



Welcome to The Industrial Truck Association 2014 Business Trends Survey

ITA 2014 Annual Meeting
The Banff Springs
Banff Springs, Alberta
Canada



2014 Business Trends Survey Task Group

Steve McDermitt, Crown Equipment
Dave Norton, The Raymond Corporation
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2014 Business Trends Survey

Panel Members

Colin Wilson (NACCO Materials Handling Group)

Tim Quellhorst (Crown Equipment)

Moderator

Aurelio Carinci (GNB Industrial Power)



- **Survey Sections**

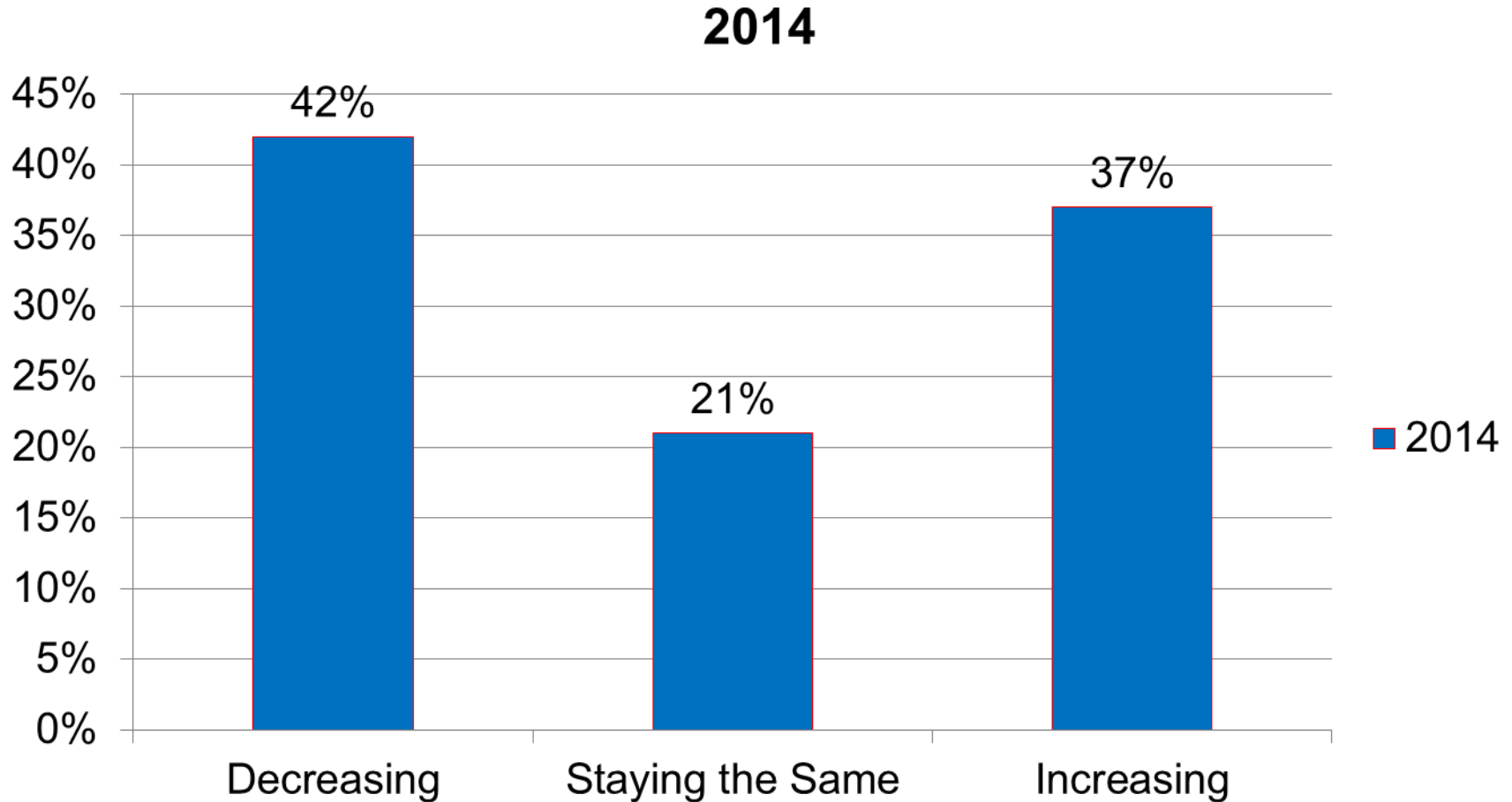
- **Section 1: Markets and Models**
- **Section 2: Procurement Practices**
- **Section 3: Future Technologies and Design Changes**
- ***Each Section is followed by a Qualitative Question specific to that Section***

