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World Material Handling Products

Industry Study with Forecasts for **2014 & 2019**

Study #2687 | October 2010 | \$6100 | 445 pages

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Despite a modest outlook in the shorter term, the US will be among the fastest growing markets and comprise over one-quarter of world growth in demand through 2014.

Global demand to rise 6.5% annually through 2014

Global demand for material handling products is projected to rise 6.5 percent per year through 2014 to approach \$113 billion. Demand will benefit from recovery in the key US market, which will rebound from dismal levels in 2009. The US will be among the fastest growing markets and comprise over one-quarter of world growth through 2014. Despite a modest outlook in the shorter term, US demand for material handling products is expected to rise 8.2 percent per year through 2014. Gains will result from recovery in manufacturing output, which plummeted in 2009 due to the economic recession. Advances will benefit from turnarounds in key markets such as the motor vehicle industry, where production is expected to nearly double by 2014.

Demand growth in the Asia/Pacific region will also outpace the global average, increasing 7.0 percent per year through 2014. India and China will show the strongest growth among national markets, due to rising manufacturing output, which will require material handling equipment to facilitate distribution and production. China has grown into a leading supplier of material handling products, taking advantage not only of its inexpensive labor pool, but also of favorable exchange rates, which have made pricing of Chinese goods especially competitive. China exports products to the US, Western Europe and throughout Asia.

World Material Handling Product Demand, 2009 (\$82 billion)



Durable goods producers market to grow the fastest

Durable goods manufacturers accounted for nearly 40 percent of global material handling equipment demand in 2009. Growth over the forecast period will be the strongest of any market, due to rising production in key markets such as the motor vehicle industry. Demand from nondurable goods manufacturers will also rise through 2014, led by healthy growth in the chemical and the food and beverage markets. Advances in other markets, which include trade and distribution companies, will benefit from the increased importance of international trade throughout the manufacturing sector.

Advanced/automated products to post best gains

Demand for conventional material handling products -- such as industrial trucks and lifts, conveyors, hoists and cranes -- will benefit from recovery in developed nations, particularly the US. However, advanced/automated material handling products such as robots, automated guided vehicles and software will post the best gains. These types of products can enhance the productivity of the material handling function, and are amenable to integration into larger-scale factory automation and automated warehouse-type environments.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Outlook & Suppliers

Material handling product demand in India is forecast to reach \$5 billion in 2014, fastest among emerging investment expenditures worldwide average. Market growth is driven by competition for foreign investment in Asian economies. Moderating growth in other Asian economies will also hold back growth in value added. Material handling products will benefit from growth in the vehicle industry. Production is expected to reach 1.4 million units in 2014, making India the fourth largest manufacturer in the region behind China, Japan and South Korea. Growth in the country's average income, albeit from a very low base, will boost consumer demand for products such as electronics, the leading opportunities for material handling suppliers.

Material handling product shipments by producers in India are projected to rise at a 9.1 percent annual rate through 2014 to \$850 million, approximating increases in demand. Industry output will be driven by growth in domestic demand and favorable export market conditions, although there will be a further widening of the country's trade deficit. On the other hand, competition from foreign manufacturers will climb as well, preventing industry output from expanding at a faster pace through 2014.

Locally based concerns include Webb-India, a joint venture of Webb and Vinar Systems Limited (India). Offshore-based multinationals such as Dematic are active as well. Others participate in the market through sales/distribution offices, such as FANUC, Sandvik and

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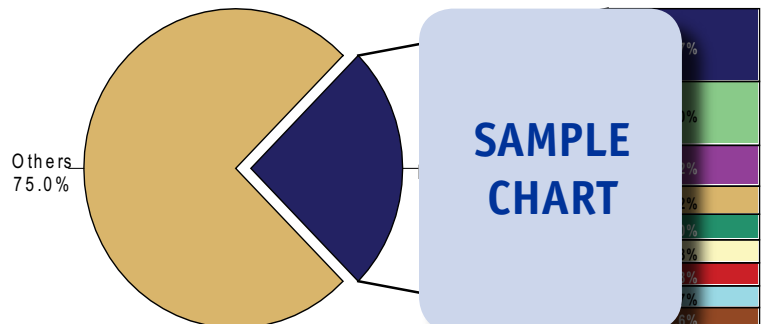
TABLE VI-10

INDIA: MATERIAL HANDLING DEMAND BY TYPE & MARKET (million dollars)

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2008\$)	100	150	200	250	300
% MVA	10	12	14	16	18
Manufacturing Value Added (bil 2008\$)	10	18	28	40	54
\$ material handling/000\$ MVA	0.1	0.15	0.2	0.25	0.3
Material Handling Demand	1	2.7	5.6	10	16.2
By Type:					
Conventional	0.5	1.35	2.8	5	7.74
Industrial Trucks & Lifts	0.1	0.27	0.56	1	1.51
Conveying Equipment	0.1	0.27	0.56	1	1.51
Hoists, Cranes & Monorails	0.1	0.27	0.56	1	1.51
Advanced/Automated	0.1	0.27	0.56	1	1.51
Auto Storage/Retrieval Systems	0.1	0.27	0.56	1	1.51
Software & Other	0.1	0.27	0.56	1	1.51
By Market:					
Durable Goods Manufacturers	0.5	1.35	2.8	5	7.74
Nondurable Goods Manufacturers	0.1	0.27	0.56	1	1.51
Other Industries	0.1	0.27	0.56	1	1.51

