Off-Highway Research

The Specialists in Global Construction Equipment Research

Researched and written by experts

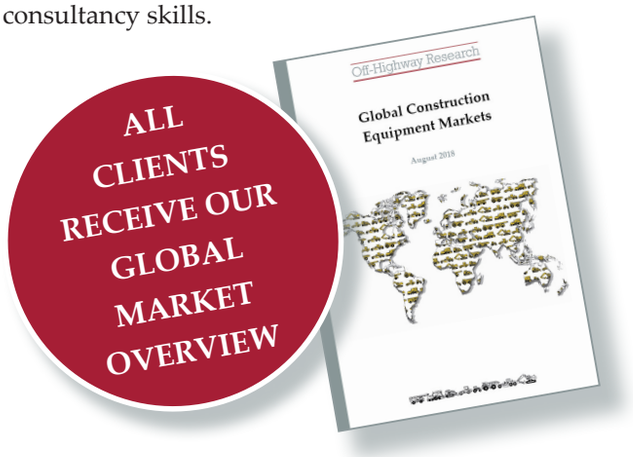
Respected worldwide for quality and accuracy

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 an unrivalled level of international research expertise to the construction, earthmoving, mining, industrial and agricultural equipment industries.

This specialist capability, offered by offices in China, Europe, India, Japan and the USA, is available through a combination of subscription services and private research in the form of reports and databases. 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 helps ensure the accuracy and high quality of the information we provide to our clients.

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

OFF-HIGHWAY RESEARCH OFFERS

- International coverage
- Databases and reports
- Historic sales and production data
- Machine population estimates
- Extensive equipment coverage
- Five-year forecasts
- Expert analysis and insights
- Bespoke private research

www.offhighwayresearch.com

For further information please contact:

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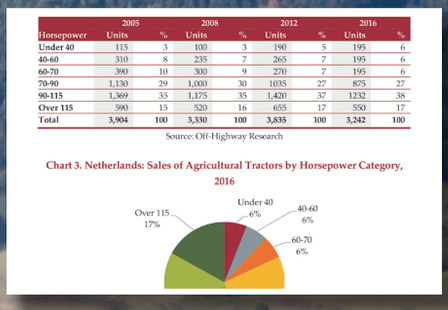
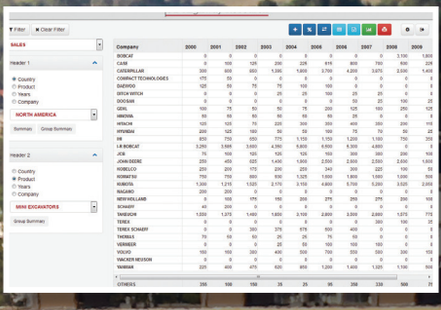


Horsepower	2005 Units	%	2008 Units	%	2012 Units	%	2016 Units	%
Under 40	115	3	100	3	190	5	195	6
40-60	310	8	235	7	265	7	195	6
60-70	390	10	300	9	270	7	195	6
70-90	1,130	29	1,000	30	1035	27	875	27
90-115	1,369	35	1,175	35	1,420	37	1232	38
Over 115	590	15	520	16	655	17	550	17
Total	3,904	100	3,330	100	3,835	100	3,242	100

Source: Off-Highway Research

Chart 3. Netherlands: Sales of Agricultural Tractors by Horsepower Category, 2016



EUROPEAN, CHINESE AND INDIAN SERVICES

Off-Highway Research's Chinese, European and Indian Services provide detailed analysis of equipment markets and major manufacturers. An annual subscription provides access to monthly Market Reports, providing timely insights into industry news and events, as well as regularly updated Equipment Analyses, Company Profiles and Country Analyses in the case of the European Service.

We believe these services deliver the most comprehensive, in-depth and accurate analysis available, providing clients with unrivalled insights. As well as containing historical data, relevant reports include five-year forecasts and expert discussion of market trends and dynamics.

