



# AITO Presidents' Forum 2024

## AITO 2024 主席论坛

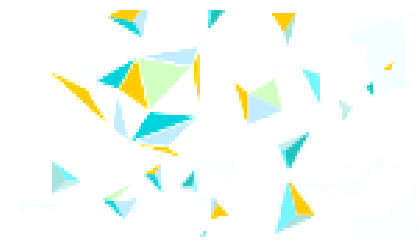
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**Ernesto Domínguez** 埃内斯托·多明格斯  
President 轮值主席  
FEM Industrial Trucks

**Presidents' Forum**  
20 September 2024, Xi'an



# Content 目录

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3. EU Outlook and challenges 欧盟展望与挑战
4. Closing remarks 结束语

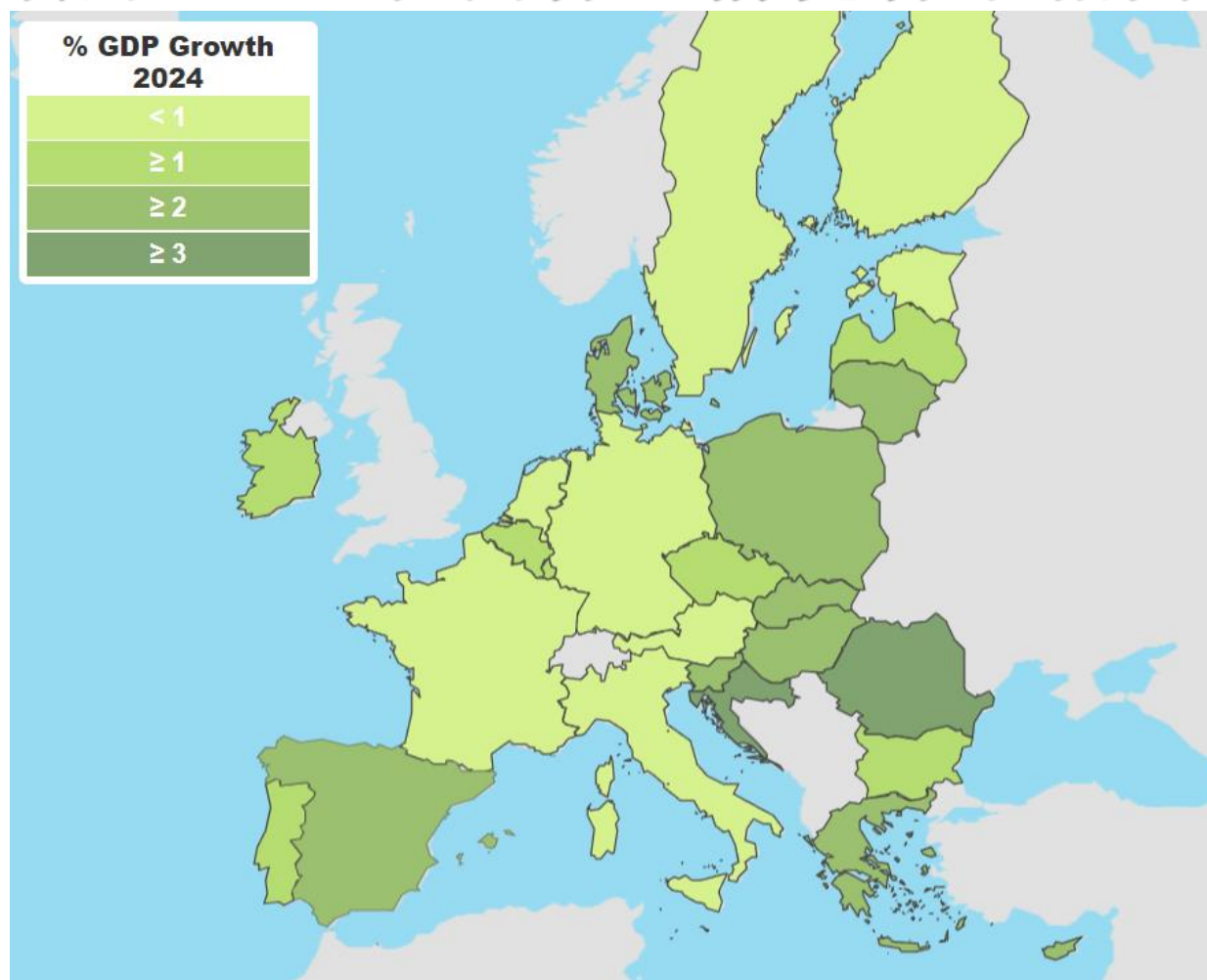


# EU real GDP growth rate: below 1% and varied picture across Europe

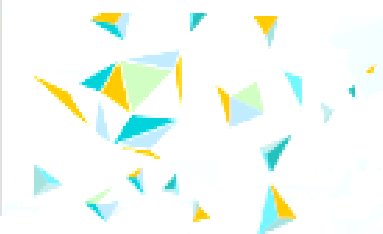
## 欧盟实际GDP增长率：低于1%，欧洲各地情况各不相同

Source: ec.europa.eu

	GDP GROWTH %	GDP增长率%
	EURO AREA	EU
	欧元区	欧盟
2022	3.4%	3.5%
2023	0.4%	0.4%
2024	0.8%	1.0%
2025	1.4%	1.6%



European materials handling federation



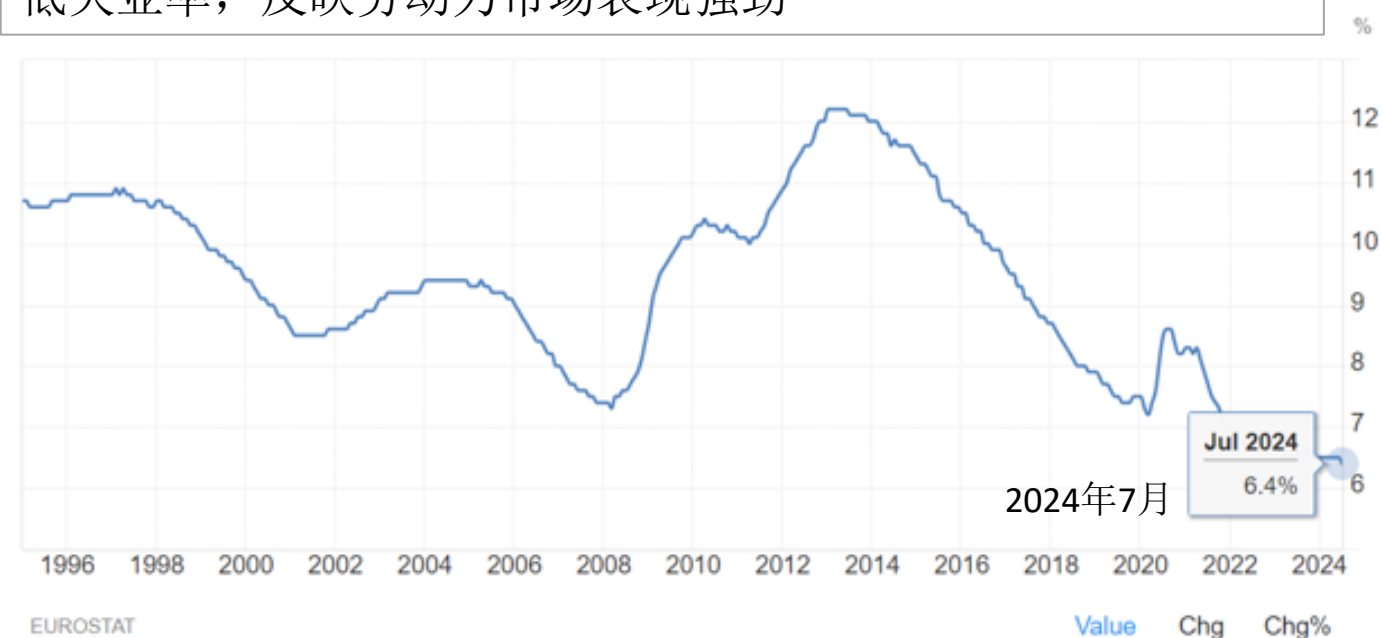
# Euro Area Inflation and Unemployment Rate

