World Forestry Equipment

Industry Study with Forecasts for **2019 & 2024**

Study #3270 | June 2015 | $6300 | 371 pages

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UNITED STATES & CANADA

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OTHER REGIONS

INDUSTRY STRUCTURE

World Forestry Equipment

Industry Study with Forecasts for ***2019 & 2024***

Gains will be driven by new engine emissions standards in the EU and US, raising average equipment prices, as well as by the ongoing mechanization of forestry operations in developing regions.

World demand to rise 4.5% annually through 2019

World demand for forestry equipment (including both purpose-built and converted machinery) is forecast to climb 4.5 percent annually to $9.3 billion in 2019. This will represent a moderation from the 2009-2014 pace of increase, a period during which market gains were spurred by a rebound in roundwood production from lows posted during the 2009 global recession, as well as by the institution of new engine emissions standards in the European Union (EU) and US, raising average equipment prices and total spending. Sales advances will be driven in part by the ongoing mechanization of forestry operations in developing regions.

World Forestry Equipment Demand, 2019
($9.3 billion)

High-value machinery to pace developed markets

In mature, developed world markets, an acceleration in economic growth and a generally favorable fixed investment climate will support product demand as forestry companies work to reduce their operating costs and increase output through the use of technologically sophisticated, high-value machinery. Additional government regulatory actions are also likely to bolster sales of new, higher priced units engineered to meet these requirements. In deflated, constant dollar terms, forestry equipment demand will rise at a 2.3 percent annual rate through 2019, marginally faster than growth in industrial roundwood output.

US to see most gains

The US and Canada together represent the largest geographic market for forestry equipment, accounting for one-third of global product demand in 2014. Western Europe is the second largest market, with a 23 percent share of all equipment sales in 2014, followed by the Asia/Pacific region, Eastern Europe, Latin America, and the Africa/Mideast region. The US will record the largest increases of any forestry equipment market in dollar terms through 2019, supported by a pickup in economic activity and construction expenditures, a healthy capital spending environment, and growth in roundwood output. Brazil, a considerably smaller but still sizable forestry machinery market, will register larger increases in percentage terms, averaging 6.5 percent per year through 2019. A number of smaller national markets -- including New Zealand, Poland, Finland, and Indonesia -- will also post above-average demand gains. On a regional basis, Latin America and Eastern Europe will record the fastest sales increases in percentage terms. Western Europe will register the weakest market advances, restricted by the already high mechanization rates in Sweden and Finland, the largest national forestry machinery markets in the region. However, lower mechanization levels in other parts of Western Europe will provide some impetus to growth in product demand through 2019.

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Sample Text, Table & Chart

TABLE VI-4

CHINA: FORESTRY EQUIPMENT DEMAND BY TYPE (million dollars)

Item	2004	2009	2014	2019	2024
Forestry Equipment Demand					
Felling Equipment:					
Chainsaws					
Harvesters					
Feller Bunchers & Other					
Extracting Equipment:					
Forwarders					
Skidders					
Other					
On-Site Processing Equipment:					
Chippers & Grinders					
Delimbers, Slashers, & Other					
Other Forestry Equipment:					
Loaders					
Mulchers & All Other					
Separately Sold Parts & Attachments:					
Saw Chain/Guide Bars/Blades/Teeth					
Harvesting & Other Cutting Heads					
Other Parts & Attachments					
% China					
Asia/Pacific Forestry Equipment Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

OTHER REGIONS

Poland: Forestry Equipment Supply & Demand forestry equipment in Poland totaled $110 million in 2014, a for 11 percent of all product demand regionwide. The nation intensive user of forestry equipment, when measured against wood output, than Russia, reflecting the lower level of forest mechanization in Poland. Between 2009 and 2014, product the country climbed 4.1 percent annually, well below the Eas average, due to the subpar gains registered in roundwood out this span.

Poland has an extremely small forestry equipment manu industry. In 2014, product shipments were only $30 million, nation had a trade deficit equivalent to 73 percent of domesti Among the products manufactured in Poland are crane-equip trailers and replacement parts. Key foreign sources of loggin ery supply include China, Germany, Sweden, and the US.

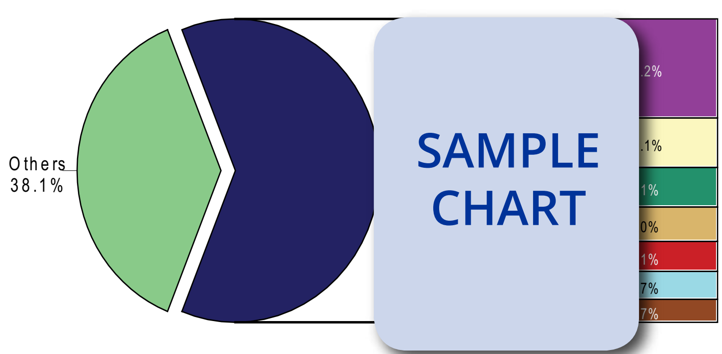
Shipments of forestry equipment from plants in Poland are forecast to expand ... million in 2019, moderating from the 2009-... estic demand. Output increases will be sp... arket growth. Nevertheless, most of the equ... be imported because of the nation's limited ma... d the size of Poland's trade deficit will rise.

