

Freedonia Focus Reports  
World Collection



# World

# Material Handling Equipment

July 2016



## Highlights

World Overview and Forecasts  
Demand by Product | Demand by Market

Regional Segmentation and Forecasts  
Regional Shipments Overview | Regional Demand Overview | North America  
Western Europe | Asia/Pacific | Other Regions

Industry Structure  
Industry Composition and Characteristics | Companies Cited

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## ABOUT THIS REPORT

### Scope & Method

This report forecasts total world demand in 2020 for material handling equipment by product, market, and major world region in US dollars at the manufacturers' level.

Product segments include:

- industrial trucks and tractors
- conveying equipment
- hoists, cranes, and monorails
- automated storage/retrieval systems
- automated guided vehicles (AGVs) and other products such as material handling software, robots, and related parts and attachments.

Excluded from the scope of this report are aerial work platforms, elevators, lift tables, construction-type cranes (principally mobile and tower cranes), wrecker cranes, and similar items sometimes considered to be material handling equipment, as well as related services (eg, equipment maintenance) and spare parts.

Reported markets encompass:

- durable goods manufacturing
- nondurable goods manufacturing
- other markets such as construction, mining operations, and government agencies and institutions.

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions. Demand by product and market segment is also forecast for each major world region.

To illustrate historical trends world, product, market, and regional demand (including product and market segments) are provided for 2010 and 2015. Finally, world shipments are segmented by major world region and provided for 2010, 2015, and 2020.

This report quantifies trends in terms of compound annual growth rates (CAGRs), which, by definition, employ in their calculation only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the trend beginning in the base year and ending in the forecast year. Forecasts are developed via the identification and analysis of pertinent statistical relationships and other historical trends and events, as well as their expected impact over the forecast period. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Unless otherwise indicated, historical demand and production values are expressed in US dollars at the prevailing rate of exchange with local currencies. Forecasts to 2020, however, assume a fixed 2015 exchange rate. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the [Table of Contents](#).

## Sources

*World Material Handling Equipment* (FW75039) is based on [a comprehensive industry study](#) published by The Freedonia Group in July 2016. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other industry studies by The Freedonia Group.

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

## Industry Codes

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
333922	Conveyor and Conveying Equipment Mfg	3429	Hardware, NEC
333923	Overhead Traveling Crane, Hoist, and Monorail System Mfg	3531	Construction Machinery and Equipment
333924	Industrial Truck, Tractor, Trailer, and Stacker Machinery Mfg	3535	Conveyors and Conveying Equipment
335314	Relay and Industrial Control Mfg	3536	Overhead Traveling Cranes, Hoists, and Monorail Systems
		3537	Industrial Trucks, Tractors, Trailers, and Stackers
		3625	Relays and Industrial Controls

