

**PORT EQUIPMENT MANUFACTURERS ASSOCIATION**

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**Survey of port handling equipment**

Report and results of surveys conducted between November 2007 and February 2008.

Objective

The objective of the survey was to determine market size for each type of equipment being surveyed, globally and by three broad geographic regions - Asia, Americas and EMEA (Europe Middle East and Africa)

Equipment types

Equipment types covered by the survey are : -

- Reachstackers
- FLT's, in three configurations
- Terminal Tractors
- Terminal Trailers

Other types of port equipment, Ship-to-Shore cranes and RTG's/RMG's are surveyed by, and the results published in, the trade press.

Methodology

All known manufacturers of the equipment types were contacted by e-mail and telephone and asked to participate by giving their companies equipment delivery numbers for 2006 and 2007.

Confidentiality

Contributors to the survey were given an assurance of strict confidentiality. The survey was conducted by Brain Robinson, an independent container and transport industry consultant who signed a confidentiality agreement with PEMA stating that individual company information given to him would not be released to any other party except in fully consolidated form. Furthermore the release of any and all data must comply with criteria established by outside council and all statistics and data will be destroyed within six months of the survey results being released.

Survey distribution

The consolidated survey results will be released to PEMA members and to all contributors to the survey.

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## The survey results

### Reachstackers

11 manufacturers were targeted of which 10 responded and contributed to the survey.

Those contributing data were CVS Ferrari, Fantuzzi Reggiane, Hyster, Indital, Kalmar, Liebherr, Linde, Konecranes, TCM and Terrex PPM

The one company not responding was Luna.

### **Consolidated results – number of units**

	Global	Americas	Asia Pacific	EMEA
2006	<b>1254</b>	<b>216</b>	<b>283</b>	<b>755</b>
2007	<b>1358</b>	<b>214</b>	<b>337</b>	<b>807</b>

It is believed that the totals reported represents more than 95% of the market.

### FLT's

12 manufacturers were targeted of which 8 responded and contributed to the survey, although two said that they were currently not producing FLT equipment.

Those contributing data to the survey were CVS Ferrari, Fantuzzi Reggiane, Hyster, Kalmar, Linde and Konecranes

Two companies, Dalian and Komatsu failed to respond. Whilst TCM contributed data for reachstackers it is believed that they also manufacture FLT's, but attempts to contact the relevant department were not successful.

Two companies, Svetruck and Taylor declined to participate

Manufacturers of FLT's were asked divide deliveries into three categories.

- FLT's for handling laden containers with spreader
- FLT's for handling laded containers with forks
- FLT's for handling empty containers with spreader

Two major manufacturers said that they were not able to track the number of heavy lift trucks that handle containers with forks vs. those with fork-mounted spreaders. The totals for these two categories were therefore combined as 'Heavy Lift Container Handling FLT's'. Numbers for those companies that did report as originally requested were consolidated.

### **Heavy Lift Container Handling FLT's - number of units**

	Global	Americas	Asia Pacific	EMEA
2006	<b>267</b>	<b>97</b>	<b>73</b>	<b>97</b>
2007	<b>254</b>	<b>57</b>	<b>91</b>	<b>106</b>

### **FLT's for handling empty containers - number of units**

	Global	Americas	Asia Pacific	EMEA
2006	<b>606</b>	<b>74</b>	<b>258</b>	<b>274</b>
2007	<b>551</b>	<b>93</b>	<b>214</b>	<b>244</b>

Market intelligence suggests that the total output for all types of FLT's for companies not responding or declining to participate is between 850 and 1000. Taylor, the US manufacturer, makes up a major portion of this and their deliveries are almost exclusively in 'Americas'.

### **Terminal Tractors**

7 manufacturers were targeted of which 5 responded and contributed to the survey.

Those contributing data were CVS Ferrari, MAFI, Terberg and Kalmar Industries.

Those declining to participate were Capacity and MOL.

Capacity delivers almost exclusively to 'Americas' region.

There are only two manufacturers of terminal tractors in North America. One of these declined to participate. The other was prepared to release numbers for 'Americas' excluding North America.

Other suppliers of terminal tractors were requested to adjust their figures accordingly so for this equipment type 'Americas' excludes North America and 'Global' figures should be read accordingly.

### **Terminal Tractors -number of units**

	Global	Americas	Asia Pacific	EMEA
2006	<b>1602</b>	<b>48</b>	<b>270</b>	<b>1284</b>
2007	<b>2207</b>	<b>103</b>	<b>697</b>	<b>1407</b>

### Terminal Trailers

11 manufacturers were targeted of which 7 responded and contributed to the survey. One other manufacturer gave a firm indication of volume, which was included in the survey.

There are two types of terminal trailer,

1. Roll trailers used for container and cargo carrying in terminals and on ro-ro ships
2. Bigger wheeled terminal trailers for use in moving containers around terminals and to and from quay cranes.

The numbers reported by participants are a mix of these types

Those contributing data were Buiscar, Busby International, Houcon, MAFI, Magnum, Novatech and Seacom.

Those not responding were CIMC, Dutch Lanka and Fabrisem.

Gaussin declined to participate.

100% of CIMC Roll Trailer production goes to Cronos, a leasing company. The manufacturer may also produce some terminal trailers, although this could not be verified, and does manufacture road chassis for the US market. Neither of these is included in the survey.

### Manufacturers delivery volumes (in units)

	Global	Americas	Asia Pacific	EMEA
2006	<b>2411</b>	<b>435</b>	<b>34</b>	<b>1942</b>
2007	<b>2348</b>	<b>446</b>	<b>8</b>	<b>1894</b>

It is believed that the volumes reported above represents in excess of 80% of the total market.

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