

# Results of 2011 Business Trend Survey

## 2011经济趋势调查结果

### 2011 Business Trend Survey Committee Members

**Annette Hall, Trelleborg**

*Vice Chairperson - Tires, Wheels and Casters Subcommittee*

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*Chairman - Accessories & Components Subcommittee*

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*Chairman - Energy Storage Systems Subcommittee*

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*Moderator – ITA 2011 Business Trend Survey*

**ITA 2011 Annual Fall Meeting**

**The Breakers**

**Palm Beach, FL**

**ITA Business Trend Survey 2011**

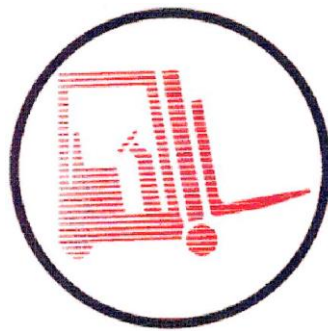


# ITA Business Trend Survey

## ITA经济趋势调查

- The ITA Business Trend Survey has been in existence since 2004  
ITA经济趋势调查从2004年开始
  - It was introduced in its current format in 2006 right here at the Breakers in Palm Beach, FL  
目前的调查版本于2006年同样在棕榈海滩的Breakers被首次引入
- The 2011 Survey represents 24 questions  
2011年调查了24个问题
  - We had a total of 18 respondents from our Regular Members answering the questions  
我们一共从会员单位获得了18个问卷答案
    - We will highlight the responses and results of the 2011 ITA Business Trend Survey.....  
我们将会标注大家的回复和结果。。。。。。





# Results of 2011 Business Trend Survey

## 2011年经济趋势调查结果

### Panel Members

### 小组成员

Jim Malvaso (Toyota Material Handling North America)

Jim Malvaso 丰田北美物料搬运公司

Brian Butler (Linde Material Handling North America)

Brian Butler 林德物料搬运北美公司

ITA 2011 Annual Fall Meeting

The Breakers

Palm Beach, FL

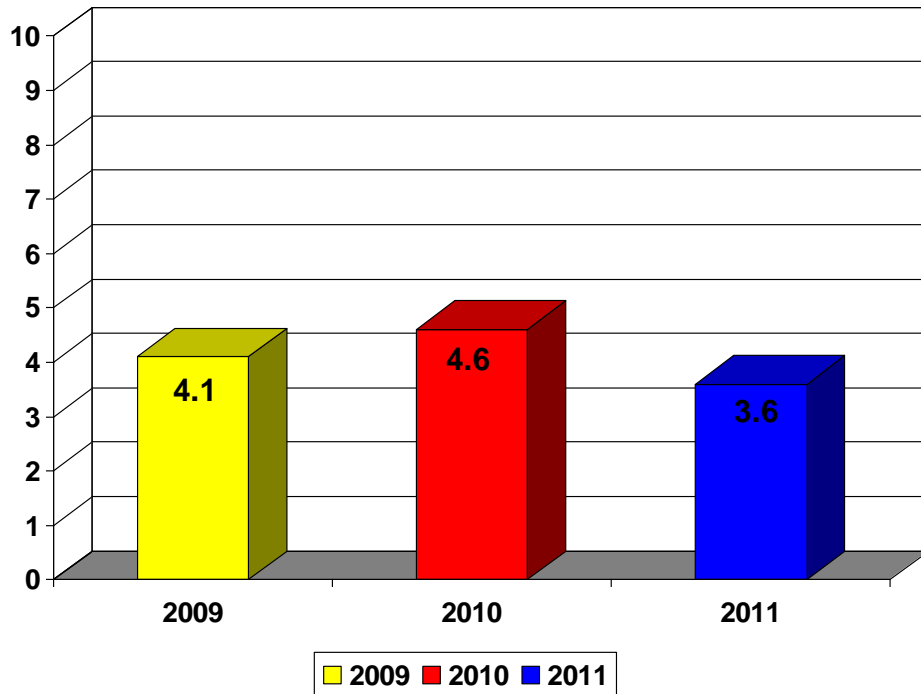


On a scale of 1 to 10, with 10 indicating very important, and 1 indicating not important at all, please rate the importance of India and South America as a market to US Forklift Manufacturers by 2016, as a market for US Exports?

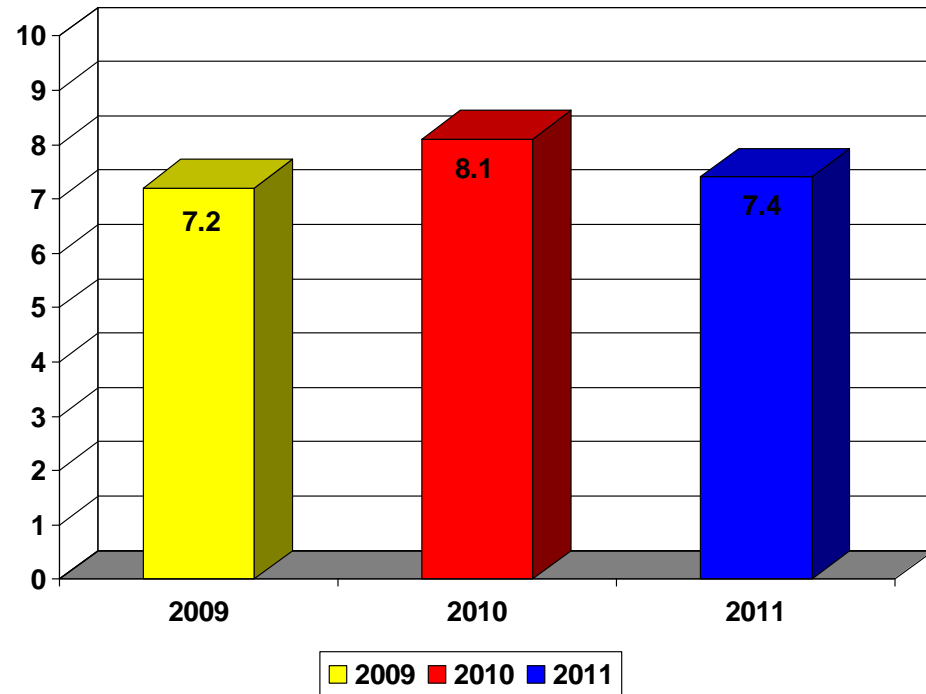
**1到10分，10代表最重要，1代表完全不重要，到2016年，作为美国的出口市场，印度和南美市场对美国叉车制造商的重要性？**

1到10分，10代表最重要，1代表完全不重要，到2016年，作为美国的出口市场，印度和南美市场对美国叉车制造商的重要性？

## India 印度



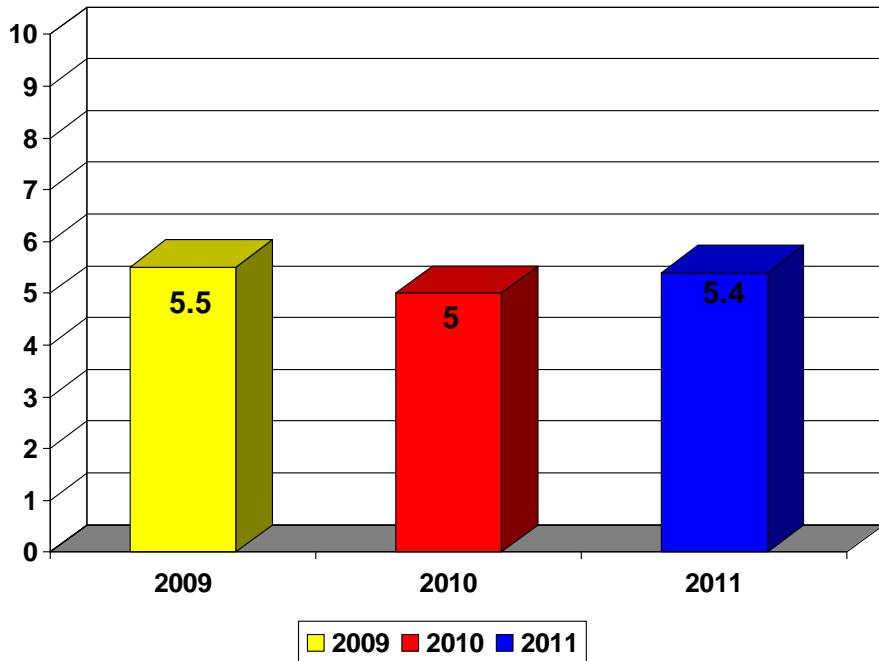
## South America 南美



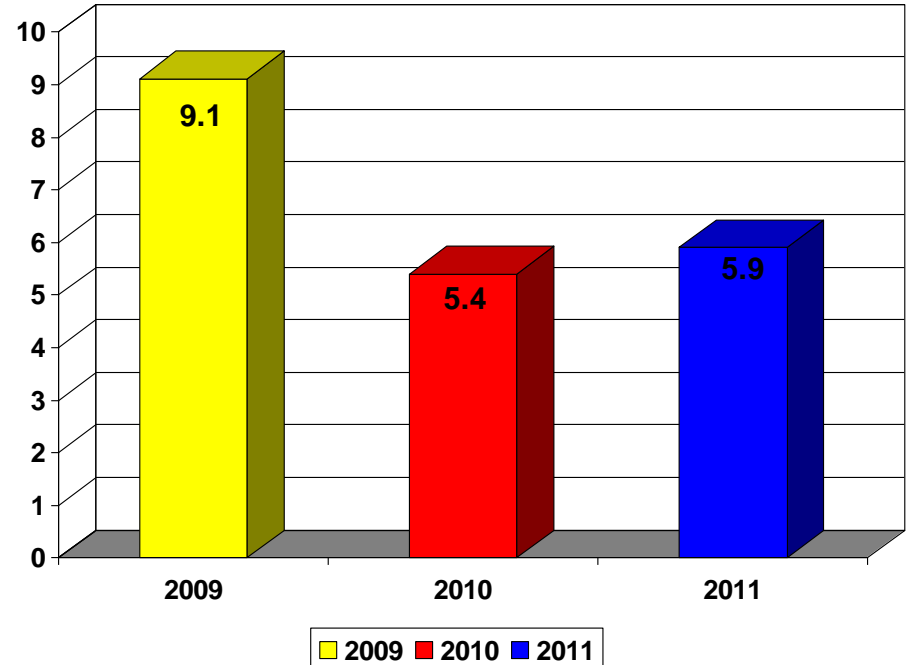
On a scale of 1 to 10, with 10 indicating very important, and 1 indicating not important at all, please rate the importance of India and South America as a market to US Forklift Manufacturers by 2016, as a location for local manufacturing partnerships (forklift production in India and Brazil)?

1到10分，10代表最重要，1代表完全不重要，到2016年，作为合作生产的基地(印度和巴西的叉车生产)，印度和南美市场对美国叉车制造商的重要性？

## India 印度



## South America 南美

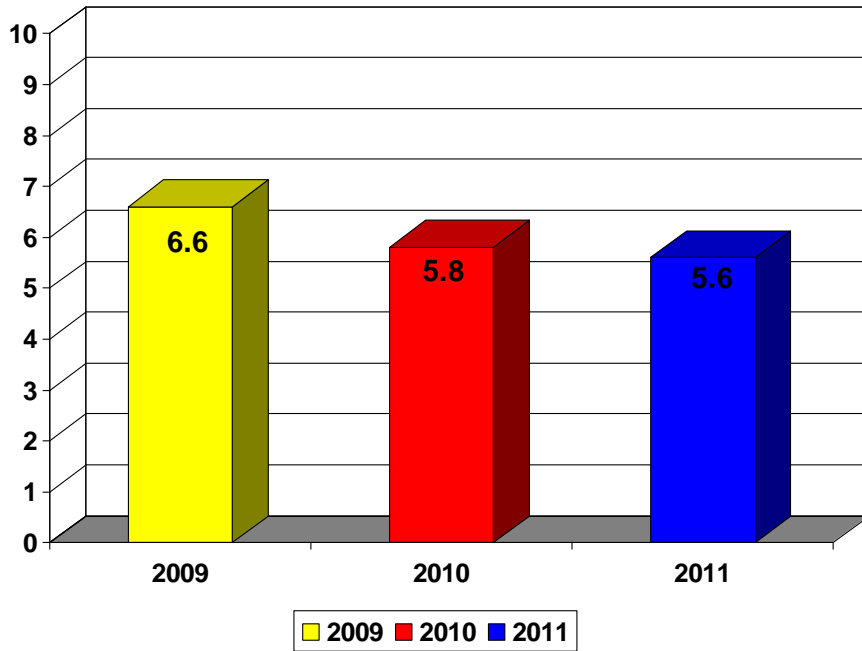


On a **scale of 1 to 10**, with 10 indicating very important, and 1 indicating not important at all, **please rate the importance of India and South America as a market to US Forklift**

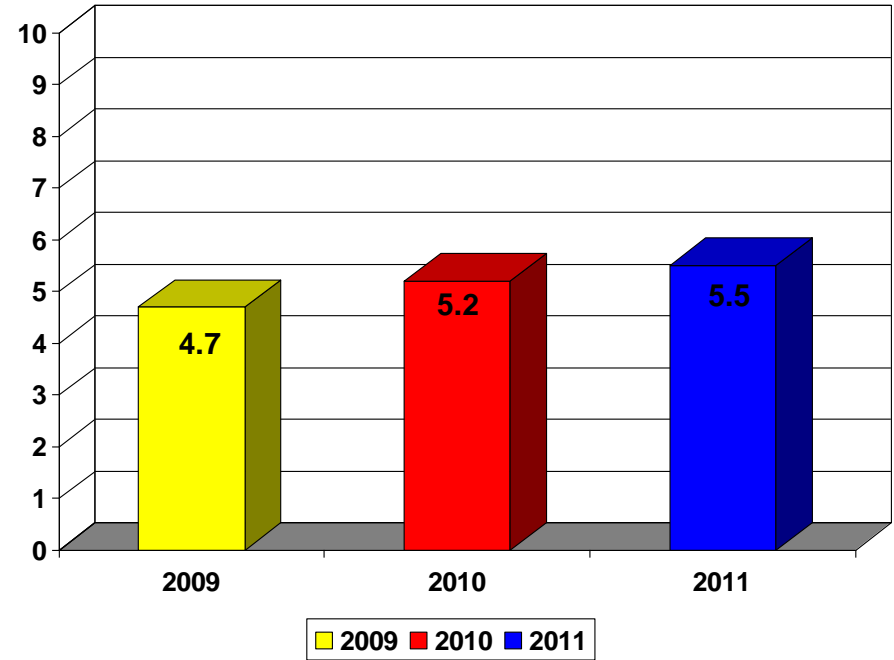
**Manufacturers by 2016, as a location for parts suppliers?**

**1到10分，10代表最重要，1代表完全不重要，到2016年，作为零配件供应商所在的地点，印度和南美市场对美国叉车制造商的重要性？**

## India 印度



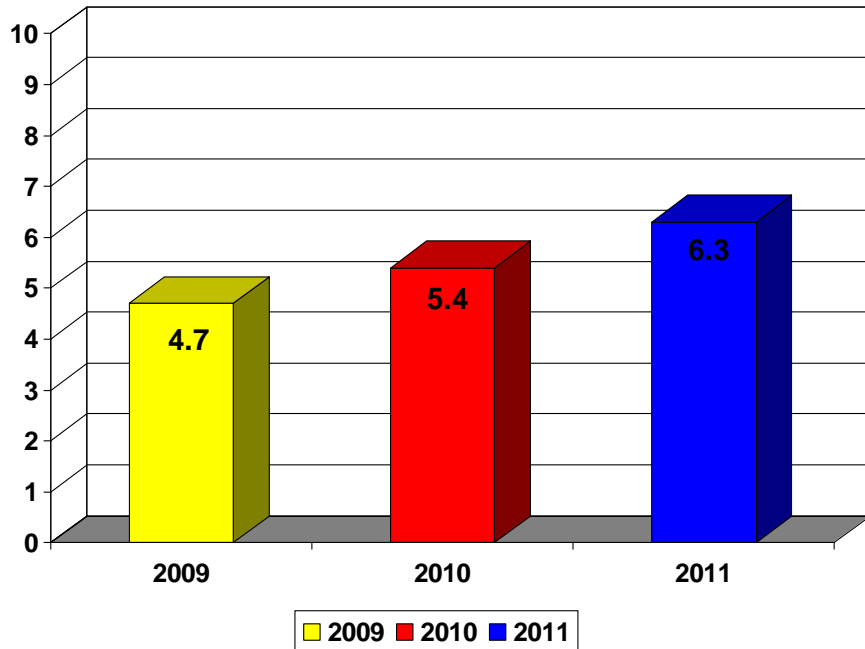
## South America 南美



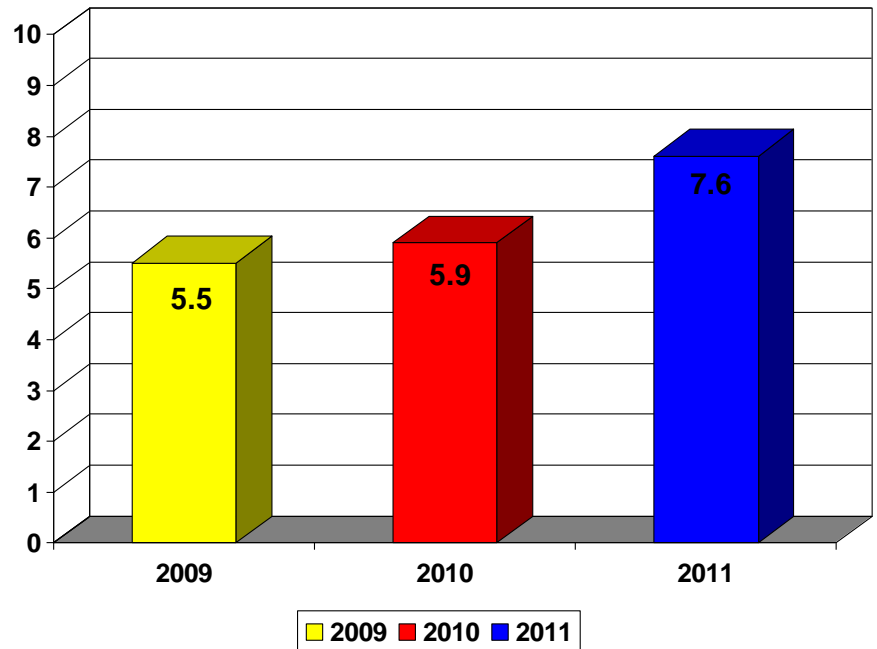
On a scale of 1 to 10, with 10 indicating very important, and 1 indicating not important at all, please rate the importance of India and South America as a market to US Forklift Manufacturers by 2016, *India and Brazil as a location for local forklift manufacturing for the local (Indian and South American) marketplace?*