1. Which global market do you see with the greatest potential for lift truck economic growth in the next three years?

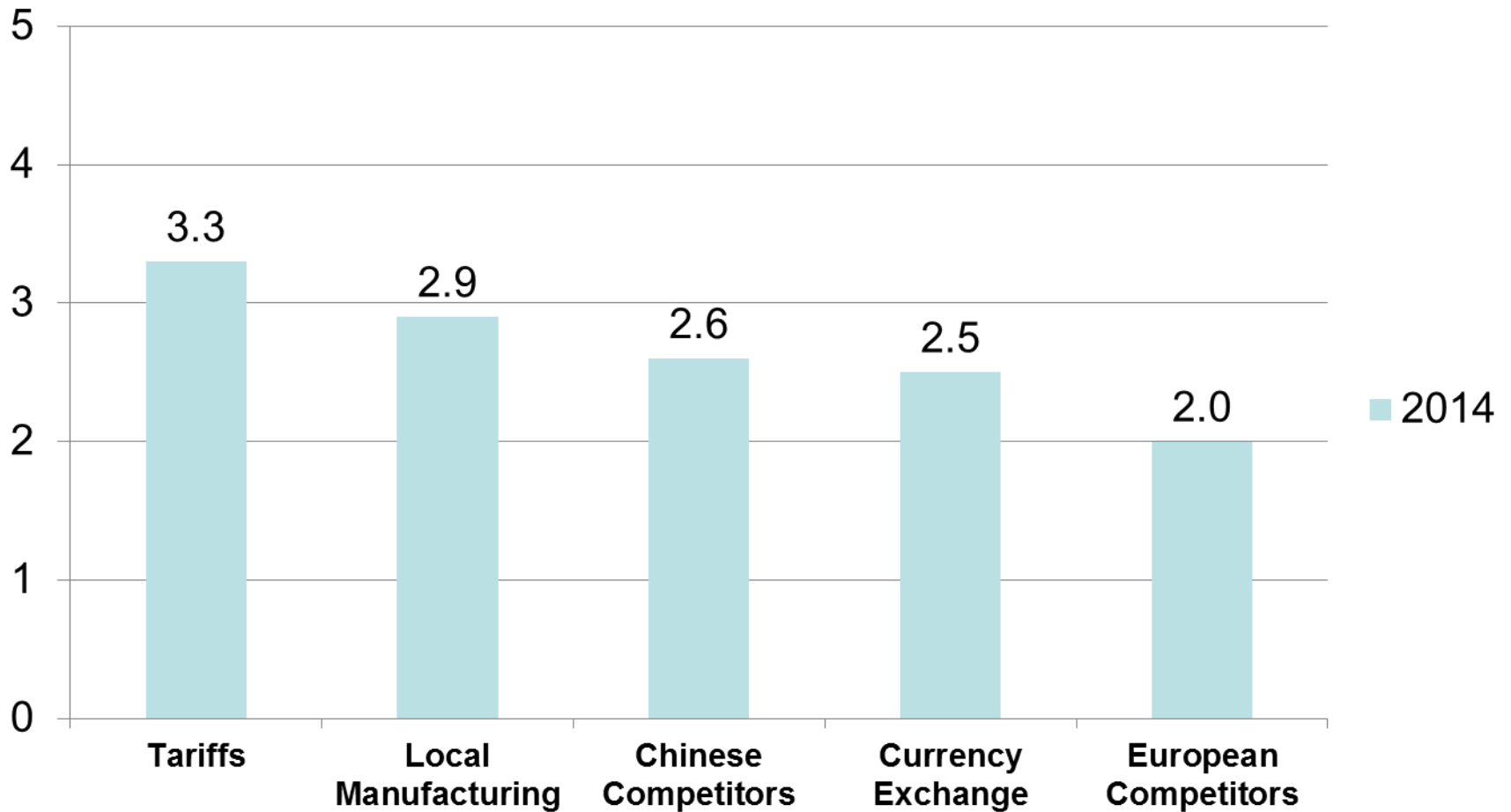
Rank each country listed 1-13. One being the greatest growth.

Country	Ranking 2014	Ranking 2013	Ranking 2012	Ranking 2011
China	1	2	9	1
USA	2	10	3	4
India	3	3	10	N/A
Mexico	4	4	4	N/A
Brazil	5	1	1	2
Rest of Asia	6	7	2	N/A
Rest of South America	7	6	N/A	N/A
Canada	8	9	8	N/A
Western European Countries	9	12	7	6
Eastern European Countries	10	8	5	5
Rest of Central America	11	N/A	N/A	N/A
Africa	12	11	11	3
Russia	13	5	4	N/A

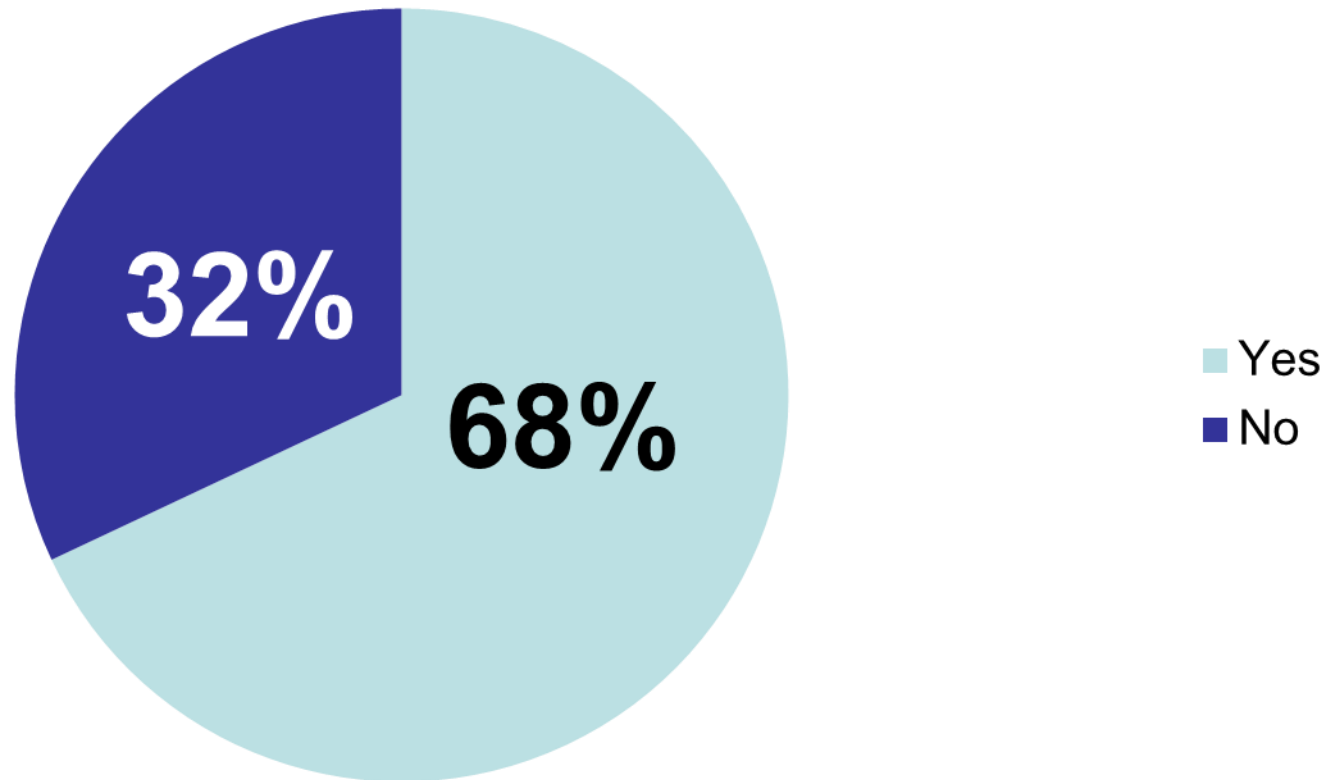
2. In the South American market, do you see US exports increasing, decreasing or staying the same in the next three years



