



Freedonia Focus Reports
Global Collection

Forestry Equipment: Europe

January 2020



BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	5
Historical Trends	5
Key Economic Indicators	7
Competition from Used, Remanufactured, & Leased Machinery	8
Environmental Factors	10
Legal & Regulatory Factors	12
Technology & Innovation	14
Demand by Country	16
3. Segmentation & Forecasts	18
Products	18
Felling Equipment	22
Extracting Equipment	23
On-Site Processing Equipment	24
Other Forestry Equipment	24
Separately Sold Parts & Attachments	25
Supply & Demand	26
4. Industry Structure	28
Industry Characteristics	28
Market Leaders	30
STIHL	30
Deere	31
Ponsse	31
5. About This Report	33
Scope	33
Sources	34
Industry Codes	35
Freedonia Methodology	35
Resources	37

List of Tables & Figures

Figure 1 Key Trends in Europe Forestry Equipment Demand, 2018 – 2023	4
Figure 2 Europe Forestry Equipment Demand Trends, 2008 – 2018	5
Table 1 Key Indicators for Europe Forestry Equipment Demand, 2008 – 2023 (2017US\$ bil)	7
Figure 3 Europe Forestry Equipment Demand by Country, 2018 (%)	17
Figure 4 Europe Forestry Equipment Demand by Product, 2008 – 2023 (US\$ mil)	18
Table 2 Europe Forestry Equipment Demand by Product, 2008 – 2023 (US\$ mil)	18
Figure 5 Europe Forestry Equipment Demand by Product, 2008 – 2023 (%)	20
Table 3 Europe Forestry Equipment Supply & Demand, 2008 – 2023 (US\$ mil)	27
Table 4 Leading Suppliers to the European Forestry Equipment Market by Principal Product Line	30
Table 5 Countries in Western Europe	34
Table 6 Countries in Eastern Europe	34
Table 7 HS Codes Related to Forestry Equipment	35
Table 8 NACE Codes Related to Forestry Equipment	35

About This Report

Scope

This report forecasts to 2023 European forestry equipment demand and production in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- felling equipment
- extracting equipment
- on-site processing equipment
- other forestry equipment, such as loaders and mulchers
- separately sold parts and attachments

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; shipments and the various segments are reported at five-year intervals for 2008, 2013, and 2018.

This report analyzes the supply of and demand for forestry equipment, including both purpose-built forestry machinery and agricultural and construction equipment adapted for use in forestry applications.

Items excluded from the scope of the report include:

- chainsaws used in construction, emergency rescue, lawn and garden care (including professional arborist products), and all other non-forestry settings
- vehicles utilized to transport personnel and equipment to and from forestry sites
- on-road trucks and trailers used to transport logs and wood chips from the landing to sawmills and other off-site facilities
- used forestry equipment of all types
- personal protection products like helmets and gloves
- axes, handsaws, and other non-powered equipment (such as log sleds/skids designed to be pulled by horses) used in manual logging operations

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

About This Report

Table 5 | Countries in Western Europe

Andorra	Gibraltar	Jersey	Saint Pierre and Miquelon
Austria	Greece	Liechtenstein	San Marino
Belgium	Greenland	Luxembourg	Spain
Channel Islands	Guernsey	Malta	Sweden*
Faeroe Islands	Iceland	Monaco	Switzerland
Finland*	Ireland	Netherlands	United Kingdom
France*	Isle of Man	Norway	Vatican City
Germany*	Italy	Portugal	

*Denotes major forestry equipment markets

Source: The Freedonia Group

Table 6 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

*Denotes major forestry equipment markets

Source: The Freedonia Group

Sources

Forestry Equipment: Europe (FE75044) is based on *Global Forestry Equipment*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

About This Report

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | HS Codes Related to Forestry Equipment

HS Code	Definition
820240	Chainsaw blades
843680	Other agricultural, horticultural, forestry, poultry-keeping, or bee-keeping machinery
843699	Parts of other agricultural, horticultural, forestry, poultry-keeping, or bee-keeping machinery
846781	Chainsaws
846791	Parts of chainsaws

Source: United Nations Statistics Division

Table 8 | NACE Codes Related to Forestry Equipment

NACE Code	Definition
28.30	Manufacture of agricultural and forestry machinery

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global

About This Report

data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Forestry Equipment

Freedonia Industry Studies

Agricultural Pesticides Market in the US

Construction Chemicals in the US

Gaskets & Seals

Global Agricultural Equipment

Global Construction Aggregates

Global Construction Chemicals

Global Construction Machinery

Global Diesel Engines

Global Filters

Global Mining Equipment

Global Off-Road Equipment Technology

Global Power Lawn & Garden Equipment

Global Power Tools

Pesticide Adjuvants Market in the US

Power Lawn & Garden Equipment

Freedonia Focus Reports

Construction: United States

Forestry: United States

Forestry Equipment: Canada

Forestry Equipment: China

Forestry Equipment: United States

Furniture: United States

Paper & Paperboard: United States

Wood Millwork: United States

Freedonia Custom Research

Trade Publications

Equipment World

Friday Offcuts

International Forest Industries

International Journal of Forest Engineering

Journal de la Mécanisation Forestière

Loggers World

Agencies & Associations

Eurostat

FCBA Institute Technique

Finnish Forest Research Institute (Metla)

Kuratorium für Waldarbeit und Forsttechnik

Statistisches Bundesamt

Swedish Transport Agency

UN Comtrade

UN Food and Agriculture Organization

Verband Deutscher Maschinen- und Anlagenbau (VDMA)