## 欧元区通货膨胀率及失业率

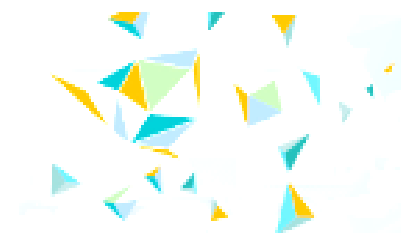
Core Inflation going down but still above historical levels  
核心通货膨胀率下降，但仍高于历史水平



Unemployment rate is low, reflecting strong labour market  
低失业率，反映劳动力市场表现强劲



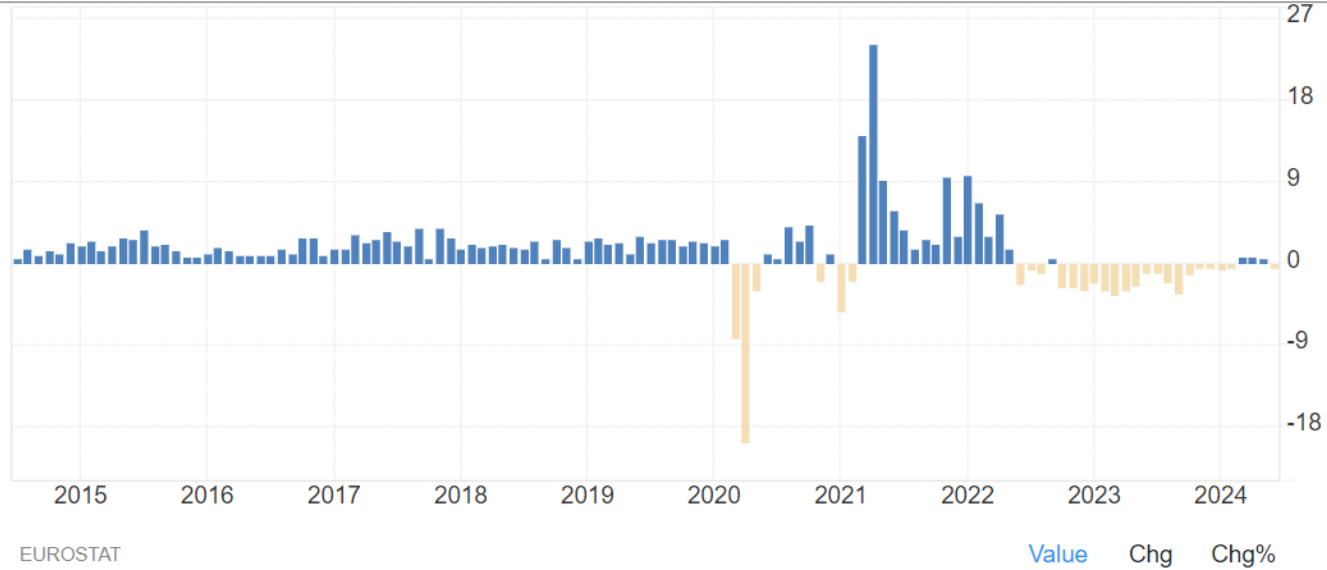
European  
materials  
handling  
federation



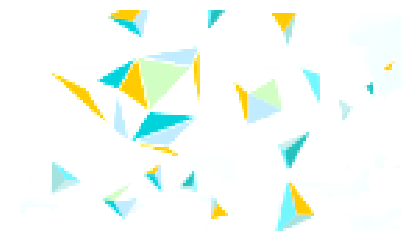
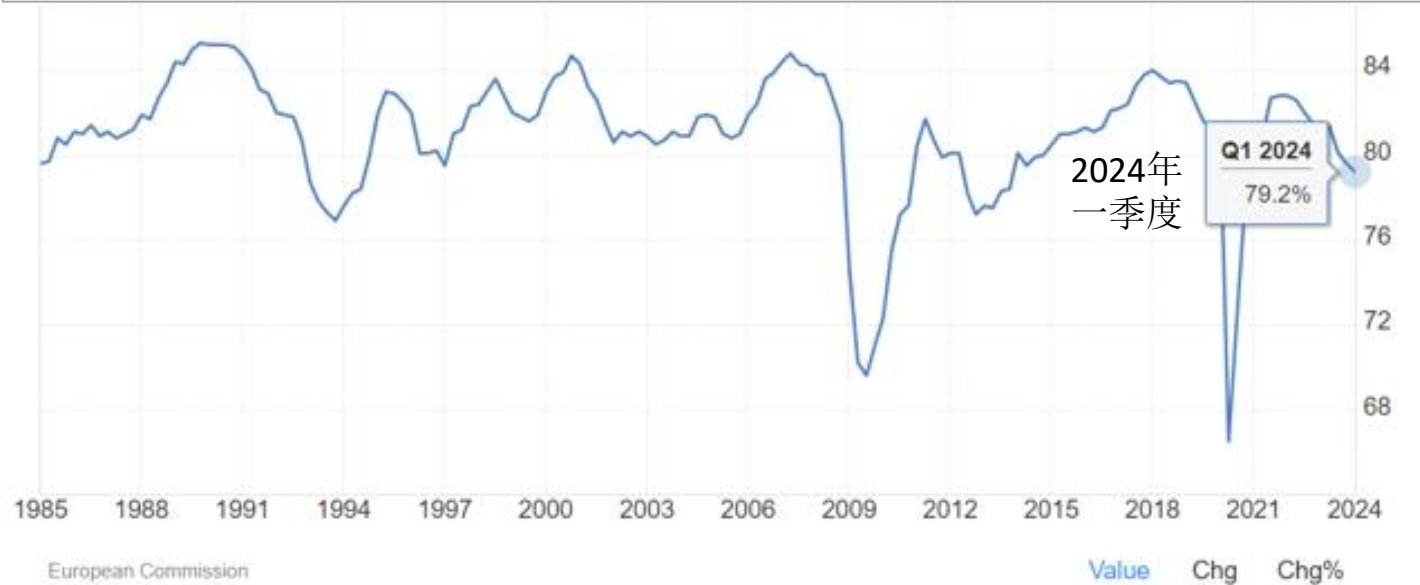
# Consumption and Investment

## 消费与投资

Retail sales picking up early 2024 but very fragile  
零售从2024年初开始低位回升，但非常脆弱



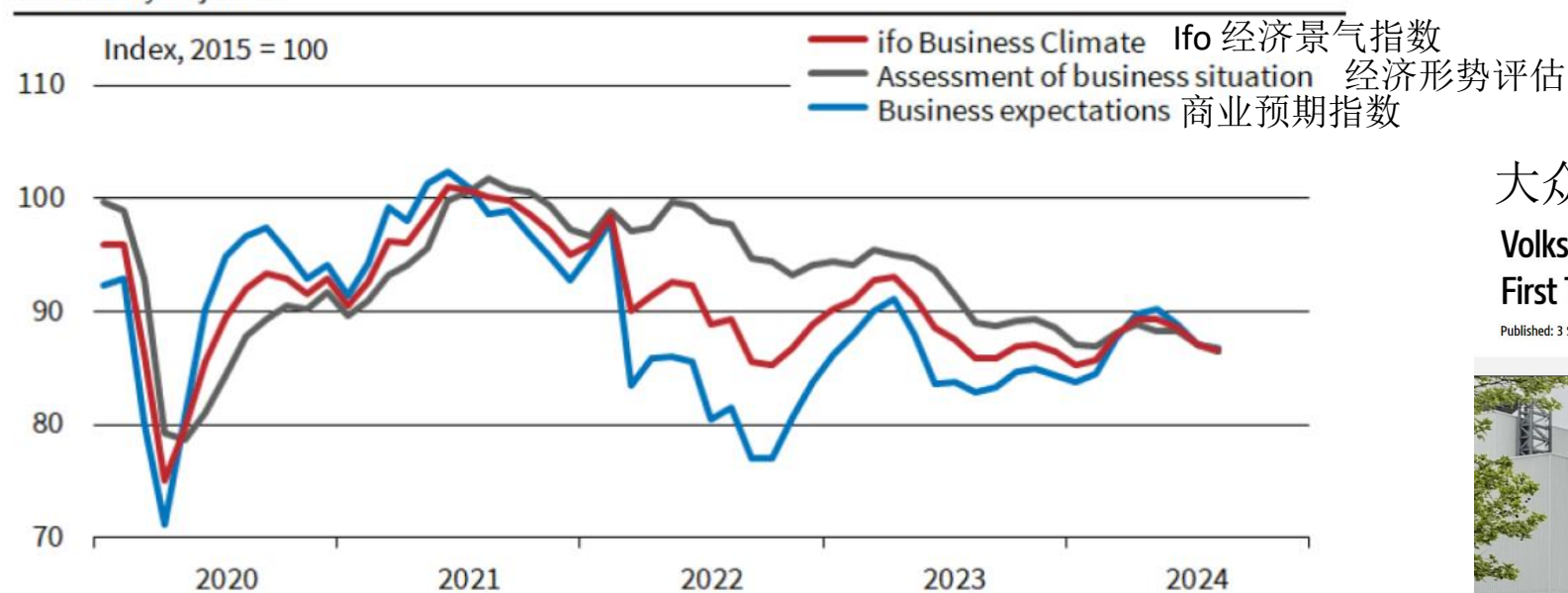
Capacity Utilization still falling, signalling weak outlook for investment  
产能利用率仍在下降，投资前景表现疲软