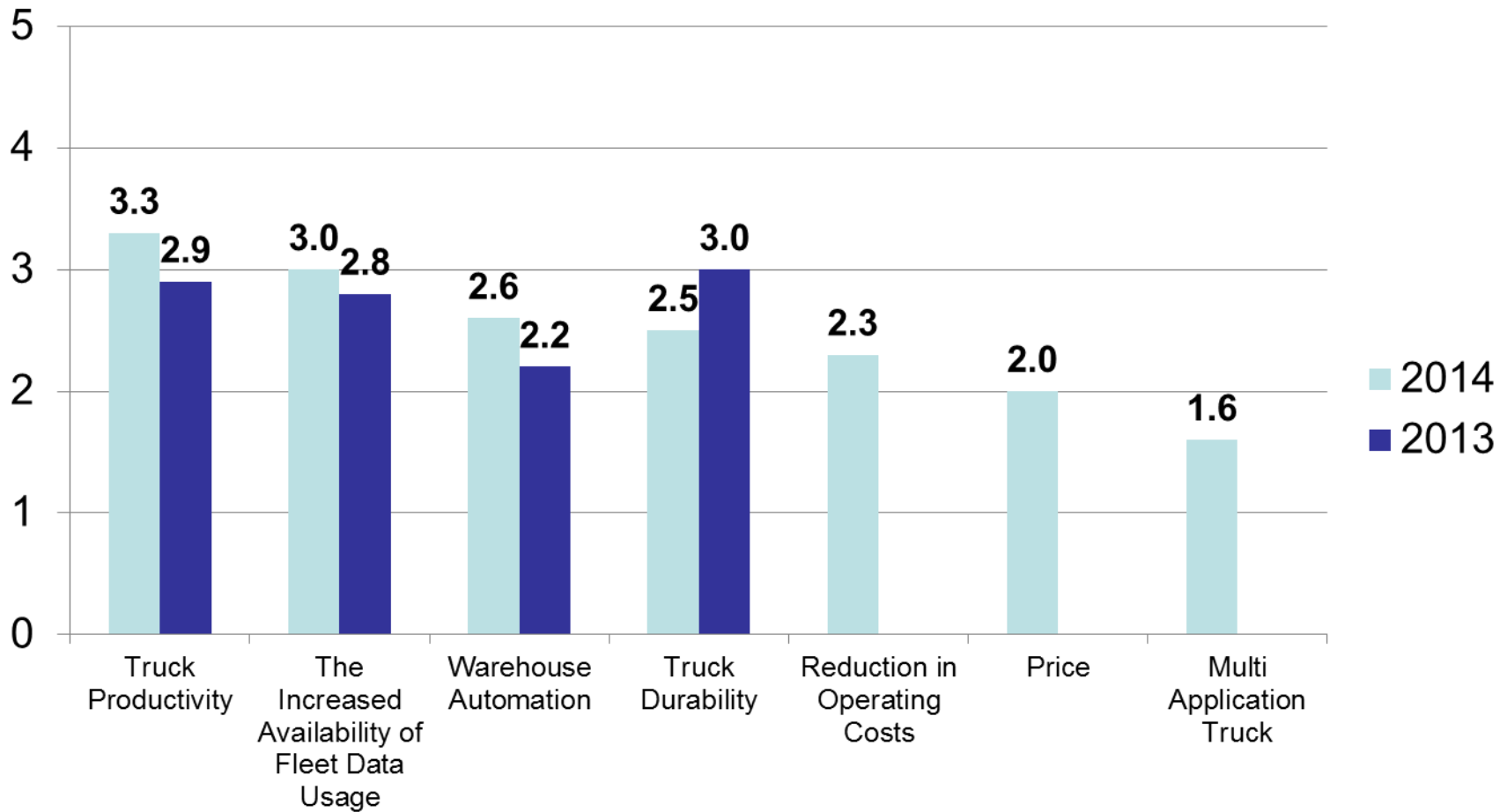
3. On a scale of 1 to 5, with 5 being High Influence and 1 being No Influence, what influences affect US exports to South America?



