

# **2019 Presidents' Forum**

## **2019年世界联盟会议主席论坛**

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# **The Trend of Chinese Economy in Recent Years**

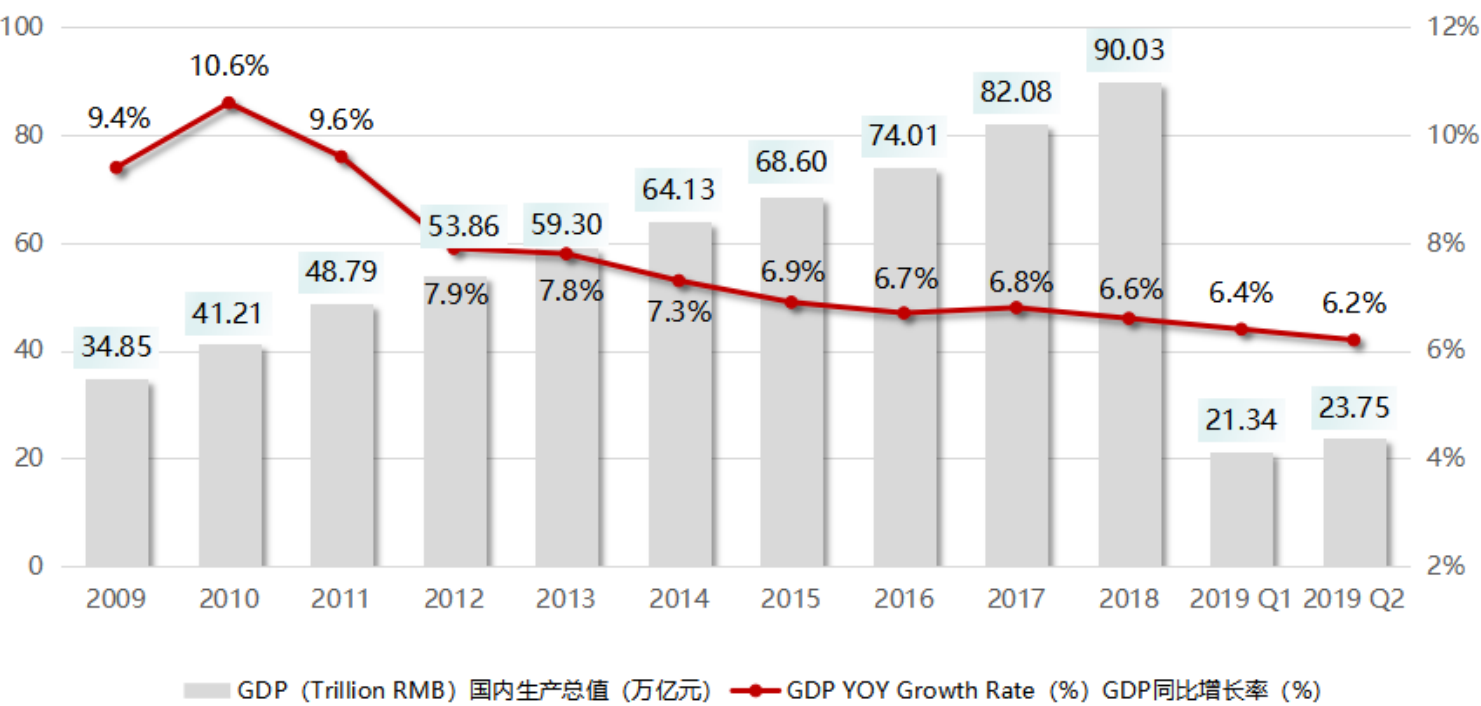
## **近年来中国经济走势**

# A. The Trend of Chinese Economy in Recent Years

## 近年来中国经济走势

### 1. China's GDP and GDP Growth Rate (2009-2019Q2)

#### 2009-2019年二季度中国国内生产总值及同比增长率



Source: National Bureau of Statistics 国家统计局

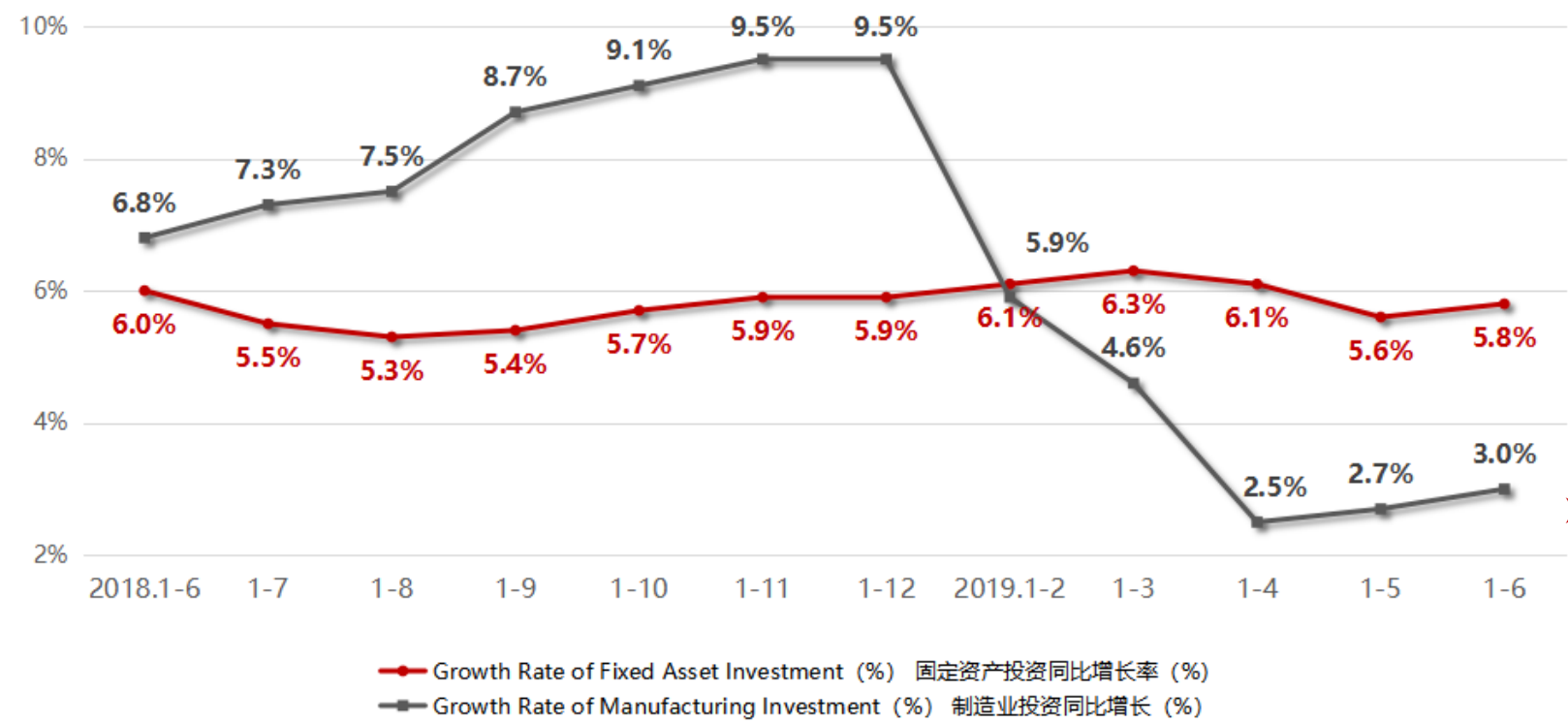
- Since 2012, China's economic growth has gradually turned to medium-high-speed and high-quality growth under the New Normal, and maintained an annual growth rate of more than 6% with great resilience. In 2018, China's GDP surpassed 90 trillion RMB for the first time. The GDP growth rate is expected to be 6% to 6.5% in 2019 and 6% in 2020.
- 自2012年以来，中国经济增速逐步从高速增长转为新常态下的中高速和高质量增长，并保持巨大韧性，年增长率持续保持6%以上，2018年GDP首次突破90万亿元。2019年预计GDP增长率为6%-6.5%，预计2020年也在6%左右。

