

Off-Highway RESEARCH



THE SPECIALISTS IN GLOBAL CONSTRUCTION EQUIPMENT RESEARCH

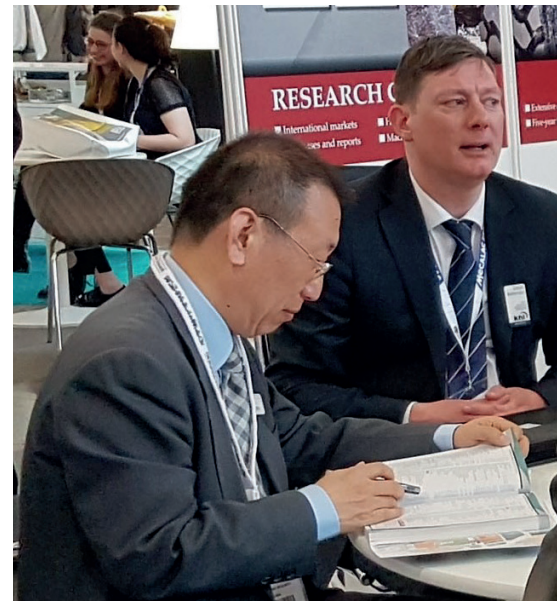
Researched and written by experts
Respected worldwide for quality and accuracy

ABOUT OFF-HIGHWAY RESEARCH

Off-Highway Research is a management consultancy specialising in the research and analysis of international construction and agricultural equipment markets, and is the largest of its kind in the world. Formed in 1981 as a division of the Economist Intelligence Unit (EIU), the business is now part of KHL Group, the world's leading supplier of international construction information.

Off-Highway Research offers unrivalled international research expertise to the construction, earthmoving, mining, industrial and agricultural equipment industries.

This specialist capability, offered by offices in China, Germany, India, Japan, the UK and USA, is available to clients through reports and databases - usually accessed as part of an annual subscription - private client research and face-to-face briefings, consultations and presentations. The company is staffed by industry specialists with a wide range of sectoral, language, analytical and consultancy skills.





WHAT MAKES US DIFFERENT?

Off-Highway Research conducts primary research and gathers information through thousands of face-to-face interviews each year. This meticulous approach, carried out by our in-house industry experts, helps ensure the accuracy and high quality of the information we provide.

Over the last five years, Off-Highway Research has provided its services to over 800 clients in more than 40 countries.

WHAT DO WE OFFER?

- National and international information
- Extensive equipment coverage
- High level to highly granular information
- Expert analysis and insights
- Confidential private research
- From face-to-face briefings to company-wide presentations
- Databases and reports
- Historic sales and production data
- Forecasts
- Machine population estimates
- Off-the-shelf and bespoke solutions

We are a specialist consultancy staffed by industry experts with decades of experience

DATABASE SERVICES

Off-Highway Research's databases of equipment sales and production allow detailed market analysis. The services can be tailored to a variety of needs and budgets, with applications ranging from market sizing products, to sophisticated tools for market share, machine population and trend analysis.

AVAILABILITY & FEATURES

- Intuitive and flexible web-based database
- Offline PC software download
- Built-in chart creation
- Export data from any search direct to Excel
- CSV file for Pivot Tables

GLOBAL VOLUME & VALUE SERVICE

Annual sales in unit and US Dollar terms by product type in 19 major countries plus the rest of the world

GLOBAL VOLUME & VALUE SERVICE PLUS

PLUS Service includes up to six size classes per product for more granular analysis

APPLICATIONS INCLUDE:

- Market sizing and forecasting in unit and Dollar terms
- Estimate machine populations
- Market sizing and population estimates by size class with the PLUS Service
- Use forecasts to inform your strategic planning process



All databases include
five-year sales forecasts



■ INTERNATIONAL DATABASE SERVICE

Western Europe, North America & Japan

■ CHINESE DATABASE SERVICE

■ INDIAN DATABASE SERVICE

■ CUSTOM DATABASES

Sales and production by year, by company, by product

Decades of historic data

APPLICATIONS INCLUDE:

- Market sizing and forecasting in unit terms
- Analyse market shares and market share trends
- Competitor analysis
- Estimate machine populations by manufacturer
- Use production data to identify component supply opportunities
- Custom databases provide a cost-effective, zero waste solution for niche manufacturers and nationally active companies such as dealers and distributors
- Use forecasts to inform your strategic planning process

THE BENEFITS OF USING OFF-HIGHWAY RESEARCH DATABASES

- Understand the market size and potential for your products
- Understand your market position
- Identify market opportunities for machine sales and/or component supply
- Target investment to growth areas
- Inform product development strategy
- Gain a competitive advantage
- Plan for profitable growth



REPORT SERVICES

Off-Highway Research's Chinese, European and Indian Services provide detailed analysis of equipment markets and major manufacturers. An annual subscription also provides access to monthly **market reports**, including the **annual review**, providing timely insights into industry news and events, as well as access to an extensive library of regularly updated **equipment analyses**, **company profiles** and **country analyses** in the case of the European Service.



