

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 specialist forecasting and market research consultancy focussing on international construction and agricultural equipment markets. 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 thanks to its team of expert researchers based in strategic markets throughout Europe, Asia and the Americas.

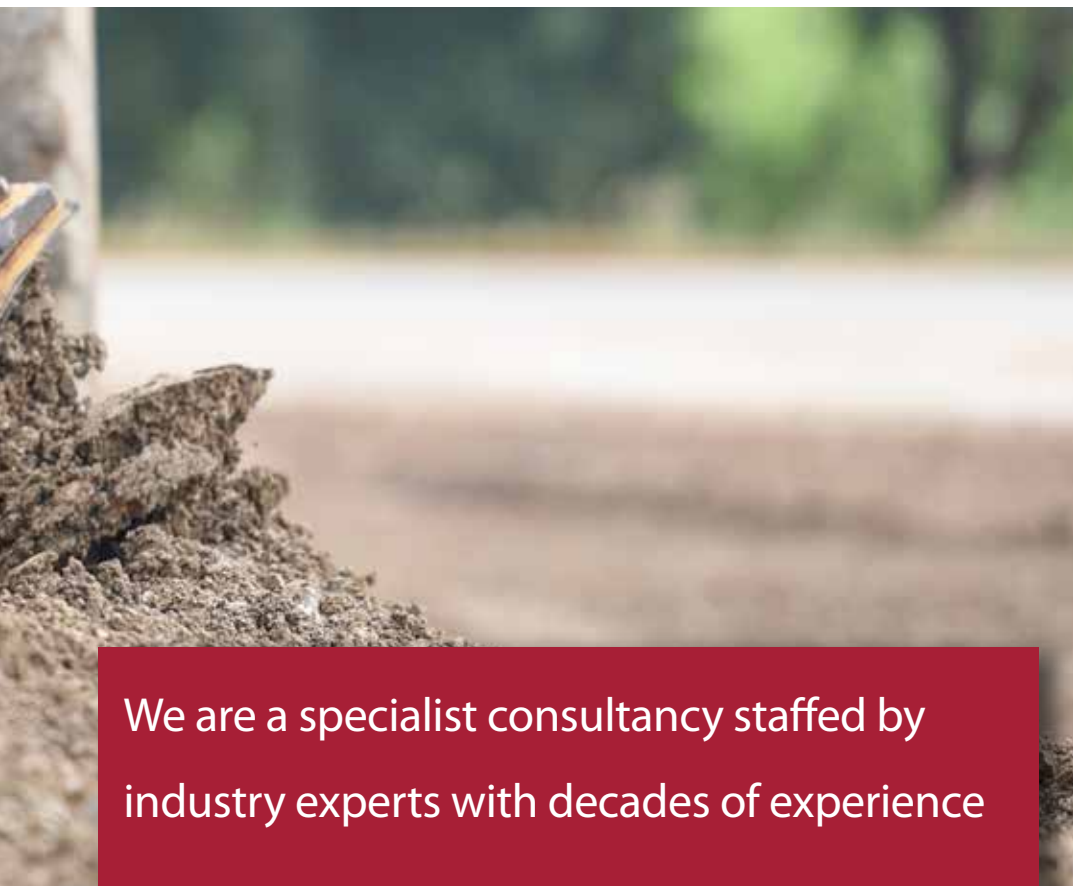
This detailed specialist knowledge is available to clients through reports and databases – usually accessed as part of an annual subscription – private client research, conferences & briefings, consultancies and presentations. The company is staffed by industry specialists with a wide range of sectoral, 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 research, carried out by our in-house team of industry experts, helps ensure the accuracy and high quality of the information we provide.



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

WHAT DO WE OFFER?

- Off-the-shelf and bespoke solutions
- National and international information
- Extensive equipment coverage
- High level to highly granular information
- Expert analysis and insights
- Confidential private research
- Bespoke company briefings & consultations
- Conferences, events & webinars
- Databases and reports
- Historic sales and production data
- Forecasts
- Machine population estimates
- Insights into the equipment distribution segment

For further information please contact:

mail@offhighwayresearch.com

DATABASE SERVICES

Our databases are an invaluable resource for a wide range of research and forecasting tasks. 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, buying pattern and trend analysis.

AVAILABILITY & FEATURES

- Intuitive and flexible web-based database
- PC App for offline working
- Export data from any search direct to Excel
- Download CSV file for Pivot Table and Power BI applications

GEOGRAPHIC COVERAGE

Detailed country-by-country data on the most important markets

PRODUCT COVERAGE

Datasets cover 16-18 product types (depending on geography) comprising the most important off-highway machine types for earthmoving, road building and materials handling

DATASETS AVAILABLE

We offer a variety of datasets for different insights and applications. These include:

- Total sales (market size) by product, country and year in units and US\$
- Sales and production (market share) by individual OEM, product, country and year in units
- Sales by customer type, product and year in units and US\$

All datasets feature decades of historic information and a five-year forecast



All product databases include
five-year sales forecasts

APPLICATIONS INCLUDE:

- Market sizing and forecasting in unit and Dollar terms
- Identify key industry trends with decades’ worth of historic data
- Analyse market shares and market share trends
- Competitor analysis
- Understand changes in buying patterns with Customer Group data
- Estimate machine populations - either in total for each machine type, or by manufacturer, size class or customer type
- 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 and that of your competitors
- 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, Indian and North American 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	NORTH AMERICAN SERVICE	CHINESE SERVICE	INDIAN SERVICE	EUROPEAN 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 more than 200 titles, with in excess of 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.

**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.

Off-Highway Research uses its Special Report series to focus on significant construction equipment markets and and sub-sectors of the industry. Our country-specific Special Reports provide deep insights into emerging markets with high growth potential , while sectoral studies examine global or regional markets for certain equipment types or sub-sectors of the equipment industry, such as the rental segment.



The most comprehensive and wide-ranging studies on their subject

NATIONAL MARKETS

PREVIOUS STUDIES INCLUDE:

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

EQUIPMENT STUDIES

PREVIOUS STUDIES INCLUDE:

- Hydraulic excavators – Global
- Mobile cranes – Global
- Powered access – China
- Wheeled loaders – Global
- Rental – Global
- Crane rental – Global

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, including product launch strategies
- 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
- 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

EVENTS

Off-Highway Research offers a comprehensive programme of conferences, briefings and webinars providing the latest market information, insights from guest speakers, opportunities for Q&A and, in the case of in-person events, opportunities for industry networking.



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
- Xiangong
- 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
- 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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