# A. The Trend of Chinese Economy in Recent Years

## 近年来中国经济走势

### 2. China's Growth Rate of Fixed Asset Investment (2018-YTD201906)➤

#### 2018-2019年6月中国固定资产投资增长同比增长率



Source: National Bureau of Statistics 国家统计局

In 2018, China's Fixed Asset Investment remained at around 6% growth year-on-year, basically in line with GDP growth. In the first half of 2019, the national fixed assets investment increased by 5.8%. However, the Growth Rate of Manufacturing Investment has declined significantly, which means the manufacturing industry has entered the adjustment period.

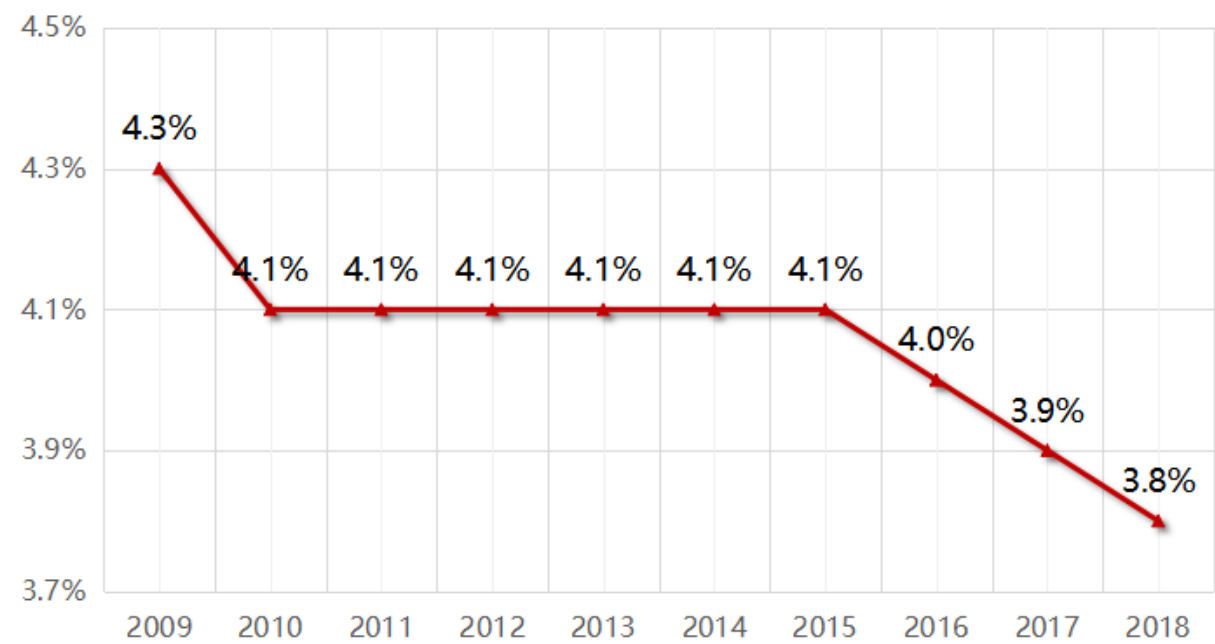
➤ 2018年，中国固定资产投资同比增速保持在6%左右，与GDP增速基本一致。2019年上半年，全国固定资产投资同比增长5.8%。但其中制造业投资增速下滑趋势明显，制造业步入调整期。

# A. The Trend of Chinese Economy in Recent Years

## 近年来中国经济走势

### 3. China's Registered Urban Unemployment Rate (2009-2018)

#### 2009-2018年中国城镇登记失业率



Source: National Bureau of Statistics 国家统计局

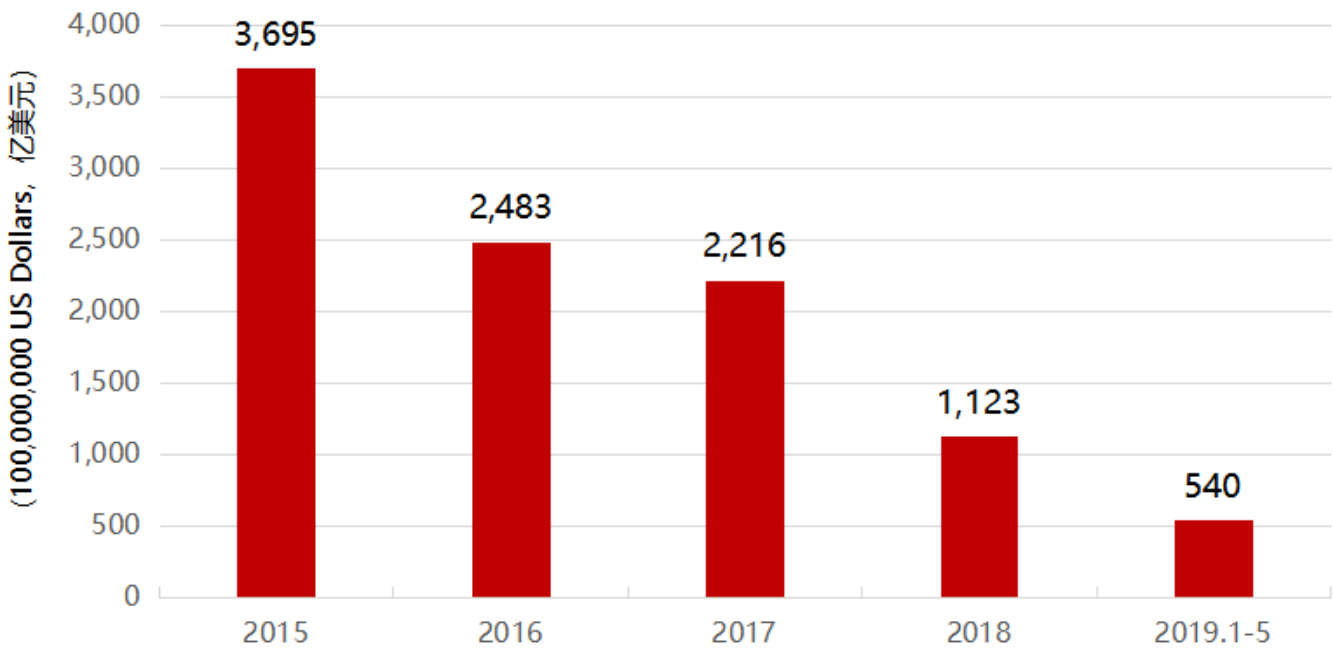
- Since 2009, China's employment has steadily increased while the unemployment rate has remained stably below 4.5%, and even dropped to less than 4% in 2017-2018. In 2018, 13.61 million new jobs were created in cities and towns, an increase of 100,000 over the previous year, which makes economy in full employment.
- 2009年以来，中国就业稳步扩大，失业率始终稳定在4.5%以下，2017-2018年进一步降至4%以下。2018年，全年城镇新增就业1361万人，比上年增加10万人，经济处于充分就业状态。