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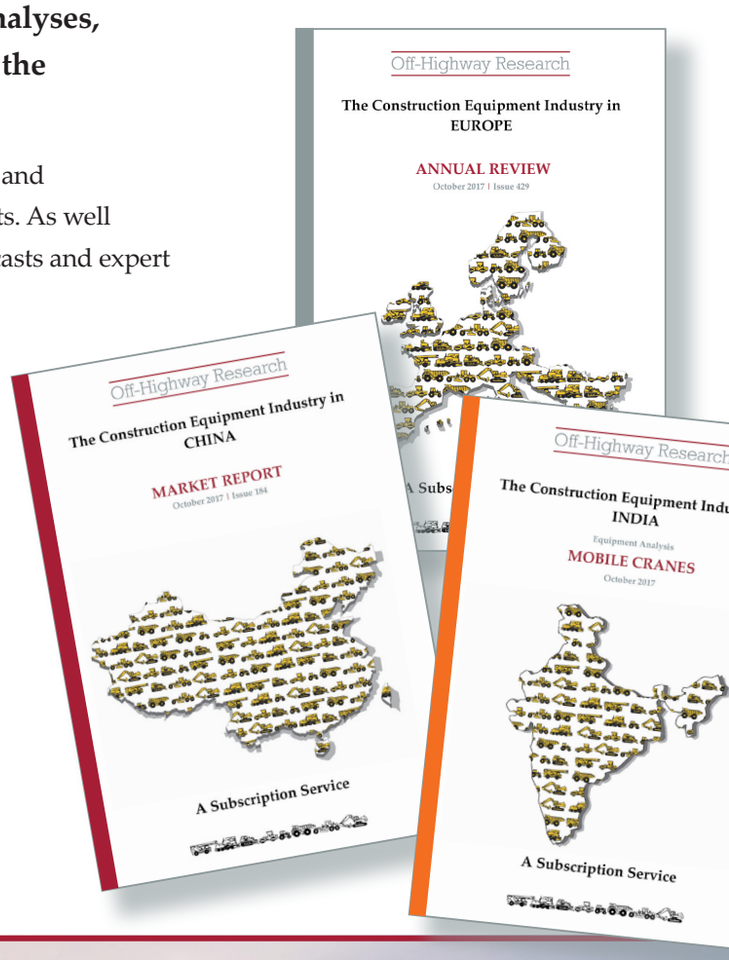
Our reports include embedded Excel data tables, which can be easily downloaded for further analysis and integration into clients' in-house analytical tools.

Clients usually access reports on a 12-month subscription basis, but individual titles can also be bought separately.



Report type	Chinese Service	European Service	Indian Service
Market Reports	✔	✔	✔
Annual Reviews	✔	✔	✔
Equipment Analysis	✔	✔	✔
Company Profiles	✔	✔	✔
Country Reports		✔	

ANNUAL SUBSCRIPTIONS

CHINESE SERVICE

INDIAN SERVICE

EUROPEAN SERVICE

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

ALL REPORTS INCLUDE HISTORIC DATA, MARKET ANALYSIS AND FIVE-YEAR FORECASTS

THE BENEFITS OF USING OFF-HIGHWAY RESEARCH REPORTS

- 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

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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.

Coverage typically 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.

EMERGING MARKETS

PREVIOUS STUDIES INCLUDE:

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

EQUIPMENT SECTORS

PREVIOUS STUDIES INCLUDE:

- Diesel Engines – India
- Hydraulic Excavators – Global
- Mobile Cranes – Global
- Powered Access – China
- Wheeled Loaders – Global

TOPICAL STUDIES

PREVIOUS STUDIES INCLUDE:

- Impact of Brexit

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- Early identification of market trends and opportunities
- Use data and analysis to make informed strategic decisions
- Gain a competitive edge
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DATABASE SERVICES

Off-Highway Research's interactive Database Services facilitate unique statistical analysis of equipment markets. 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 and machine population analysis.

Available online system or as a PC software download for offline working, Off-Highway Research's database platforms are powerful analytical tools in their own right. However, they also allow straightforward data export to Excel, allowing easy integration of information with other sources and clients' own in-house systems.

INTERNATIONAL – EUROPE, JAPAN & NORTH AMERICA

CHINESE

INDIAN

SINGLE EUROPEAN COUNTRIES

Sales and production by company and product with 15-35 years of historical data, depending on country

APPLICATIONS INCLUDE:

- Market sizing and forecasting in unit terms
- Analyse market shares and market share trends
- Use production data to identify component supply opportunities
- Estimate machine populations by manufacturer

ALL DATABASE SERVICES INCLUDE FIVE-YEAR SALES FORECASTS

GLOBAL VOLUME AND VALUE SERVICE

Market size in unit and US Dollar terms by product type, by 19 major countries plus the rest of the world

APPLICATIONS INCLUDE:

- Market sizing and forecasting in unit and Dollar terms
- Estimate total machine populations

GLOBAL VOLUME AND VALUE SERVICE PLUS

All the information from the Global Volume and Value Service further broken down by up to six weight categories for each product

EXTRA INFORMATION

- The PLUS service offers 524 data points per year, compared to 224 in the standard service

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
- Help plan for profitable growth

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PRIVATE CLIENT RESEARCH

REPORT

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
- Financial 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 OEMs and their distributors
- Component sourcing strategies
- The viability of equipment rental in specific markets

ENQUIRING ABOUT PRIVATE CLIENT RESEARCH IS RISK-FREE - THERE IS NO CHARGE FOR A PROPOSAL

THE BENEFITS OF USING BESPOKE RESEARCH

- Tailor research to your requirements
- Confidentiality – 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

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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
- Mitsui
- Mizuho Bank
- Morgan Stanley
- 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)
- Imder (Turkey)
- Intermat
- IronPlanet
- Jetro
- National Fluid Power Association (US)
- Ritchie Bros
- VDMA (Germany)

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