



Global and China Forklift Industry Report, 2013

Sep. 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

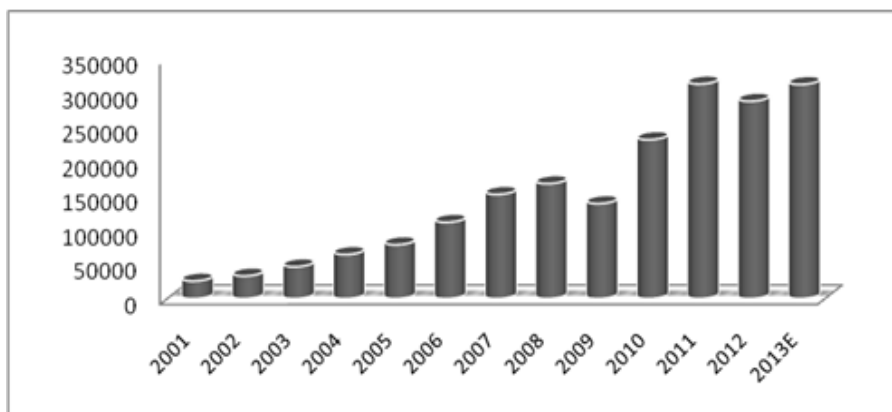
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In 2012, the economy of China entered a stage for transition. As a result, the forklift industry failed to sustain the growth momentum in the preceding two years, with the annual sales volume decreasing by 8.0% year-on-year to 288,662 sets.

In H1 2013, China's forklift sales volume hit 165,366 sets, up 8.3% compared with that in 2012. The estimation shows that China forklift market will see continuing slow growth in the second half year with the targeted sales volume all the year round picking up to the level of 2011.

Total Forklift Sales Volume in China, 2001-2013



Source: CITA; ResearchInChina Global and China Forklift Industry Report, 2013

Among forklift products, electric forklifts have witnessed an impressive surge in terms of market occupancy, thanks to the call for energy saving and emission reduction. In 2012, the market share of electric forklift was 27.7%, up 1.2 percentage points over the preceding year and up 7.2 percentage points over 2005. In the future, China electric forklift industry is expected to sustain buoyant development, contributing to: a) comparing to Europe's 75% and US' 60%, China electric forklift occupies relatively small market share; b) China has mastered advanced electric forklift technologies.

When it comes to industrial players, China forklift market has grouped into several camps. The first camp refers to two leading forklift giants, i.e., Anhui Forklift Truck Group and Hangcha Group Co.,Ltd. with their sales volume in 2012 holding a share of 46.8%, up 2.4 percentage points over the previous year.

The second refers to large engineering machinery enterprises including Xiamen XGMA Machinery Co.,Ltd., Guangxi LiuGong Machinery Co., Ltd, Lonking (Shanghai) Forklift Co., Ltd., Shandong Shantui Machinery Co., Ltd. and Sunward Equipment Group. In 2012, Lonking (Shanghai) Forklift Co., Ltd. and Guangxi LiuGong Machinery Co., Ltd joined the ranks of top 20 forklift companies worldwide.

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The third camp refers to foreign brands including Toyota Industrial Corp, Linde Group, Jungheinrich Group, Hyster, Mitsubishi and NICHYU. In 2012, Linde (dominated by top-grade products) and Baoli (targeting mid-and low-range products) under Kion Group collectively made up 7% market share in Chinese forklift market, taking the first place among the foreign brands.

In order to meet the robust demand for high-end forklifts in the whole Asian-Pacific market, especially the Chinese market, Jungheinrich Group built a new plant in China covering an area of 60,000 sq meters. On Aug.8, 2013, the new plant was formally open, specializing in the development and production of walking-type electric trucks, counterbalanced forklifts and reach forklifts.

The fourth refers to newcomers such as Sino-American-Zhejiang Maximal Forklift Co.,Ltd., Zhejiang Goodsense Forklift, Chery, etc. In 2012, Sino-American-Zhejiang Maximal Forklift Co.,Ltd. ascended to the one among the top three forklift enterprises by export, and joined the ranks of the top 20 players in global forklift industry for the first time.

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