# A. The Trend of Chinese Economy in Recent Years

## 近年来中国经济走势

### 4. China's International Trade Balance (2015-YTD201905)

#### 2015-2019年5月中国国际贸易差额



Source: State Administration of Foreign Exchange 国家外汇管理局

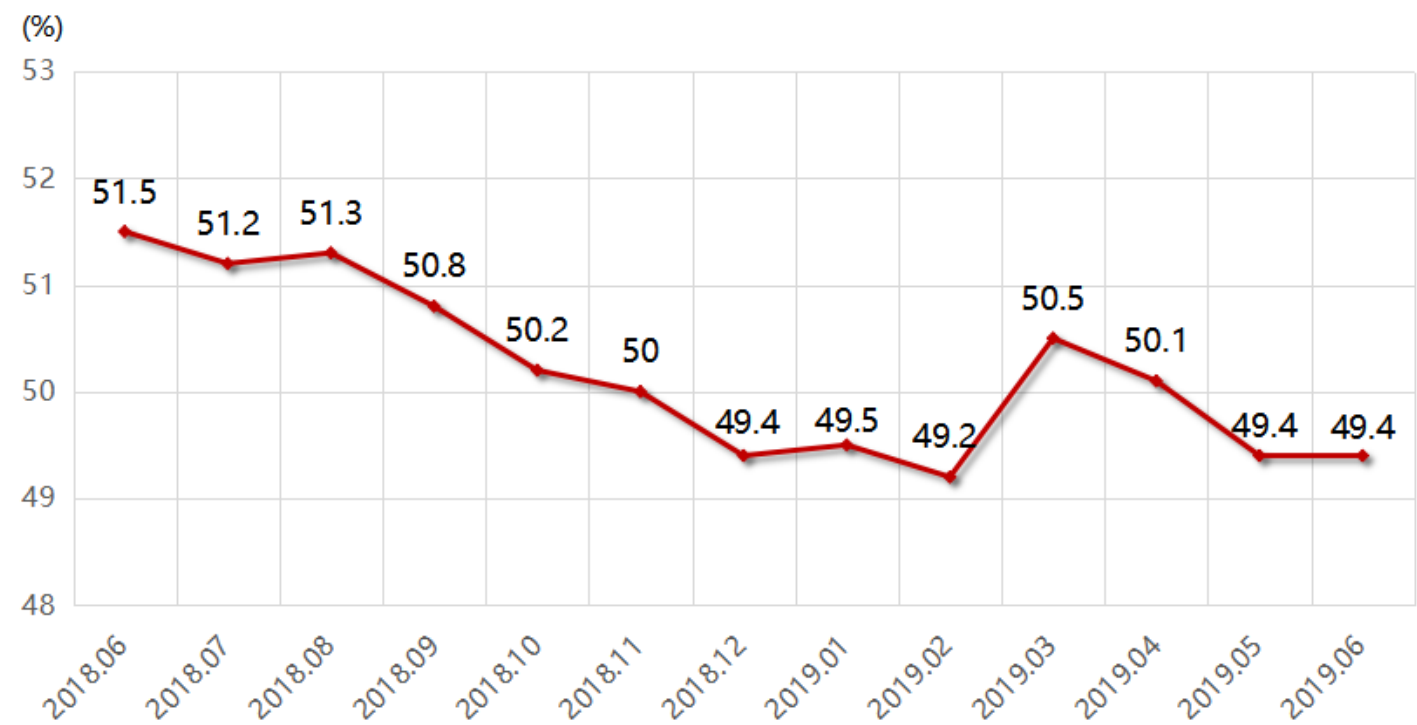
- With the strong growth of China's domestic demand, China's international trade surplus has been narrowing in recent years, and it will shrink further in the future. All along, China has been striving to pursue trade balance and win-win cooperation.
- 随着中国内需的强劲增长，近年来中国国际贸易顺差在持续收窄，且未来顺差还将进一步缩小。一直以来，中国始终努力追求贸易平衡，互利共赢。

# A. The Trend of Chinese Economy in Recent Years

## 近年来中国经济走势

### 5. China's PMI Index (201806-201906)

#### 2018年6月-2019年6月中国制造业采购经理指数



Source: National Bureau of Statistics 国家统计局

- PMI Index in June 2019 was 49.5%, the same with last month. Tax-cut policy might boost manufacturing investment growth.
- 2019年6月份，中国制造业采购经理指数为49.4%，与上月持平，制造业景气度仍偏弱，减税政策有望提升制造业投资增速。