1到10分，10代表最重要，1代表完全不重要，到2016年，*作为当地制造商在印度和巴西当地市场*，印度和南美市场对美国叉车制造商的重要性？

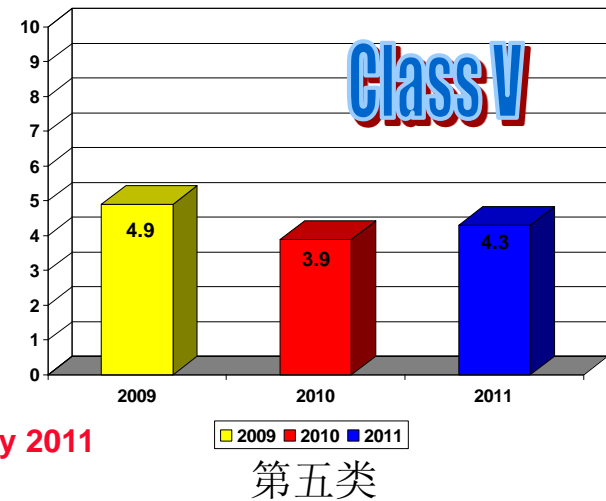
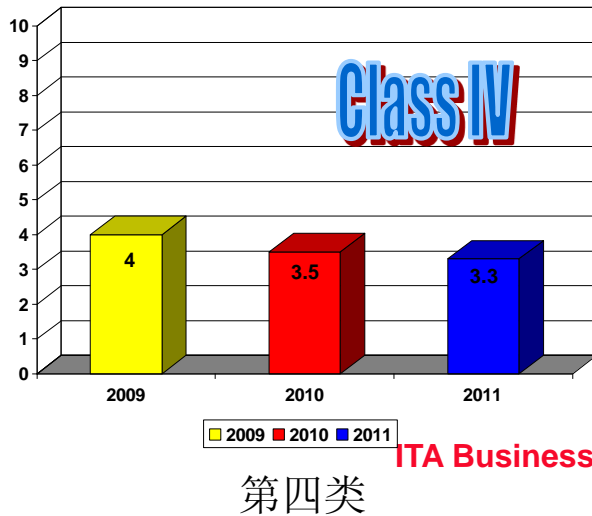
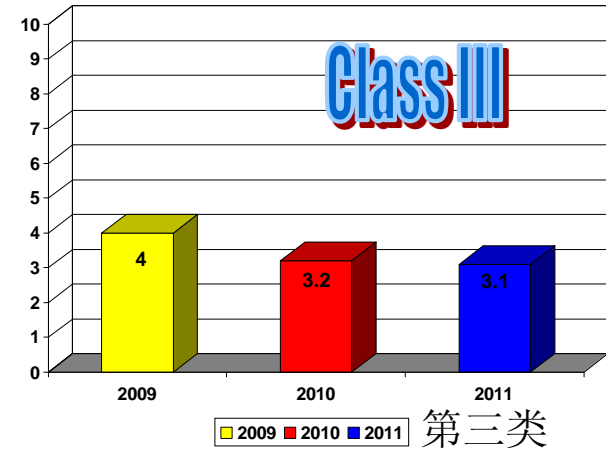
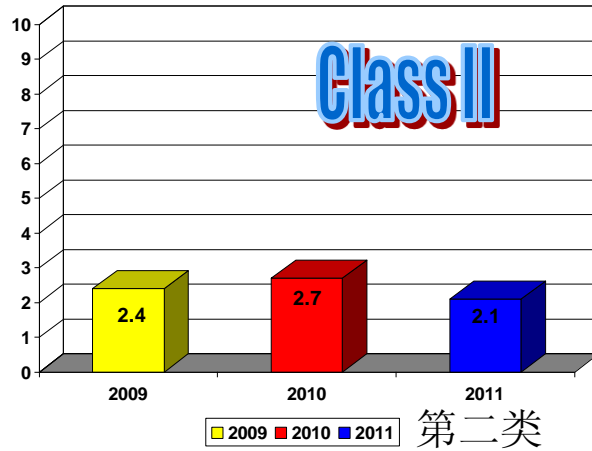
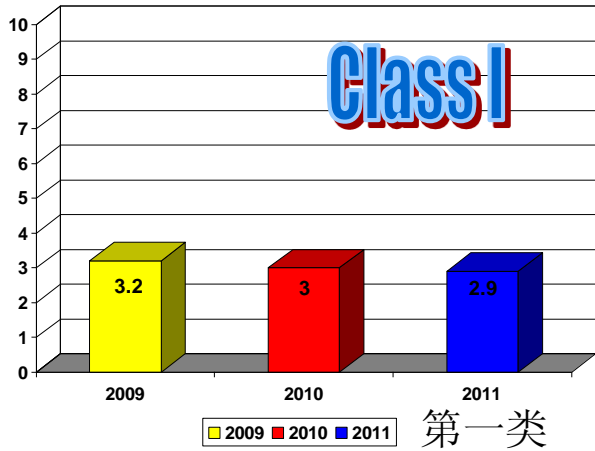
## India 印度



## South America 南美

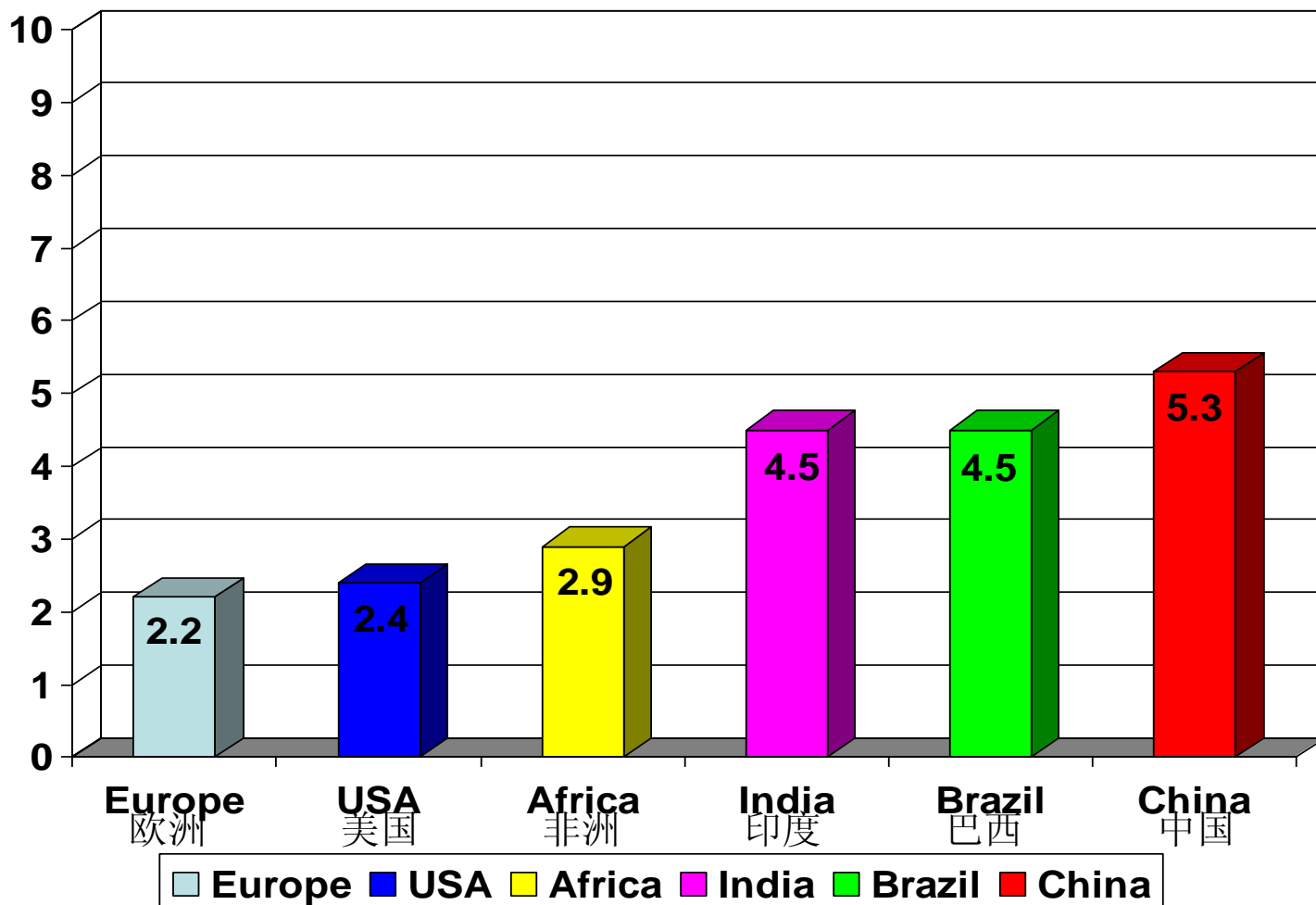


On a **scale of 1 to 10**, with 10 indicating a very significant impact, and 1 indicating no impact, **please rate the impact of Indian produced forklifts on the North American forklift market** by the year 2016, for each forklift class? (this includes forklifts manufactured in India which are imported to North America by ITA member companies)  
**1到10分**，10代表最重要，1代表完全不重要，请为印度制造的叉车到**2016**年在北美市场每种车型的重要性打分（包含在印度制造并且由ITA成员公司进口到美国市场的车辆）？





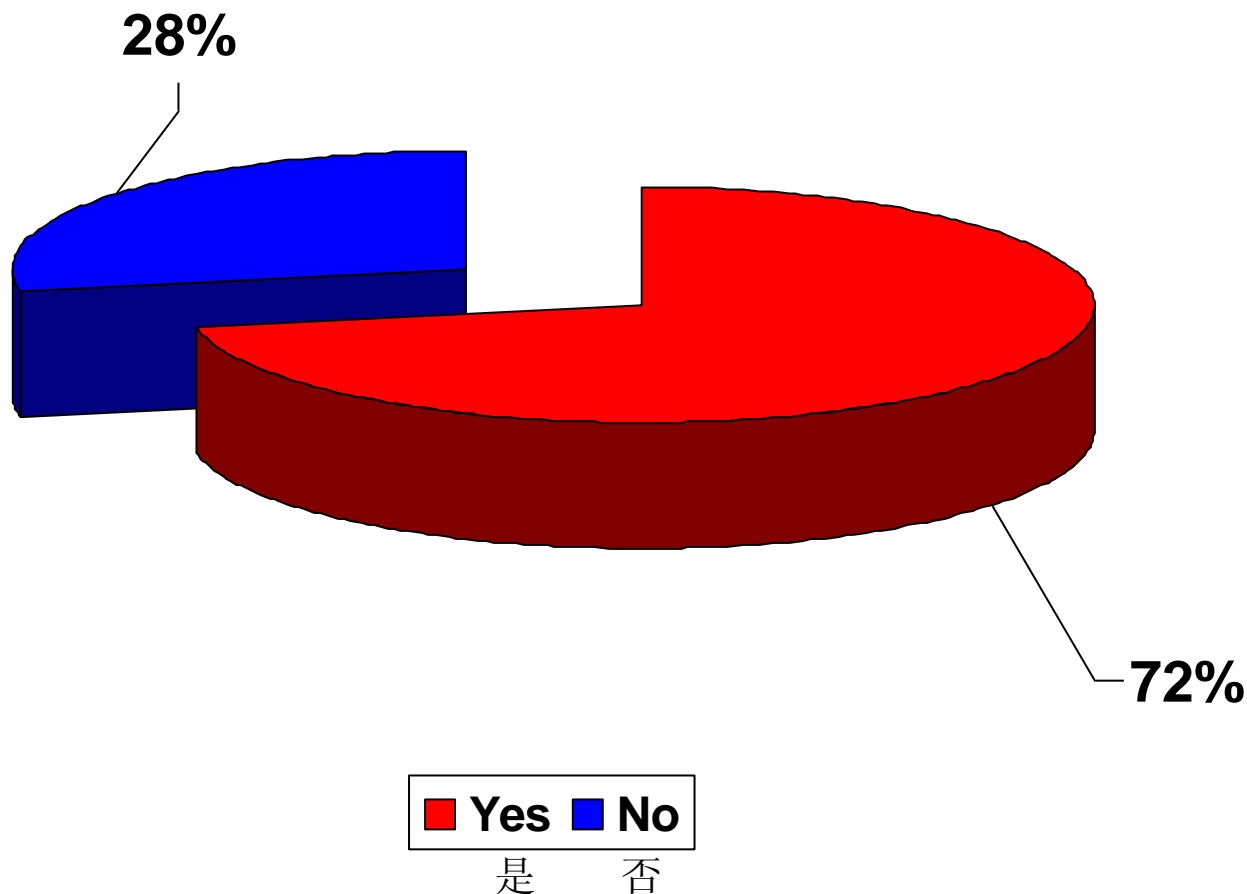
Which global market do you see with the greatest economic growth in the next five years? (Ranked in order from least growth to greatest growth). 您能看到哪个全球市场在未来5年将获得最大的经济增长？请由1到6排序，增速依次递增。



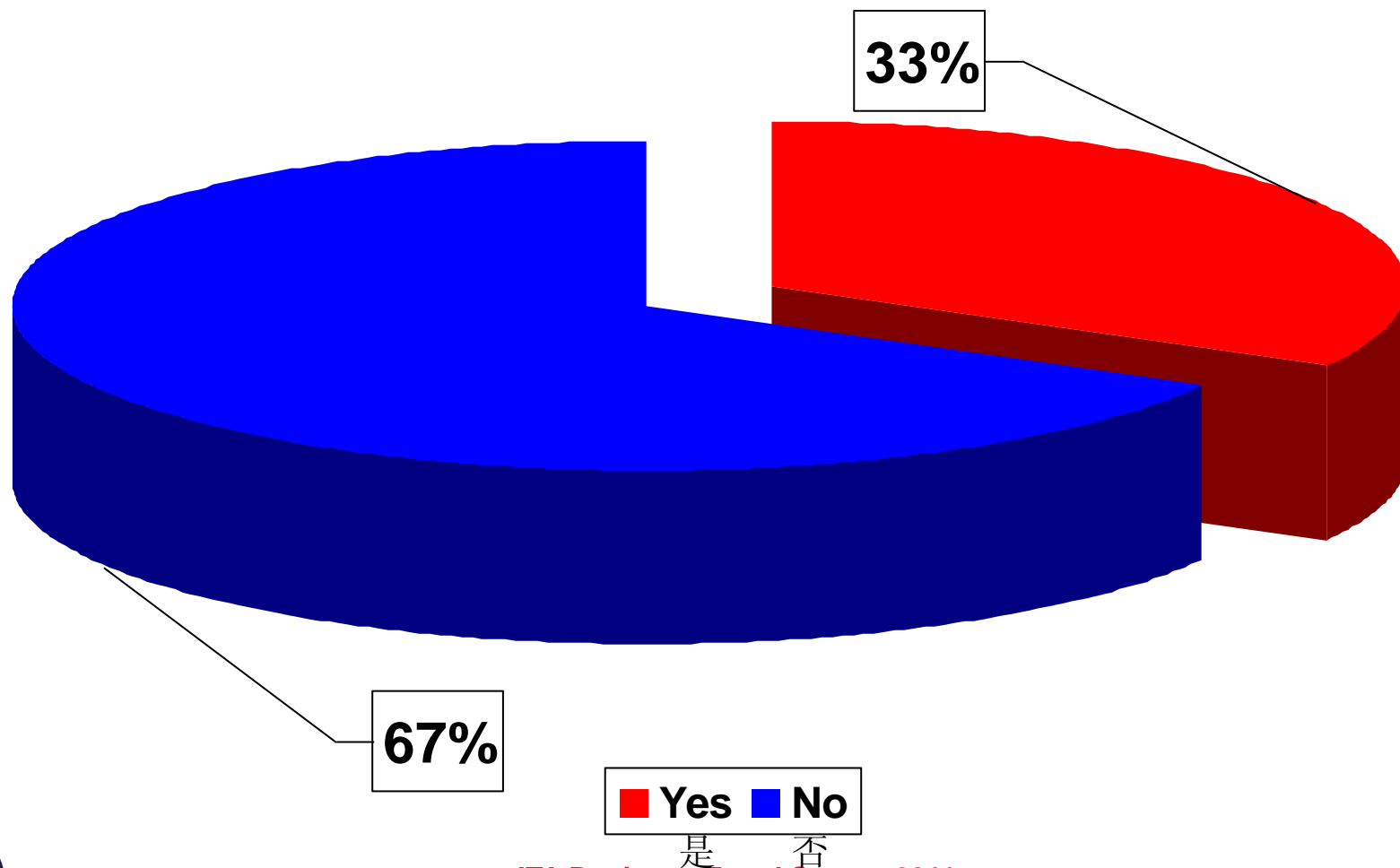
ITA Business Trend Survey 2011

With greater focus on **lean manufacturing and lean operations** do you feel that forklift trucks is an area where companies look to eliminate or reduce their fleet sizes?

