

Off-Highway Research

INDUSTRY NEWSLETTER

1ST QUARTER 2018

Special Reports for 2018 announced

Off-Highway Research will publish three new Special Reports in September 2018, focussing on the construction equipment industries in Indonesia and Thailand, and the global wheeled loader segment.

Ranging in length from 150-350 pages, Off-Highway Research's Special Reports are based on extensive field research and are regarded as the most comprehensive and wide-ranging studies available.

Indonesia is by far the largest construction equipment market in South-East Asia, and is also a key manufacturing location for several OEMs. The country's construction equipment industry was last profiled by Off-Highway Research in 2015, a study which revealed a dynamic 12,000-23,000 unit per year market, with local production of some 10,000 excavators, compactors, dozers and dump trucks.

Thailand, which was last the subject of a Special Report in 2014, is also a major regional market and equipment manufacturing hub. Demand for construction equipment has reached as high as 8,000 units per year recently, and the country is also a production centre for dozers, excavators, motor graders and cranes.

Meanwhile global demand for wheeled loaders is currently running at some 135,000 units per year, with a value of more than US\$13 billion.

Off-Highway Research's study on this sector follows on from previous popular reports on the global hydraulic excavator and global mobile crane sectors, which have featured high-level worldwide market analysis, with subsequent chapters looking in-depth at key regional markets and providing profiles of leading manufacturers.

All three Special Reports will be available in September 2018 and can be ordered in advance from www.offhighway-store.com or by contacting mail@offhighway.co.uk



www.offhighway.co.uk



Indian dozer market set for growth



Demand from road construction, mining and government defence spending is expected to drive up crawler dozer sales in India by more than 25 per cent over the next five years. Sales are expected to be a combination of fleet replacement and expansion due to rising activity levels.

Off-Highway Research's latest report on the sector said, "The general atmosphere for the infrastructure development in the country is conducive to growth in construction and mining activities. There is an increased focus by the current government on infrastructure development which is monitoring all projects at the highest level to swiftly remove hindrances. The government is taking continuous initiatives to reform procedures

and policies such as the Real Estate (Regulation and Development) Bill, environment, and forest clearances and land acquisition issues more efficiently."

The dominant force in the Indian dozer market has historically been BEML, the country's sole domestic manufacturer of this type of equipment. However, other suppliers such as Caterpillar and Komatsu have carved out a reasonable market share. The buoyancy of recent years and the strong outlook have encouraged other OEMs to compete, with nine dozer suppliers vying for business last year.

Off-Highway Research's 48-page Equipment Analysis on the Indian crawler dozer industry is now available for subscribers to the Indian Service. It is also available to buy from www.offhighway-store.com.

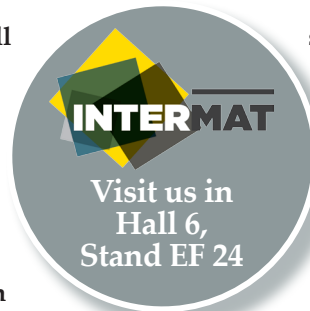
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Visit us at Intermat

Off-Highway Research will exhibit at Intermat in Paris from 23rd-28th April on Stand EF024, Hall 6, as part of the UK Pavilion. It will use the event to present updated forecasts on the global construction equipment industry and launch new market intelligence products.

Among these will be the Global Volume & Value Service PLUS. This will build on the company's existing Global Volume & Value Service, which provides worldwide equipment sales broken down by country and equipment type in unit (Volume) and US Dollar (Value) terms.

The enhanced PLUS Service will go into greater detail, with sales by up to six weight/



size classes per product type, again in unit and Dollar terms. This will provide 524 data points per year, compared to 224 in the standard Service.

This rich pool of information is expected to be of particular interest to clients who require a deeper and more detailed knowledge of international markets.

In addition, both the PLUS and standard Volume & Value Services will be integrated into Off-Highway Research's online database system for ease of use alongside its other data products, the International, Chinese and Indian Database Services. All Off-Highway Research database products include historic figures and five-year forecasts.



Diesel Progress joins the family

Global construction information publisher and owner of Off-Highway Research, KHL Group, has acquired the US-based publisher Diesel & Gas Turbine Publication Group (D>P).

Founded in 1935 and based in Wisconsin, D>P is a leading publisher of information for the on-highway, off-highway, stationary and marine engine-powered equipment markets.

It focuses on the construction and agriculture, power generation and commercial vehicle equipment sectors through its North American magazine *Diesel Progress* and globally through *Diesel Progress International*. A new title, *New Power Progress*, for electrification, hybrids and new engine and powertrain technologies, has recently been successfully launched.

In addition, D>P publishes COMPRESSORtech2 for the gas compression industry, and Diesel & Gas Turbine Worldwide, a highly respected website covering the global



James King (left), Managing Director of KHL Group, with Mike Osenga, President of Diesel & Gas Turbine Publication Group

rail, power generation, marine and oil and gas large horsepower markets.

KHL Group has offices in the UK, USA, Chile, China, India and Turkey. It publishes 12 magazines and offers e-newsletters, exhibitions, conferences, awards and management consultancy services. Its magazines include *International Construction*, *Construction Europe*, *International Cranes and Specialized Transport*, *International Rental News*, *Access International*, *American Cranes & Transport* and *Construction Latin America*.

Language options for Database Services

Off-Highway Research's Databases Services are now available to users in six additional languages besides English – Chinese, French, German, Italian, Japanese and Spanish. These are easily access via a pull-down menu in the top-right of the Database screen.

The language options are available across the full range of Off-Highway Research's databases – The International Database Service, Chinese Database Service and Indian

Database Service, as well as the Global Volume & Value Service, which is now available in our on-line and downloadable database systems for the first time, as well as the brand new Global Volume & Value Service PLUS.

The language option has been added to make use of the databases easier for Off-Highway Research's clients around the world.

More information on Off-Highway Research's Database services are available on www.offhighway.co.uk

Keep up to date with industry news

Off-Highway Research offers a variety of ways for clients and non-clients alike to keep up to date with developments in global equipment markets

WEEKLY NEWS

Visit the News section of www.offhighway.co.uk for the latest developments in global markets

NEWSLETTER

Sign-up for our monthly e-mail news briefing via the Monthly News Briefing section of www.offhighway.co.uk

PRESS CUTTINGS

The Press Cuttings section of www.offhighway.co.uk gives you access to news on our industry from media outlets around the world

SOCIAL MEDIA

Follow us on Twitter - @OHR_Global, join our LinkedIn group, *Global off-highway equipment market news* or subscribe to the Off-Highway Research YouTube channel



Off-Highway Research

The Specialists in Global Construction Equipment Research



Off-Highway Research specialises in the research and analysis of international construction and agricultural equipment markets. Since 1981 clients have leveraged our reports, databases and expertise to understand global markets, identify trends & opportunities, analyse the competitive landscape and grow their businesses profitably.

With an emphasis on primary research and with five offices on three continents, we can provide unrivalled insights to clients anywhere in the world.

For further information contact:
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