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World Elevators

Industry Study with Forecasts for **2017 & 2022**

Study #3113 | December 2013 | \$6100 | 362 pages

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Even though growth in the Chinese market will slow, it will still generate nearly one-half of new growth worldwide, with India, Brazil and Turkey also contributing to global advances.

World demand to rise 5.6% annually through 2017

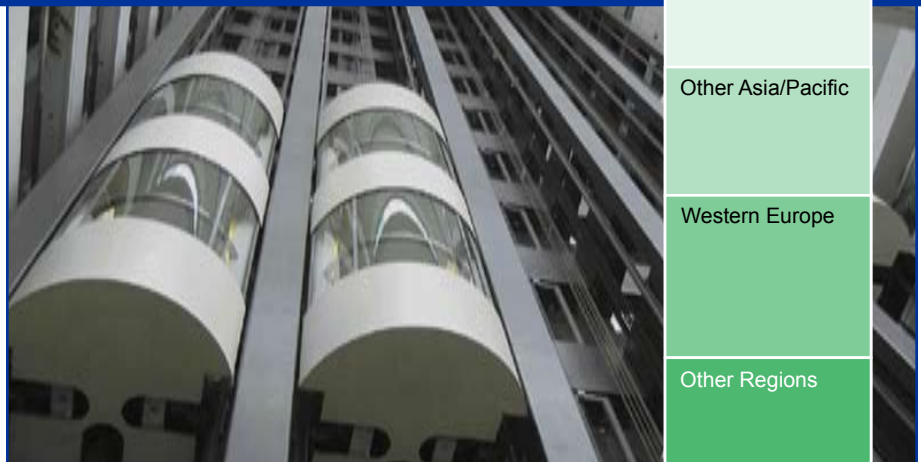
Global demand for elevator equipment (including elevators, escalators and moving walkways, and associated parts) and services is projected to rise 5.6 percent annually to \$111 billion in 2017. Growth will decelerate from the pace of the 2007-2012 period, when gains were driven by explosive growth of more than 25 percent per year in China. Even though the Chinese market will cool from that breakneck pace, it will still generate nearly one-half of the growth in the market between 2012 and 2017.

Other developing markets that will contribute to global advances through 2017 include India, which will add 50 million urban residents and per capita GDP increases that will outpace the global average. Central and South America is expected to see above average increases, led by Brazil, the region's largest elevator market. The Africa/Mideast region is also expected to experience strong growth, though much of the expansion will be confined to Turkey and high income urban areas in the Middle East.

Equipment demand to outpace services

Growth in US demand for elevator services will outpace that in most developed countries, as the market recovers from a low 2012 base. Increases in Japan and Western Europe will

World Elevator Equipment & Services Demand, 2017 (\$111 billion)



mark a significant improvement from the marginal growth in the 2007-2012 period. However, growth in developed regions will trail that in the developing regions.

In 2007, global demand for elevator services exceeded demand for equipment. However, 2012 marked a significant change in the global market, as demand for equipment exceeded services demand, driven by strong growth in new unit installations in the developing world. That trend is expected to continue through 2017, as the large number of new units will not need as many costly repairs as aging stock, and safety codes may be less strictly enforced in developing markets.

In 2012, the Chinese passenger and freight elevator market made up over half of global demand by value, and even more on a unit basis. Through 2017, China's share of the world market will decline slightly from that in 2012.

Energy efficient equipment to increase penetration

Globally, there will be an emphasis on installation of energy efficient elevators, escalators, and moving walkways. Manufacturers have introduced new technologies and improved existing ones to boost energy efficiency. Space and energy saving machine room-less (MRL) elevators will continue to increase their penetration of the global elevator market.

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Sample Text, Table & Chart

ASIA/PACIFIC

Demand for new passenger and freight elevators in China is projected to increase through 2017 to 2022. The growth is driven by strong growth in construction, though the elevator installation market is expected to decelerate in the near term.