随着公司日趋精益化的生产及经营，您是否觉得企业将考虑取消或者精简叉车车队规模？

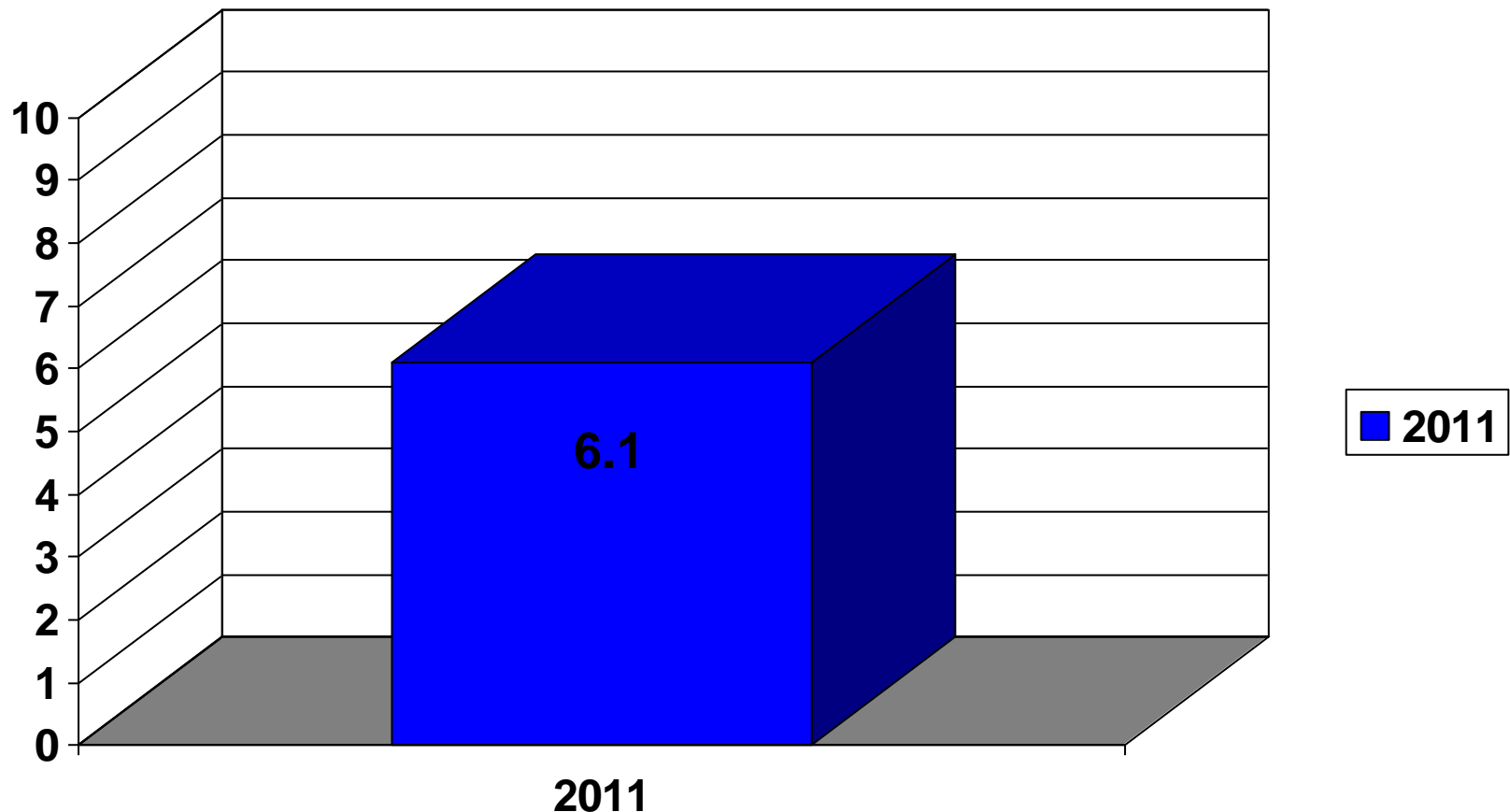


Do you foresee the duties imposed on imported US manufactured forklifts will be eliminated by 2016? 您是否预见到2016年，美国制造的叉车出口税负将被免除？



On a **scale of 1 to 10**, with 10 indicating very significant and 1 indicating no impact, with the current value of the **US Dollar** do you expect increased exports of **US manufactured** forklift trucks?

**1到10分**，10代表最重大的影响，1代表完全没影响，根据**美元**的目前价值，您是否预期**美国制造**的叉车的出口量将上升？

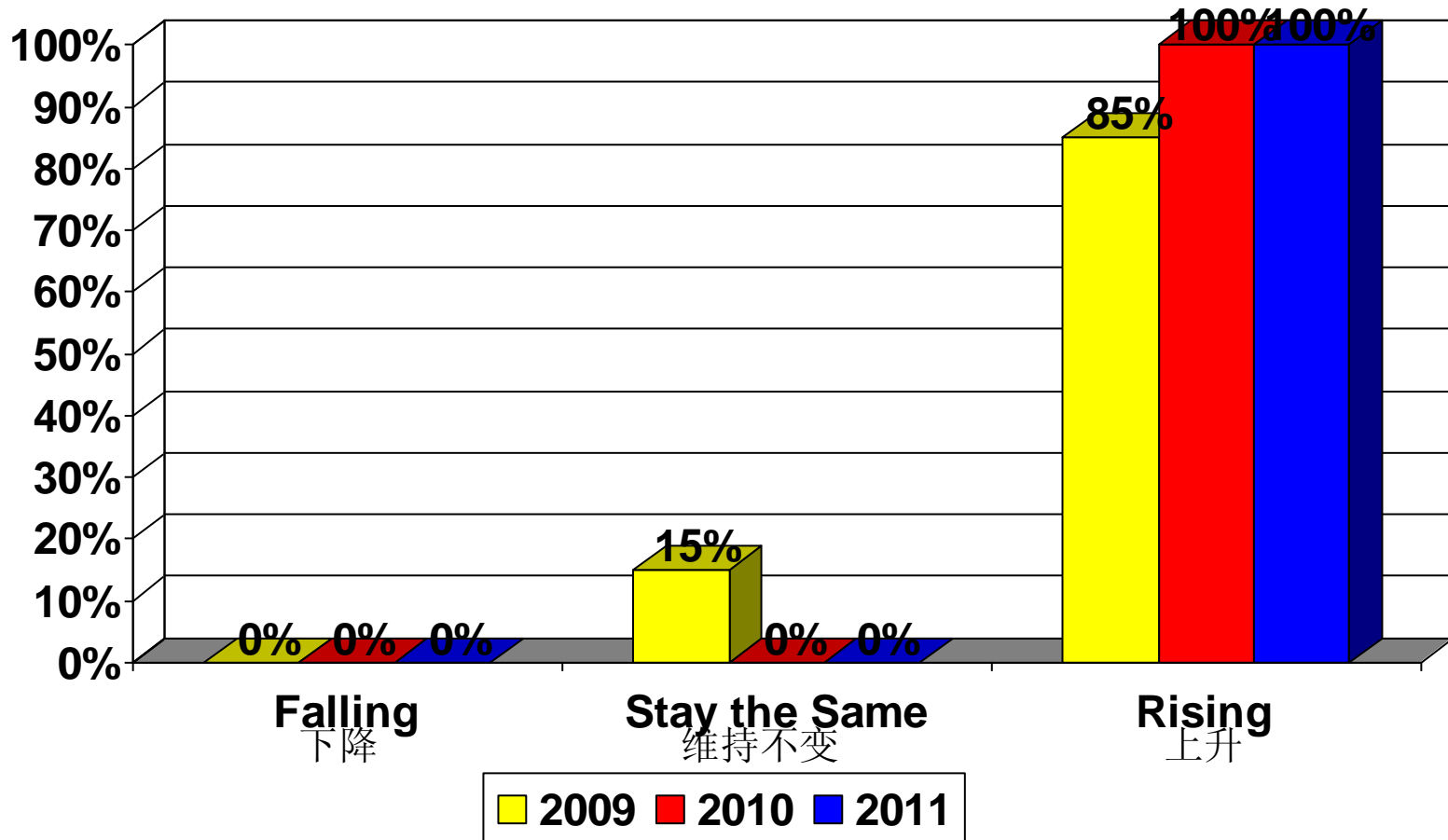


**2011**  
ITA Business Trend Survey 2011



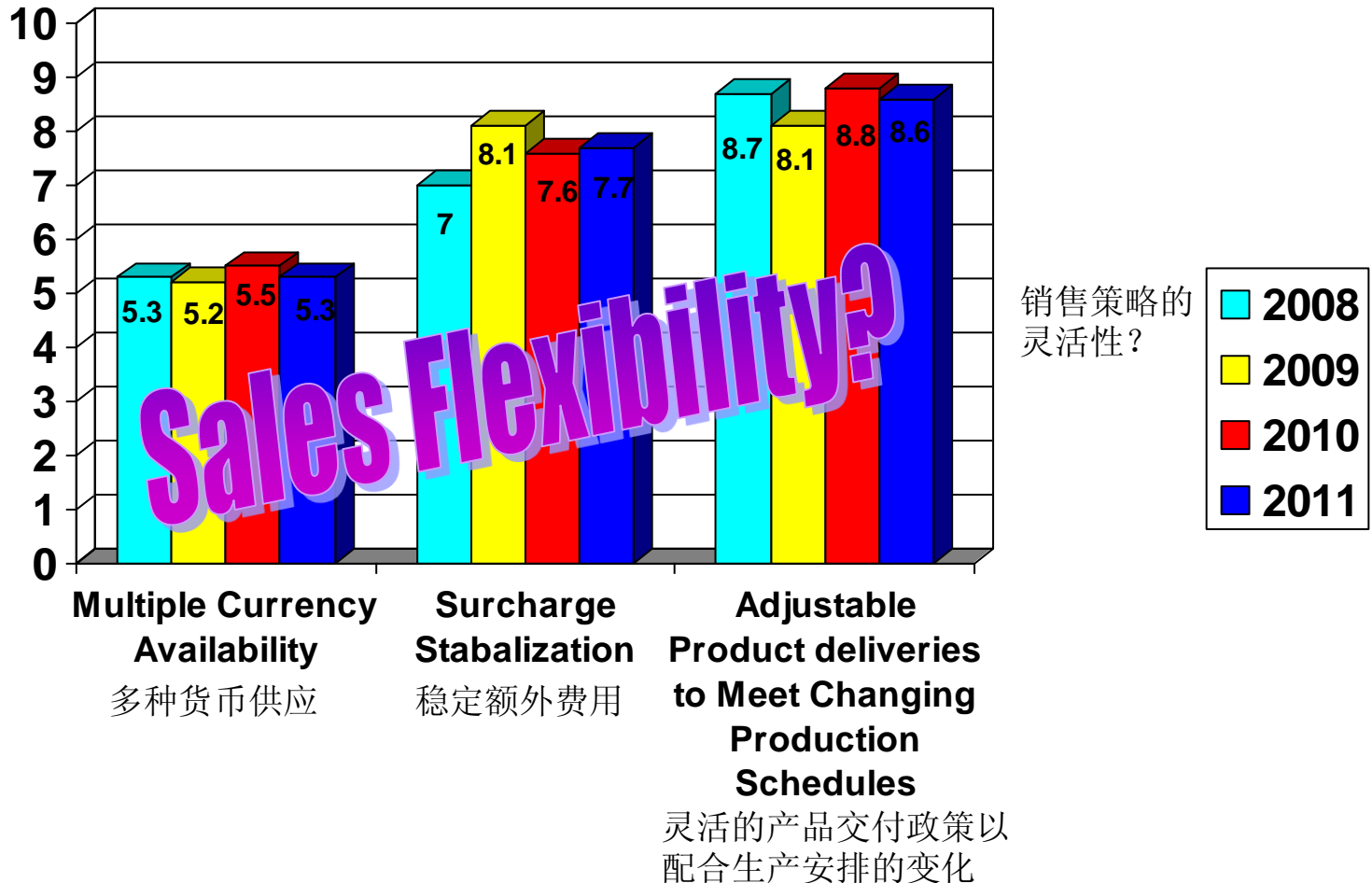
Please indicate **your expectation for the change in material costs** for the following time period. (2011 compared to 2010)

请指出在以下时间段，**您对于公司材料成本的改变的预计**（2011年与2010年比较）

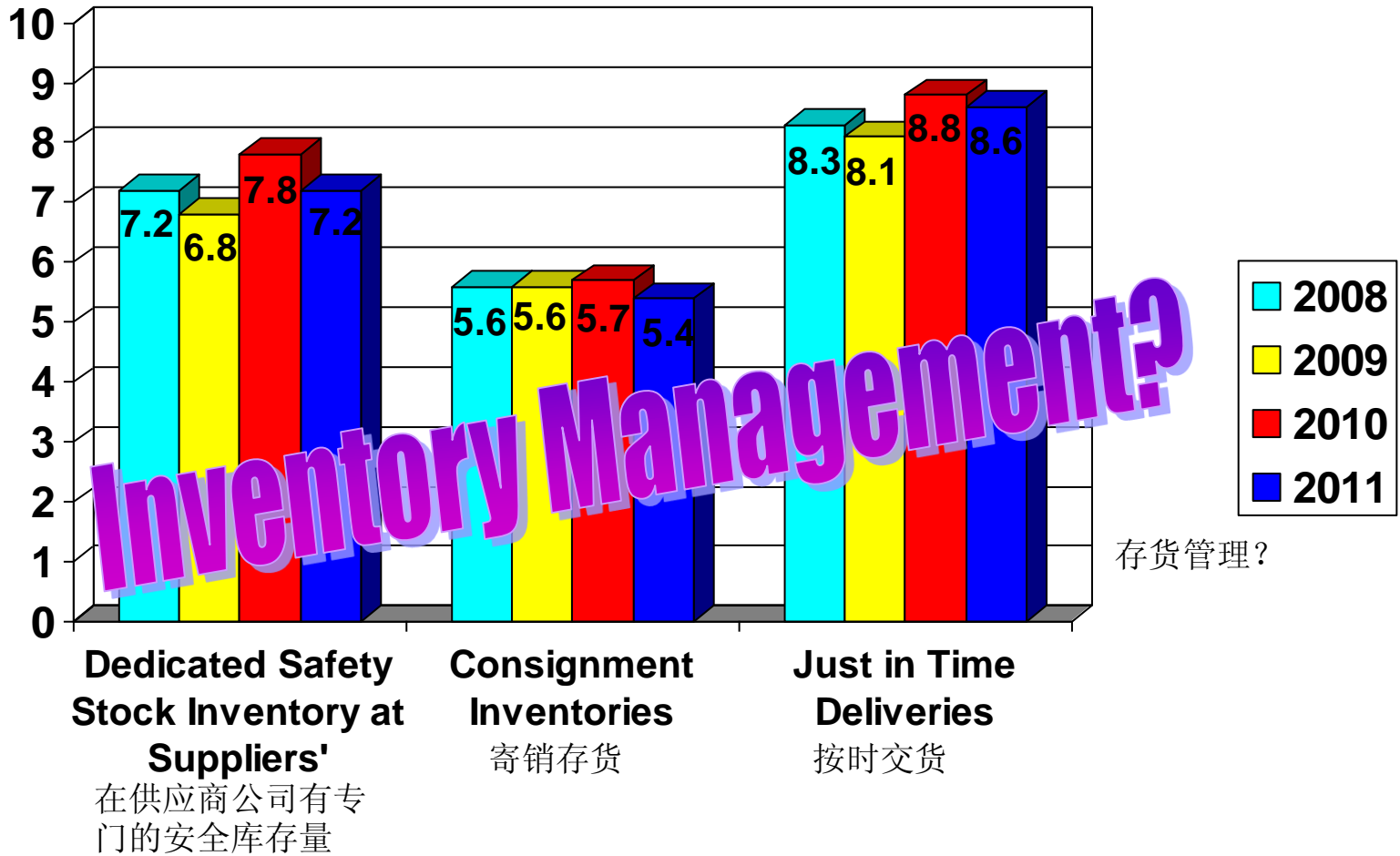


On a **scale of 1 to 10**, with 10 indicating very important and 1 indicating not important at all, **please rate the importance of the following items when you are evaluating supplier performance.**