# European Industry: German Business Climate deteriorates

## 欧洲工业：德国商业环境恶化

ifo Business Climate Germany<sup>a</sup>  
Seasonally adjusted 季节性调整



<sup>a</sup> Manufacturing, service sector, trade, and construction.  
Source: Ifo Business Survey, August 2024.

© Ifo Institute

制造业，服务业，贸易及建筑业



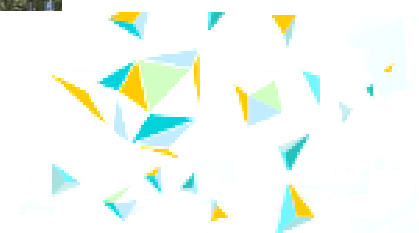
European  
materials  
handling  
federation

大众汽车87年来首次考虑关闭其德国汽车工厂  
Volkswagen Mulls Closing German Car Factories for the First Time in Its 87-Year History

Published: 3 Sep 2024, 16:53 UTC • By: Cristian Agatie



前方惊涛骇浪





欧盟眼中的奥运奖牌数

THE OLYMPIC MEDAL COUNT AS SEEN THROUGH THE EU'S EYES

		GOLD	SILVER	BRONZE	TOTAL
1	European Union	58	71	83	212
2	China	33	24	16	73
3	USA	27	34	24	85
4	Japan	21	8	14	43
5	Australia	17	4	18	39
6	ROC	15	21	19	55
7	Great Britain	15	18	16	49
8	New Zealand	7	5	6	18
9	Republic of Korea	6	4	9	19
10	Cuba	5	7	3	12



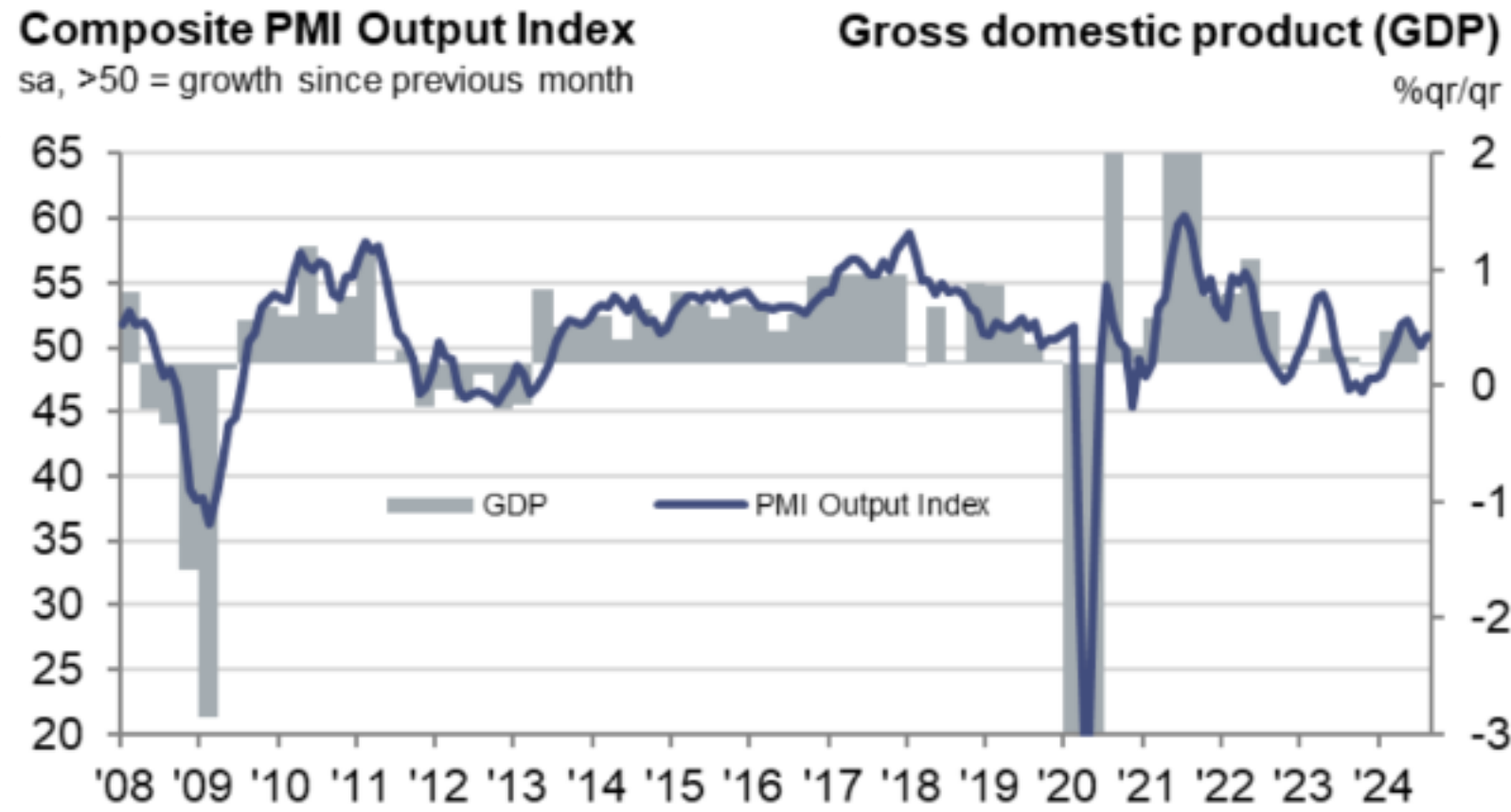
European materials handling federation



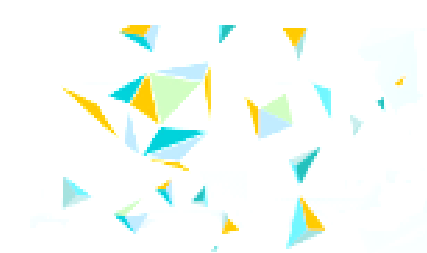
# EU Economic Sentiment Indicator

## 欧盟经济景气指标

综合产出采购经理人指数  
>50 = 环比增长



Source: HCOB, S&P Global PMI, Eurostat via S&P Global Market Intelligence.