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## Table of Contents

Section	Page
About This Report .....	i
Highlights .....	1
World Overview & Forecasts .....	2
Demand by Product.....	2
Chart 1   World Material Handling Equipment Demand by Product; 2010, 2015, 2020 (US\$ mil).....	2
Industrial Trucks & Tractors.....	2
Conveying Equipment.....	3
Hoists, Cranes & Monorails.....	4
Automated Storage/Retrieval Systems.....	6
AGVs & Other Products.....	6
Chart 2   World Material Handling Equipment Demand by Product Share; 2010, 2015, 2020 (%).....	8
Demand by Market .....	9
Chart 3   World Material Handling Equipment Demand by Market; 2010, 2015, 2020 (US\$ mil) .....	9
Durable Goods Manufacturing.....	9
Nondurable Goods Manufacturing.....	10
Other Markets.....	11
Chart 4   World Material Handling Equipment Demand by Market Share; 2010, 2015, 2020 (%) .....	12
Regional Segmentation & Forecasts .....	13
Regional Shipments Overview .....	13
Chart 5   World Material Handling Equipment Shipments by Region; 2010, 2015, 2020 (US\$ mil).....	13
Chart 6   World Material Handling Equipment Shipments by Region Share; 2010, 2015, 2020 (%) ..	14
Regional Demand Overview.....	15
Chart 7   World Material Handling Equipment Demand by Region; 2010, 2015, 2020 (US\$ mil).....	15
Chart 8   World Material Handling Equipment Demand by Region Share; 2010, 2015, 2020 (%).....	17
North America.....	18
Chart 9   NA: Material Handling Equipment Demand by Product; 2010, 2015, 2020 (US\$ mil) .....	18
Chart 10   NA: Material Handling Equipment Demand by Market; 2010, 2015, 2020 (US\$ mil).....	19
Western Europe.....	20
Chart 11   WE: Material Handling Equipment Demand by Product; 2010, 2015, 2020 (US\$ mil).....	20
Chart 12   WE: Material Handling Equipment Demand by Market; 2010, 2015, 2020 (US\$ mil) .....	21
Asia/Pacific.....	22
Chart 13   A/P: Material Handling Equipment Demand by Product; 2010, 2015, 2020 (US\$ mil).....	22
Chart 14   A/P: Material Handling Equipment Demand by Market; 2010, 2015, 2020 (US\$ mil).....	23
Other Regions .....	24
Chart 15   OR: Material Handling Equipment Demand by Region; 2010, 2015, 2020 (US\$ mil).....	24
Central & South America.....	24
Eastern Europe.....	25
Africa/Mideast.....	26
Chart 16   OR: Material Handling Equipment Demand by Product; 2010, 2015, 2020 (US\$ mil).....	27
Industry Structure.....	28
Industry Composition & Characteristics.....	28
Chart 17   World Material Handling Equipment Market Share by Supplier, 2015 .....	28
Market Share.....	28
Companies Cited.....	34
Resources.....	35

To return here, click on any Freedonia logo or the Table of Contents link in report footers.  
PDF bookmarks are also available for navigation.

## RESOURCES

### The Freedonia Group

*3423 World Material Handling Equipment*, July 2016

[www.freedoniagroup.com](http://www.freedoniagroup.com)

[see study contents](#)

#### Related Industry Studies

*3439 Hand Tools*, July 2016

[see study contents](#)

*3380 Power Tools*, June 2016

[see study contents](#)

*3395 World Agricultural Equipment*, April 2016

[see study contents](#)

*3373 World Machine Tools*, January 2016

[see study contents](#)

*3324 World Elevators*, October 2015

[see study contents](#)

*3282 World Construction Machinery*, June 2015

[see study contents](#)

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*Manufacturing: United States*

[see report contents](#)

*Mining & Quarrying: United States*

[see report contents](#)

*World Agricultural Equipment*

[see report contents](#)

*World Construction Machinery*

[see report contents](#)

*World Mining Equipment*

[see report contents](#)

Freedonia Custom Research

[see capabilities](#)

### Trade Publications

*American Machinist* (USA)

<http://americanmachinist.com>

*Bulk Transporter* (USA)

[www.bulktransporter.com](http://www.bulktransporter.com)

*The MHEDA Journal* (USA)

[www.themhedajournal.org](http://www.themhedajournal.org)

*Material Handling & Logistics* (USA)

[www.mhlnews.com](http://www.mhlnews.com)

*Material Handling Network* (USA)

[www.mhnetwork.com](http://www.mhnetwork.com)

*Modern Materials Handling* (USA)

[www.mmh.com](http://www.mmh.com)

*Packaging World* (USA)

[www.packworld.com](http://www.packworld.com)

*Processing Magazine* (USA)

[www.processingmagazine.com](http://www.processingmagazine.com)

### Agencies & Associations

Conveyor Equipment Manufacturers Association

[www.cemanet.org](http://www.cemanet.org)

European Materials Handling Federation

[www.fem-eur.com](http://www.fem-eur.com)

Industrial Truck Association

[www.indtrk.org](http://www.indtrk.org)

International Monetary Fund

[www.imf.org](http://www.imf.org)

Material Handling Equipment Distributors Association

[www.mheda.org](http://www.mheda.org)

Material Handling Institute

[www.mhi.org](http://www.mhi.org)

Organisation for Economic Co-operation and Development

[www.oecd.org](http://www.oecd.org)

United States Census Bureau

[www.census.gov](http://www.census.gov)

World Bank

[www.worldbank.org](http://www.worldbank.org)

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