**1到10分，10代表最重要，1代表完全不重要，当您在评估供应商表现时，请指出以下几点的重要性？**



On a **scale of 1 to 10**, with 10 indicating very important and 1 indicating not important at all, **please rate the importance of the following items when you are evaluating supplier performance**  
**1到10分**，10代表最重要，1代表完全不重要，**当您在评估供应商表现时，请指出以下几点的重要性？**

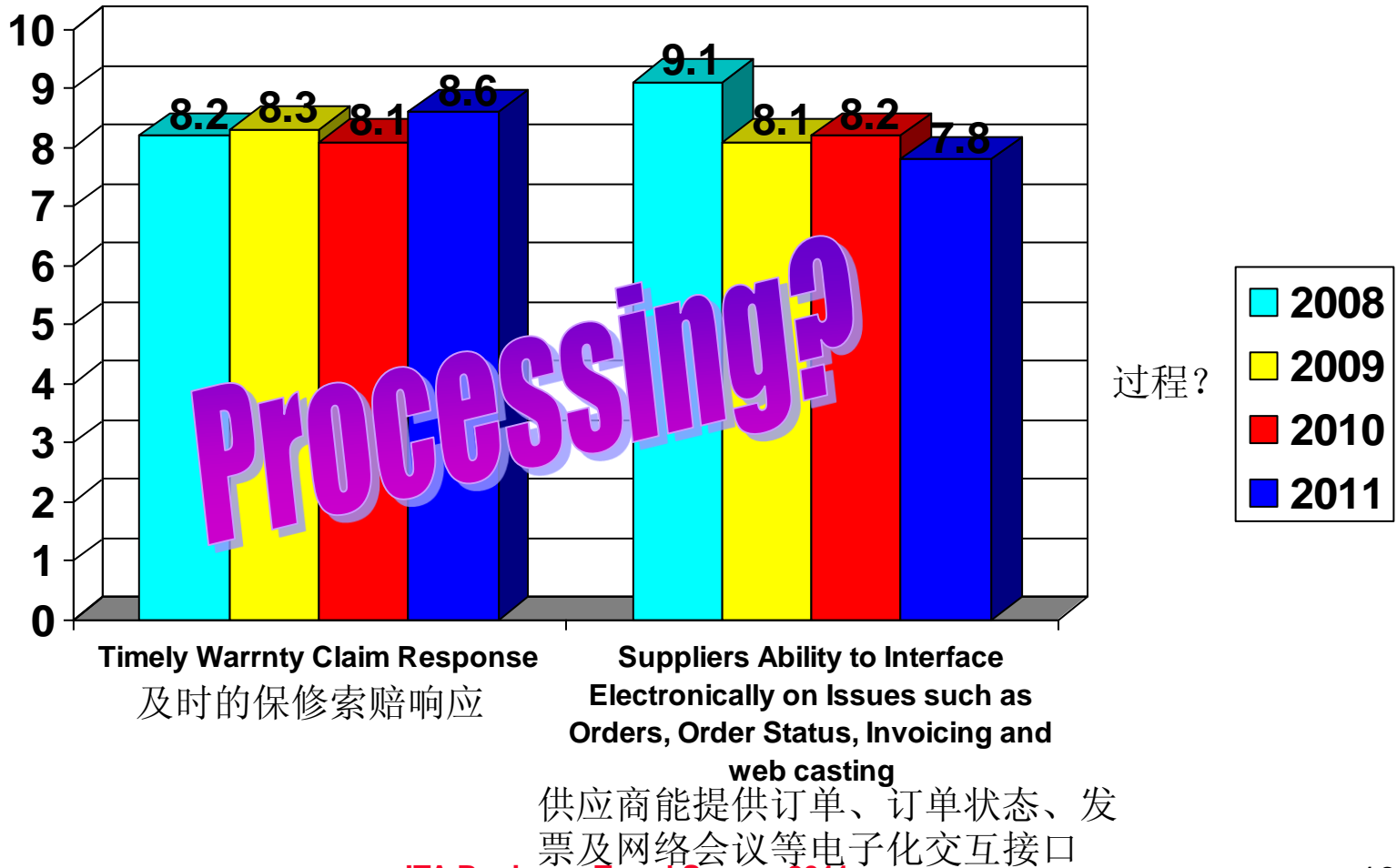


存货管理？



On a **scale of 1 to 10**, with 10 indicating very important and 1 indicating not important at all, **please rate the importance of the following items when you are evaluating supplier performance**

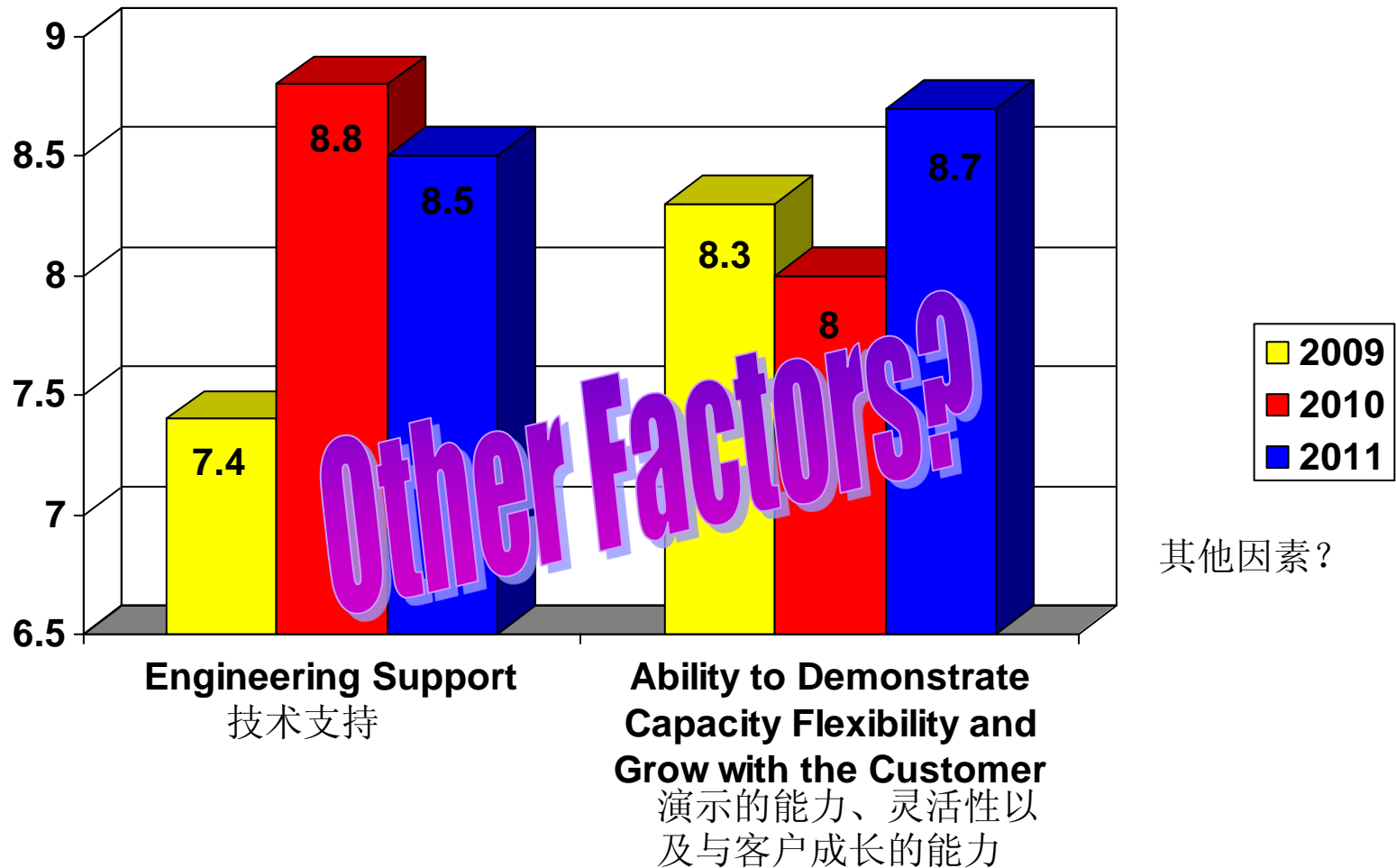
**1到10分，10代表最重要，1代表完全不重要，当您在评估供应商表现时，请指出以下几点的重要性？**





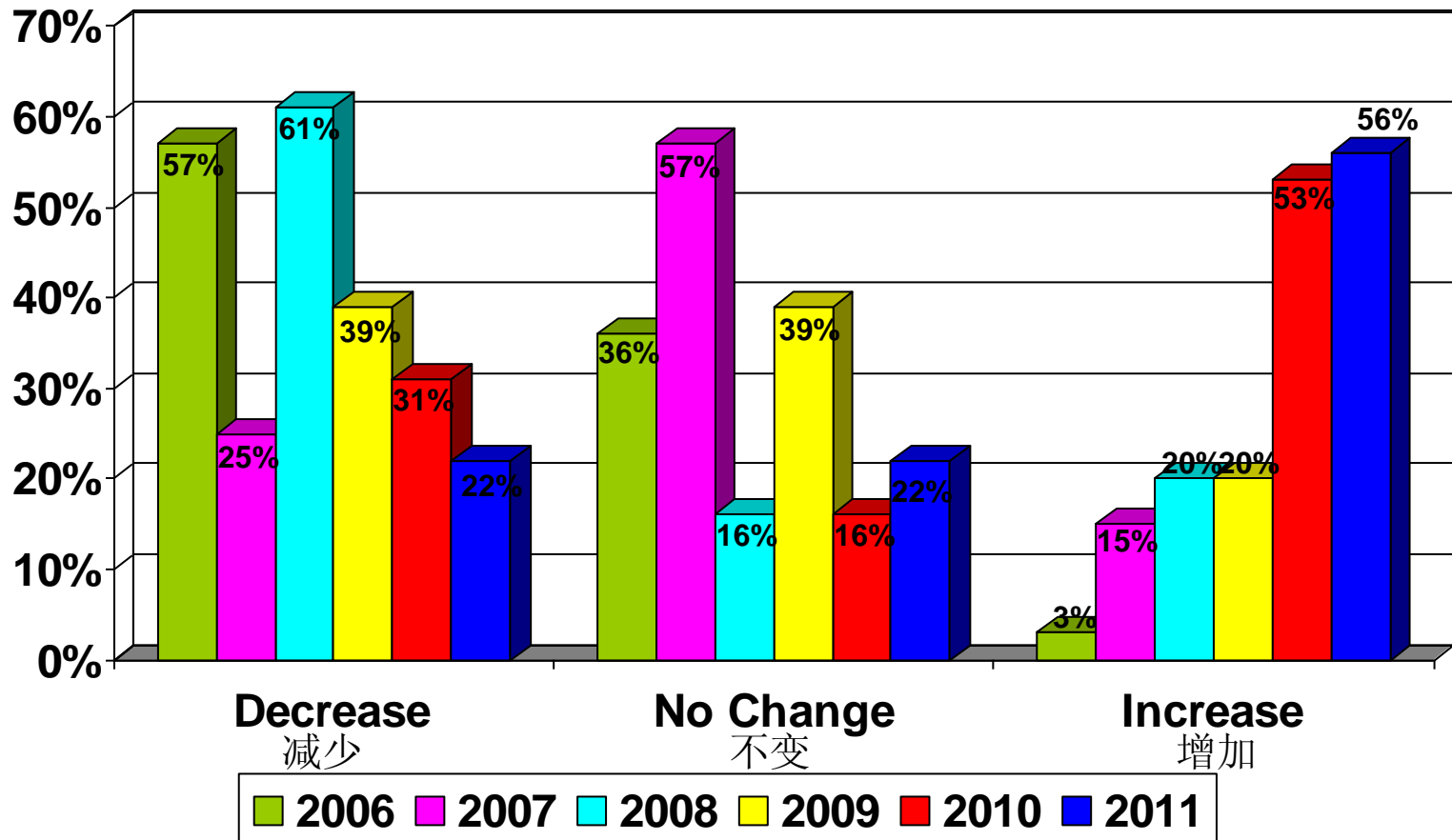
On a **scale of 1 to 10**, with 10 indicating very important and 1 indicating not important at all, **please rate the importance of the following items when you are evaluating supplier performance**

**1到10分，10代表最重要，1代表完全不重要，当您在评估供应商表现时，请指出以下几点的重要性？**



# Thinking about **your company's supplier base**, which of the following best describes how you expect it to change by 2016?

考虑贵公司的供应商库，以下哪个最能描述您预期到**2016年**的情况？



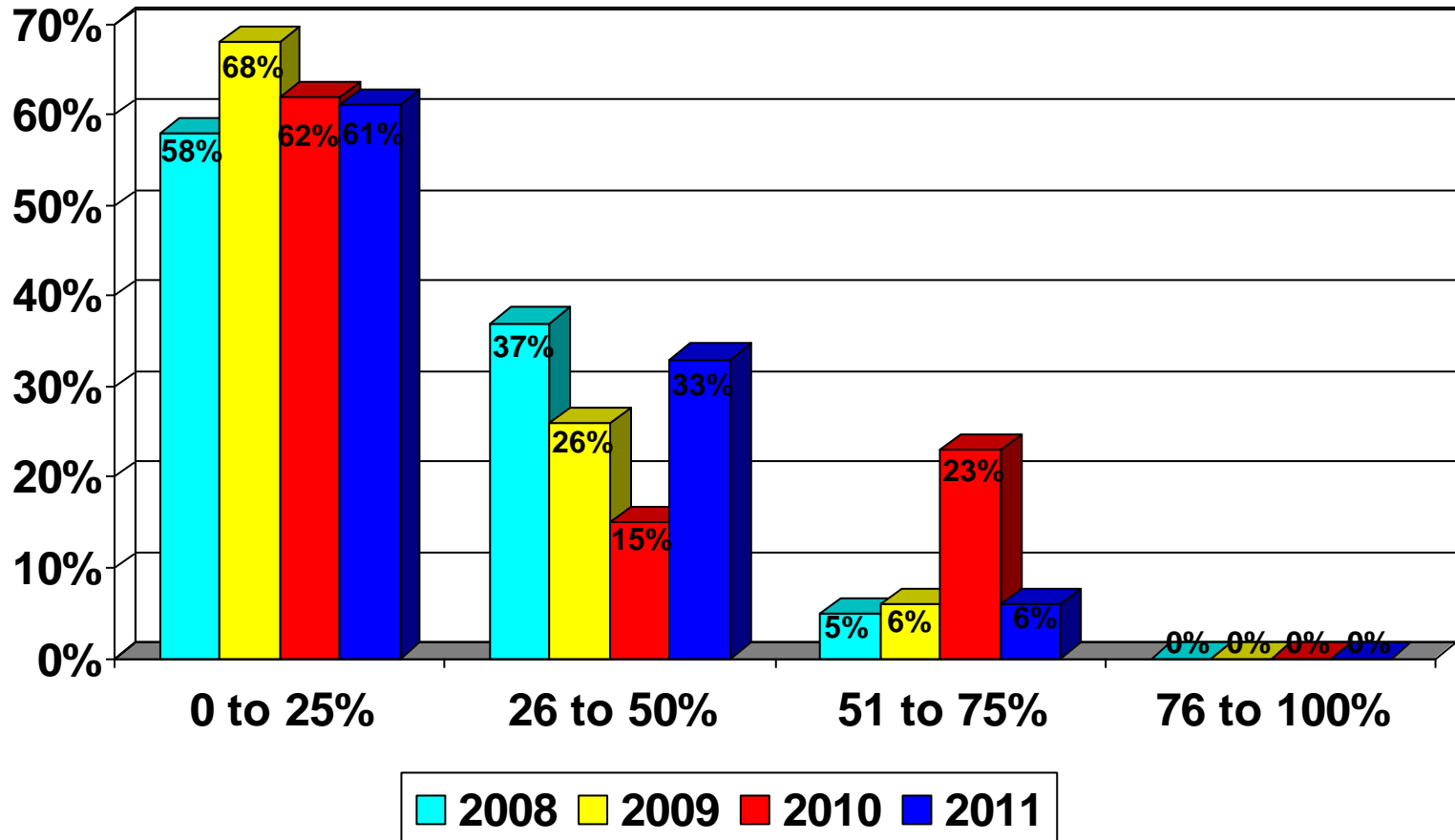
**Do you anticipate a change in the source of supply for any of the components listed by 2016?** If you anticipate changing the sourcing location by 2016, indicate if the change will locate manufacturing to North America, from North America or elsewhere.