SAMPLE TEXT

FAO FAR and Ośrodek Techniki Leśnej w Jarocinie are sentative locally headquartered forestry equipment producer (Finland) also assembles forestry cranes in Stargard Szczeci number of other foreign equipment manufacturers -- includi Sweden, Logset, Ponsse, Rottne Industri, and STIHL -- mai sales and service operations.

CHART VIII-2

WORLD FORESTRY EQUIPMENT MARKET SHARE, 2014 ($7.4 billion)



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Sample Profile & Table, & Study Coverage

TABLE V-3

SWEDEN: FORESTRY EQUIPMENT SUPPLY & DEMAND
(million dollars)

Item	2004	2009	2014	2019	2024
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2013$)					
m^3 roundwood produced/mil $ GDP					
Roundwood Production (mil m^3)					
$ forestry equip/m^3 roundwood					
Forestry Equipment Demand					
net exports					
Forestry Equipment Shipments					
% Sweden					
Western Europe Forestry Equipment Shpts					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

COMPANY PROFILES

Eco Log Sweden AB
Norra Hamngatan 41
826 22 Söderh
Sweden
46-270-42-95
http://www.ec

Annual Sales:
Employment:

Key Products: ders

SAMPLE PROFILE

Eco Log Sweden is a manufacturer of harvesters, harvesting heads, and forwarders for forestry applications. The Company is privately held.

The Company's harvesters are primarily sold through the D series and feature pendulum arms that enable the harvesters to work in almost any terrain. One representative model is the 560D BLUE, which is intended for thinning and light harvesting applications. Another harvester is the 688 STEEPHUNTER model, an eight-wheeled harvester equipped with a double implement pump circuit to maximize hydraulic flow and enable the crane to operate simultaneously with the harvesting head.

Harvesting heads include LOG MAX products intended for installation on all types of carriers. Eco Log Sweden's forwarders, which are also available through the D series, feature extendable bunks that can create a loading surface of up to 6.1 square meters.

Manufacturing activities for Eco Log Sweden are conducted at a 12,730-square-meter plant at the Company's Söderhamn, Sweden

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STUDY COVERAGE

This Freedonia study, ***World Forestry Equipment***, presents historical data (2004, 2009, 2014) plus forecasts (2019, 2024) for supply and demand, as well as demand by type, in 6 regions and 15 countries. The study also considers key market environment factors, examines the industry structure, evaluates company market share and profiles 38 industry competitors worldwide.

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Related Studies

Drilling Products & Services

US demand for oil and gas drilling products and services is forecast to increase to $71 billion in 2019, reflecting average annual gains of 3.0 percent. Services will remain the dominant segment while fluids will grow the fastest. The Eastern and Western US will be the fastest growing regional markets. This study analyzes the $60.8 billion US drilling product and service industry, with forecasts for 2019 and 2024 by product and service for four regional markets and 17 state markets. The study also evaluates company market share and profiles industry players.

#3286..................June 2015.....................$5300

World Construction Machinery

World demand for construction machinery is forecast to advance 3.9 percent annually through 2019 to $218 billion. China will be the fastest growing national market and surpass the US as the largest. Demand for excavators and loaders will advance at the fastest pace, fueled by rising construction and surface mining activity. This study analyzes the $180 billion world construction machinery industry, with forecasts for 2019 and 2024 by product for six world regions and 23 major countries. The study also evaluates company market share and profiles industry participants.

#3282..................June 2015.....................$6500

World Power Tools

Global power tool demand will rise 4.8 percent per year through 2018 to $32.9 billion. The US will remain the largest market, while China and India remain the fastest growing. Cordless electric tools will outpace the larger corded power tool segment. The dominant professional market will outpace consumer demand. This study analyzes the $26 billion world power tool industry, with forecasts for 2018 and 2023 by product, electric power source, market, world region, and for 25 countries. The study also evaluates company market share and profiles industry participants.

#3241...............January 2015..................$6500

World Material Handling Products

Global material handling product demand will rise 5.0 percent annually through 2018 to $142 billion. India and China will grow the fastest as material handling products supply growing manufacturing and distribution activity. Automated storage and retrieval systems and automated guided vehicles will grow the fastest. This study analyzes the $111 billion world material handling product industry, with forecasts for 2018 and 2023 by product, market, world region, and for 29 countries. This study also evaluates company market share and profiles industry participants.

#3196........... September 2014...............$6400

World Agricultural Equipment

Global demand for agricultural equipment will rise 6.9 percent yearly through 2018 to $208 billion. China will be the fastest growing market, followed by Turkey, Brazil, Thailand, India and South Africa. Tractors will remain the largest equipment segment, while harvesting machinery will exhibit the most rapid growth in demand. This study analyzes the $149 billion world agricultural equipment industry, with forecasts for 2018 and 2023 by type, world region, and for 28 countries. The study also evaluates company market share and profiles industry players.

#3166...................July 2014.....................$6300

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