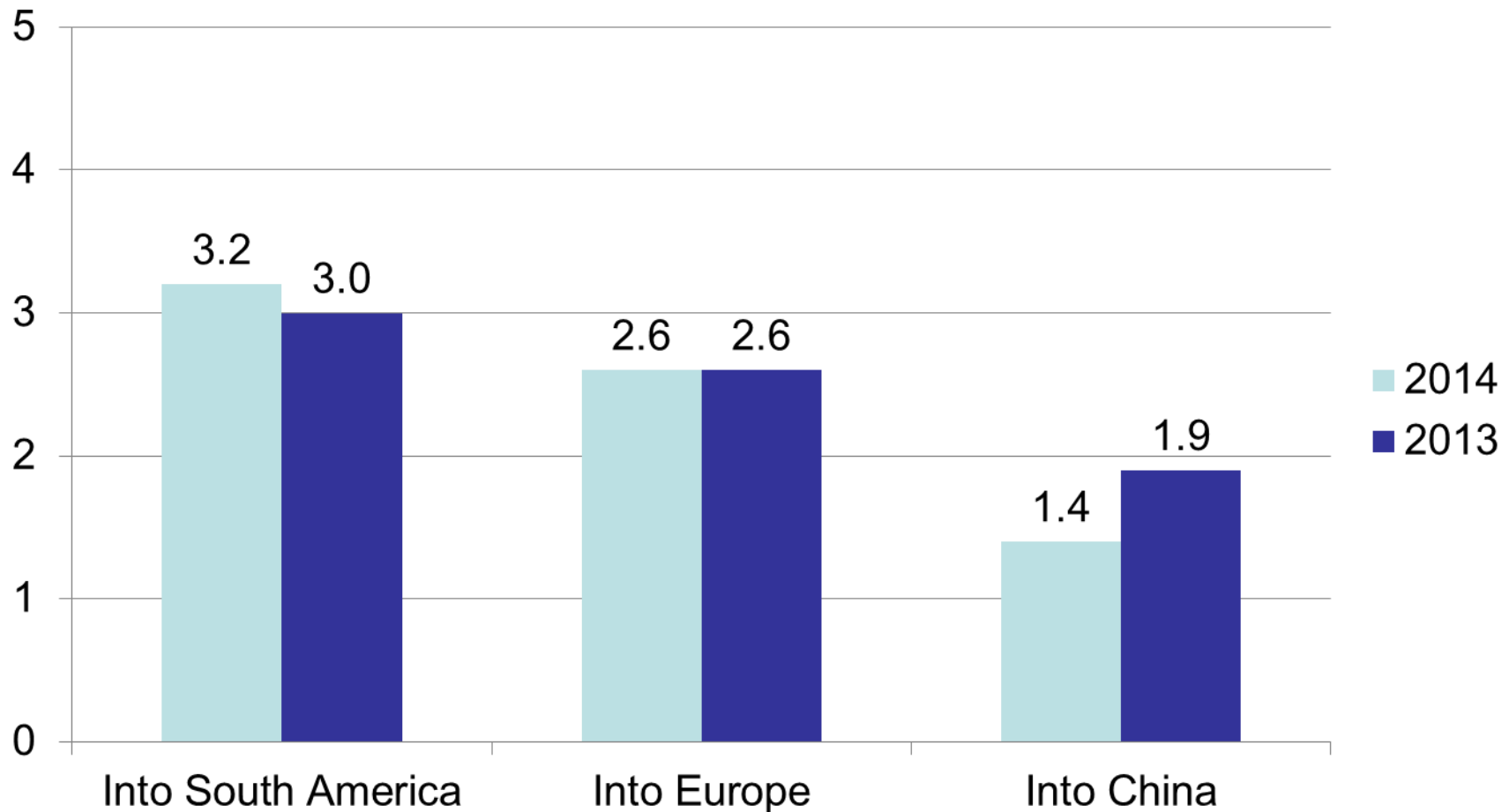
4. Do you see lift truck fleet size being reduced in general?



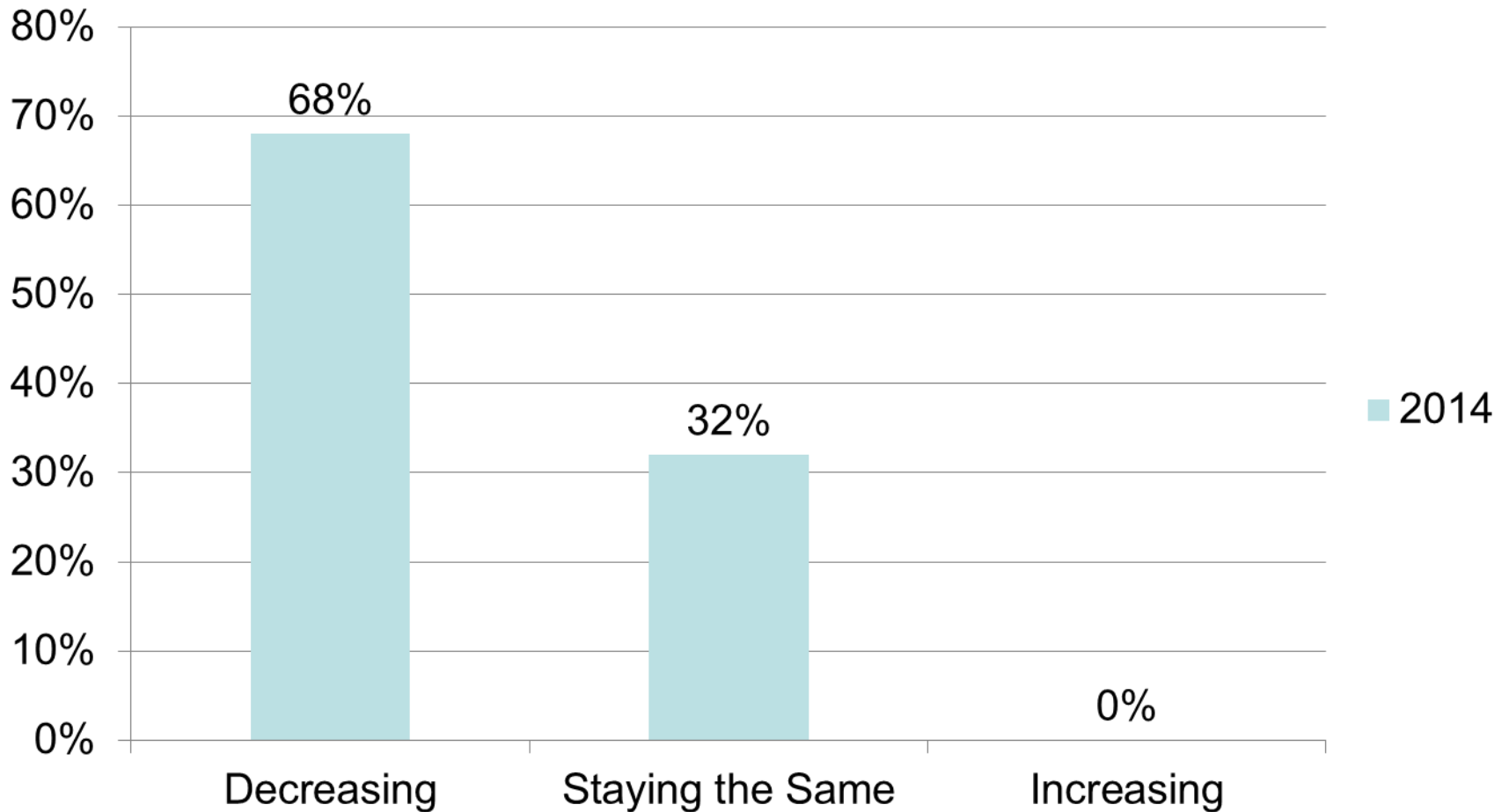
5. On a scale of 1 to 5, with 5 being High Influenced and 1 being No Influence, please rate the influence of the following factors on lift truck fleet size reduction.