**您是否预期到2016年，下列任何一款部件将改变其供应商制造地？** 如果您预期2016年将有改变，请指出供应源的生产地点。

From 2010 Business Survey 2010年的调查						From 2011 Business Survey 2011年的调查				
Components元件	Change Source 改变来源		If yes, change will be..... 如是，改变将...			Change Source 改变来源		If yes, change will be..... 如是，改变将...		
	2010 No 否	2010 Yes是	To North America 到北美	From North America 来自北美	Elsewhere 别处	2011 No 否	2011 Yes 是	To North America 到北美	From North America 来自北美	Elsewhere 别处
	Electrical Systems电气系统	38%	62%	12%	48%	40%	50%	50%	50%	50%
Mast and Attachments门架及属具	62%	38%	60%	20%	20%	69%	31%	50%	0%	50%
Hydraulic Components液压元件	46%	54%	44%	28%	28%	50%	50%	34%	16%	50%
Drive Trains传动系统	46%	54%	43%	0%	57%	53%	47%	70%	15%	15%
Engines / Power Sources引擎/动力系统	38%	62%	25%	0%	75%	44%	56%	11%	22%	67%
Assembly组装	77%	23%	50%	25%	25%	59%	41%	71%	29%	0%
Other Component Systems其他元件系统	38%	62%	38%	0%	62%	31%	69%	45%	27%	27%
Structural Weldments结构焊接	69%	31%	60%	0%	40%	44%	56%	56%	11%	33%



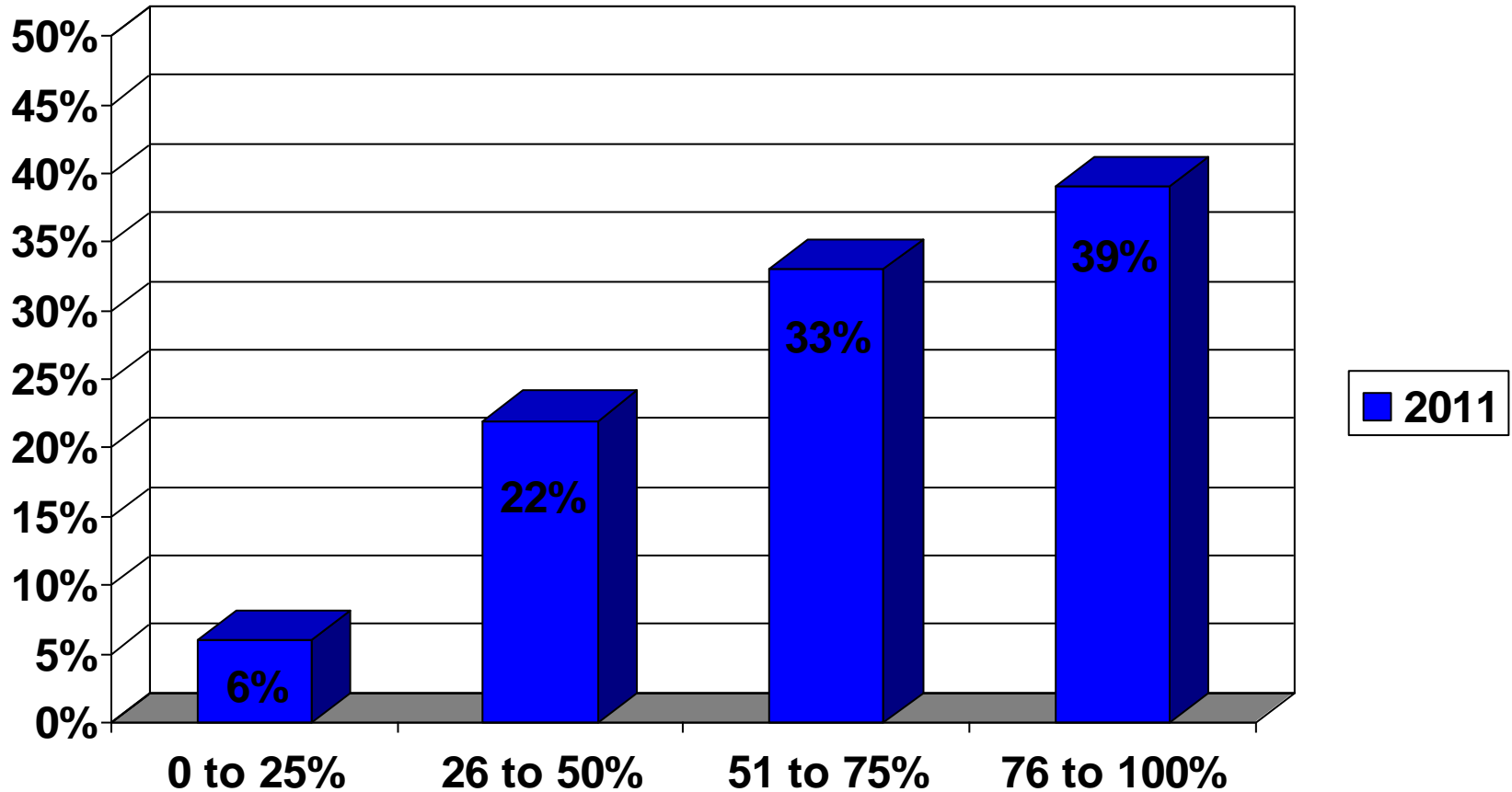
# What percentage of North American industry forklift shipments, currently use data management systems? 实时数据管理系统在北美工业车辆发货的百分比?



ITA Business Trend Survey 2011

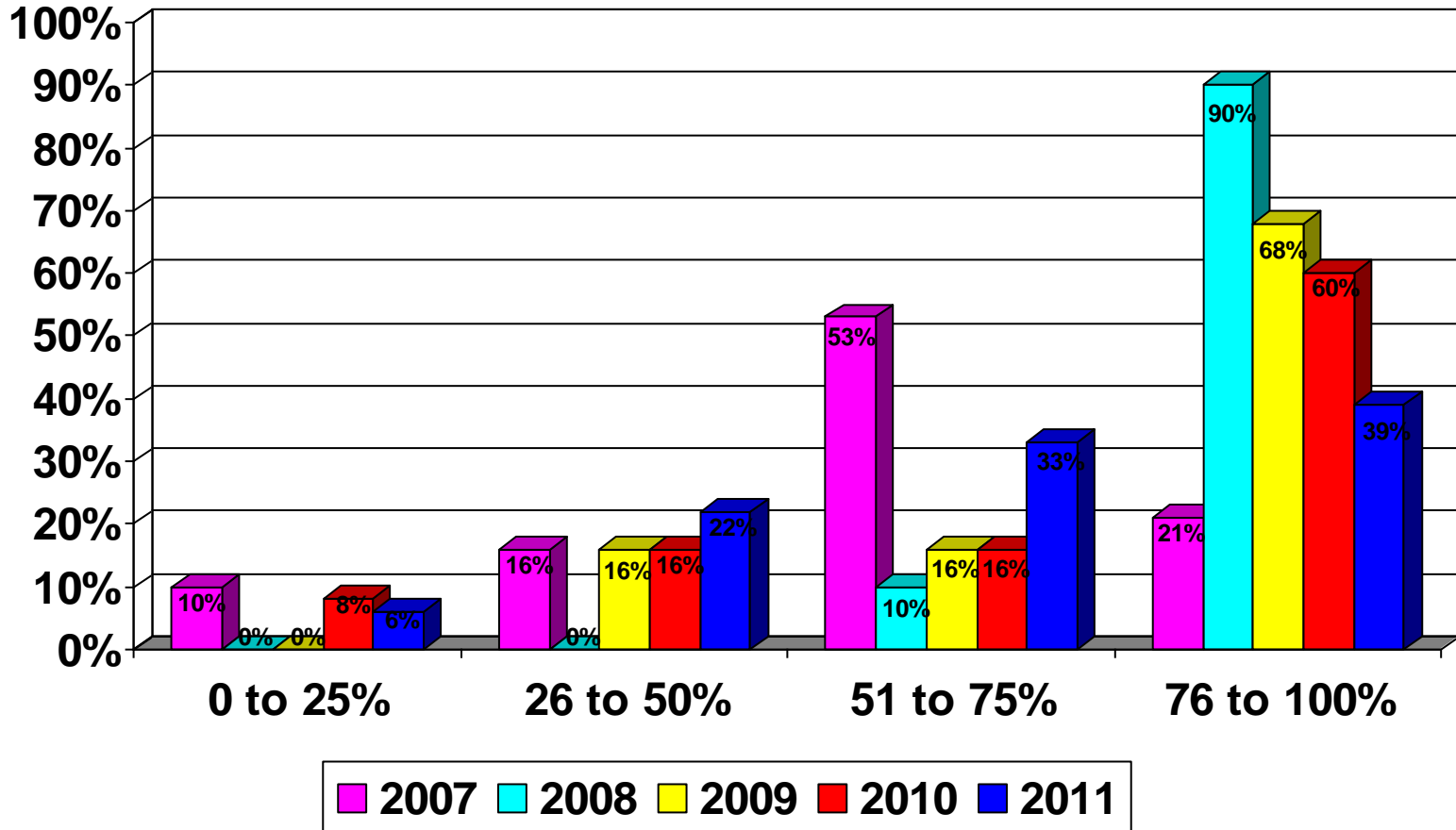


What percentage of North American industry forklift shipments, **will incorporate OEM produced data management systems in 2016?**  
到2016年添加“贴牌生产”数据管理系统的车辆将占北美工业车辆发货的百分比？



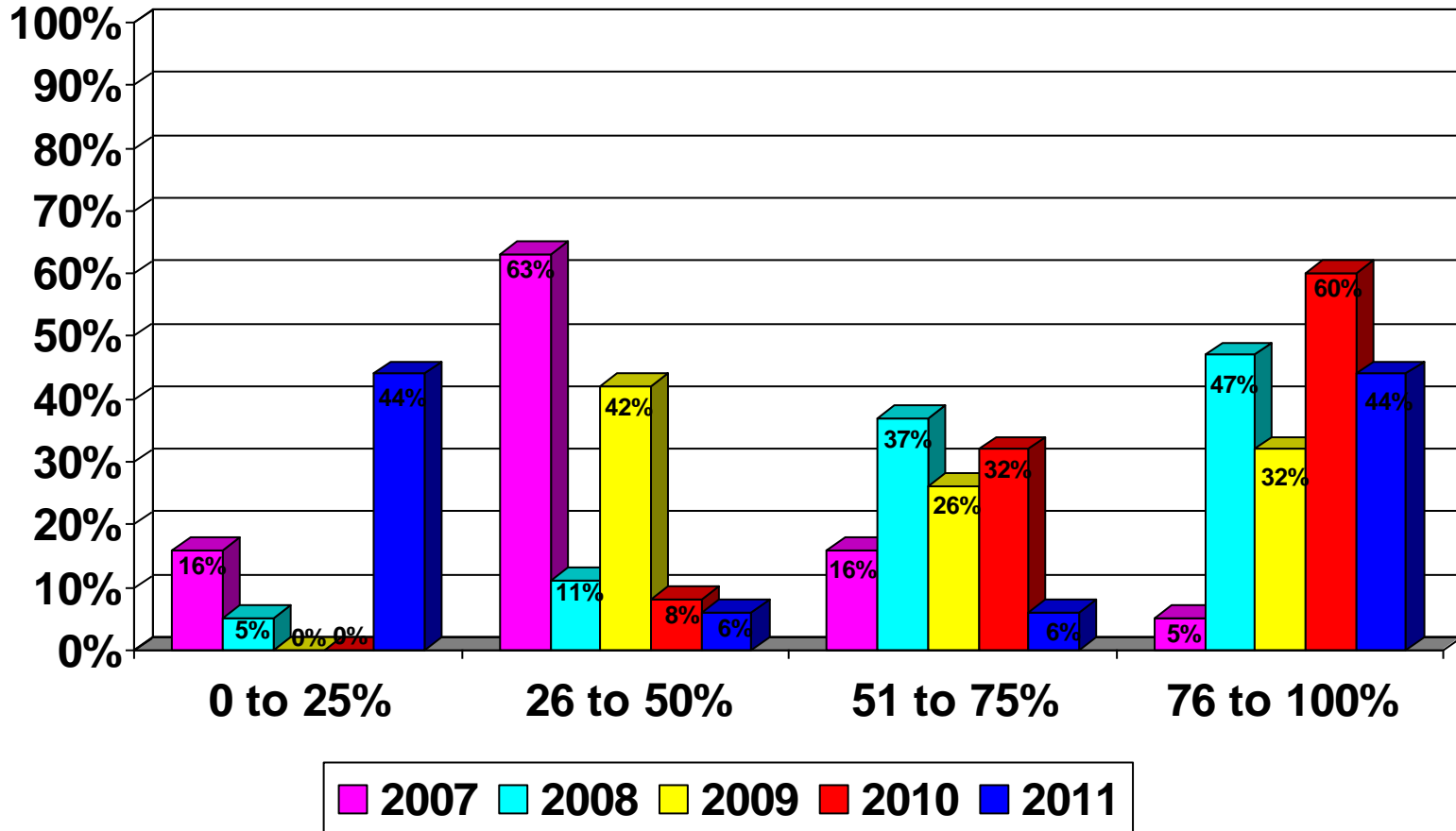
What percentage of North American industry forklift shipments, **will use LED lights display in 2016?**

**到2016年使用LED灯/显示屏的车辆占北美工业车辆发货的比重?**



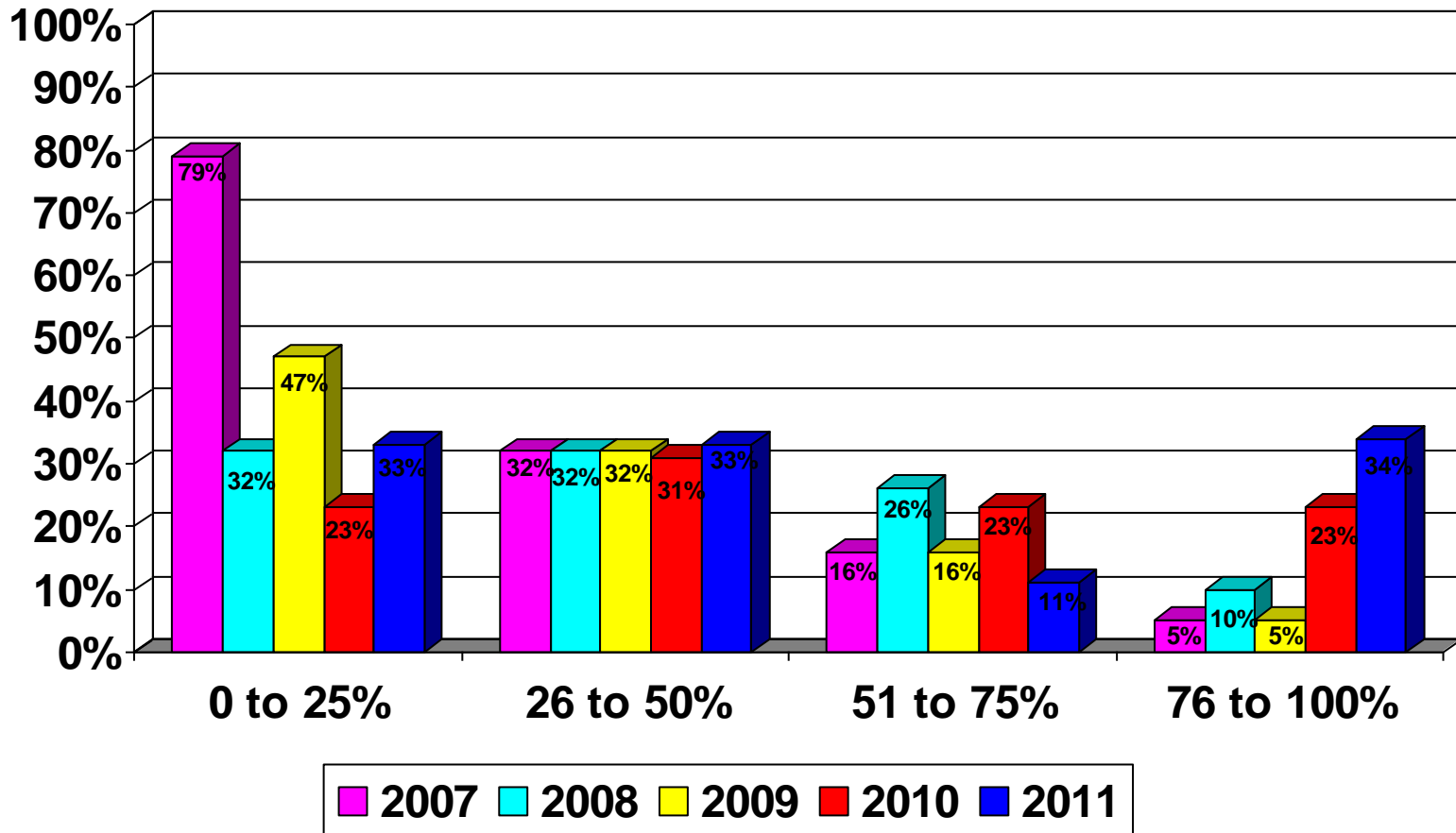
# What percentage of North American industry forklift shipments, will recover energy from regenerative braking in 2016?

