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# World Material Handling Products

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Industry Study with Forecasts for **2016 & 2021**

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Study #2919 | August 2012 | \$6300 | 382 pages

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*The growth of automated systems, coupled with strong national markets for these products in countries such as China and India, will raise global demand for material handling products.*

## Global demand to rise 4% annually through 2016

Global demand for material handling products is forecast to climb 4.0 percent annually through 2016 to \$123.6 billion. Energy efficient products, such as electric lift trucks, will see solid gains as end users seek to reduce costs. The rising importance of e-commerce will also fuel demand for automated equipment, as business is conducted more often in large, lightly-staffed warehouses.

## Markets in India and China to see fastest gains

Among national markets, India and China will see the fastest gains, in large part because of rising manufacturing output, which will spur demand for equipment to facilitate distribution and production. West European markets include many of the most intensive users of material handling equipment in the world, because manufacturers in the region have long been among the leaders in adopting automated equipment as a response to high domestic labor costs. The US market, which accounted for 22 percent of global sales in 2011, is expected to remain the top consumer through 2016. After a period of sluggish gains between 2006 and 2011, demand in the US will perform better through 2016, bolstered by improved manufacturing conditions, especially in the motor vehicle industry.

## US to remain largest global producer, followed by China

The US, China, Germany, and Japan



possess the largest national material handling equipment industries in the world. Despite posting sluggish growth between 2006 and 2011, the US remains the largest global producer of material handling products and is expected to see stronger output increases through 2016 as domestic market conditions improve. China possesses the second biggest material handling equipment industry and is the largest net exporter of these products. Chinese output has grown well above the global average in recent years, fueled by robust gains in local demand. Although neighboring Asian countries offer lower labor costs than China, the country continues to benefit from foreign investment in local facilities. Germany and Japan possess sizeable trade surpluses in these products, reflecting their large manufacturing sectors

## AGVs, automated storage and retrieval systems to see strongest growth

Automated storage and retrieval systems and automated guided vehicles (AGVs) will post the best growth of any product type through 2016. Strong gains in automated equipment demand will reflect a shift in manufacturers' preference toward products that can enhance productivity and are amenable to integration into larger-scale factory automation and automated warehouse-type environments. Sales of more conventional material handling products -- including industrial trucks and lifts, hoists, cranes, and conveyors, -- will see solid gains as well, benefiting from improved economic conditions in developed countries.

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Sample Text,  
 Table & Chart

WESTERN EUROPE

Germany: Outlook & Suppliers

The market for material handling products in Germany is projected to grow through 2016 to \$1.2 billion. Sales will advance through 2016, reflecting an improved economic outlook. Specifically, an upturn in income levels, will however, a downturn in demand from advanced manufacturing plant in Shenyang, Mexico and Brazil.

Material handling products is projected to climb to \$1.2 billion through 2016, above the regional average. Growth in shipments will accelerate from the 2006-2011 pace, in large part because of the pickup in domestic sales and an improved outlook for many important export markets. German manufacturers, like manufacturers in other developed nations, will face stiff competition from suppliers in low-cost countries, notably those in Asia. Nevertheless, production gains are expected to outpace those in the domestic market, resulting in a widening of the country's large trade surplus through 2016.

Two of the global leaders in material handling manufacturing including Jungheinrich and KION Group, are headquartered in Germany. In addition, several other large multinationals -- such as BEUMER Maschinenfabrik, Dürr, EISENMANN, and Schäfer -- call Germany home. Beyond these large domestic firms, many of the major multinationals are active in the country via manufacturing or sales/distribution offices.

TABLE V-4

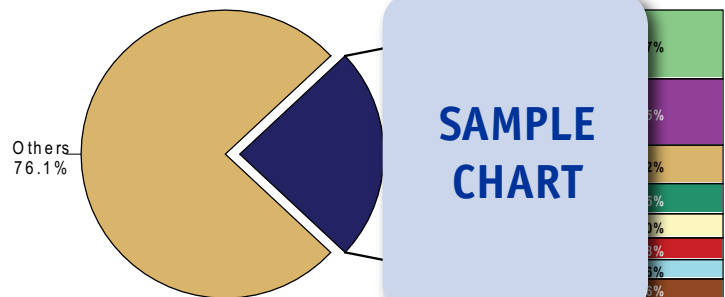
GERMANY: MATERIAL HANDLING DEMAND BY TYPE & MARKET (million dollars)

| Item                                | 2001 | 2006 | 2011 | 2016 | 2021 |
|-------------------------------------|------|------|------|------|------|
| Gross Domestic Product (bil 2010\$) | 3470 | 3700 | 3970 | 4470 | 4900 |
| \$ material handling/000\$ GDP      |      |      |      |      |      |
| Material Handling Demand            |      |      |      |      |      |
| By Type:                            |      |      |      |      |      |
| Industrial Trucks & Lifts           |      |      |      |      |      |
| Conveying Equipment                 |      |      |      |      |      |
| Hoists, Cranes, & Monorails         |      |      |      |      |      |
| AS/RS                               |      |      |      |      |      |
| AGVs & Other                        |      |      |      |      |      |
| By Market:                          |      |      |      |      |      |
| Durable Goods Manufacturing         |      |      |      |      |      |
| Nondurable Goods Manufacturing      |      |      |      |      |      |
| Other Industries                    |      |      |      |      |      |