# Europe – Industrial Truck Market

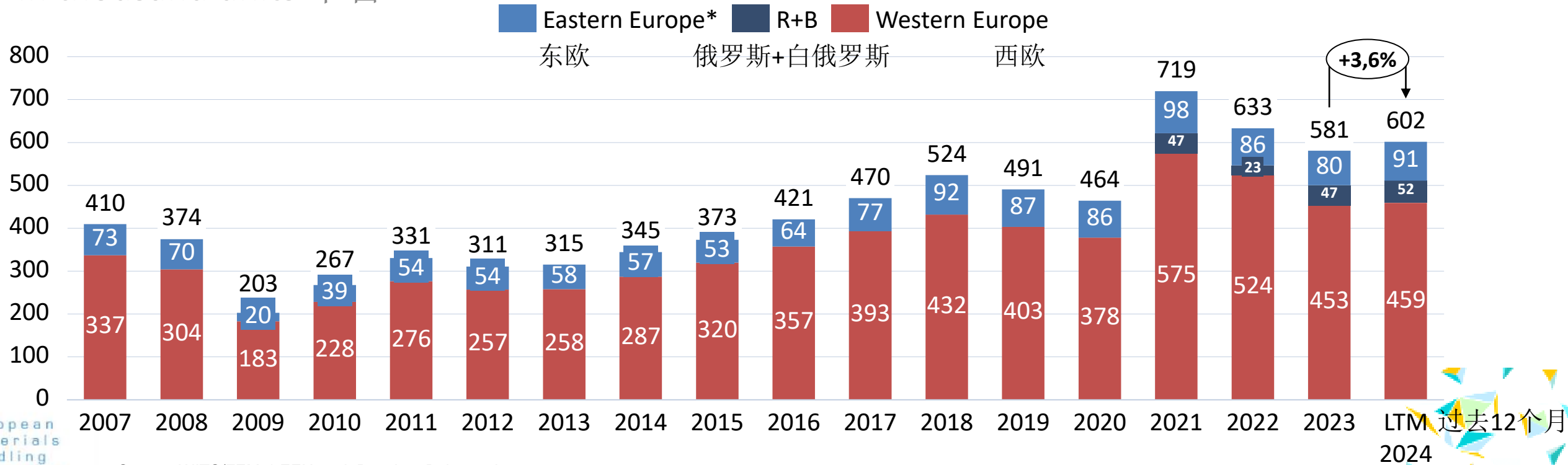
## 欧洲工业车辆市场

Historic Order Development 2007 – 05/2024 历史订单发展

Status: May 2024

2024年5月

In thousand units 千台



European materials handling federation

Source: WITS/FEM; \* EEU excl. Russia + Belarus since 2021

过去12个月  
2024



# Europe – Industrial Truck Market

## 欧洲工业车辆市场

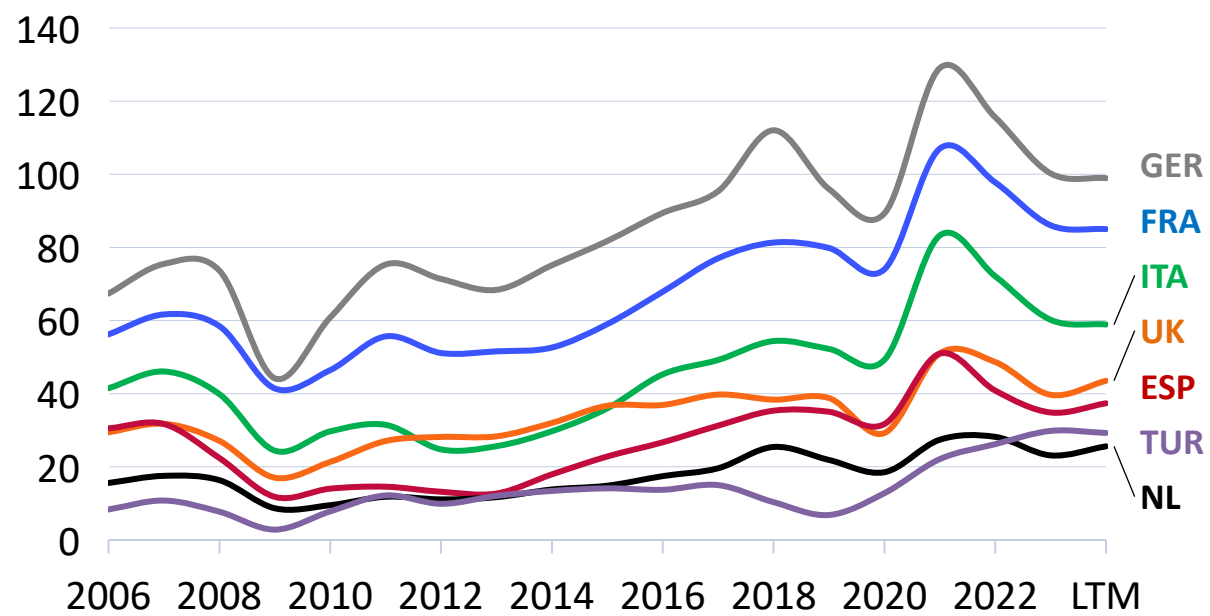
Status: May 2024

2024年5月

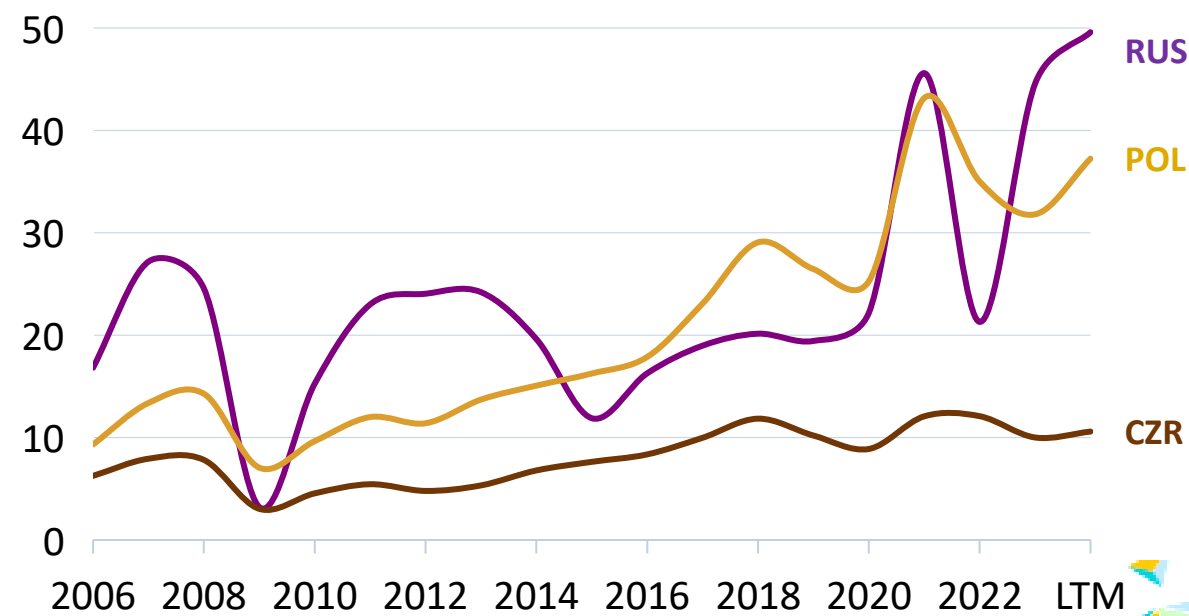
### Country Trends 国家趋势

In thousand units 千台

#### Western Europe 西欧



#### Eastern Europe 东欧



European materials handling federation

Source: WITS/FEM

LTM 2024  
过去12个月

LTM 2024  
过去12个月





# Europe – Industrial Truck Market

## 欧洲工业车辆市场

Status: May 2024

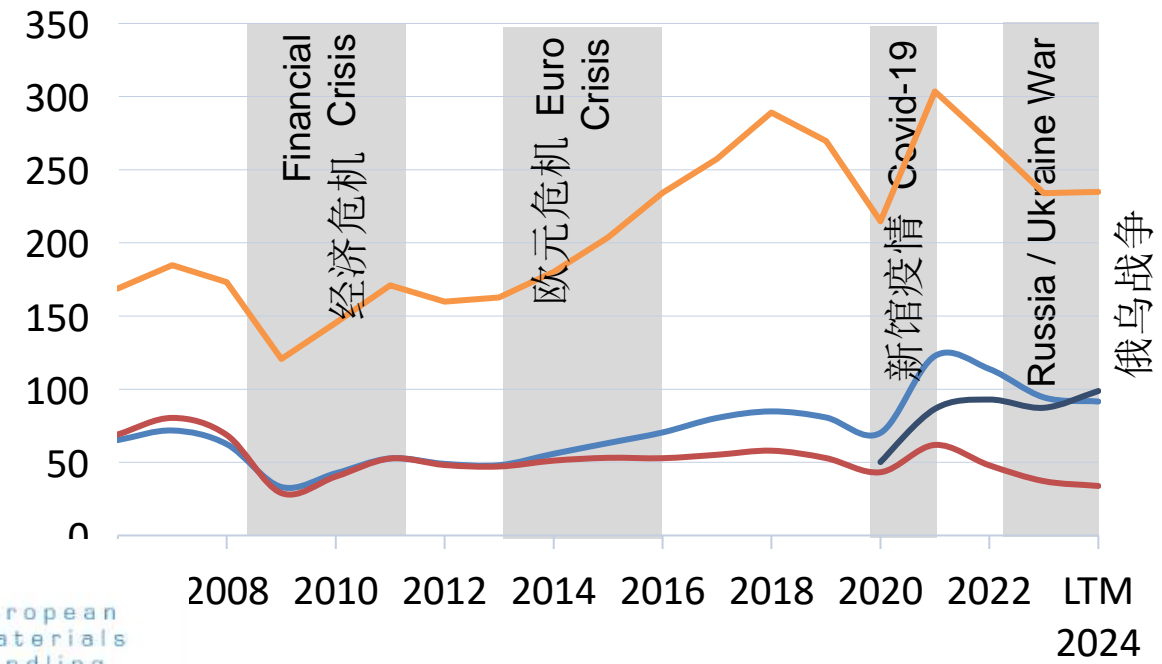
### Product Trends – ICB vs ECB vs WH 各车型趋势

In thousand units 千台

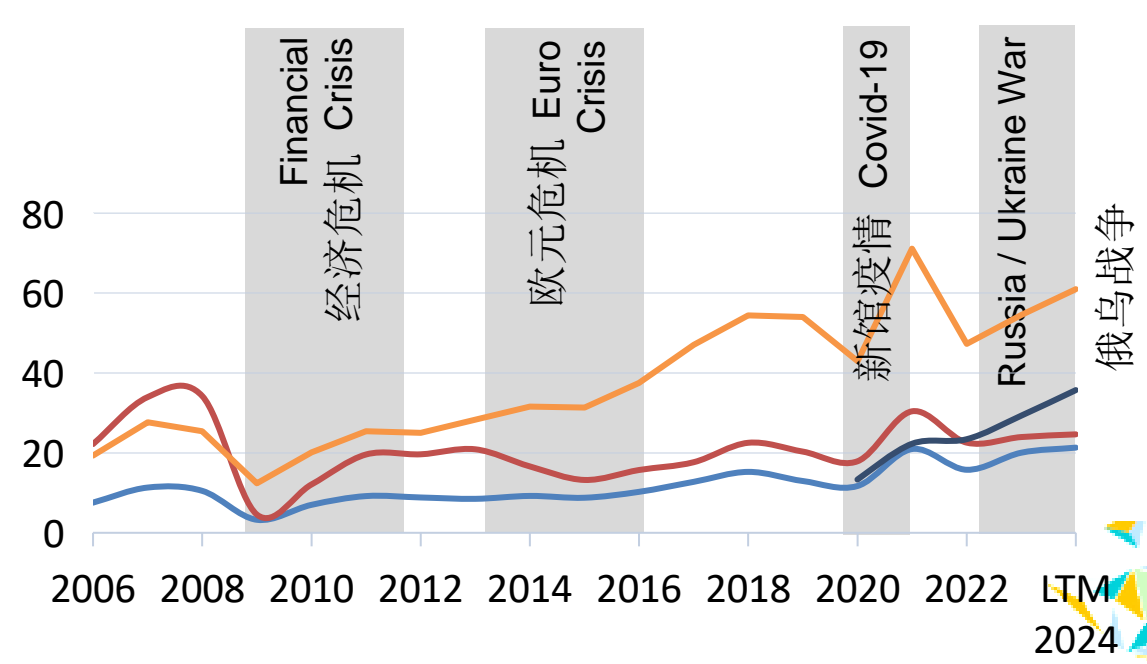
— ECB — WH 3.1  
— ICB — WH\*

— ECB — WH 3.1  
— ICB — WH\*

### Western Europe 西欧



### Eastern Europe 东欧



European materials handling federation

Source: WITS/FEM; \* WH excl. CI 3.1 from 2020