到2016年采用来自再生制动的能量回收的叉车占北美工业车辆发货的百分比？



# What percentage of North American industry forklift shipments, will recover energy from lowering loads in 2016?

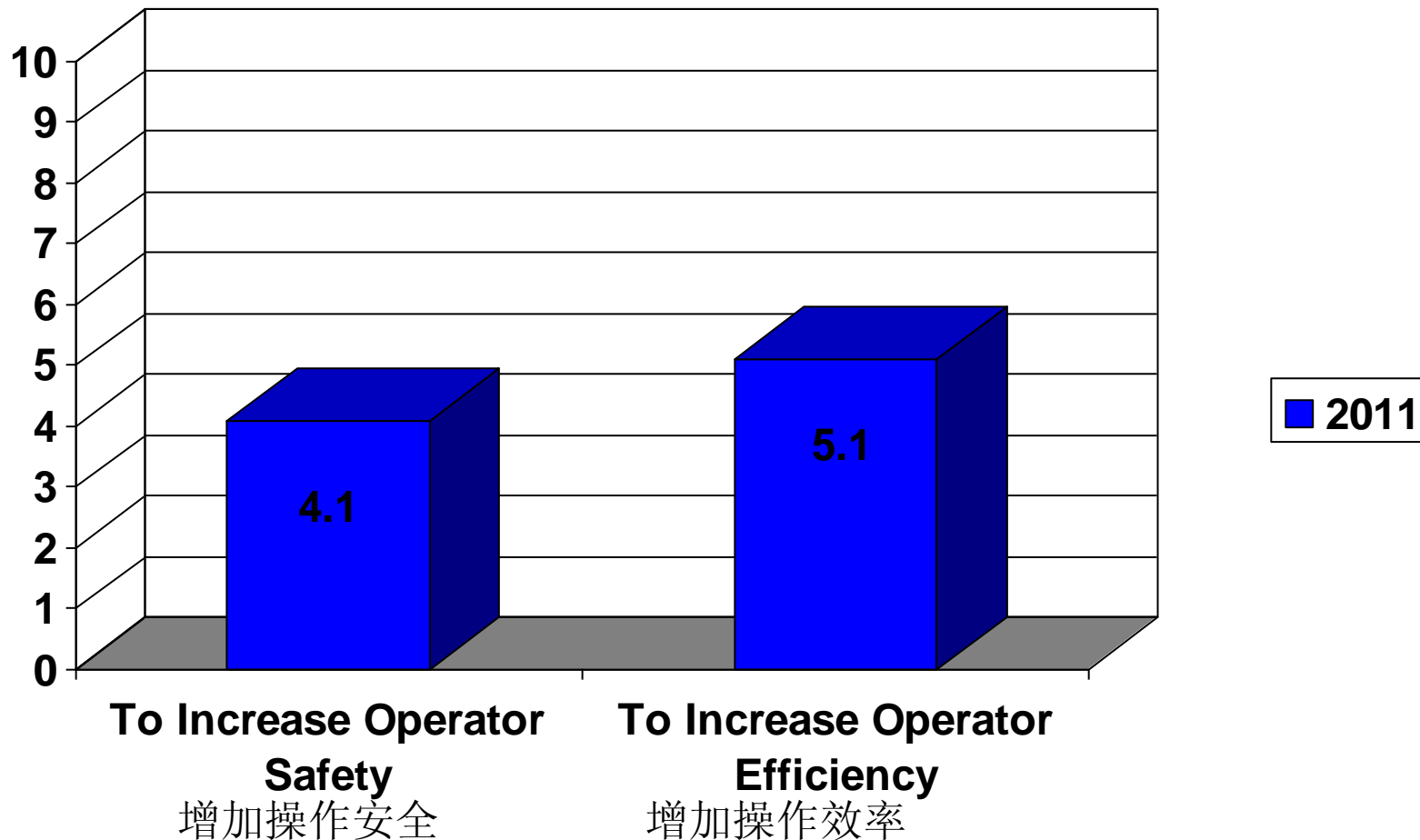
到2016年采用货物下降的能量回收的叉车占北美工业车辆发货的百分比？





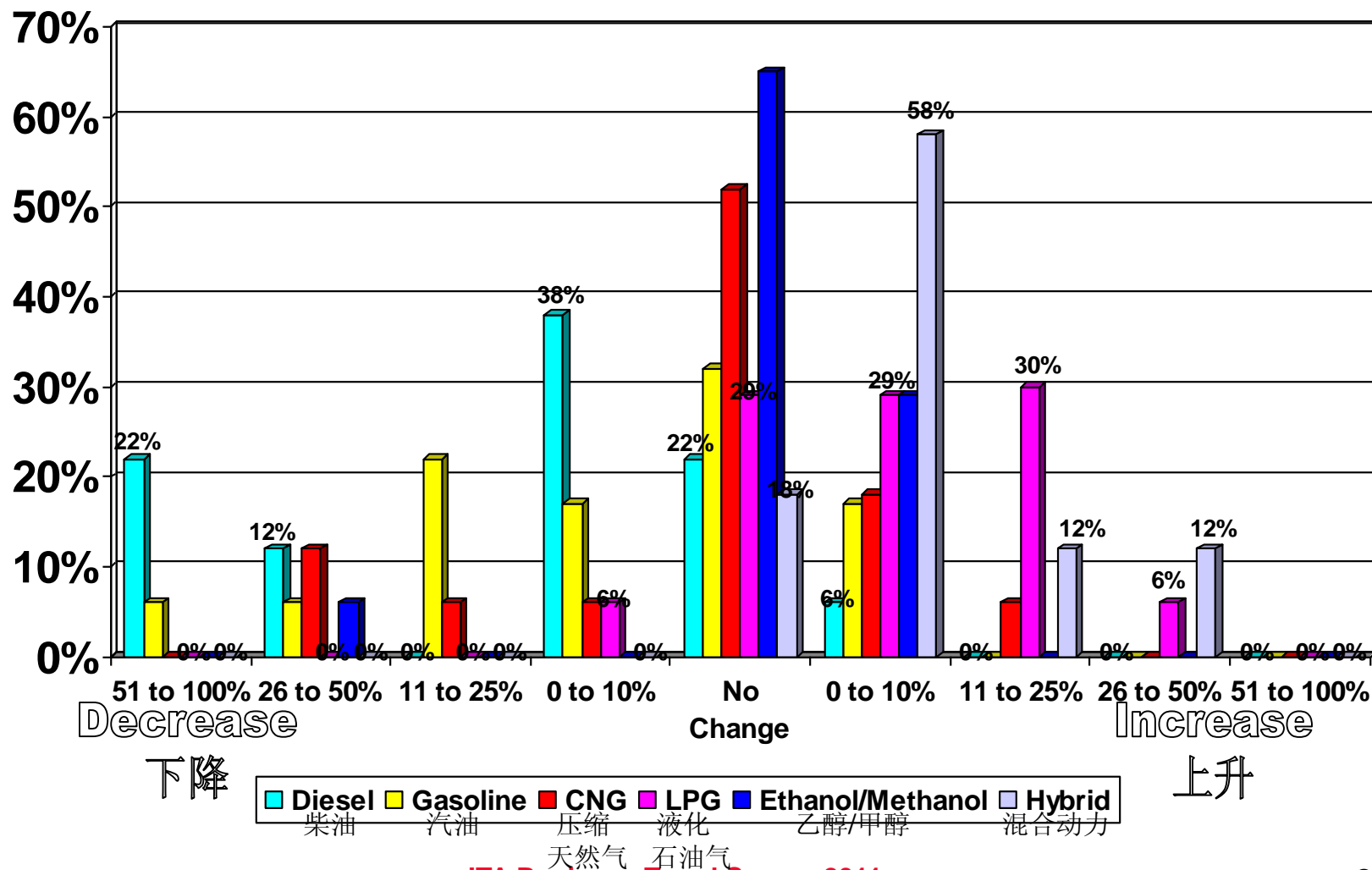
On a **scale of 1 to 10**, with 10 indicating very important and 1 indicating not important at all, **please rate the importance of implementing laser lighting on “forks” by 2016?**

**1到10分，10代表最重要，1代表完全不重要，请为到2016年，货叉上使用激光灯的重要性评分**



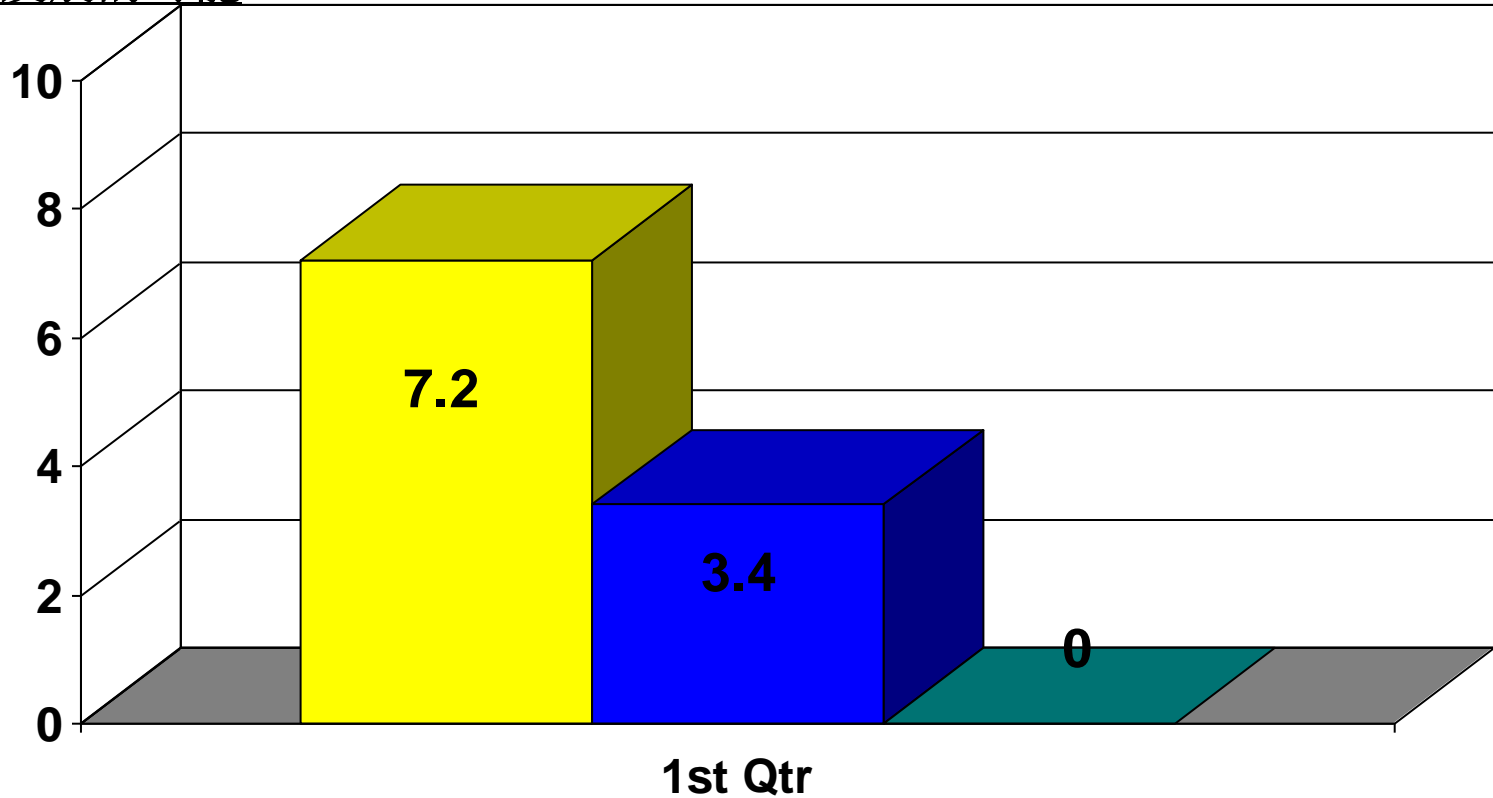
# How will the market demand for types of Internal Combustion forklifts differ in 2016 compared to today?

## 与现在相比，到2016年，市场对不同种类内燃叉车的需求



On a **scale of 1 to 10**, with 10 indicating very likely and 1 indicating not likely at all, **please rate the likelihood of the following types of Hybrid powered forklift trucks being available for sale by the year 2016?**

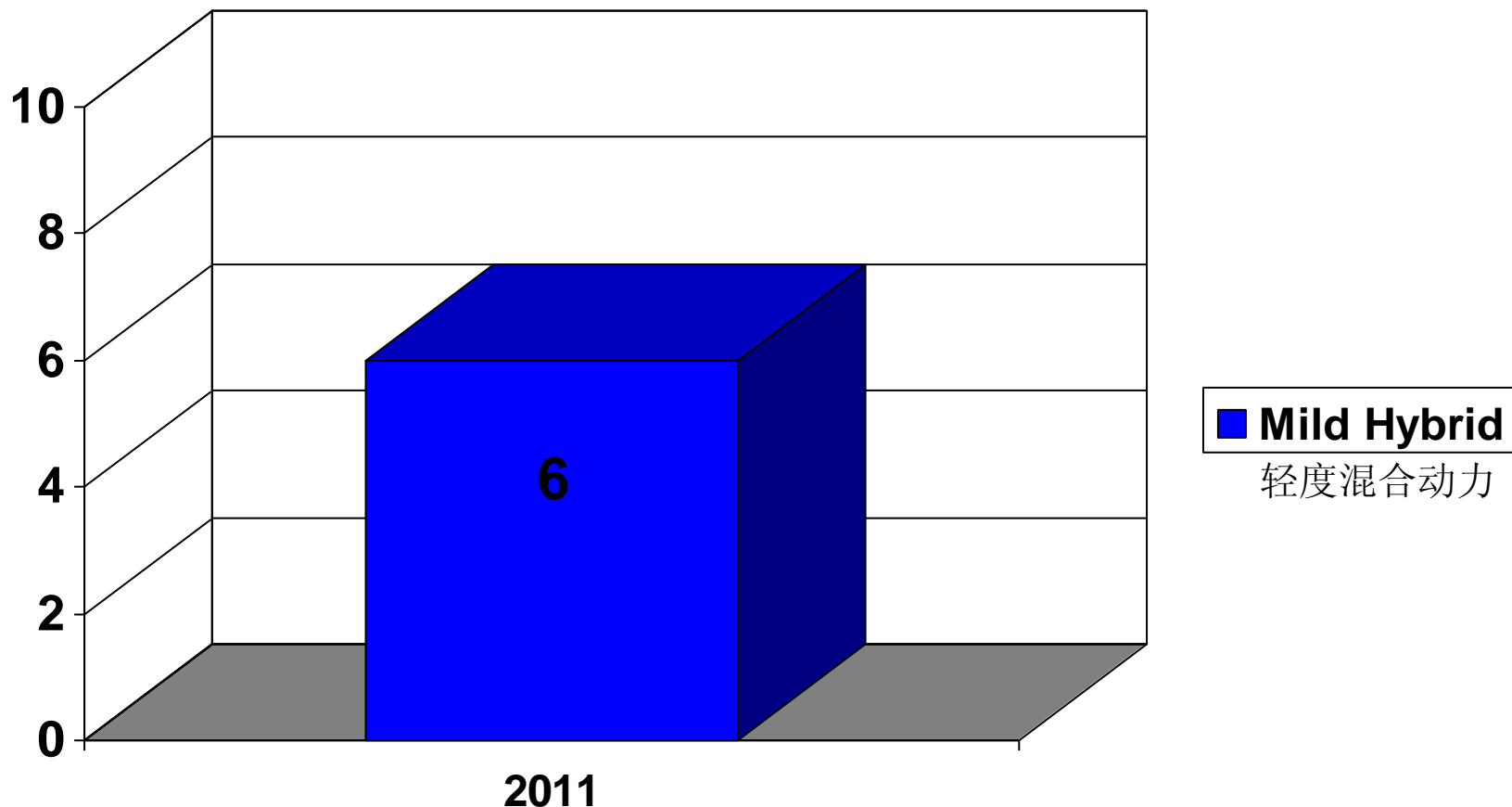
从1到10的范围，10分代表非常有可能，1代表不可能。为了有助于降低二氧化碳排放量而应用在第四、第五类产品上的混合动力发动机，在未来5年排放要求上有没有发展的可能