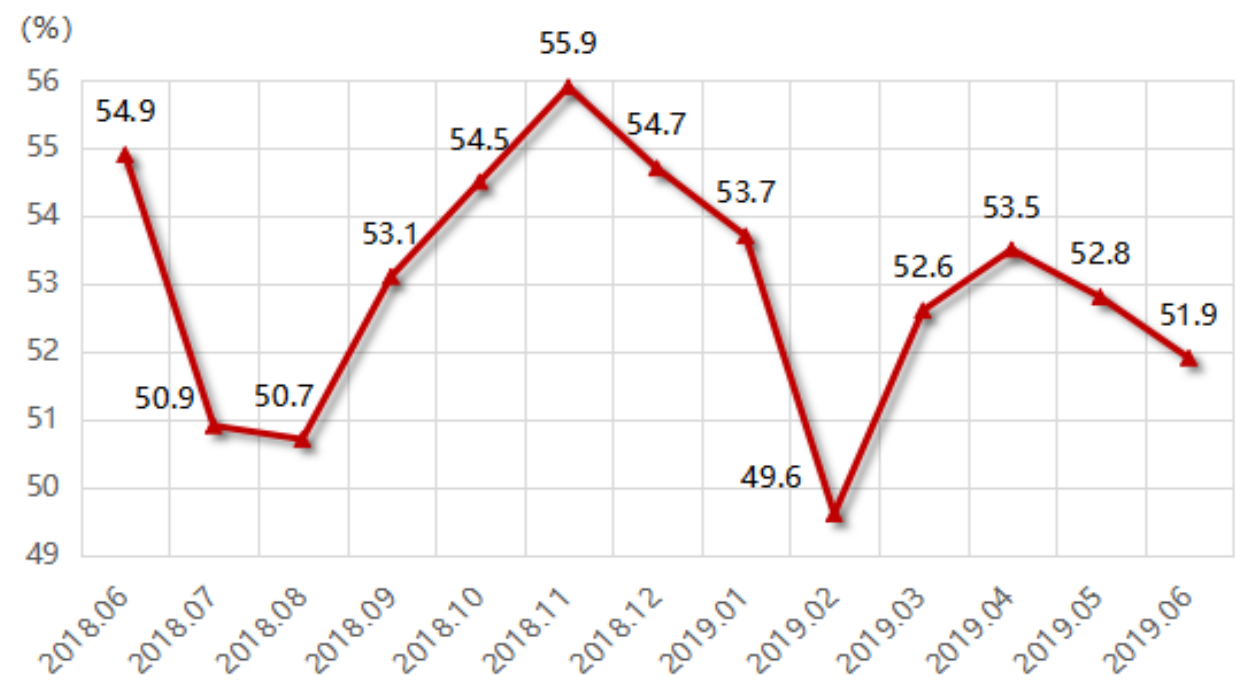


# A. The Trend of Chinese Economy in Recent Years

## 近年来中国经济走势

### 6. China's LPI Index (201806-201906)

#### 2018年6月-2019年6月中国物流业景气指数



Source: China Federation of Logistics and Purchasing 中国物流与采购联合会

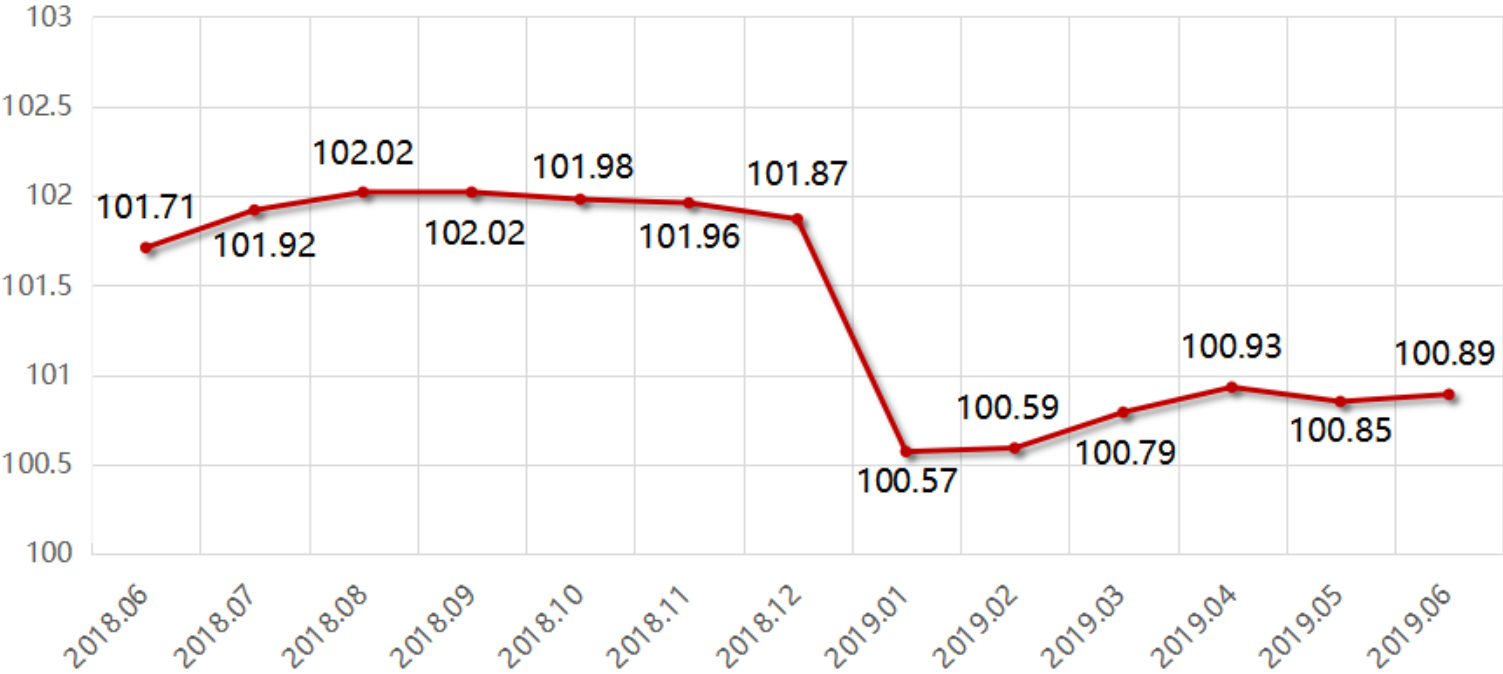
- The index of China's logistics industry shows periodic changes. Since June 2018, the index has basically been above 50, which means that the logistics industry in China continues to operate in the prosperity range.
- 中国物流业景气指数呈周期性变化。自2018年6月以来，该指数基本均在50以上，意味着中国物流业持续运行在景气区间。

# A. The Trend of Chinese Economy in Recent Years

## 近年来中国经济走势

### 7. China's Real Estate Development Prosperity Index (201806-201906)

#### 2018年6月-2019年6月中国房地产开发景气指数



- Since June 2018, China's Real Estate Development Index has been over 100, in a properly prosperous state.
- 2018年6月以来，中国房地产开发景气指数维持在100左右，运行在适度景气区间。

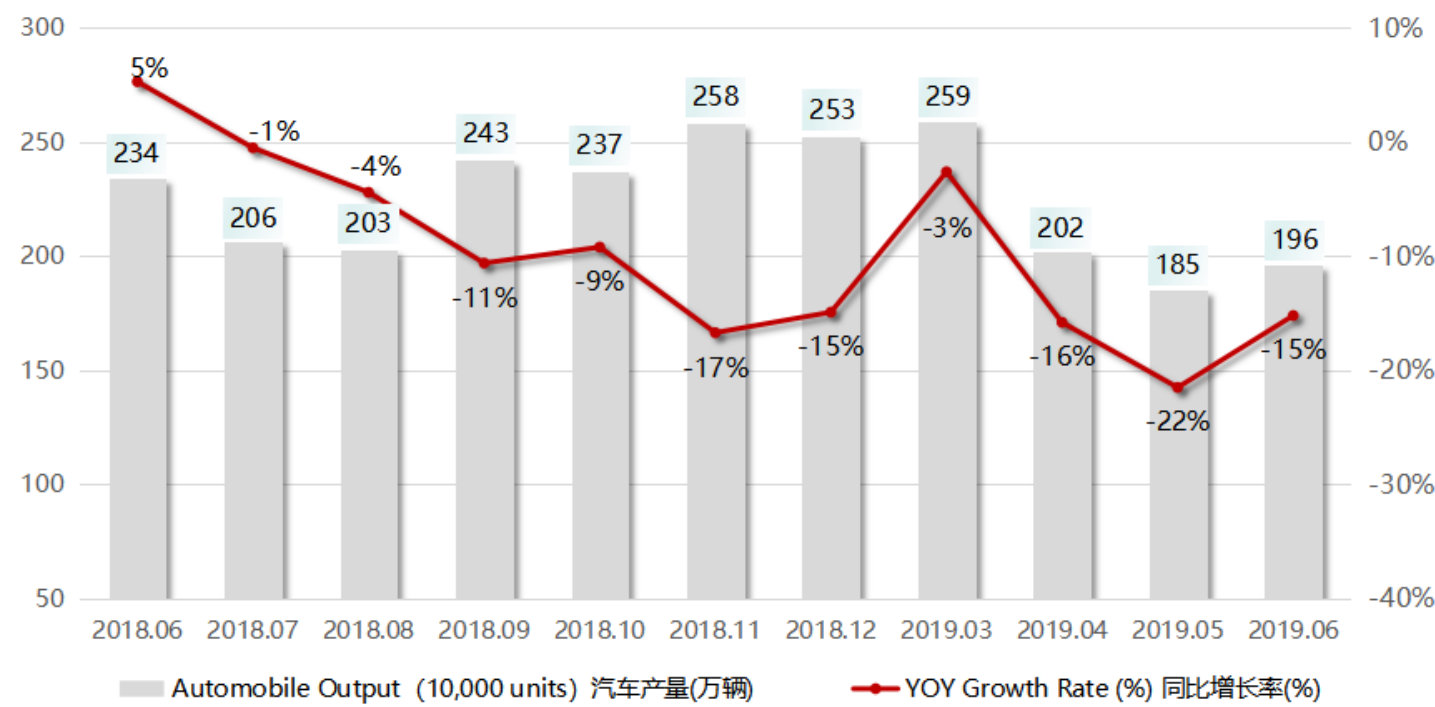
Source: National Bureau of Statistics 国家统计局