LTM 2024  
过去12个月

LTM 2024  
过去12个月

# Eurozone Outlook: modest growth, varied across countries

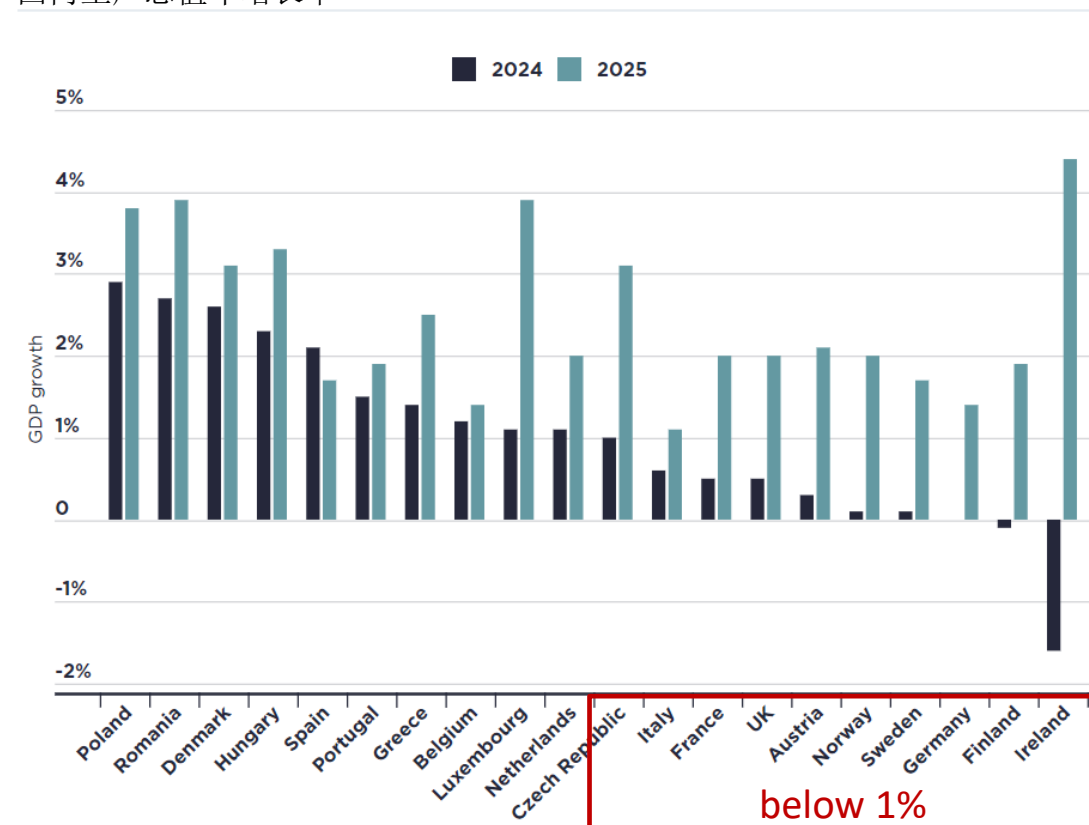
## 欧元区展望：温和增长，各国不同

Source: Oxford Economics; EU commission

(Annual percentage changes unless specified)						
年增长率	2022	2023	2024	2025	2026	2027
GDP	3.5	0.5	0.8	1.4	1.6	1.6
Private consumption	4.4	0.7	1.0	1.7	1.9	1.8
Fixed investment	2.2	1.2	-0.1	2.7	2.7	2.4
Government consumption	1.6	1.0	1.2	0.7	0.6	0.6
Exports of goods and services	8.2	-1.1	-0.1	3.4	3.4	2.8
Imports of goods and services	7.5	-0.4	1.0	2.5	2.7	2.4
Industrial production	2.1	-2.1	-2.0	2.8	3.4	2.9
Consumer prices	8.4	5.4	2.3	1.4	1.6	1.9
Unemployment rate (%)	6.8	6.6	6.5	6.4	6.4	6.2
Current a/c balance (% of GDP)	-0.4	1.6	2.4	2.1	1.9	1.8
Government balance (% of GDP)	-3.7	-3.6	-3.1	-2.7	-2.3	-2.0
Bank's deposit rate (% EOP)	2.0	4.0	3.3	1.8	1.8	1.8
10-yr govt. bond yield, EZ avg (% EOP)	3.4	2.8	3.1	3.0	2.9	2.9
Exchange rate (US\$ per euro, EOP)	1.07	1.11	1.09	1.10	1.12	1.13
Exchange rate (euro per £, EOP)	0.89	0.87	0.85	0.85	0.86	0.86