■ IC/Electric ■ IC/Hydraulic Fluid Pressure ■ Other  
油电混合动力 液压混合动力 其他

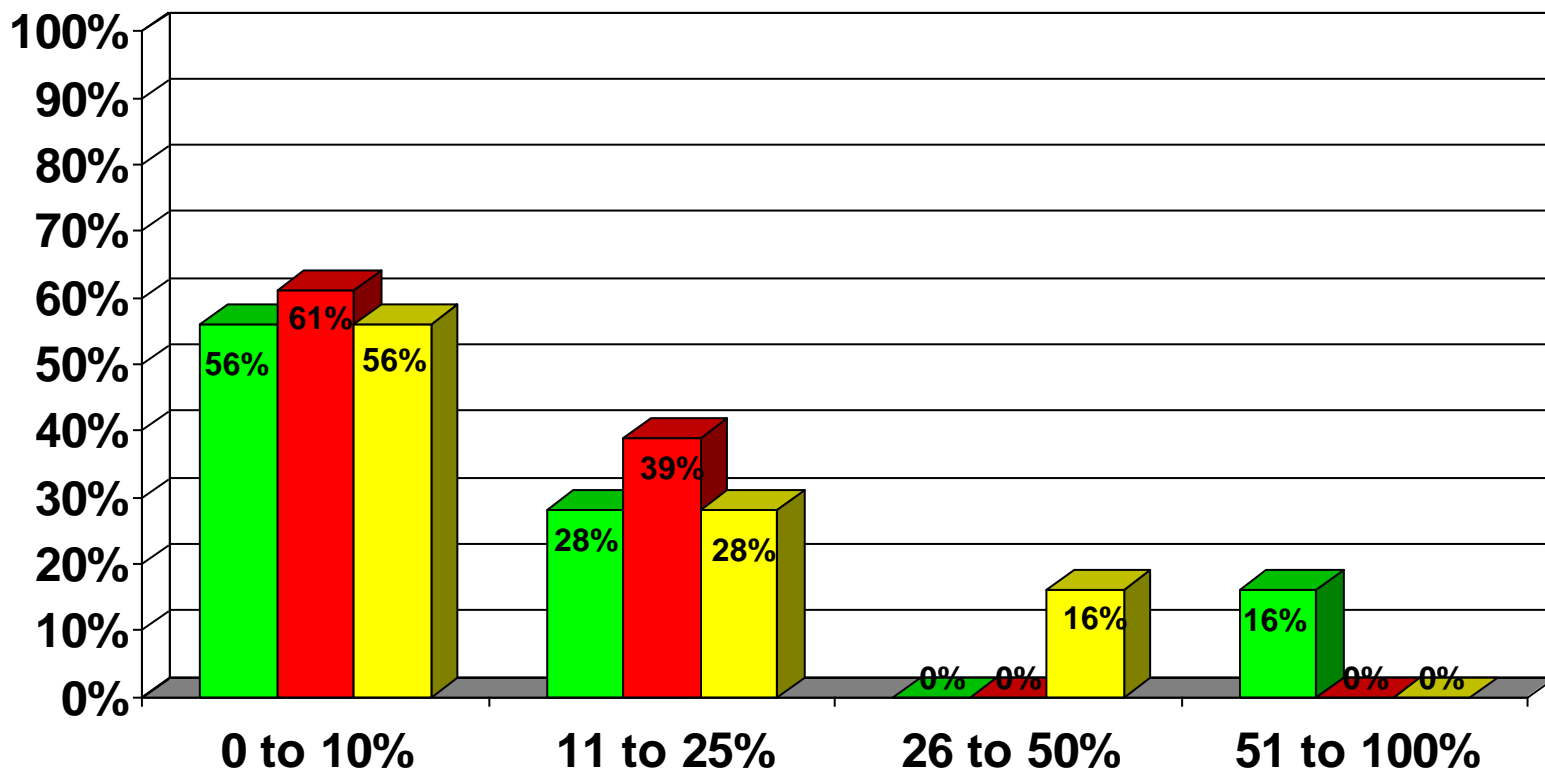


On a scale of **1 to 10**, with 10 indicating very likely and 1 indicating not likely at all, **how likely is it that with the emission control mandates, Mild - Hybrid engine forklifts will be developed for Class IV & V product by 2016 to help reduce CO2 emissions?** (Mild Hybrid – start/stop during engine idling, lowering loads, slow speeds and while vehicle is stopped)  
从**1到10**的范围，**10**分代表非常有可能，**1**代表不可能。到**2016**年，随着排放控制的正式实施，轻度混合动力叉车被应用于第四、五类产品，以帮助降低二氧化碳排放量的可能性有多少？  
(轻度混合动力 – 怠速时启动/刹车，货物下降，降速和刹车)



In 2016, of the total **fuel cell powered forklift shipments**, what will percentage be for each of the following truck class?

到**2016**年，在所有销售的使用燃料电池的叉车中，以下车型所占的比重为：

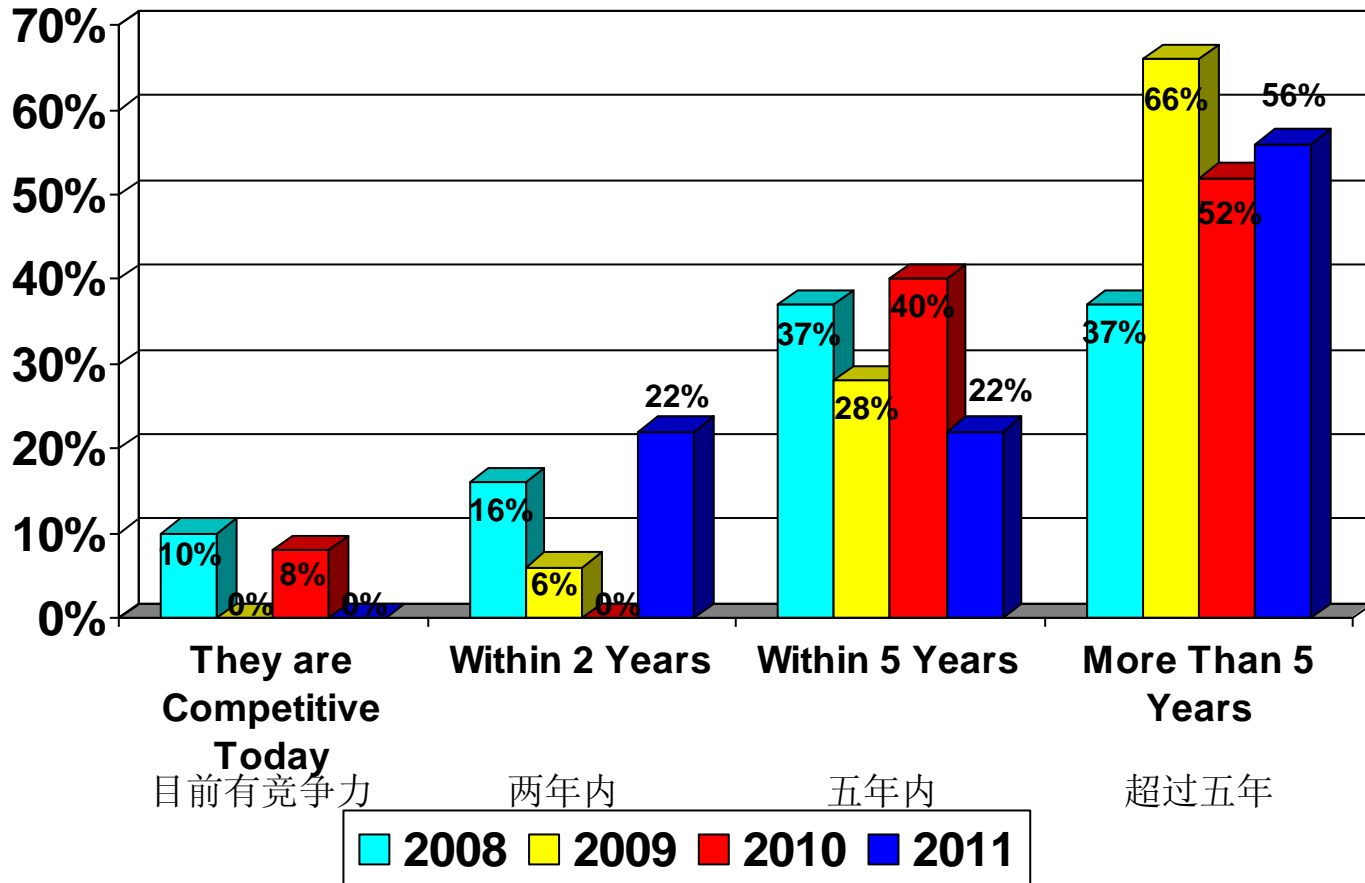


■ Class I ■ Class II ■ Class III

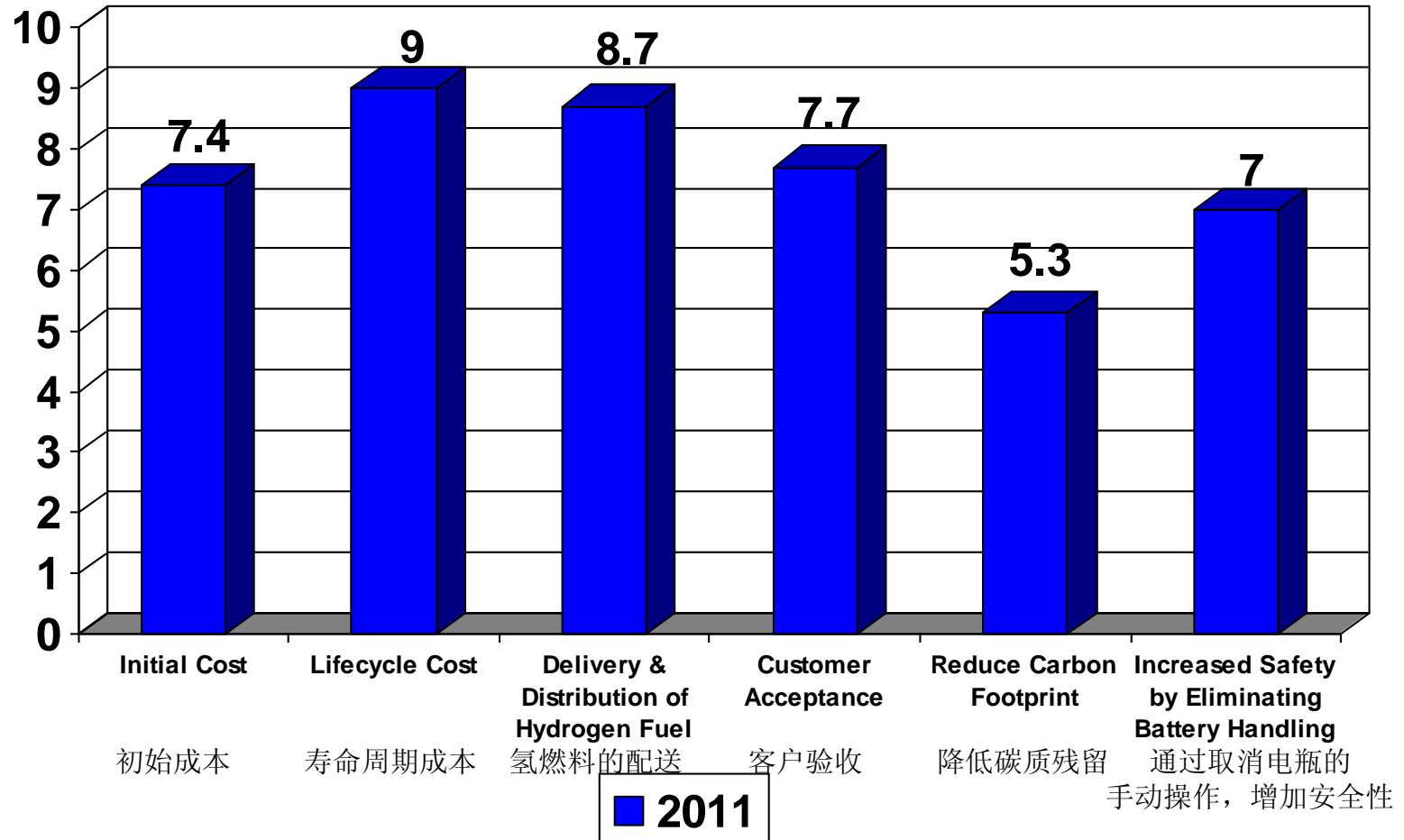
第一类 第二类 第三类



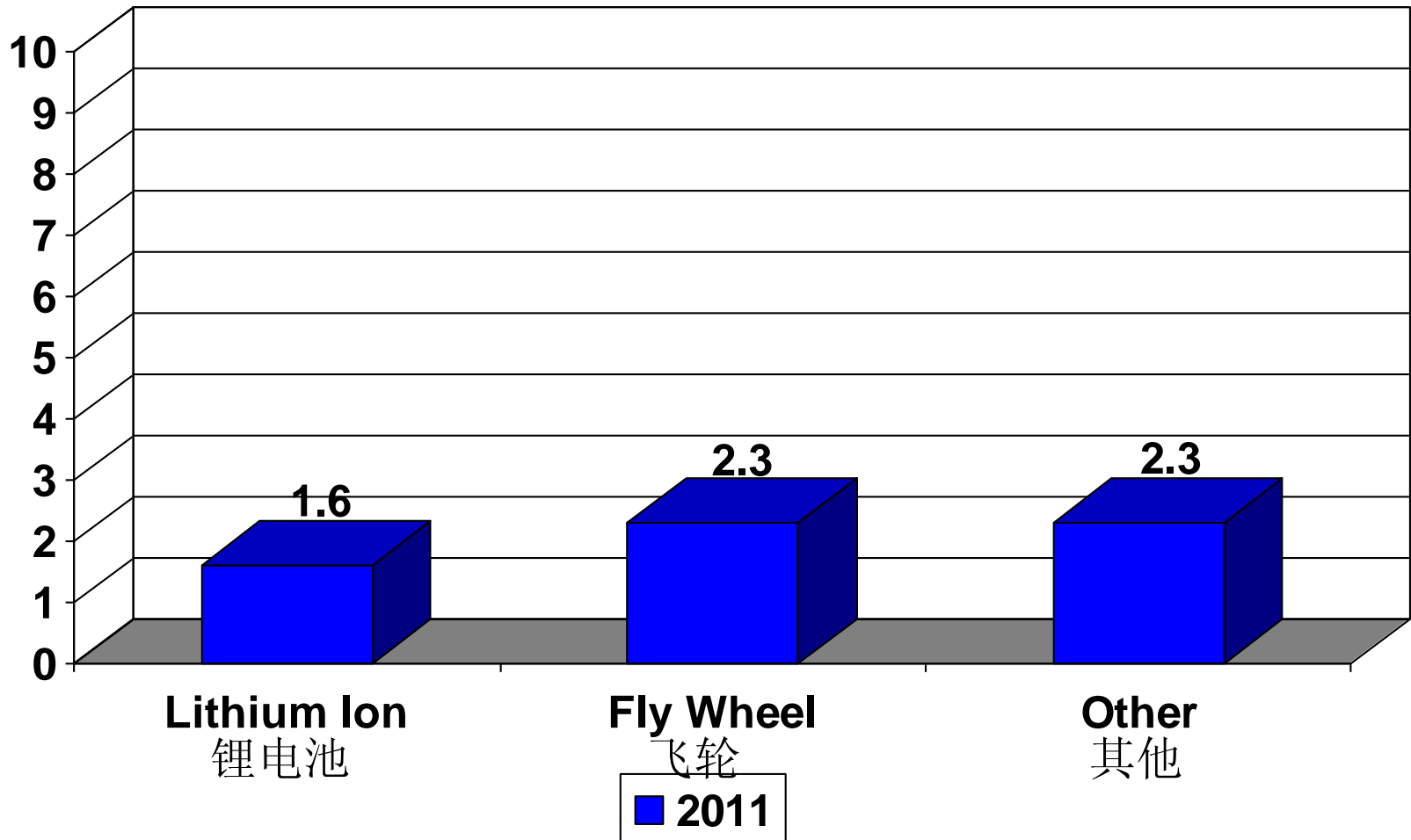
When do you believe a hydrogen fuel system (including hydrogen sourcing) will show a positive lifecycle cost versus lead-acid battery and charger systems? 你认为什么时候燃料电池系统（包含氢分子离子源）将比铅酸电池系统具有更低的周期使用成本？



On a **scale of 1 to 10**, with 10 indicating very important and 1 indicating not important at all, **please rate the importance of the following factors regarding fuel cell technology.** 在1到10范围内，10表示非常重要，1表示完全不重要。以下因素对燃料电池技术的重要性有多少？