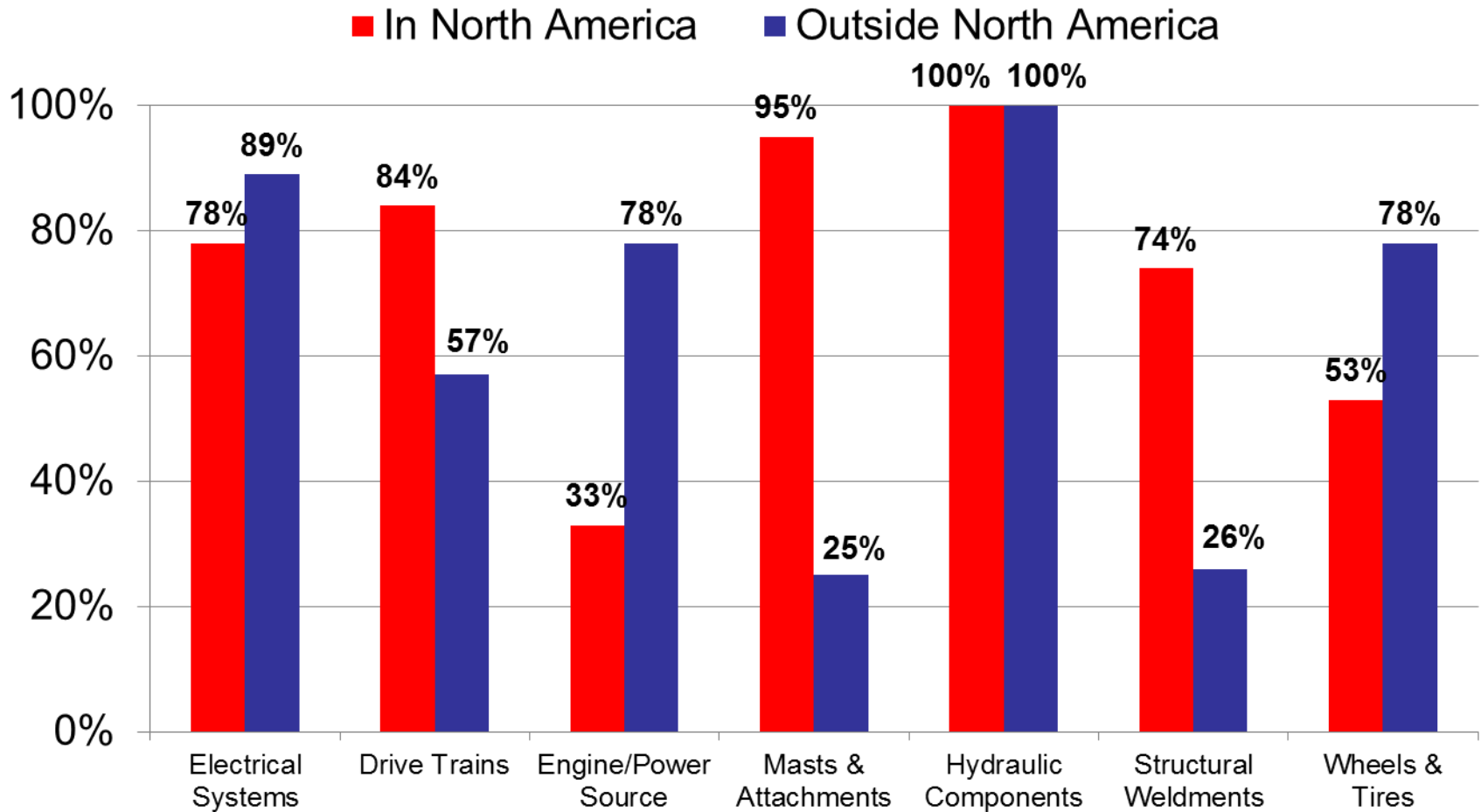
6. On a scale of 1 to 5, with 5 indicating Very Significant Impact and 1 indicating No Impact, if you foresee the duties imposed on imported US manufactured forklifts being eliminated, what impact would that have on market growth in the next three years?



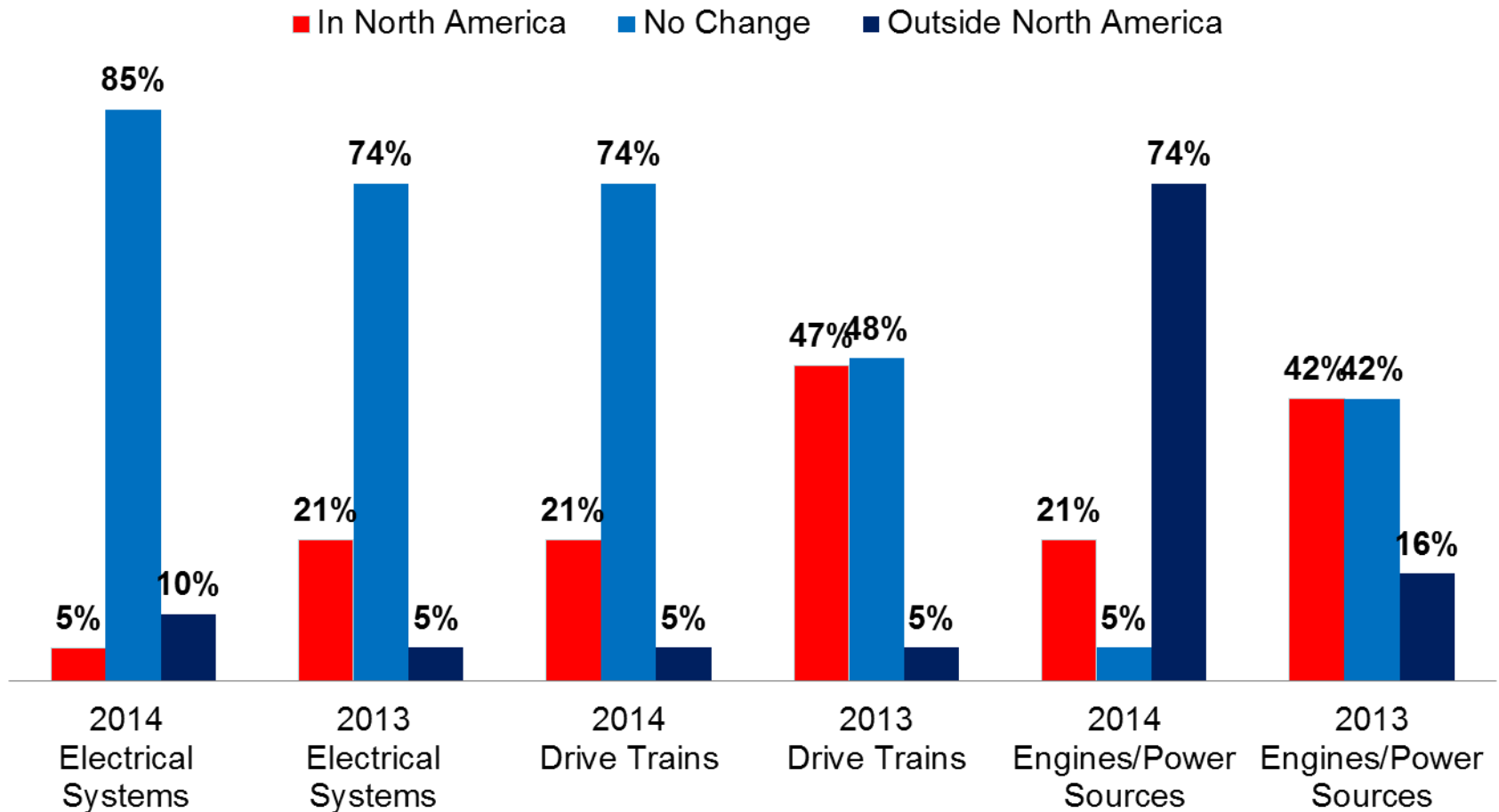
1. Qualitative Question – Do you foresee the number of forklift dealers in North America increasing, decreasing or staying the same over the next three years?