Annual GDP growth

国内生产总值年增长率



below 1%

低于1%



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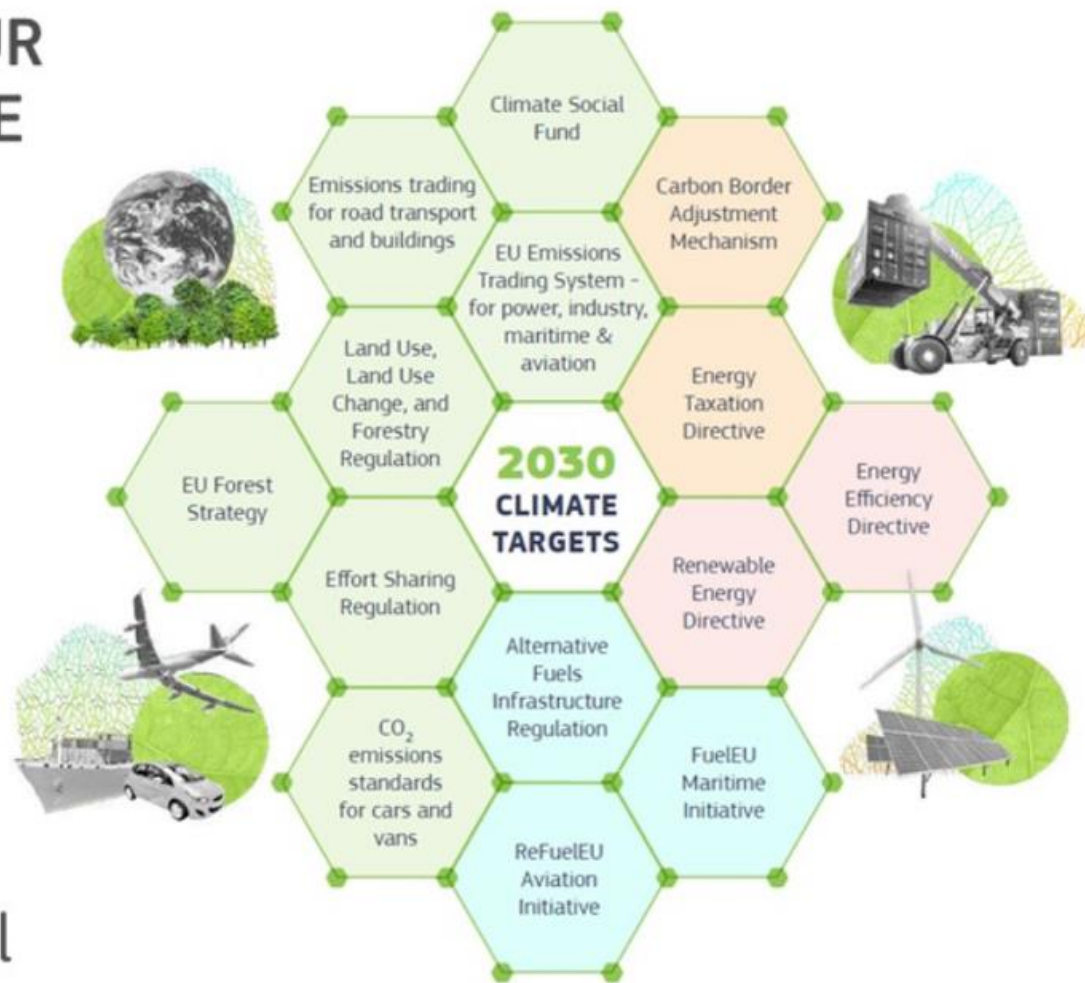


# EUROPEAN GREEN DEAL 欧洲绿色协议

REACHING OUR  
2030 CLIMATE  
TARGETS

实现2030年  
气候目标

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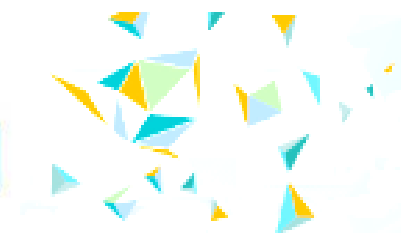


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#EUGreenDeal



European  
Commission



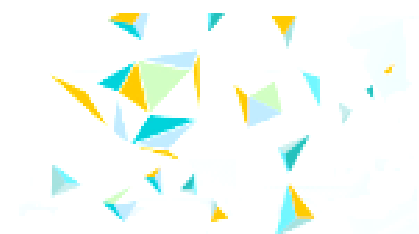


## Preparing for a tsunami of new EU ESG Regulations 为欧盟新的ESG法规所带来的海啸做好准备措施

The ESG Committee identified >80 recent or new EU laws in the areas of EU Green Deal, EU Just Transition / Social Pillar, EU Digitalisation package etc that can be classified under umbrella of Environment, Social, Governance matters – compliance with which is reportable if identified material under CSRD. All these laws have different risk levels and different dates of applicability.



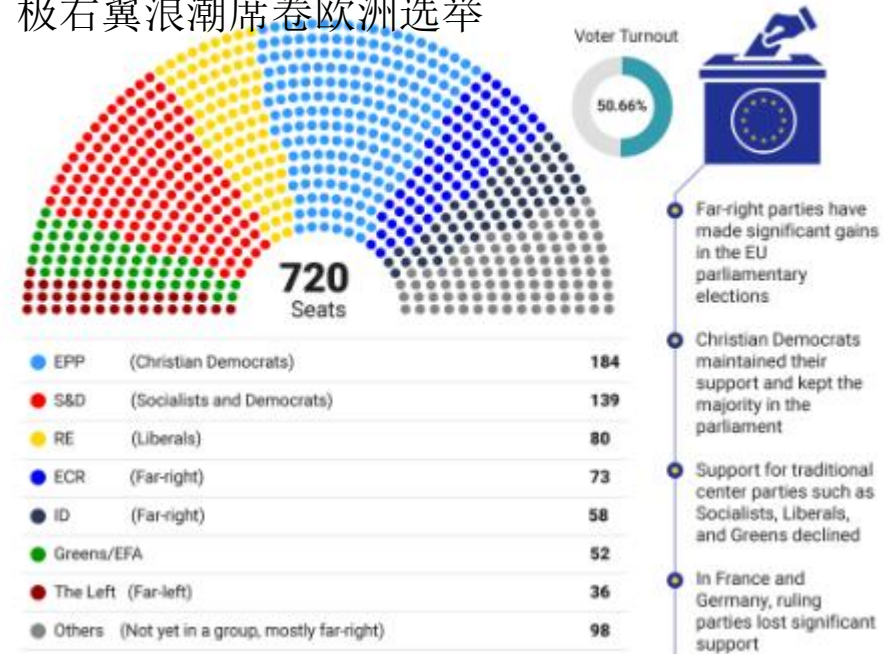
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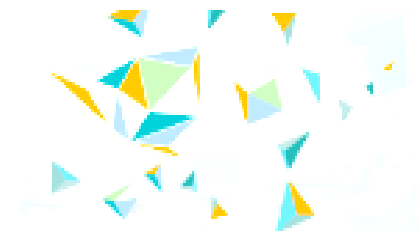
# Political Uncertainties 政治不确定性

## Far-right wave sweeps European elections

极右翼浪潮席卷欧洲选举



- ✓ Geopolitical conflicts in Middle East and Ukraine
- ✓ European Elections May 2024
- ✓ Election results in France and Germany
  - 中东和乌克兰的地缘政治冲突
  - 2024年5月欧洲选举
  - 法国和德国的选举结果

