

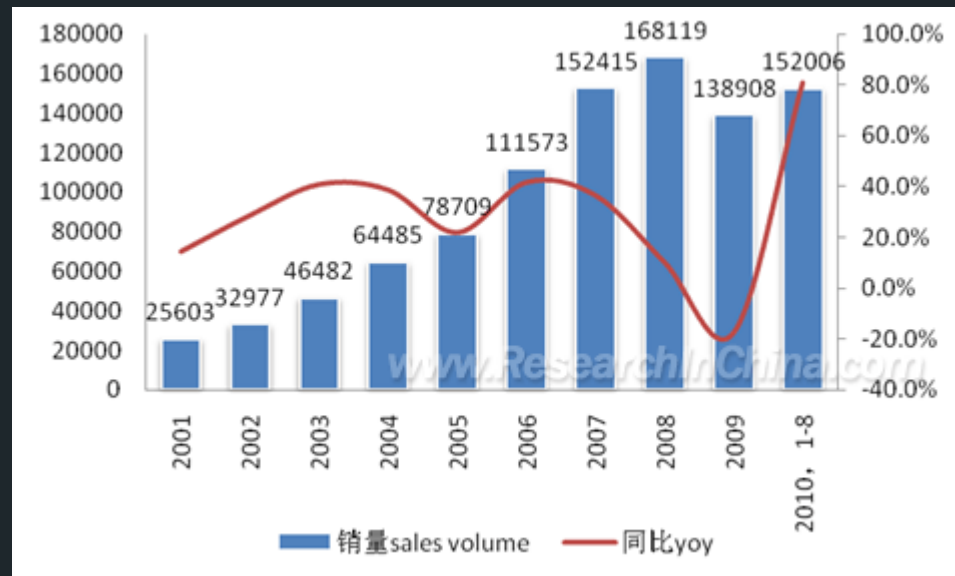
Global and China Forklift Industry Report, 2009-2010



In 2009, the global crisis inflicted heavy losses on the world forklift industry, resulting in a sharp drop of 40% or above for sales volume of forklift trucks in Europe, America, Oceania and Africa. The case was also the same to China whose forklift sales volume witnessed the first-ever negative growth in the past decade. However, the forklift industry of China resumed in the second half year of 2009 thanks to a series of stimulus policies. Noticeably, China experienced an explosive growth in the industry in the first 8 months of 2010.

The robust demand of internal combustion counterbalanced forklift truck featured by strong load-bearing capacity and environmental adaptability is the engine for the significant growth of Chinese forklift market.

Sales Volume & YOY Growth of Forklifts in China, 2001-2010 (Sets)



Source: CITA; ResearchInChina

The fast growth of the sales volume of forklifts in China allured the entry of more foreign enterprises and joint ventures into Chinese market. As of H1 2010, nearly all world's top 20 forklift giants, except CROWN (US) and COMBILIFT (Ireland), had marched into Chinese market.

World's Top 5 Forklift Companies by Sale and Their Enterprises in China

Rank	Company	Forklift Sales (US\$bn)	Enterprises in China
1	Toyota	4.6	Toyota Industrial (Kunshan), Toyota Material Handling (Shanghai) Co., Ltd
2	KION Group	4.1	Linde (China) Forklift Truck, KION Baoli (Jiangsu) Forklift Co., Ltd
3	Jungheinrich	2.3	Jungheinrich Assembling Factory (Qingbu, Shanghai), Jungheinrich Forklift (Shanghai)
4	Crown Equipment	1.6	Crown Equipment (Suzhou) Co., Ltd, Crown Lift Trucks Commercial (Shanghai) Co., Ltd
5	NACCO	1.5	Shanghai Hyster Forklift Co., Ltd

Source: Modern Materials Handling; ResearchInChina

Meanwhile, domestic large-scale engineering machinery groups including Guangxi LiuGong Machinery, Lonking (Shanghai) Forklift and Sunward Intelligent also followed suit and released their capacities in a progressive way. In H1 2010, the forklift sales volume of LiuGong Machinery reached 2,740 units, up 125% year on year, and that of Lonking (Shanghai) Forklift 5,100 units, up 132% from the same period of last year. In October 2010, Sunward Intelligent launched new energy forklifts, namely electric forklift and LPG forklift.

As the growing number of domestic and foreign enterprises swarm into Chinese forklift industry, the market Competition becomes increasingly fierce. Domestic brands like AnHui Heli and Hangcha still steadily rank the top list in spite of cut-throat competition; and joint ventures like Lonking (Shanghai) and Tailift (Qingdao) thrusts into the top 10 in China. Among foreign manufacturers, Linde (China) Forklift Truck ranks the top 3. Additionally, Ningbo Ruyi Joint Stock and Zhejiang Noblelift which are adept in the production of manual Pallet Truck also embarked on vehicle field and made remarkable achievements.

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