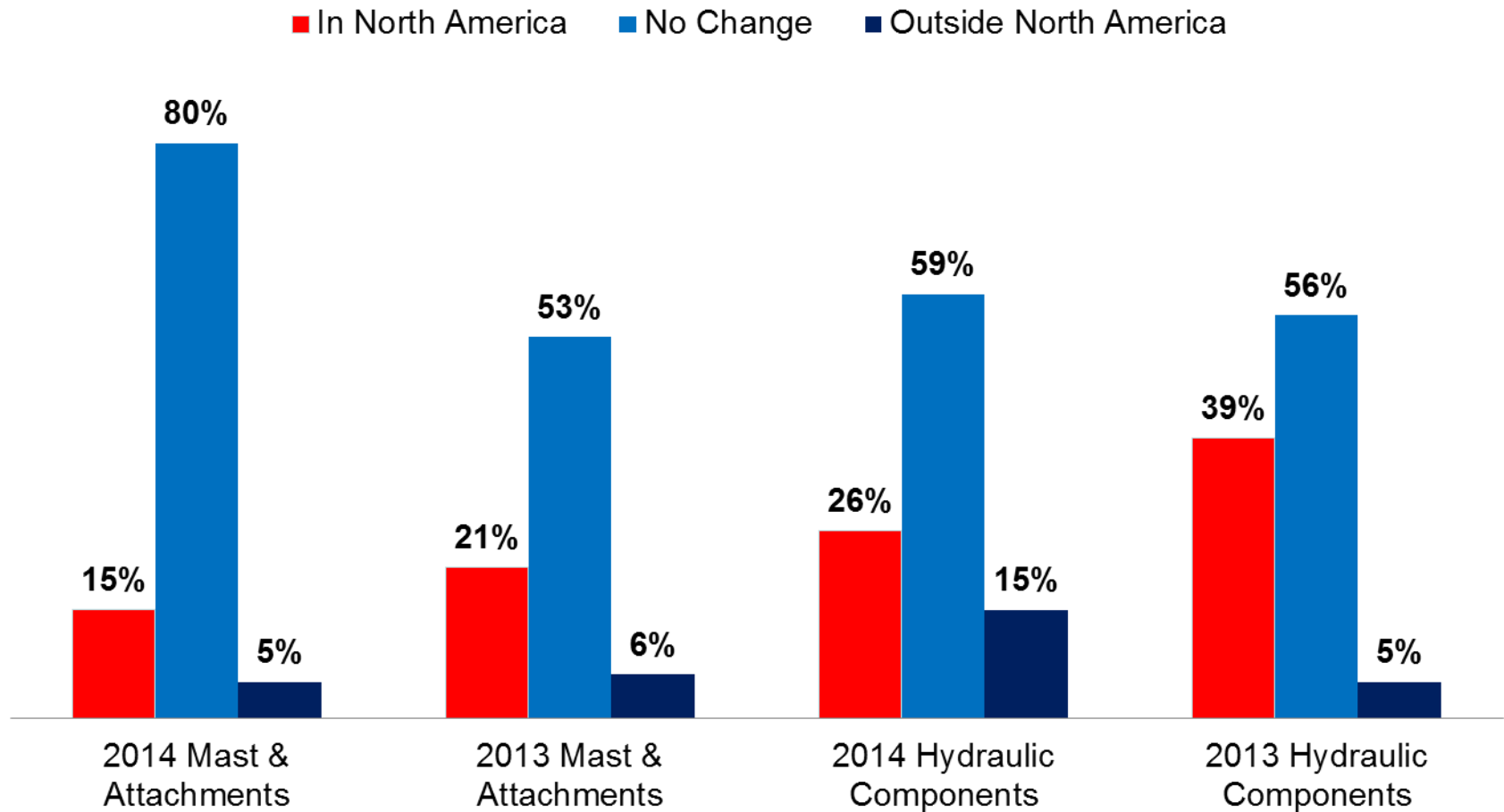
7a. Where do you currently source the following items?