CHART VIII-1

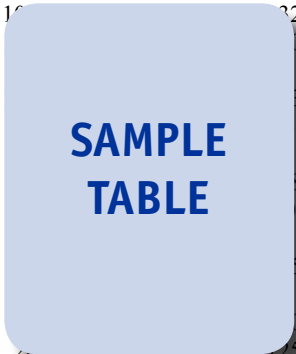
WORLD MATERIAL HANDLING MARKET SHARE BY COMPANY (\$82 billion, 2009)



**Sample Profile,
 Table & Forecast**

TABLE VI-9
INDIA: MATERIAL HANDLING SUPPLY & DEMAND
 (million dollars)

Item	1999	2004	2009	2014	2019
Population (million persons)	100	110	120	130	140
\$ GDP/capita	100	110	120	130	140
Gross Domestic Product (bil 2008\$)	100	110	120	130	140
% GFI	100	110	120	130	140
Gross Fixed Investment (bil 2008\$)	100	110	120	130	140
\$ material handling/000\$ GFI	100	110	120	130	140
Material Handling Product Demand	100	110	120	130	140
net exports	100	110	120	130	140
Material Handling Product Shipments	100	110	120	130	140



COMPANY PROFILES

XCMG Construction Machinery Group Incorporated
 Industrial Zone 1
 Xuzhou Economic Development Zone
 Jiangsu
 China
 86-516-8773-9
 http://www.xcmg.com

Annual Sales:
 Employment:
 Key Products:

SAMPLE PROFILE

Xuzhou Construction Machinery Group (XCMG) is a state-owned manufacturer of construction and other equipment. The Company maintains a production facility in Xuzhou, Jiangsu, China and a direct sales network that serves customers in various countries and regions worldwide.

The Company is active in the world material handling equipment industry through the manufacture and sale of cranes. Among XCMG's cranes are truck-mounted and crawler types. The Company's truck-mounted cranes include models with lift capacities of up to 25,000 kilograms. XCMG makes crawler cranes with advanced hydraulic drives and fully slewing lattice booms. Other cranes made from the Company include standard truck and all-terrain models.

XCMG designs, produces and markets cranes via several subsidiaries. For example, the XCMG Xuzhou Truck-Mounted Crane Company Limited subsidiary (China) develops and produces truck-mounted cranes and other equipment, while the Xuzhou Heavy Machinery Company Limited subsidiary (China) sells cranes and other products

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“Overall material handling product demand in the Asia/Pacific region is expected to increase 7.0 percent per year through 2014 to \$35.5 billion, modestly outperforming sales increases in the rest of the world. Growth will be fueled by accelerating levels of motor vehicle production (spurred in part by a turnaround in the Japanese automotive industry), as well as by continued growth in fixed investment expenditures and overall manufacturing activity in the region.”
 --Section VI, pg. 157

OTHER STUDIES

World Agricultural Equipment

Global demand for agricultural equipment will rise 4.5% per year to 2014, paced by the accelerating mechanization of the farm sectors in developing countries. Replacement demand will define the industrialized world, led by "precision agriculture" equipment that use GPS and wireless sensors. This study analyzes the \$99.2 billion world agricultural equipment industry, with forecasts for 2014 and 2019 by type, world region and for 26 countries. It also evaluates company market share and profiles industry participants.

#2666 August 2010 \$5900

Packaging Machinery in China

Demand for packaging machinery in China will grow 8.7% yearly through 2014, driven by growth in packaged food and beverages, drugs and personal care products. Filling and form/fill/seal equipment will remain the largest segment, while labeling and coding types grow the fastest. This study analyzes the 39.2 billion yuan packaging machinery industry in China, with forecasts for 2014 and 2019 by product, market and Chinese region. It also evaluates company market share and profiles industry participants.

#2638 May 2010 \$5300

World Industrial Rubber Products

Global industrial rubber product demand will climb 4.3% yearly through 2013. China will surpass the US to become the largest national market, and claim over one-third of all new demand. Advances will be stronger in the hose and belt segments, while mechanical rubber goods remains dominant. This study analyzes the \$79.3 billion world industrial rubber product industry, with forecasts for 2013 and 2018 by market, product, world region and for 27 countries. It also evaluates company market share and profiles industry players.

#2609 March 2010 \$5800

Elevators in China

The market in China for elevator and escalator products and services will grow 10.9% annually through 2013, driven by new construction and ongoing urbanization. Products will remain the dominant sector, while services grow the fastest. Nonresidential buildings will be the fastest growing markets. This study analyzes the 66.2 billion yuan elevator industry in China, with forecasts for 2013 and 2018 by product, service, market and region. It also evaluates company market share and profiles industry participants.

#2541 December 2009 \$5200

World Mining Equipment

Global mining equipment demand will rise 4.9% annually through 2013. Gains will be driven by rising demand for commodities such as iron ore and copper, and the ongoing thirst for energy sources such as coal. China will be the fastest growing market and the largest producer of mining equipment. This study analyzes the \$45.4 billion world mining equipment industry, with forecasts for 2013 and 2018 by application, product, world region and for 34 countries. It also evaluates market share and profiles industry players.

#2562 November 2009 \$5900

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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