# A. The Trend of Chinese Economy in Recent Years

## 近年来中国经济走势

### 8. China's Automobile Output and YOY growth rate (201806-201906)

#### 2018年6月-2019年6月中国汽车产量及同比增长率



Source: National Bureau of Statistics 国家统计局

- After many years of high-speed growth, negative growth first appeared in China's Auto industry in recent 28 years. In the first half of 2019, the output of China's Auto industry still goes down.
- 中国汽车工业在经历多年的高速增长后，2018年行业产销量28年来首次出现同比负增长。2019年上半年，汽车产量继续走低。

**Current Situation of Industrial Vehicle Industry in China**

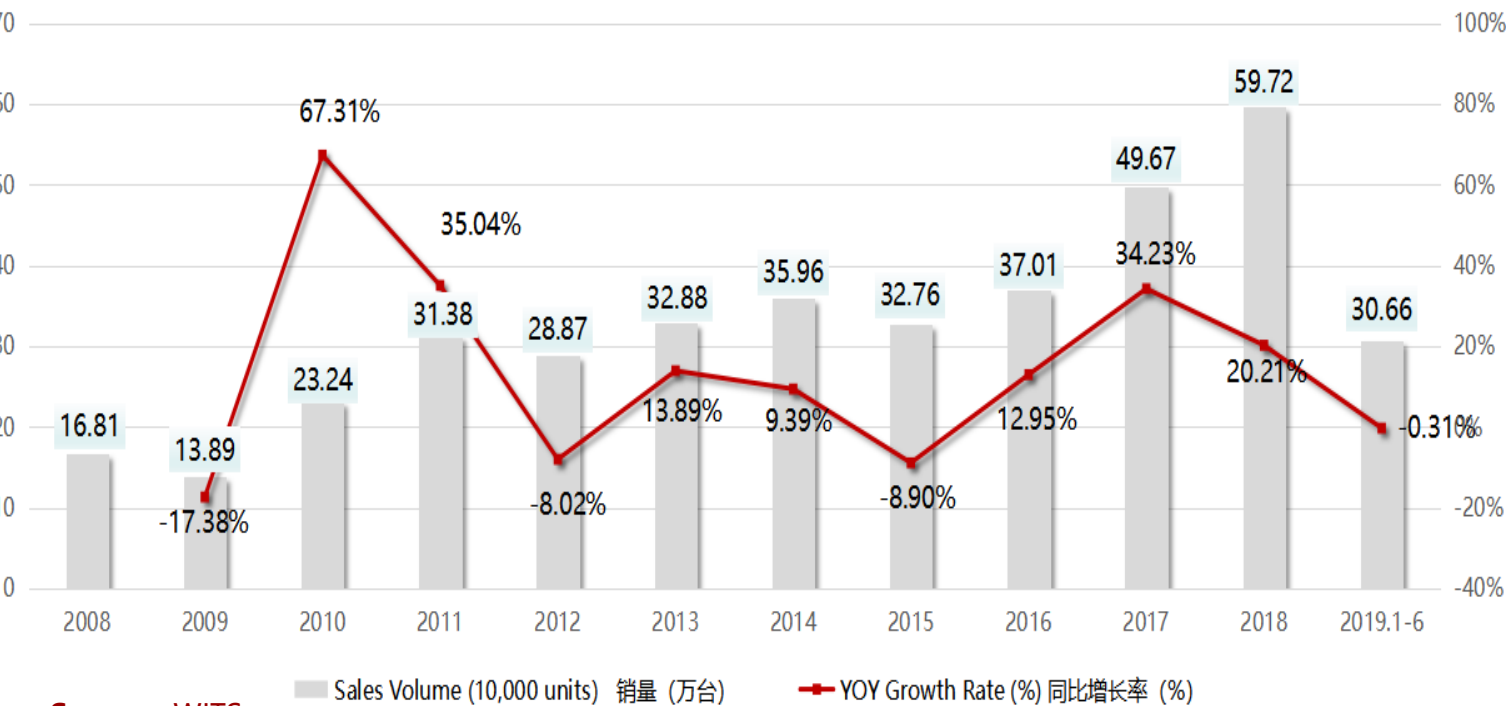
**当前中国工业车辆行业发展现状**

## B. Current Situation of Industrial Vehicle Industry in China

### 当前中国工业车辆行业发展现状

#### 1. China's Sales Volume of Industrial Trucks (2009-YTD201906)

##### 2009-2019年6月中国工业车辆销量



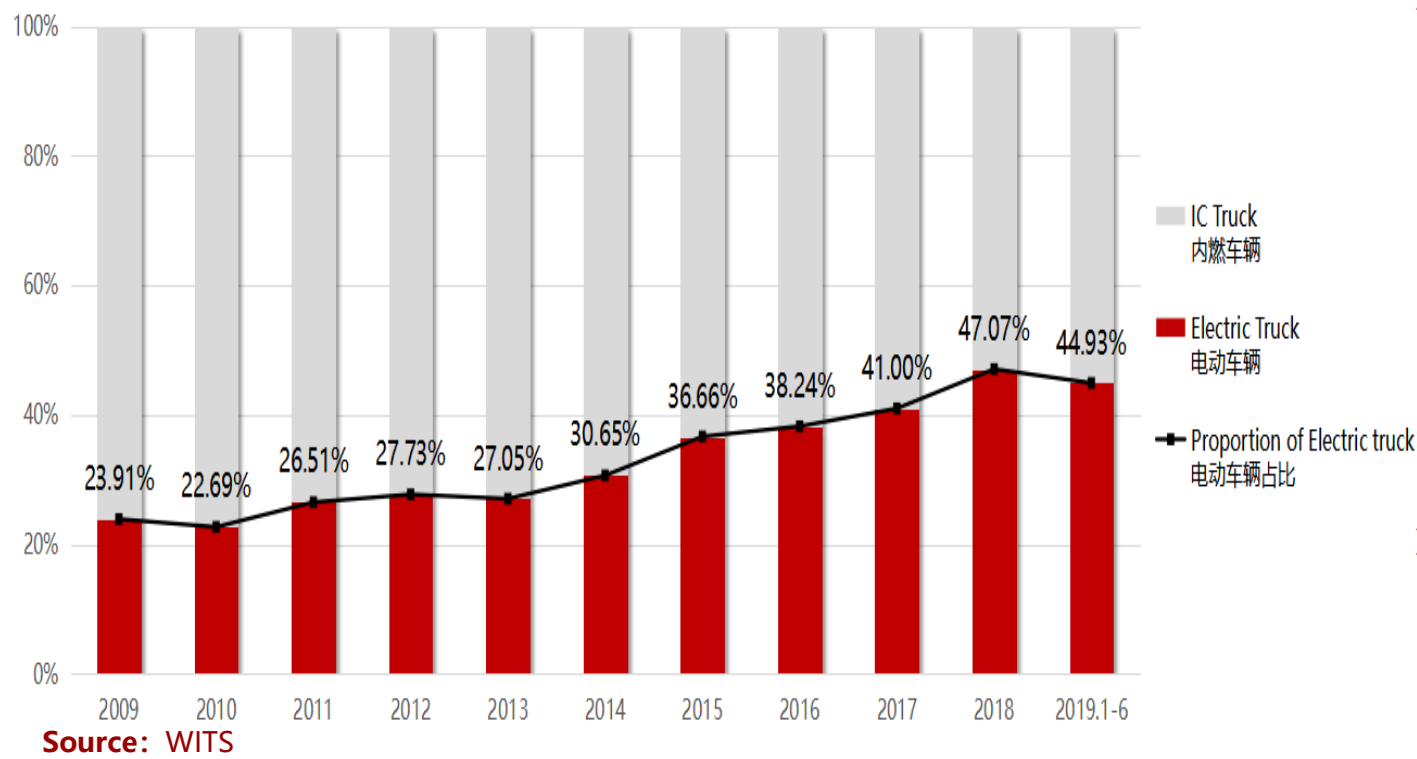
- Over the past 10 years, the development of industrial vehicles in China is moving from "quantity improvement" to "quality leap". On the one hand, the total market volume continues to expand; on the other hand, through 4-5 years of market adjustment, the development of quality has also been improved significantly.
- 近十年来，中国工业车辆发展正在从“量的提升”向“质的飞跃”迈进。一方面，市场总量不断扩大；另一方面，通过4-5年的市场调整，“发展质量”也得到了显著提升。