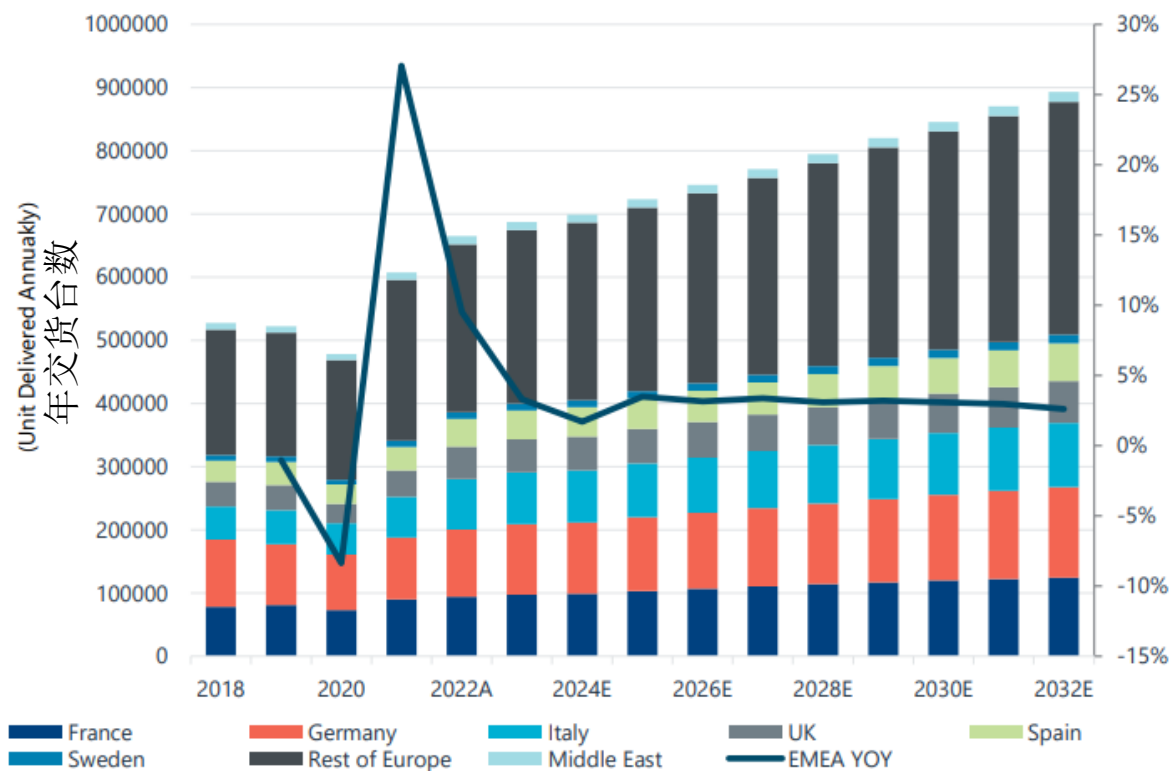




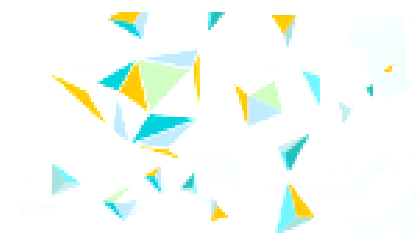
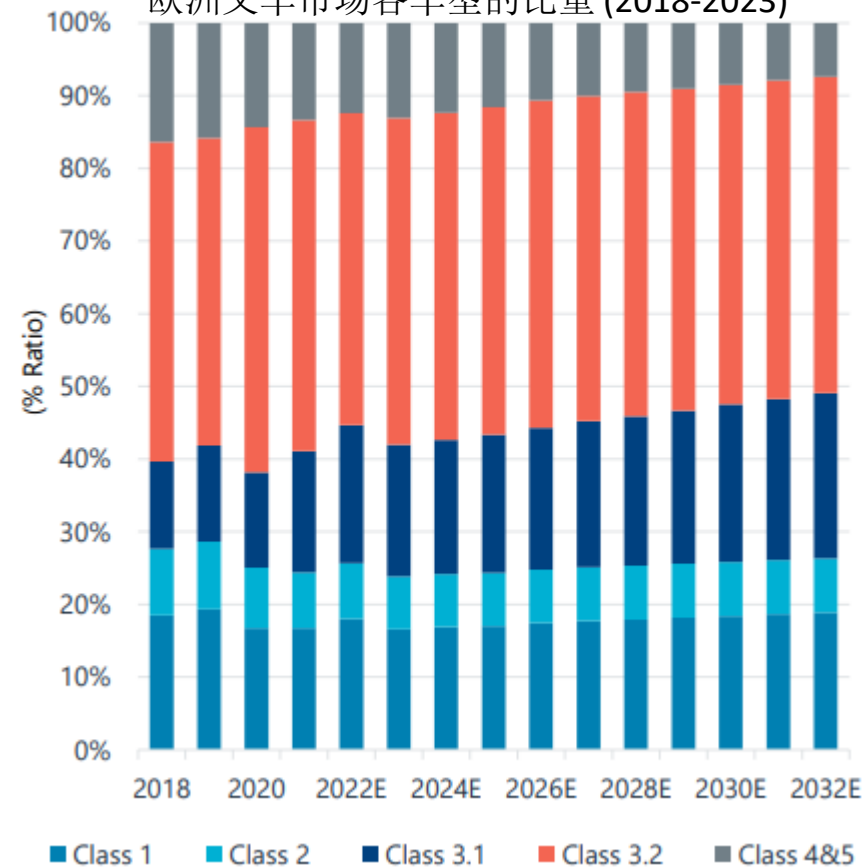
# Material Handling Market Outlook 物料搬运市场展望

## Long term growth , shift in Products 长期增长趋势，产品迭代

EMEA Forklift Market Size and Growth Rate (2018-2032)  
欧洲叉车市场容量及增速 (2018-2023)



EMEA Forklift Market By Class (2018-2032)  
欧洲叉车市场各车型的比重 (2018-2023)

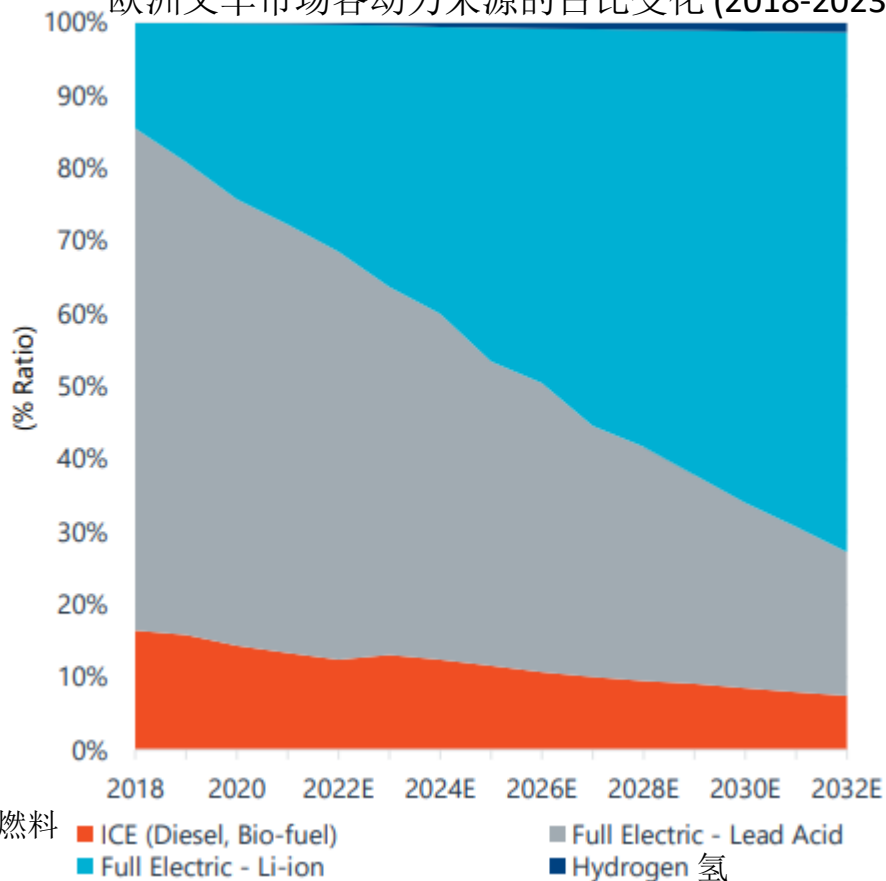


# Material Handling Market Outlook 物料搬运市场展望

## Change of Energy Source 动力能源的变化

EMEA Forklift Market By Powertrain (2018-2032)