REPORT TYPE	CHINESE SERVICE	EUROPEAN SERVICE	INDIAN SERVICE
MARKET REPORTS	✓	✓	✓
ANNUAL REVIEWS	✓	✓	✓
EQUIPMENT ANALYSIS	✓	✓	✓
COMPANY PROFILES	✓	✓	✓
COUNTRY REPORTS		✓	

All reports include historic data, market analysis and five-year forecasts



We believe these services provide the most comprehensive, in-depth and accurate information available. Reports include expert discussion of market trends and dynamics along with forecasts where relevant. Our full library includes almost 200 titles, with more than 10,000 pages of data, analysis and discussion. Off-Highway Research reports include embedded Excel data tables, which can be easily downloaded for further analysis and integration into clients' in-house analytical tools.

Clients usually access reports on a 12-month subscription basis, but individual titles can also be bought separately. Subscriptions to just the monthly market reports can also be arranged as a cost-effective alternative to a full subscription.

■ CHINESE SERVICE

■ INDIAN SERVICE

■ EUROPEAN SERVICE

- | | | |
|-----------|---------------|------------------|
| ■ Austria | ■ Greece | ■ Spain |
| ■ Belgium | ■ Ireland | ■ Sweden |
| ■ Denmark | ■ Italy | ■ Switzerland |
| ■ Finland | ■ Netherlands | ■ United Kingdom |
| ■ France | ■ Norway | |
| ■ Germany | ■ Portugal | |

THE BENEFITS OF USING OFF-HIGHWAY RESEARCH REPORTS

- Gain insights from our team of industry experts
- Early identification of market trends and opportunities
- Use data and analysis to make informed strategic decisions
- Gain a competitive edge
- Understand your market position
- Inform product development programmes
- Evaluate the success of your strategies
- Help plan for profitable growth
- Understand customer needs and demands



SPECIAL REPORTS

Off-Highway Research regularly publishes in-depth studies which cover topics outside those of our subscription services. These special reports are developed following extensive field research and are regarded as the most comprehensive and wide-ranging studies available on their subject.

Our special reports either focus on the construction equipment industry in a specific country, or provide insights into an equipment market on either a global or regional level. Typically country-specific coverage includes market size and trends, market shares, equipment production data, component sourcing information, distribution arrangements and distributor profiles, manufacturer profiles and machines available. Country-specific Special Reports cover up to 18 equipment types, as appropriate to the individual market.



The most comprehensive and wide-ranging studies on their subject

NATIONAL MARKETS

PREVIOUS STUDIES INCLUDE:

- Indonesia
- Iran
- Malaysia
- Mongolia
- Myanmar
- Nepal
- Philippines
- Poland
- Saudi Arabia
- South Africa
- South Korea
- Sri Lanka
- Thailand
- Turkey
- Vietnam

EQUIPMENT STUDIES

PREVIOUS STUDIES INCLUDE:

- Diesel engines – Global
- Diesel engines – India
- Hydraulic excavators – Global
- Mobile cranes – Global
- Powered access – China
- Wheeled loaders – Global

TOPICAL REPORTS

PREVIOUS REPORTS INCLUDE:

- Impact of Brexit

OFF-HIGHWAY RESEARCH SPECIAL REPORTS

- Benefit from the most detailed and rigorous studies available
- Identify market trends and opportunities
- Use data and analysis to make informed strategic decisions
- Identify potential manufacturing and distribution partners
- Gain a competitive edge
- Understand your market position
- Inform product development programmes
- Evaluate the success of your strategies
- Plan for profitable growth
- Understand customer needs and demands



PRIVATE CLIENT RESEARCH

Clients who need insights into issues outside the scope of Off-Highway Research's standard reports and services often turn to us to commission bespoke private and confidential research. By leveraging our global industry expertise and many decades of research experience they are able to gain unique insights based on an individually tailored brief.