## B. Current Situation of Industrial Vehicle Industry in China

### 当前中国工业车辆行业发展现状

#### 2. Proportion of Electric Truck vs. IC Truck-China (2009-YTD201906)

2009-2019年6月中国市场电动车与内燃车比例变化情况



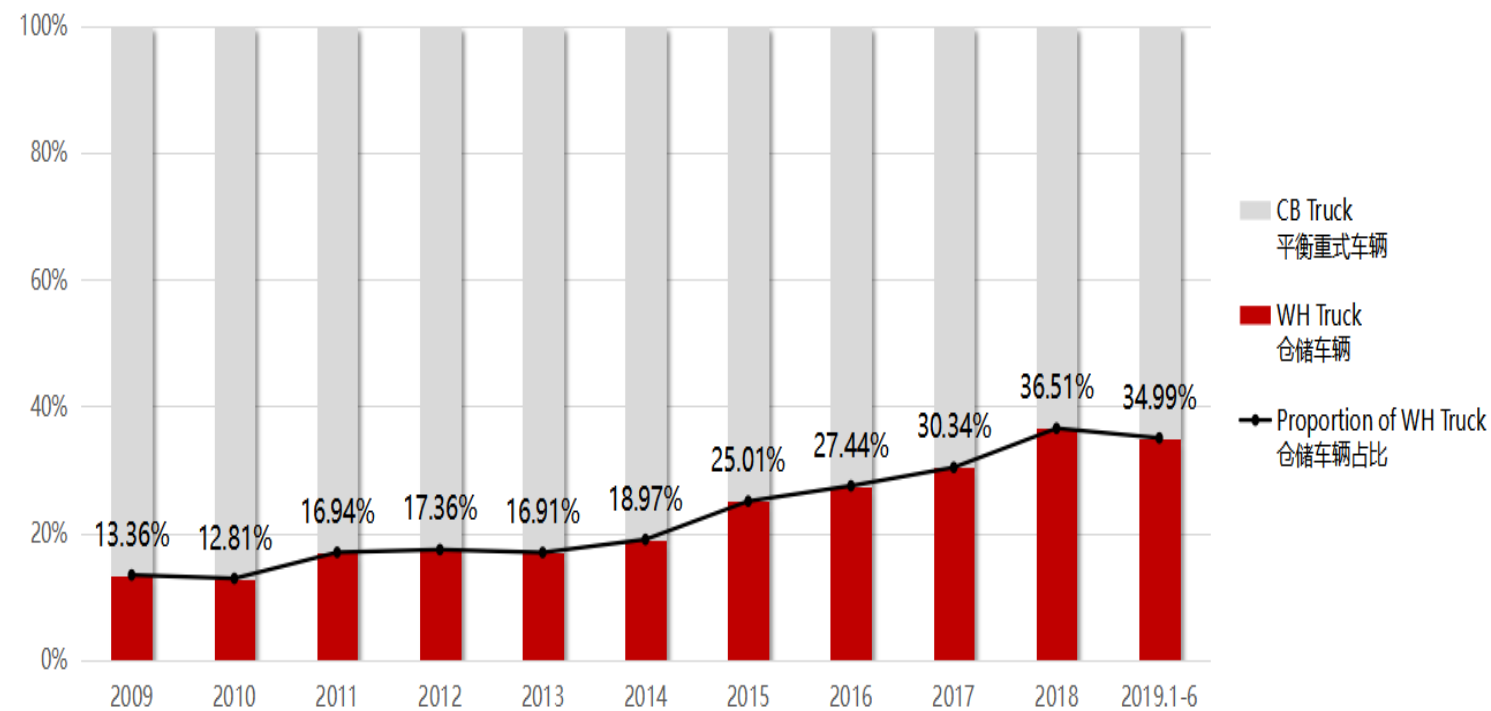
- As can be seen from the 10-year track of China's industrial truck market development, as the world moves towards multipolarity and greater economic globalization, the proportion of China's industrial vehicle electric products has increased from 23% to 47%, and the pace of "electronization" is steadily moving forward.
- 中国工业车辆市场发展10年的轨迹可以看出，随着世界多极化、经济全球化的不断加深，中国工业车辆电动产品占比已经从23%提升到47%，**“电动化”**的步伐正在稳步向前。

