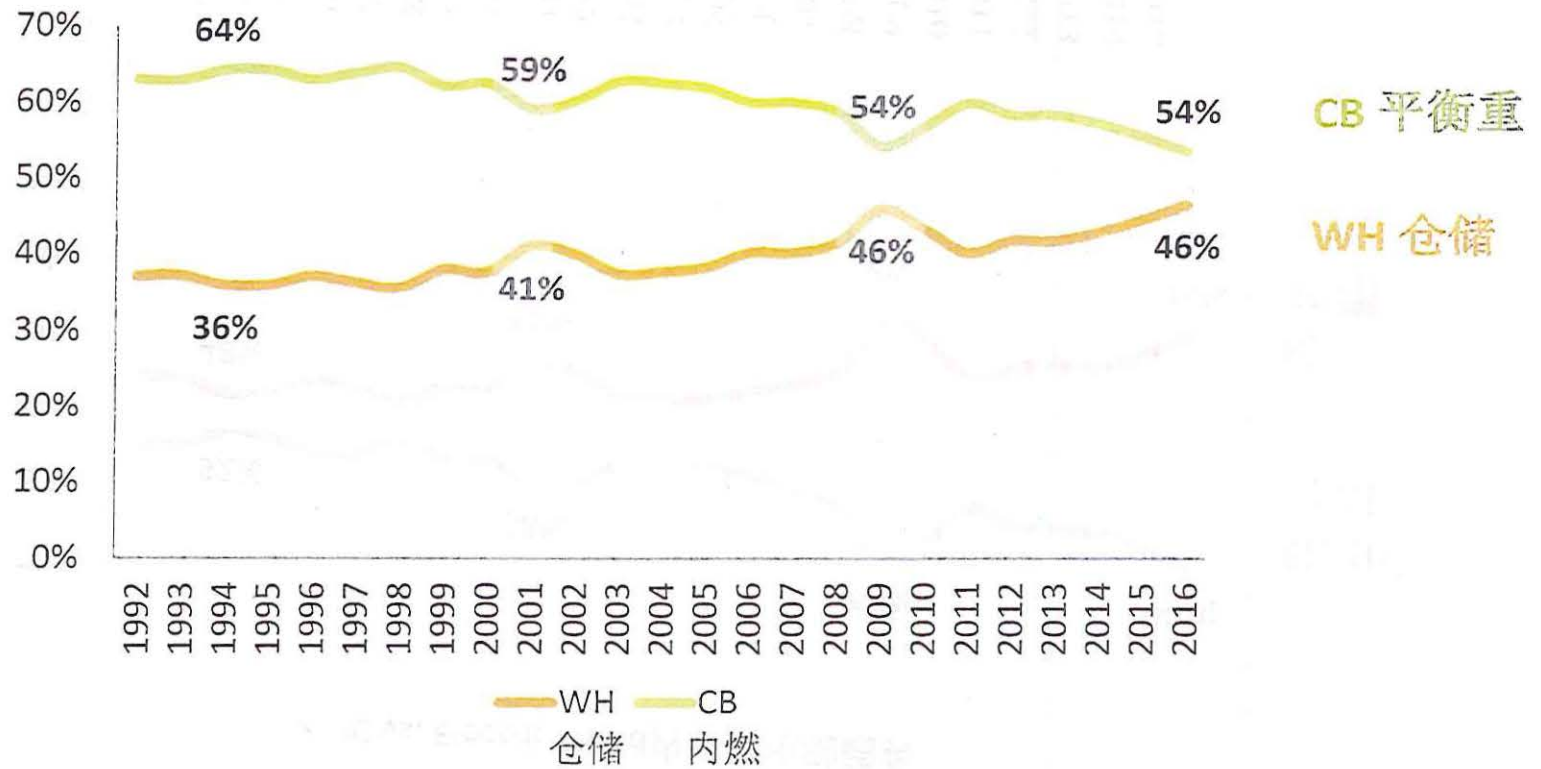
Note: Includes U.S., Canada, Mexico and Government 含美国、加拿大、墨西哥和政府