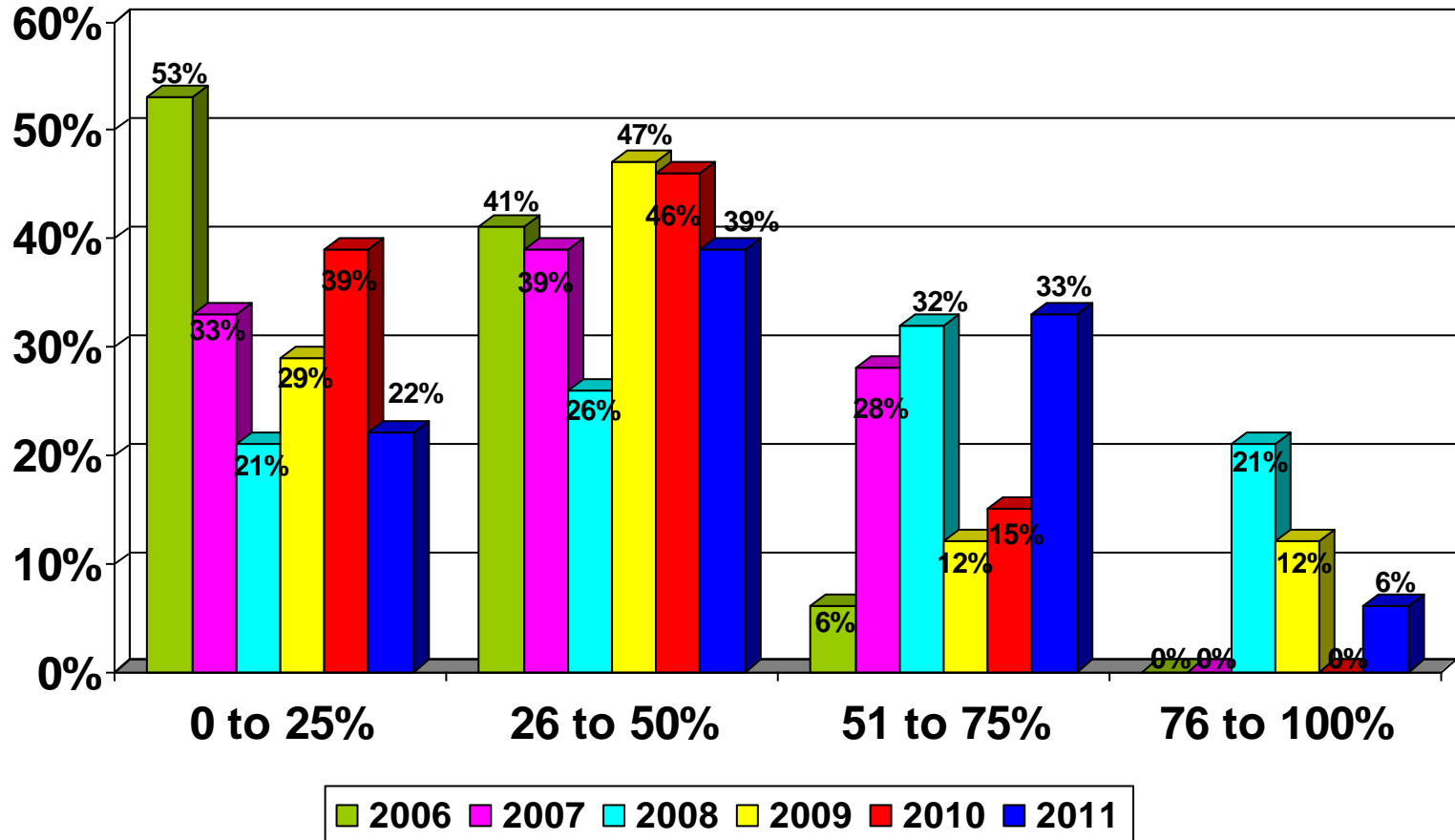


What sources of energy technology (other than lead-acid batteries) will be used in forklift trucks by 2016? 到2016年，什么样来源的能量技术（除铅酸电池外）将被用于叉车

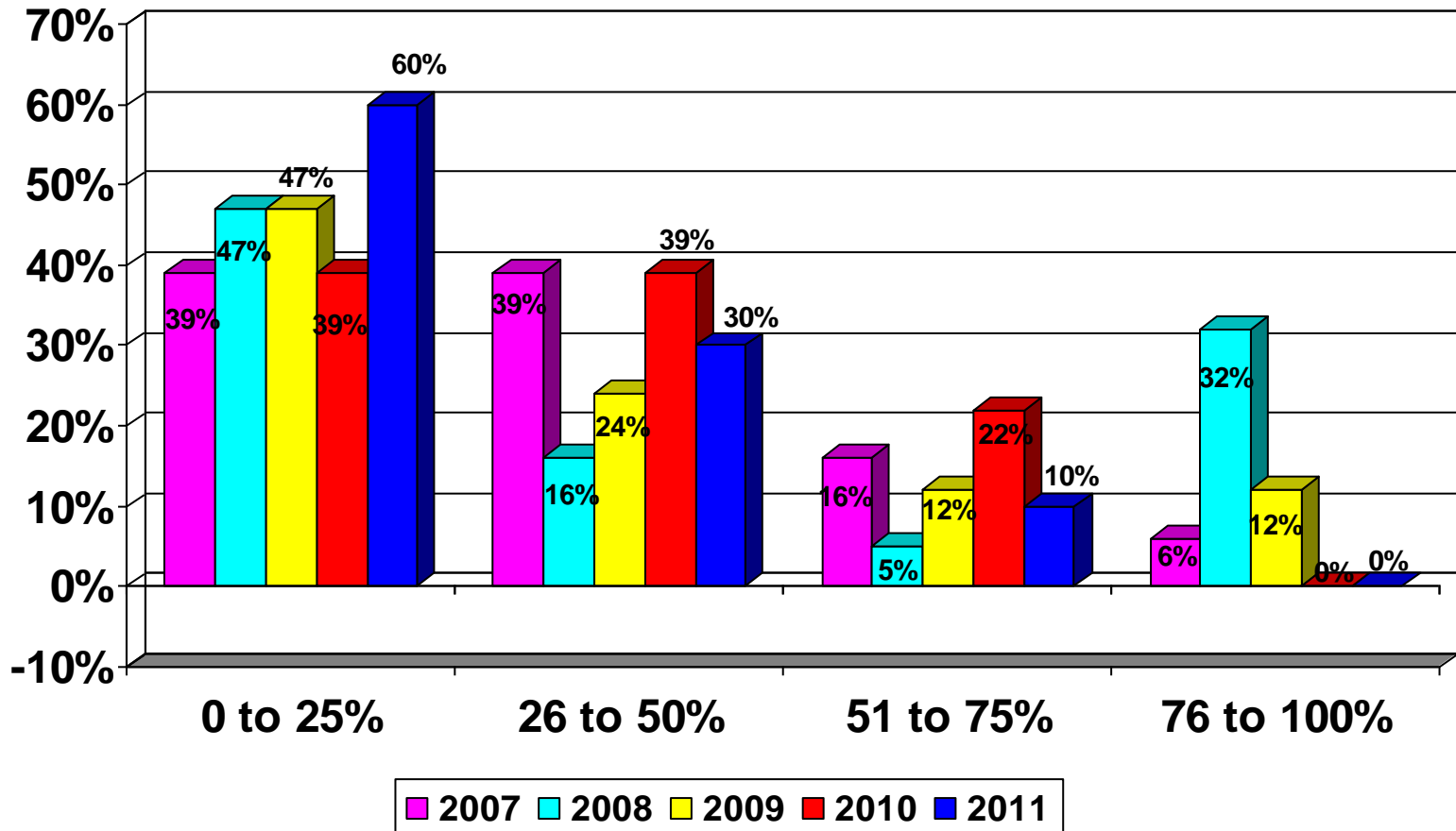




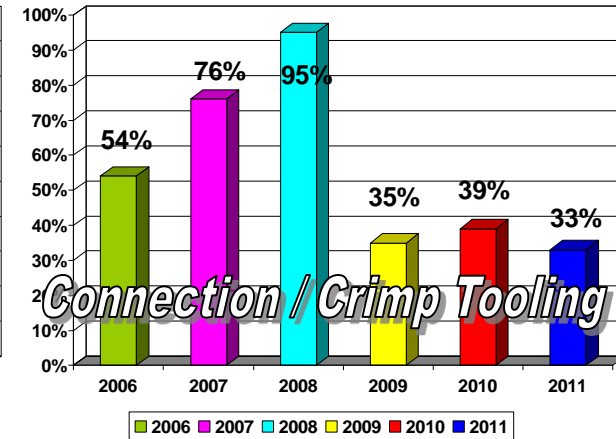
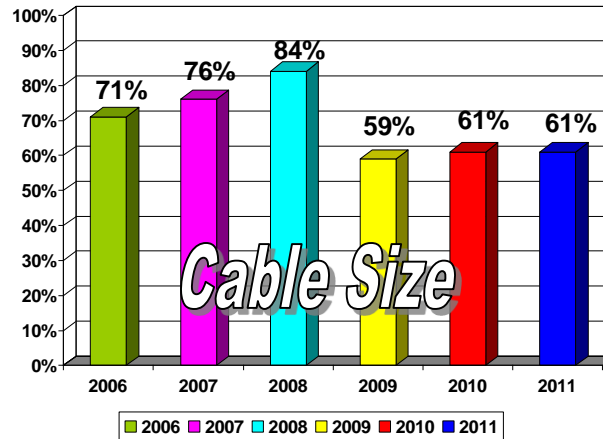
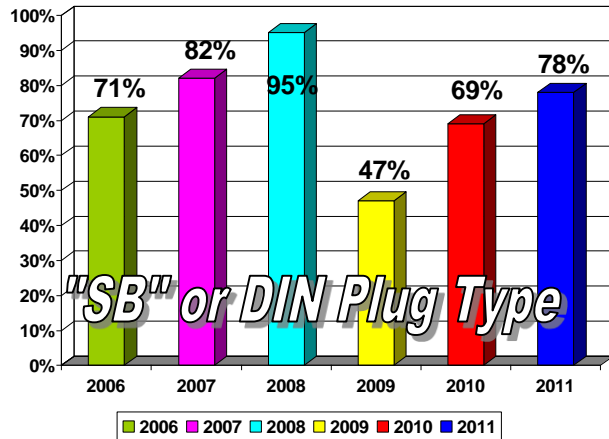
What percent of the market will be garnered with opportunity charging (where the charger start rate is 25 – 30% of the battery’s rated capacity) by 2016? 到**2016**年，市场运用随机充电的比重有多少？（在电池剩余电量**25%-30%**的时候开始充电）



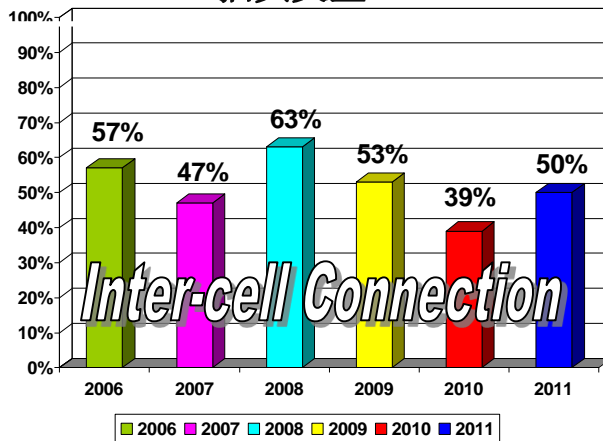
What percent of the market will be garnered with fast charging (where the charger start rate is 40 – 50% of the battery’s rated capacity) by 2016? 到**2016**年，市场运用快速充电的比重有多少？（在电池剩余电量**40%-50%**的时候开始充电）



Within each of the following areas is there a need for international standards to be developed related to fast charging? 是否有必要就快速充电的以下领域发展一个全球性的标准?

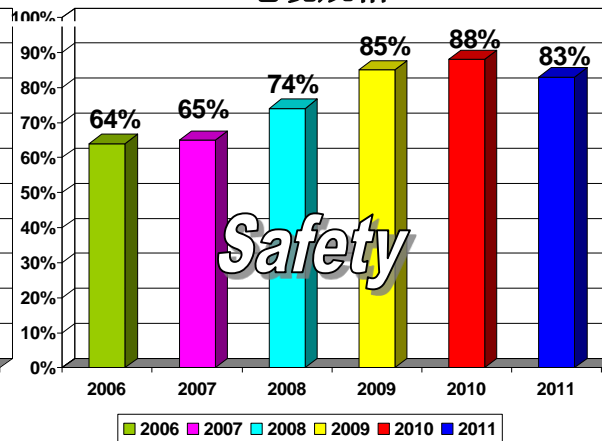


插头类型



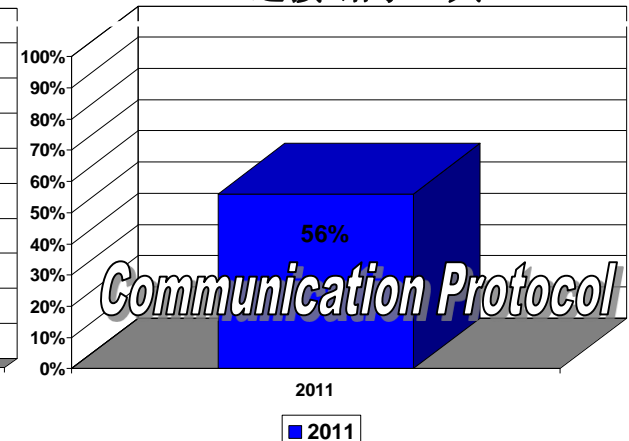
电池间连接

电缆规格



电池操作

连接/钳子工具

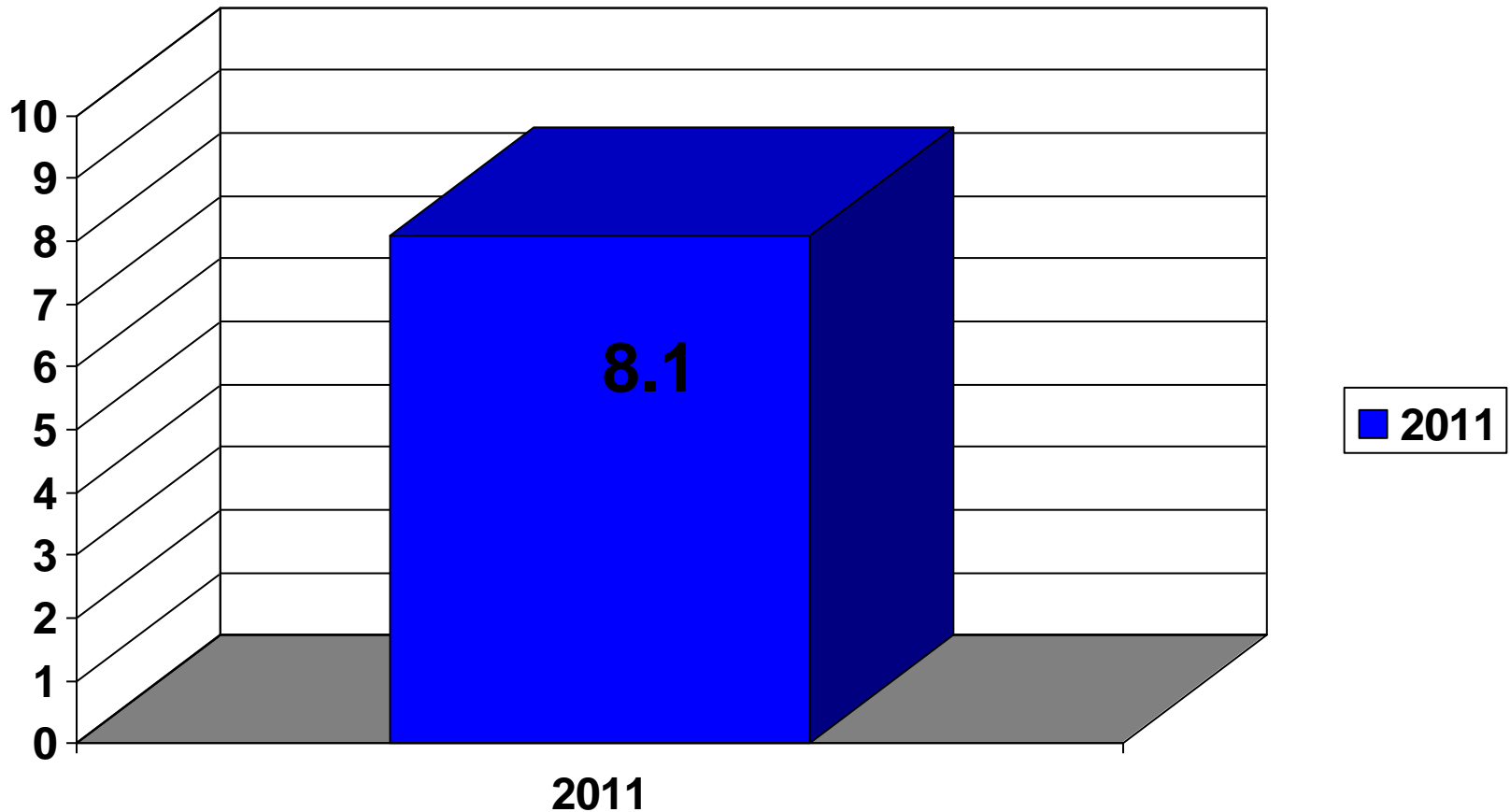


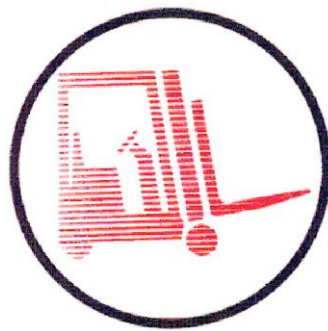
安全通信协议



On a **scale of 1 to 10** do you see the social media network becoming more influential as a communication and marketing tool to reach out to customers within your organization in the next five years?

在**1到10**范围内，10表示非常重要，1表示完全不重要。在接下来的5年，您是否预见到作为面对客户沟通和宣传的工具，社会多媒体网络将越来越重要？





Results of 2011 Business Trend Survey

Thank you for your  
attention and participation.

感谢各位的关注与参与

ITA 2011 Annual Fall Meeting  
The Breakers  
Palm Beach, FL