## B. Current Situation of Industrial Vehicle Industry in China

### 当前中国工业车辆行业发展现状

#### 3. Proportion of CB Truck vs. WH Truck-China (2009-YTD201906)

##### 2009-2019年6月中国市场平衡重车与仓储车比例变化情况



Source: WITS

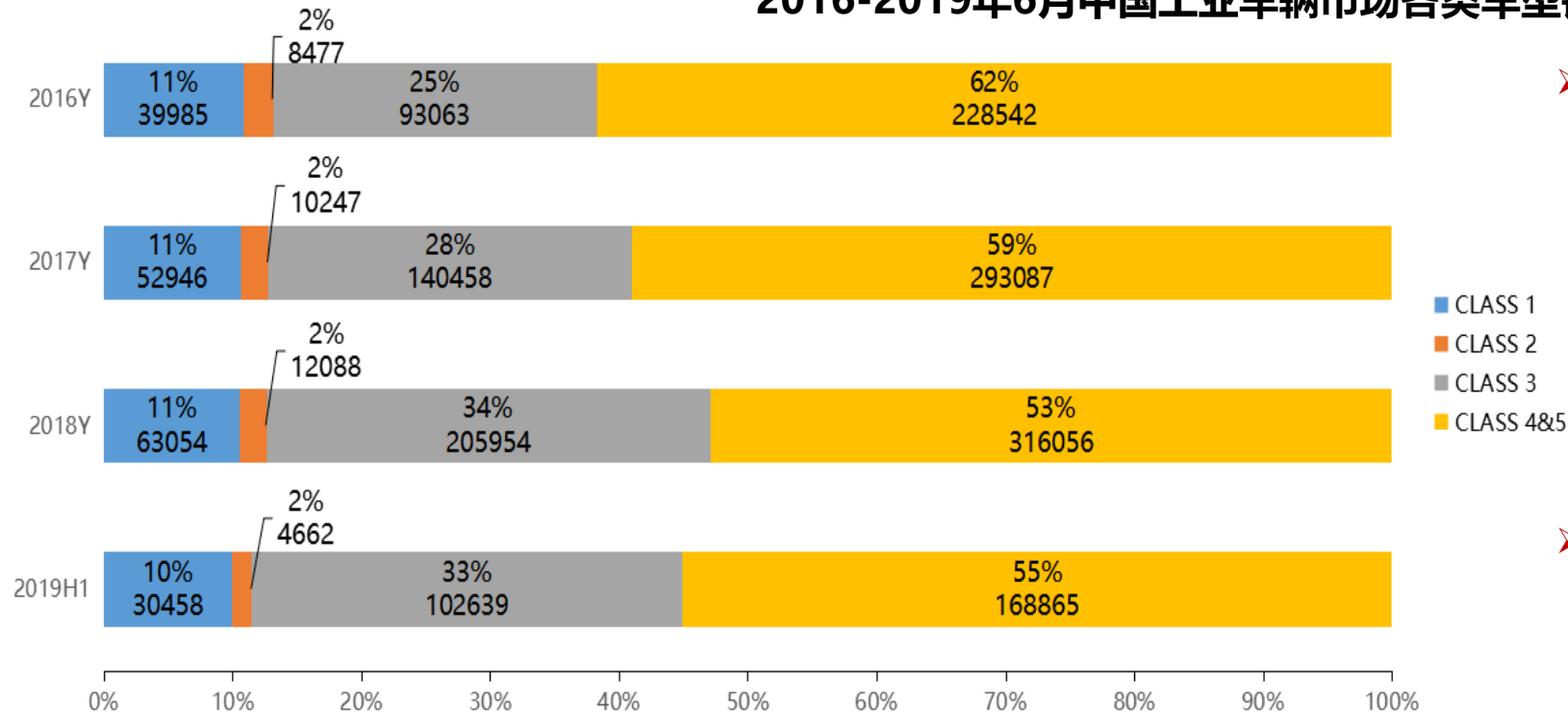
- With the continuous development of innovation in China, industrial truck industry is moving from "integrated innovation" to "technological innovation". China's Warehouse Trucks are not only approaching you silently, but also influencing different industries gradually in terms of safety, efficiency and energy savings.
- 随着中国创新发展的不断推进，工业车辆领域正在从“集成创新”向“技术创新”不断迈进。**中国的仓储车辆不仅悄悄地走近了你身边，也在慢慢的从安全、高效、节能等方面改变着各行各业。**

## B. Current Situation of Industrial Vehicle Industry in China

### 当前中国工业车辆行业发展现状

#### 4. Sales of Five Types of Industrial Trucks-China (2016-YTD201906)

2016-2019年6月中国工业车辆市场各类车型销售情况



Source: WITS

- At the same time, with the rise of global "unilateralism" and "trade protectionism", it is difficult for China to develop its industrial trucks on its own. Structural optimization and innovation development are affected by some uncertainties.
- 与此同时，随着全球“单边主义”“贸易保护”主义的抬头，中国工业车辆的发展很难独善其身。**结构优化、创新发展受到一定程度的不确定因素影响。**



**Development trend of Industrial Vehicle Industry in China**

**未来中国工业车辆行业发展趋势**

## C. Development trend of Industrial Vehicle Industry in China

### 未来中国工业车辆行业发展趋势

#### 1. Driven by the superposition of economic environment and industry cycle, China's industrial vehicle industry has entered a period of adjustment

经济大环境与行业周期的叠加，促使中国工业车辆行业进入调整期

- In December 2018, the China Central Economic Work Conference emphasized that China will comprehensively promote steady growth, promote reform, restructure, benefit people's livelihood and prevent risks, and maintain economic operation in a reasonable range through "six stability". It has laid a good foundation for the continuous development of industrial trucks in China. 2018年12月，中国中央经济工作会议强调，中国将统筹推进稳增长、促改革、调结构、惠民生、防风险工作，通过“六稳”保持经济运行在合理区间。**为中国工业车辆不断发展奠定了良好基础。**
- In June 2019, President Xi Jinping announced at the G20 Osaka Summit that China will further release a number of major initiatives to accelerate the formation of a new situation of opening up. It provides policy guarantee for China's industrial truck industry to serve the global market. 2019年6月，习近平主席在G20大阪峰会宣布，中国将进一步推出若干重大举措，加快形成对外开放新局面。**给中国工业车辆服务全球提供了政策保障。**
- However, Sino-US trade conflicts have brought great uncertainties to the economic development of both sides, and also bring a certain impact on the world economy, and impel China's industrial truck industry to a new period of adjustment. 然而，中美贸易摩擦自发生以来，给中美双方经济发展带来较大不确定性，也对世界经济造成一定冲击。**促使中国工业车辆行业进入了新的调整期。**

**high-quality  
development**  
高质量发展

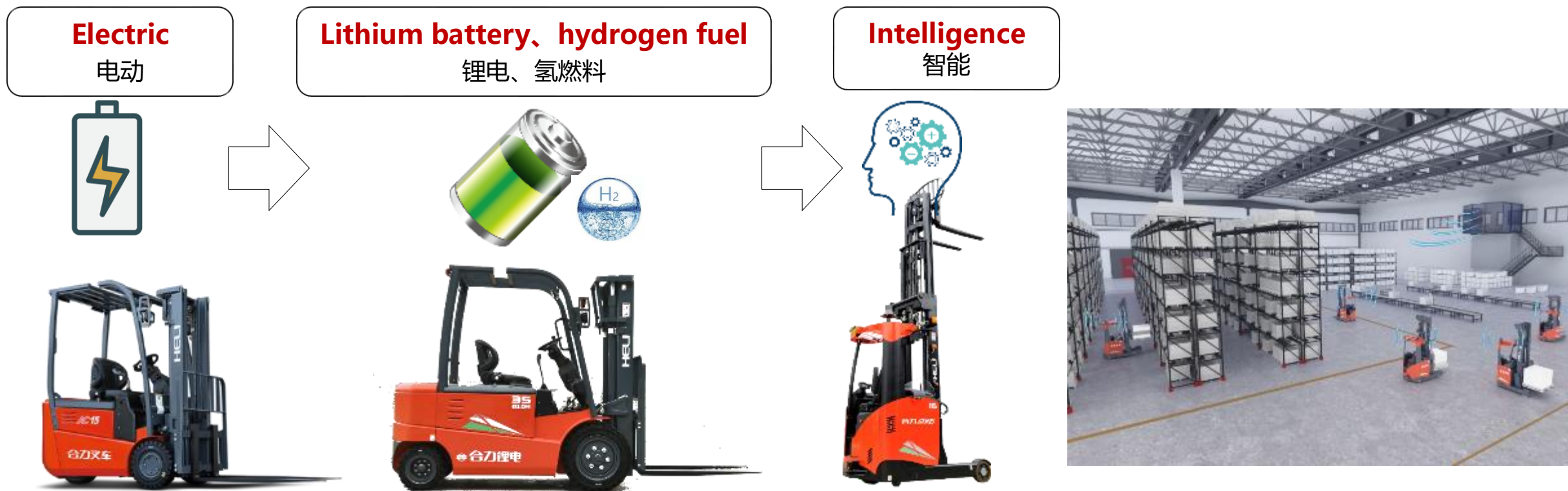


## C. Development trend of Industrial Vehicle Industry in China

### 未来中国工业车辆行业发展趋势

2. With the rapid growth of electric and new energy products, enterprises are introducing intelligent products and transforming into service providers of total solutions

