

Global and China Forklift Industry Report, 2014-2016

Oct.2014

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

A forklift is a tool that is most widely used to move or lift materials in logistics industry. After a short span of adjustment in 2012, the global forklift industry rebounded in 2013, with the orders exceeding 1 million units for the first time. Moreover, the sales volume surpassed the highest level before the financial crisis. This was mainly attributed to the factors including further development of logistics industry and growth in demand for machinery substituting for manual work.

As the world's largest forklift consumer market, China saw a forklift sales volume of 329,000 units in 2013, up 13.9% from a year earlier, accounting for 33.2% of the global total. Among them, the exported forklifts amounted to 113,000 units, up 15.3% year on year, reaching a record high. In future, China's forklift industry will maintain steady growth. It is projected that by 2015 the forklift sales volume will exceed 400,000 units, and the exports are very likely to approach 150,000 units.

Forklifts primarily fall into two categories: electric forklift and internal combustion forklift (mainly petrol and diesel-powered). Due to the problems of petrol and diesel-powered internal combustion forklifts such as exhaust emissions and noise pollution, electric forklifts have long been widely used in the United States and some European countries, with the market share in Europe close to 80%, nearly 60% in the Americas, but less than 30% in China.

In addition to vigorous development of electric forklifts, new-energy forklifts like natural gas, lithium battery, liquefied petroleum gas, and fuel cell have captured extensive attention and found wide applications over recent years. At present, the companies such as Hyster-Yale, Toyota Industrial Corp, Linde Material Handling, Jungheinrich Group, Anhui Heli, and BYD have launched energy-saving and environmentally friendly forklifts.

Abstract

Global and China Forklift Industry Report, 2014-2016 released by ResearchInChina mainly focuses on the followings:

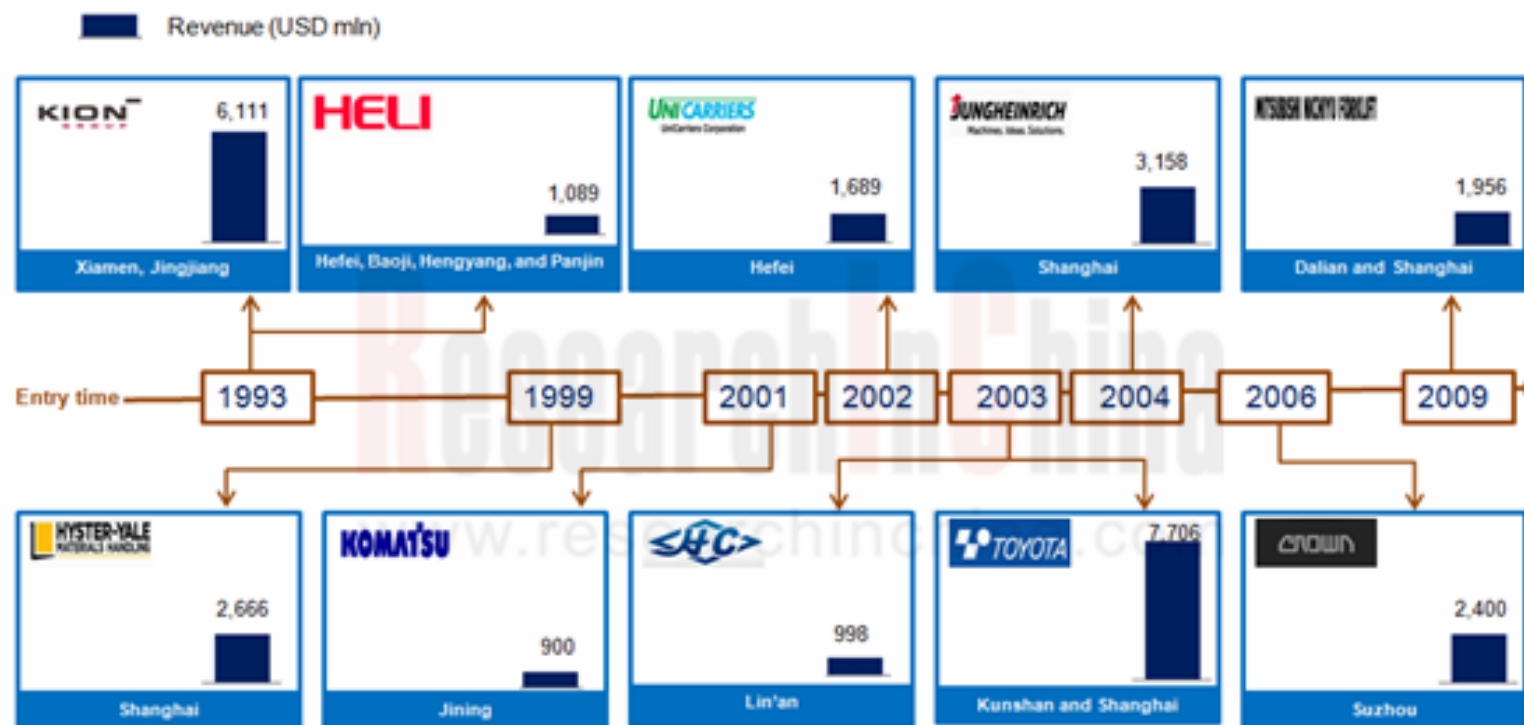
- ❑ Market status of global forklifts, development of major countries, as well as top 20 global enterprises, etc.;
- ❑ Production, sales, and import & export of forklifts in China;
- ❑ Market status and key enterprises in electric and internal combustion forklifts in China;
- ❑ Product, regional, and corporate structure of forklifts in China;
- ❑ Operation and forklift business of top 10 global and 21 Chinese enterprises;
- ❑ Development trend and prospects of China's forklift industry.

For a long time, Toyota Industrial Corp, Kion Group, Jungheinrich Group, Hyster-Yale, and Crown Equipment Corp. have been among the top 5 global forklift enterprises, and this ranking remained unchanged in 2013. In April 2013, Mitsubishi merged with Nichiyu's Forklift Segment, which made the new joint venture—Mitsubishi Nichiyu Forklift rank sixth in global forklift industry. Meanwhile, that was followed by UniCarriers jointly established by TCM and Nissan as the 7th player. These enterprises all have set up forklift production bases in China.

Then what came the 8th and 9th were Anhui Forklift and Hangcha Group, the two largest forklift companies in China. In 2013, the forklift sales volume of the two companies accounted for 47% of the total in China, holding an absolutely leading position. In October 2014, Hangcha Group announced its proposed listing in Shanghai Stock Exchange, with the funds raised mainly into 50,000 units/a Complete Electric Industrial Vehicle and Frame Project, 200 units/a container forklift project, and 800 units/a Intelligent Industrial Vehicle R&D and Manufacturing Project, etc..

In addition, the enterprises like Lonking (Shanghai) Forklift and Guangxi LiuGong Machinery had ranked among the top 20 global forklift enterprises. In April 2014, Guangxi LiuGong Machinery founded the second forklift company—Shandong Liugong Forklift Co., Ltd. (the other: Shanghai Liugong Forklift Co., Ltd.).

Top10 Global Forklift Manufacturers' Revenue and Production Bases in China, 2013



Source: Global and China Forklift Industry Report, 2014-2016 compiled by ResearchInChina

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