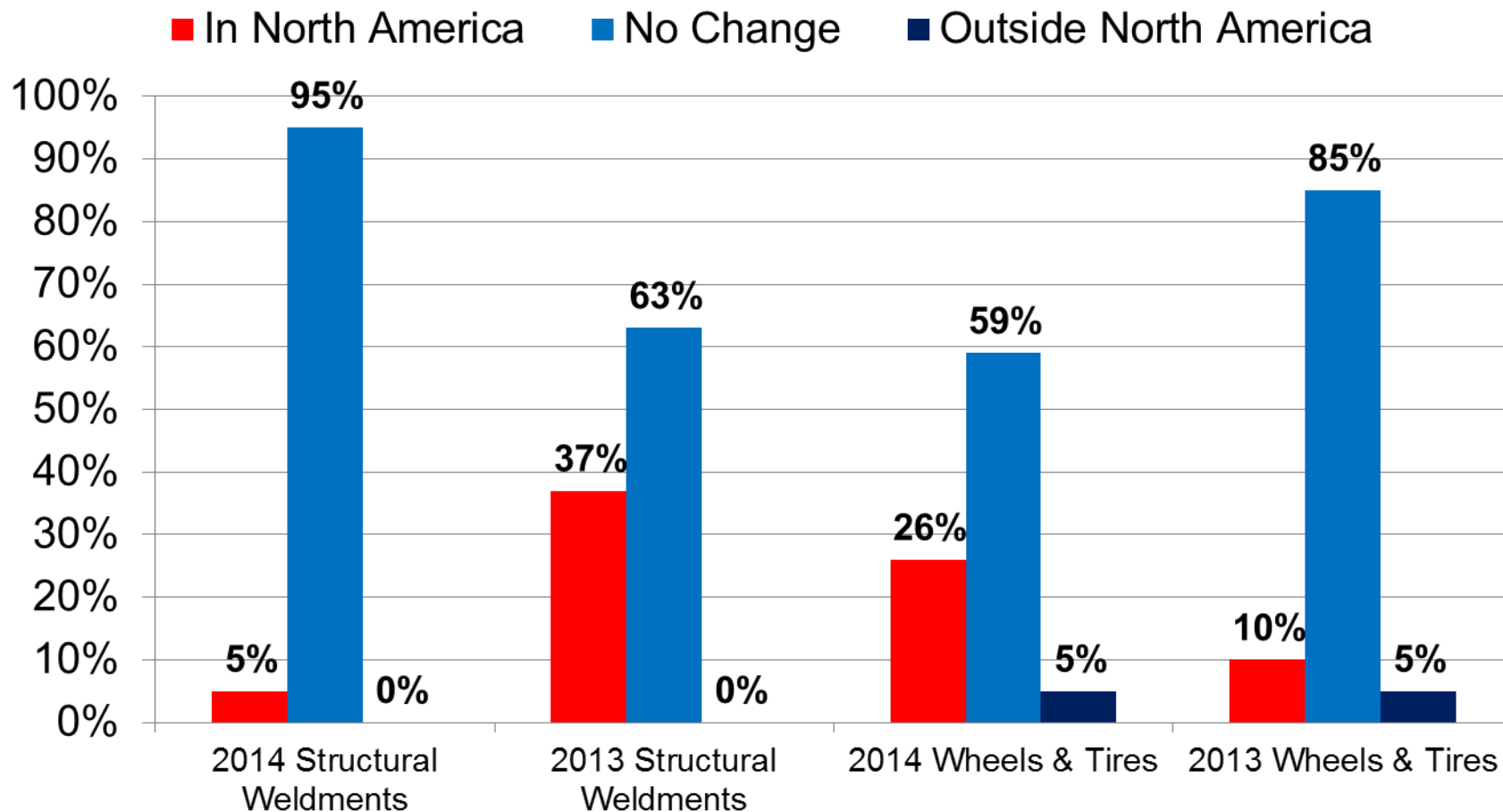
7(b)(1). Do you anticipate changing the source of the following items in North America, Outside North America or No Change in the next three years?



7(b)(2). Do you anticipate changing the source of the following items in North America, Outside North America or No Change in the next three years?



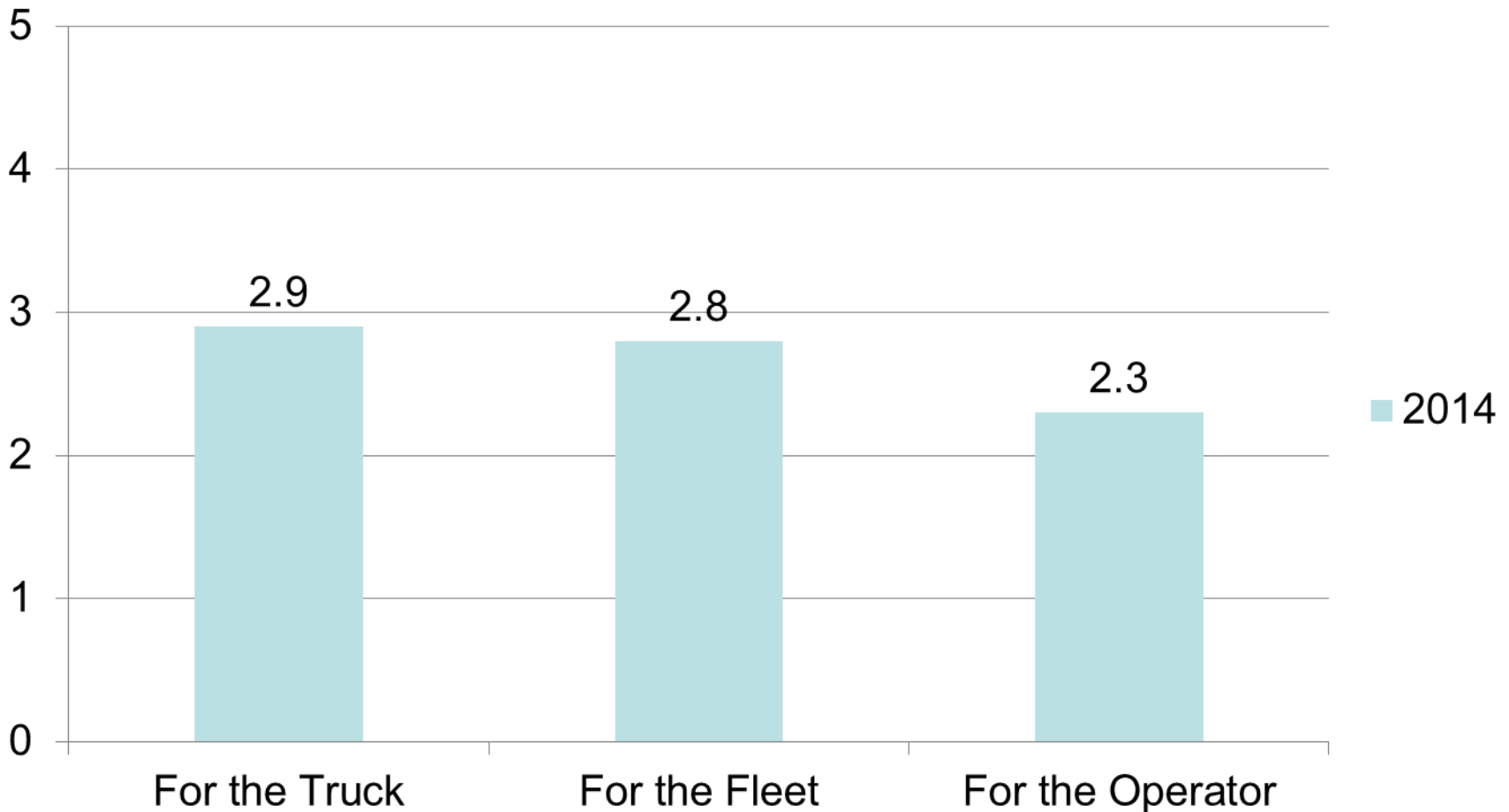
7(b)(3). Do you anticipate changing the source of the following items in North America, Outside North America or No Change in the next three years?