SAMPLE TABLE

CHART VIII-1

WORLD MATERIAL HANDLING MARKET SHARE (\$101.4 billion, 2011)



SAMPLE CHART

## Sample Profile, Table & Forecast

**TABLE V-3**  
**GERMANY:**  
**MATERIAL HANDLING SUPPLY & DEMAND**

| Item                                      | 2001 | 2006 | 2011 | 2016 | 2021 |
|---|------|------|------|------|------|
| Population (million persons)              |      |      |      |      |      |
| \$ GDP/capita                             |      |      |      |      |      |
| Gross Domestic Product (bil 2010\$)       |      |      |      |      |      |
| % GFI                                     |      |      |      |      |      |
| Gross Fixed Investment (bil 2010\$)       |      |      |      |      |      |
| \$ material handling/000\$ GFI            |      |      |      |      |      |
| Manufacturing Value Added (bil 2010\$)    |      |      |      |      |      |
| \$ material handling/000\$ MVA12.1        |      |      |      |      |      |
| Material Handling Product Demand (mil \$) |      |      |      |      |      |
| net exports                               |      |      |      |      |      |
| Mtl Handling Prod Shipments (mil \$) 1    |      |      |      |      |      |

**SAMPLE PROFILE**

**SAMPLE TABLE**

### COMPANY PROFILES

#### Melrose plc

Precision House  
 Arden Road  
 Alcester B49 6HN  
 United Kingdom  
 44-17-897  
 http://www

Revenues: Europe 42%, North America 4 Countries 7%  
 Geograph  
 America 4  
 Employm

Key Produ mechanical grabs, lifters

Melrose is an international engineering group that designs, develops and manufactures various specialty components. The Company operates in three segments: Energy, Lifting, and Other Industrial.

The Company competes in the world material handling equipment industry via the Lifting segment, which had revenues of \$777 million and employed 3,080 in 2011. Among other goods, the segment produces a wide range of lifting products. These items are sold primarily in the US and Europe.

The Lifting segment's operations include those of Acco Material Handling Solutions (York, Pennsylvania), a wholly owned subsidiary that manufactures and sells such lifting products as trolleys, stackers, cranes, hoists, mechanical grabs, and lifters. Among the company's trolleys and hoists are HEAVY-RATED models. Acco Material Handling also makes ACCOLIFT electric chain and hand chain hoists; WRIGHT WAY electric chain hoists; WRIGHT hand-operated hoists;

"In 2011, German material handling industry output totaled \$11.9 billion, representing the largest West European industry and the third biggest in the world, behind only the US and China. Between 2006 and 2011, industry output advanced at a modest 1.4 percent annual rate but nevertheless outpaced the regional average during that span. Growth in recent years has been restrained by competition from suppliers in low-cost foreign countries. However, the industry has nevertheless been able to register gains, in large part because of ..."  
 --Section V, pg. 87



**OTHER STUDIES**

**World Robotics**

This study analyzes the world market for automatically controlled, reprogrammable, multipurpose manipulators used in industrial automation, and for semi- or fully autonomous machines that perform nonmanufacturing services. The study presents historical demand data (2001, 2006, 2011) and forecasts for 2016 and 2021 by robot type (industrial, service), market (e.g., electrical/electronics, automotive), world region and major country. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2876 ..... August 2012 ..... \$6100

**World Elevators**

Global elevator and escalator equipment and services demand is forecast to rise 6.4 percent yearly through 2015 to \$90 billion. China will solidify its spot as the largest elevator market and remain the top escalator market. The best prospects exist for energy-efficient elevators, in-home elevators and machine room-less (MRL) elevators. This study analyzes the \$66 billion world elevator industry, with forecasts for 2015 and 2020 by product, service, market, world region and for 16 countries. The study also evaluates company market share and profiles industry players.

#2832 ..... January 2012 ..... \$5900

**Industrial Controls in China**

Demand for industrial controls in China is projected to rise 13.6 percent annually through 2015 to 259 billion yuan. Advanced control products will continue to rise faster than conventional controls. Electrical and electronic equipment will be the fastest growing market, supported in part by the increasing penetration of industrial controls in this segment. This study analyzes the 137 billion yuan industrial controls industry in China, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry participants.

#2817 ..... December 2011 ..... \$5400

**Welding Equipment & Consumables**

US demand for welding equipment and consumables will rise 6.4 percent annually through 2015. Arc and resistance welding systems will remain the dominant welding techniques. Welding electrodes and filler metal will remain the dominant consumables, while emergent products like flux-and metal-cored electrodes grow the fastest. This study analyzes the \$5.2 billion US welding equipment and consumables industry, with forecasts for 2015 and 2020 by technology, product and market. The study also evaluates company market share and profiles industry players.

#2785 ..... October 2011 ..... \$4900

**Pallets**

US demand for pallets is forecast to rise 6.1 percent annually through 2015. Pallets made from wood -- primarily lumber -- will continue to account for nearly 95 percent of demand, while plastic and metal pallets grow at double-digit rates. New pallet demand will outpace the dominant refurbished pallet segment. This study analyzes the 967 million unit US pallet industry, with forecasts for 2015 and 2020 by material, product, market and region. The study also evaluates company market share and profiles industry competitors.

#2766 ..... May 2011 ..... \$4800

**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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