**SAMPLE
TEXT**

One key factor in the elevator market is investment in public areas, including and subway lines. For example, Beijing, Chengdu, and Lanzhou announced plans in 2013 for major subway projects that will be completed by 2020. Virtually all major elevator companies have secured contracts to provide elevators to major construction projects in China in recent years. For example, in June 2013 Otis Elevator announced it will provide the elevators in Goldin Finance 117 in Tianjin, a skyscraper is expected to reach 597 meters and become the second tallest building in China upon completion in 2016. The project will entail the supply of 255 elevators and escalators. Among those units, Otis will supply 50 double-deck elevators to conserve space and energy by reducing the number of elevator shafts required in the building, and all elevators will feature a regenerative drive system that will also help to conserve energy. Goldin Finance 117 is just one of many tall buildings expected to be completed in China by 2017.

In May 2013, KONE won an order to supply 41 elevator and escalators to the Ningtian Intercity Rail Line in Nanjing, China. The metro line will have 17 stations and is expected to open in July 2015. The KONE TRANSITMASTER escalators will be powered by the KONE DRIVE, which helps to minimize energy consumption in buildings.

Schindler has also secured several major projects in China, including the Century Link Plaza in Shanghai, a project that consists of two towers.

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TABLE VI-4

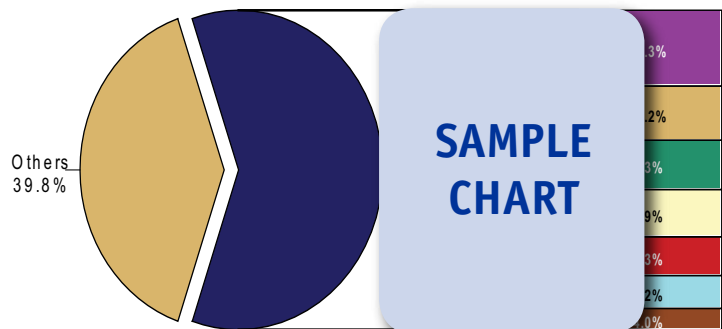
CHINA: ELEVATOR SUPPLY & DEMAND
(million dollars)

Item	2002	2007	2012	2017	2022
Gross Domestic Product (bil 2011\$)	4,000	5,000	6,000	7,000	8,000
\$ GDP/capita	4,000	5,000	6,000	7,000	8,000
Population (mil persons)	1,200	1,300	1,400	1,500	1,600
% urban	40	50	60	70	80
Urban Population (mil persons)	480	650	840	1,050	1,280
\$ elevators/000\$ GDP	0.0001	0.0001	0.0001	0.0001	0.0001
\$ elevators/urban capita	0.0001	0.0001	0.0001	0.0001	0.0001
Elevator Equipment/Services Demand	100	150	200	250	300
% equipment	10	15	20	25	30
Elevator Equipment Demand	100	150	200	250	300
- imports	0	0	0	0	0
+ exports	0	0	0	0	0
Elevator Equipment Shipments	2013	2013	2013	2013	2013

**SAMPLE
TABLE**

CHART VIII-1

WORLD ELEVATOR MARKET SHARE
(\$84.4 billion, 2012)

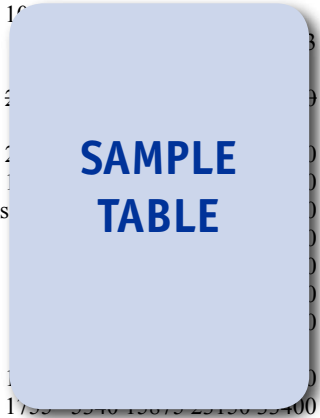


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-5
CHINA: ELEVATOR DEMAND BY TYPE & MARKET
 (million dollars)

Item	2002	2007	2012	2017	2022
Building Construction (bil 2011\$)	488	1000	1500	2000	2500
\$ elevators/000\$ construction					
Elevator Equipment/Services Demand					
By Type:					
Equipment					
Passenger/Freight Elevators					
Escalators & Moving Walkways					
Other Equipment & Parts					
Services					
Installation					
Modernization & Repair					
By Market:					
Residential					
Nonresidential					



COMPANY PROFILES

Imem Ascensores SL
 C/Adarzo 167B
 Penacastillo
 39011 Santander, Cantabria
 Spain
 34-942-34-60-
<http://www.imem.com>

Annual Sales:
 Employment:
 Key Products:

SAMPLE PROFILE

Imem Ascensores designs, manufactures, installs, and services elevators throughout Spain. The Company is privately held.