# North American Lift Truck Industry 北美叉车行业

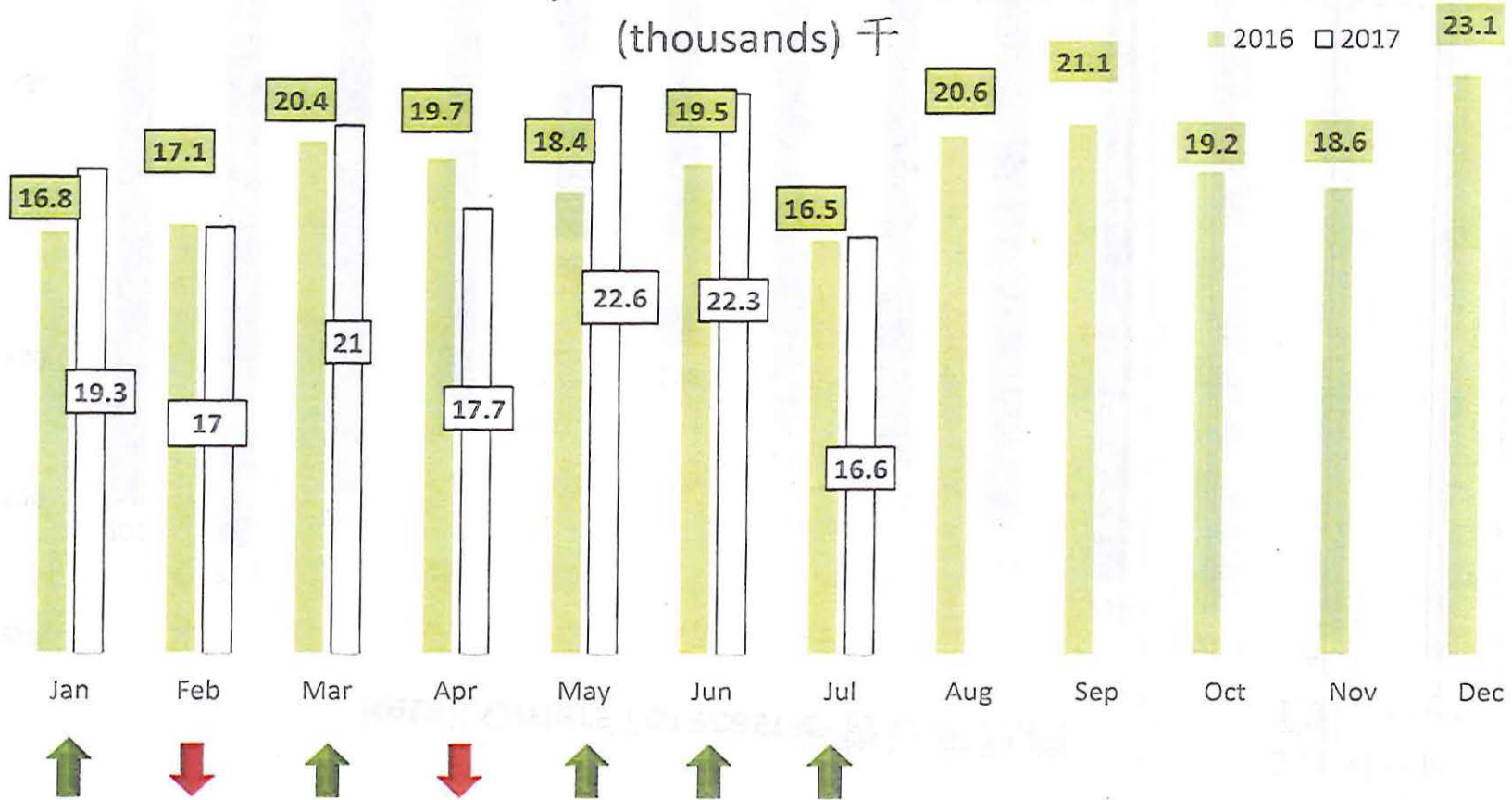
IC vs. Electric Trend 内燃和电动趋势



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



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

## 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

- **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



INDUSTRIAL  
TRUCK ASSOCIATION

# National Forklift Safety Day

## 全国叉车安全日

- 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**







# 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

INDIANAPOLIS  
BUSINESS JOURNAL



HOUSTON★CHRONICLE



THE SACRAMENTO BEE

MODERN  
MATERIALS HANDLING®

StarTribune

The Miami Herald

Newsday



# Powered Industrial Truck Industry Profile

## 机动工业车辆行业概况

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### Industry Profile Content

#### 行业概况内容

- 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



OXFORD  
ECONOMICS



# 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

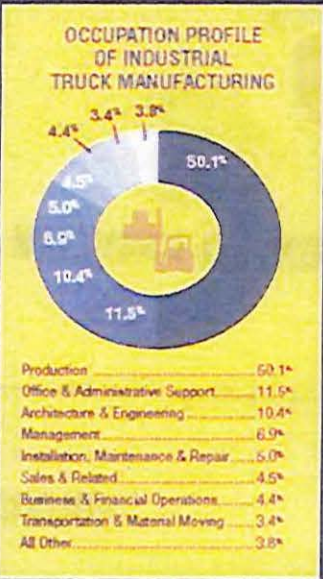


INDUSTRIAL TRUCK MANUFACTURERS MAKE A WIDESPREAD CONTRIBUTION THROUGHOUT THE US ECONOMY.

**\$25.7 BILLION**  
contribution to US GDP annually

<b>\$10.8 BILLION</b> direct contribution	<b>\$7.3 BILLION</b> indirect contribution	<b>\$7.6 BILLION</b> induced contribution
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**100 YEARS** The industrial truck manufacturing sector has been an important and active part of the American economy for 100 years.



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

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



(Source: Bureau of Labor Statistics - BLS)

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.



**ALLIANCE OF INDUSTRIAL TRUCK ORGANIZATIONS**



1997 - 2017



# THANK YOU