电动和新能源产品增长迅速，企业推出智能化产品，向整体解决方案服务商转型



## C. Development trend of Industrial Vehicle Industry in China

未来中国工业车辆行业发展趋势

### 3. Application of Internet of Things and 5G Technology in Industrial Vehicle Industry

物联网技术、5G技术在工业车辆行业的应用



## C. Development trend of Industrial Vehicle Industry in China

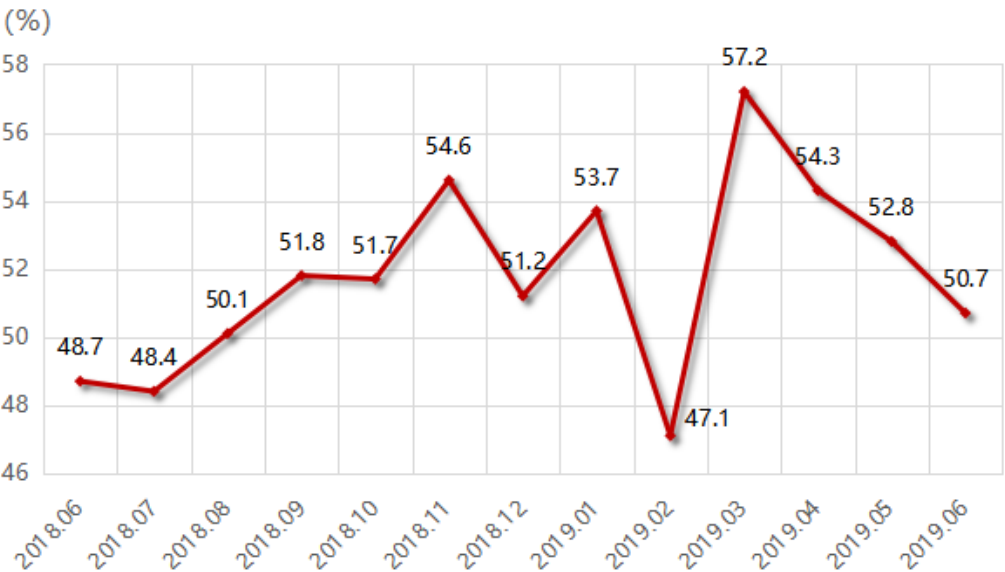
### 未来中国工业车辆行业发展趋势

4. With the rapid increase of labor cost, electric warehouse vehicles are more widely used

随着人力成本的快速成长，电动仓储车辆的应用越来越广泛

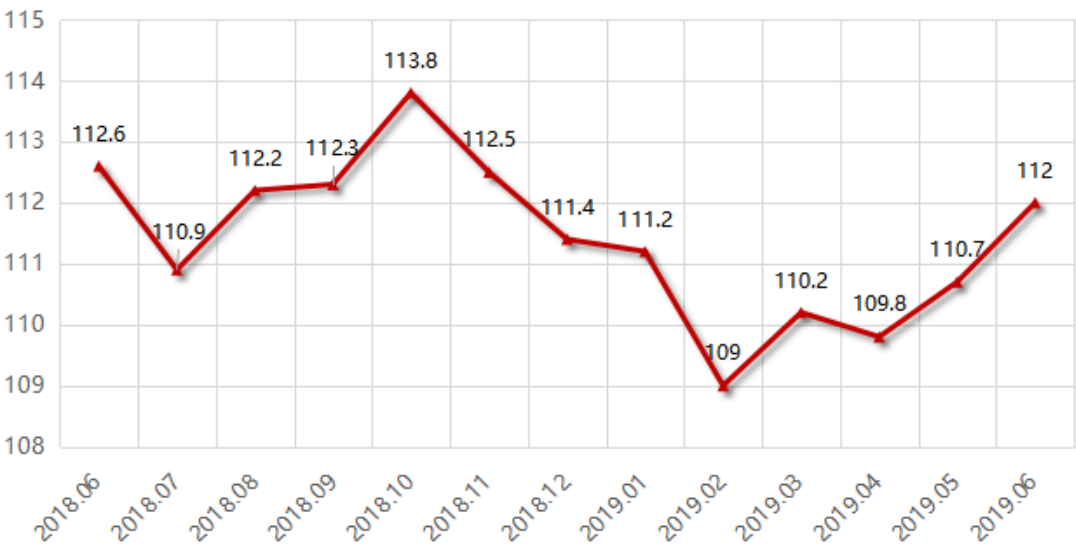
China's Warehousing Index (201806-201906)

中国仓储指数(201806-201906)



China's E-commerce Logistics Index (201806-201906)

中国电商物流指数(201806-201906)



Source: China Federation of Logistics and Purchasing 中国物流与采购联合会

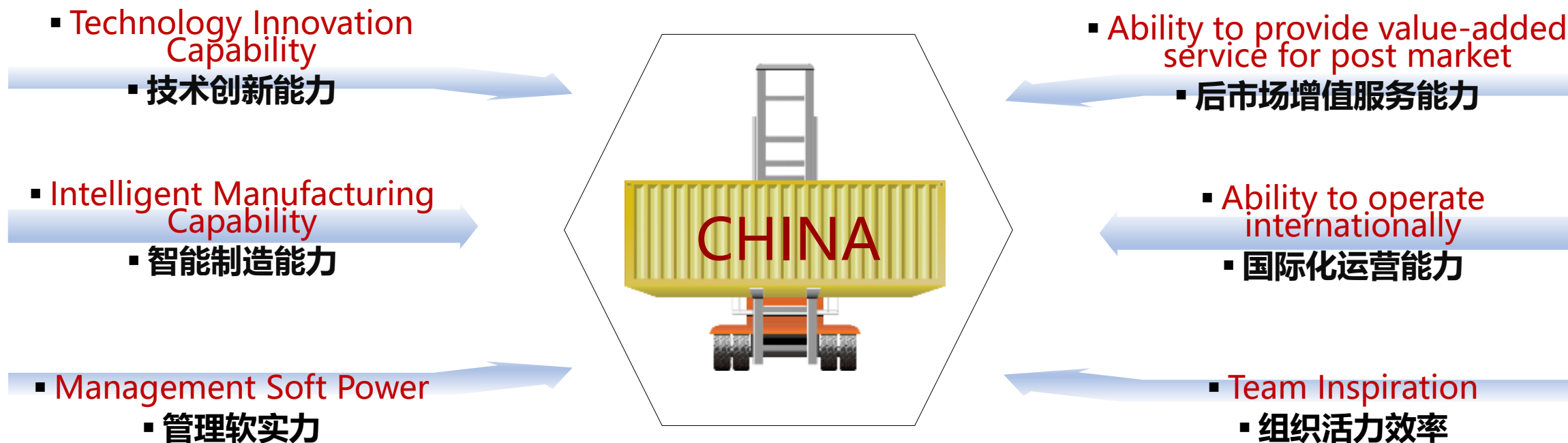


## C. Development trend of Industrial Vehicle Industry in China

### 未来中国工业车辆行业发展趋势

#### 5. Industry competition will be more intense, more and higher new requirements for enterprises

行业竞争将会更加激烈，对企业提出更多更高的新要求





**THANK YOU**

谢谢