The Company competes in the world elevator industry via the manufacture of passenger and freight elevators. Additionally, Imem Ascensores markets elevator components and provides various installation, maintenance, modernization, and repair services. Passenger elevators from the Company are suitable for installation in residential buildings, offices complexes, hotels, public institutions, retailers and department stores, and railway stations. Specific products include the SILENS-PRO product line, in addition to HYDROADVANCE, hydraulic, observation, and home models. Among Imem Ascensores' SILENS-PRO elevators are the following: SILENS-PRO TOP machine room-less (MRL) types, which feature maximum load capacities between 300 and 630 kilograms (kg) and vertical travel capabilities up to 60 meters; SILENS-PRO COMPACT elevators that can travel at speeds up to one meter per second (mps) for use in residential buildings; SILENS-PRO VANGUARD elevators, which feature a maximum load capacity up to 1,275 kg and travel speeds ranging from 1 to 1.6 mps for

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STUDY COVERAGE

This Freedonia study, **World Elevators**, offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for supply and demand, as well as demand by product, service, market, world region, and for 18 countries. The study also details market environment factors, evaluates company market share and profiles 41 key competitors in the global industry.

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OTHER STUDIES

World Mining Equipment

Global demand for mining machinery is forecast to expand 8.6 percent per year through 2017 to \$135 billion. The Asia/Pacific region and Central and South America will be the fastest growing markets. Metals mining equipment will remain the largest product segment and will see the most rapid gains in demand. This study analyzes the \$89.5 billion world mining equipment industry, with forecasts for 2017 and 2022 by market, product, world region, and for 29 countries. The study also evaluates company market share and profiles industry competitors.

#3107 January 2014 \$6300

World Siding (Cladding)

The global siding market is projected to rise 5.1 percent annually to 5.7 billion square meters in 2017, valued at \$89 billion. North America will be the fastest growing regional market, while the Asia/Pacific region will remain dominant. Masonry and concrete will remain the most popular siding products. This study analyzes the 4.4 billion square meter world siding industry, with forecasts for 2017 and 2022 by product, market, world region and for 36 countries. The study also evaluates company market share and profiles industry players.

#3101 November 2013 \$6300

World Housing

World construction of new housing units will rise 3.3 percent per annum to 60.9 million units in 2017. Over 80 percent of global new housing construction will take place in the Asia/Pacific and Africa/Mideast regions, while North America and Western Europe will have the highest rates of growth. This study analyzes the two billion unit world housing industry, with forecasts for 2017 and 2022 by housing type, world region, and for 22 countries. The study also considers market environment factors such as world economic trends, demographics, and housing construction.

#3087 October 2013 \$5700

World Construction Machinery

Global demand for construction machinery will rise 6.0 percent per year to \$189 billion in 2017. Gains will be fueled primarily by the Asia/Pacific region, particularly China, as construction spending on infrastructure and other projects continues to increase. Excavators and loaders will record the fastest sales growth. This study analyzes the \$141.5 billion world construction machinery industry, with forecasts for 2017 and 2022 by product, world region, and for 33 countries. The study also evaluates company market share and profiles industry participants.

#3041 July 2013 \$6300

Construction Outlook in China

Construction expenditures in China are expected to rise 8.5 percent per annum in real terms through 2017. Nonbuilding construction of transportation infrastructure and utility projects will see the fastest growth. The Central-East region will remain the largest market while the Northwest region will grow the fastest. This study analyzes the 13.3 trillion yuan construction industry in China, with forecasts for 2017 and 2022 by market, application, and geographic region. The study also evaluates company market share and profiles industry participants.

#3035 July 2013 \$5300

About The Freedonia Group

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