EXAMPLES OF PRIVATE RESEARCH AND CONSULTANCY PROJECTS INCLUDE:

- Market research and analysis
- Market feasibility studies
- End-user surveys
- Planning and marketing strategy studies
- Diversification and acquisition studies
- Identifying manufacturing and distribution partners
- Studies into market size and potential for specific machines, components and consumables
- Market potential for new products and variants
- The market for leases and financial products
- The relationship between OEMs and their suppliers and distributors
- Component sourcing strategies
- The viability of equipment rental in specific markets



THE BENEFITS OF BESPOKE RESEARCH

- Tailor research to your requirements
- Gain a competitive advantage from 'your eyes only' findings
- Gain insights into a specific issue or aspect of the industry
- Leverage Off-Highway Research's expertise and experience
- Benefit from unbiased and independent insights

Enquiring about Private Client Research is risk-free – there is no charge for a proposal



OFF-HIGHWAY RESEARCH CLIENTS

EQUIPMENT MANUFACTURERS

- Ashok Leyland
- Atlas Copco
- Ausa
- Belaz
- Bell Equipment
- Beml
- Bomag
- Case
- Caterpillar
- CNH
- Deere
- Doosan
- Dynapac
- Escorts
- Furukawa
- Hanix
- Hiab
- Hidromek
- Hitachi
- Hyundai
- JCB
- JLG
- Kato Works
- Kawasaki
- Kobelco
- Komatsu
- Kubota
- Liebherr
- Liugong
- Ljungby
- Mahindra & Mahindra
- Manitou
- Manitowoc
- Merlo
- Moxy
- Sany
- Shantui
- Steyr
- Sumitomo Heavy Industries
- Sunward
- Tadano

- Terex
- Terra
- TIL
- Valtra
- Volvo
- Wacker Neuson
- Wirtgen
- XCMG
- Xiagong
- Yanmar

COMPONENT SUPPLIERS

- Allison Transmission
- Berco
- Bergstrom
- BKT
- Bonfiglioli
- Borg Warner
- Bosal-Sekura
- Bosch Rexroth
- Brueninghaus Hydromatic
- Brevini
- Bridgestone
- Carlisle
- Commercial Vehicle Group
- Carraro
- Comer
- Comoplast Solideal
- Continental
- Corning
- Cummins
- Dalmine
- Dana
- Danfoss
- Delphi
- Denison Hydraulics
- Deutz
- Donaldson
- Dunlop
- Eaton
- Esco

- Fina
- Foton
- Fritzmeier
- Gates Rubber
- GKN
- Goetze
- Goodyear
- Grammer
- Graziano
- Haldex
- Husco
- Hyco
- HydraForce
- Italtractor
- KAB Seating
- Kayaba
- Kirloskar
- Lemmerz
- Lombardini
- Lubrizol
- Mann & Hummel
- Meritor
- Metalogenia
- Michelin
- Mobil
- Nabtesco
- Oerlikon Graziano
- Parker
- Perkins Engines
- Poclain Hydraulics
- Rolls Royce
- Sauer Danfoss
- Sears Seating
- Shell
- SIAC
- Siemens
- SKF
- Soosan
- SSAB
- ST Kinetics
- Tata Steel
- TC Industries
- Thyssen Krupp
- Topcon

- Trimble
- Total
- Wipro
- ZF

FINANCIAL INSTITUTIONS

- ABN AMRO
- Bank of America
- Bernstein
- BMO Capital
- BNP Paribas
- Citigroup
- Credit Suisse
- De Lage Landen
- Deloitte
- Deutsche Bank
- Evercore ISI
- GE Capital
- Glenview
- Goldman Sachs
- JP Morgan
- KPMG
- Merrill Lynch
- Mizuho Bank
- Nomura Securities
- Sanwa Bank
- SREI
- Sumitomo Mitsui Banking

DISTRIBUTION & RENTAL COMPANIES

- Bakheet
- Dozco
- Finning
- Geveke
- Gmmco
- Hertz Equipment
- Itochu
- Kanematsu
- Kanoo
- Loxam

- Marubeni
- Mitsubishi
- Mitsui
- Olayan
- Robert Aebi
- Terra
- TIL
- Zeppelin

TRADE ASSOCIATIONS, EXHIBITION AND CONFERENCE ORGANISORS, & OTHERS

- AEM (US)
- Bauma
- British Army
- British Fluid Power Association
- CCMA (China)
- CECE (EU)
- Construction Equipment Association (UK)
- Department of Trade & Industry (UK)
- DLR (France)
- Duxes (China)
- European Commission
- Financial Times
- ICEMA (India)
- Imer (Turkey)
- Intermat
- IronPlanet
- Jetro
- National Fluid Power Association (US)
- Ritchie Bros
- VDMA (Germany)

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