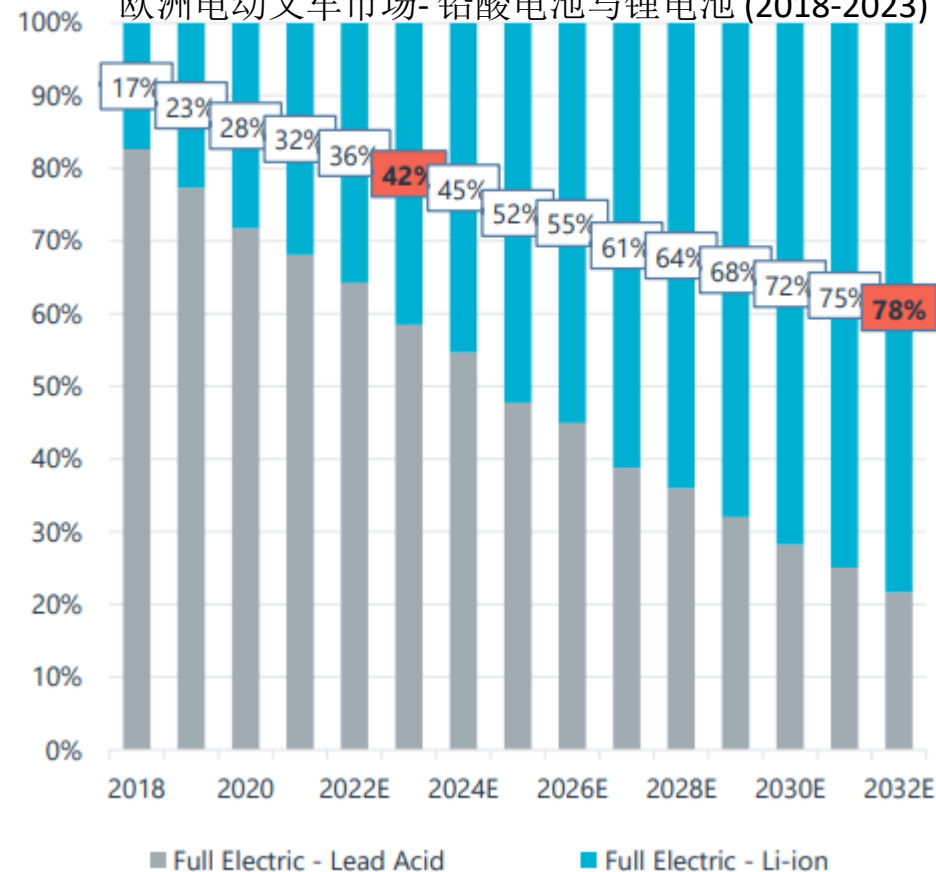
欧洲叉车市场各动力来源的占比变化 (2018-2023)



EMEA Electric Forklift Market - Lead-Acid vs. Li-ion

(2018-2032)

欧洲电动叉车市场- 铅酸电池与锂电池 (2018-2023)



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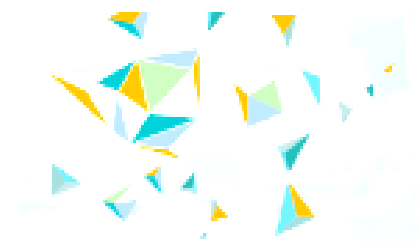
柴油、生物燃料

ICE (Diesel, Bio-fuel)

Full Electric - Li-ion

Full Electric - Lead Acid

Hydrogen 氢



# Material Handling Market Outlook 物料搬运市场展望

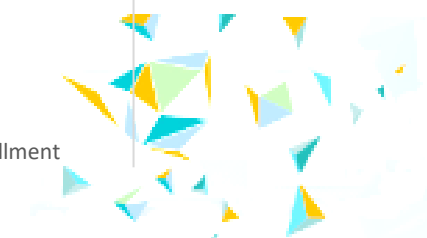
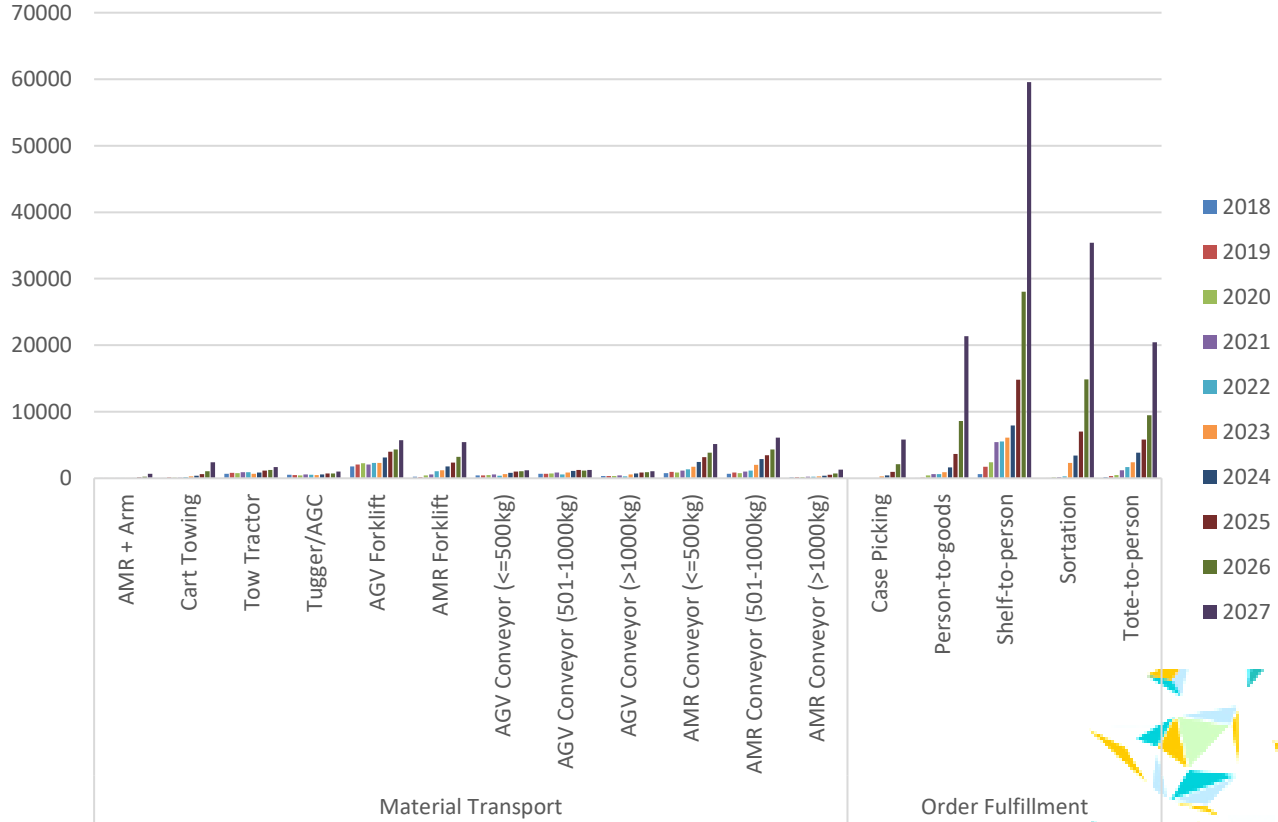
## Automated-Autonomous-Mobile robots' growth

## 自动化智能搬运机器人的增长



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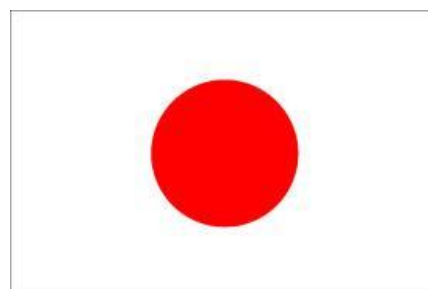
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# Closing remarks 结束语

THANK YOU  
谢谢



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