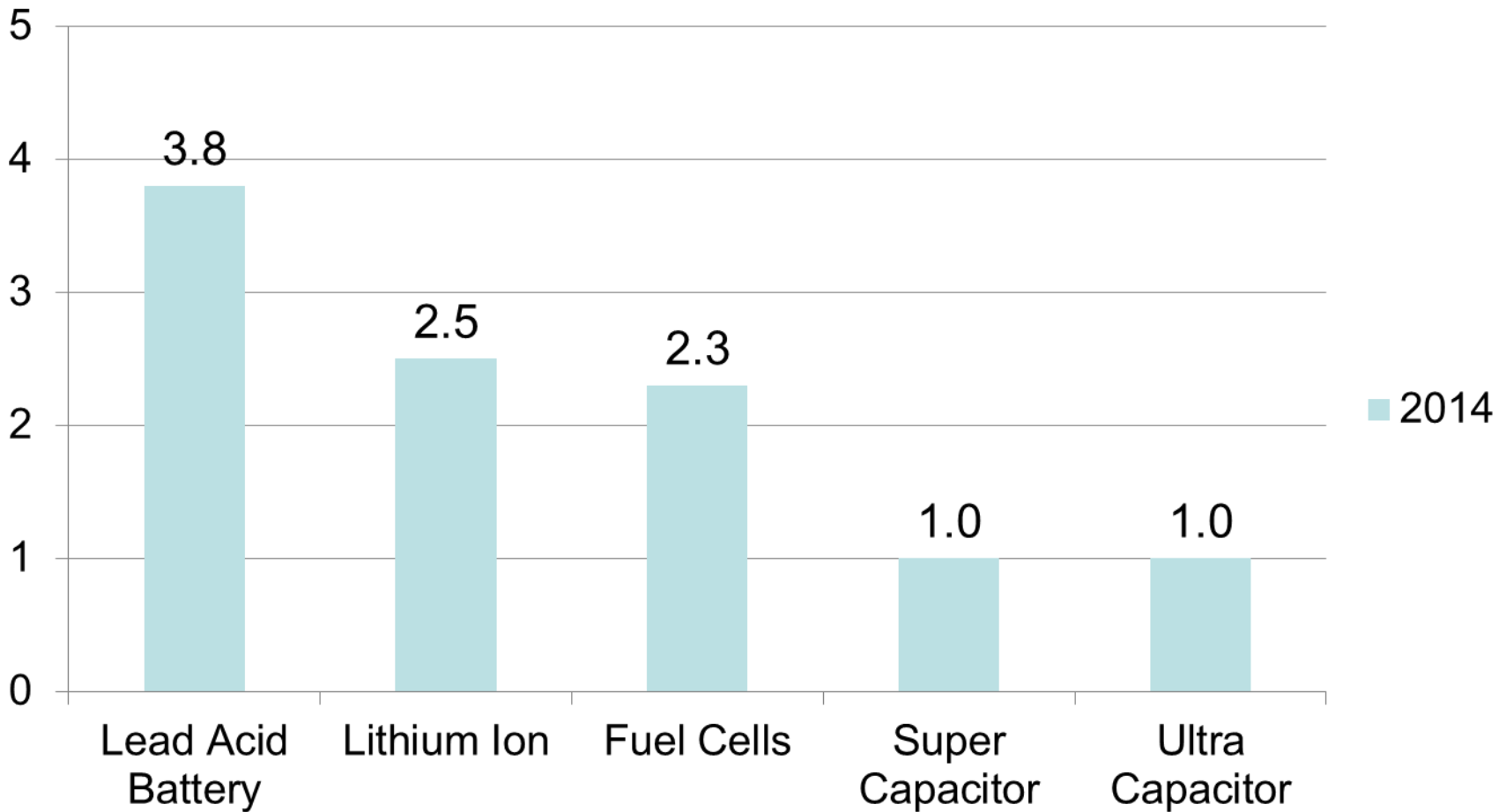
2. Qualitative Question – Recognizing some suppliers in your chain serve multiple industries, do you foresee a growing consolidation trend in supplier base to recognize increased efficiencies? If so, where do you see those increases in efficiencies transcending into the forklift industry?

- Consolidation
 - Limiting supply base
 - Mergers and/or acquisitions
- Standards
 - B56
- Government Legislations
 - EPA
 - OSHA

8. Rate the following on a scale of 1 to 5, with 5 being Will Utilize and 1 being Will Not Utilize, of all North American forklift shipments the will utilize or feature Fleet Data Information for the following?



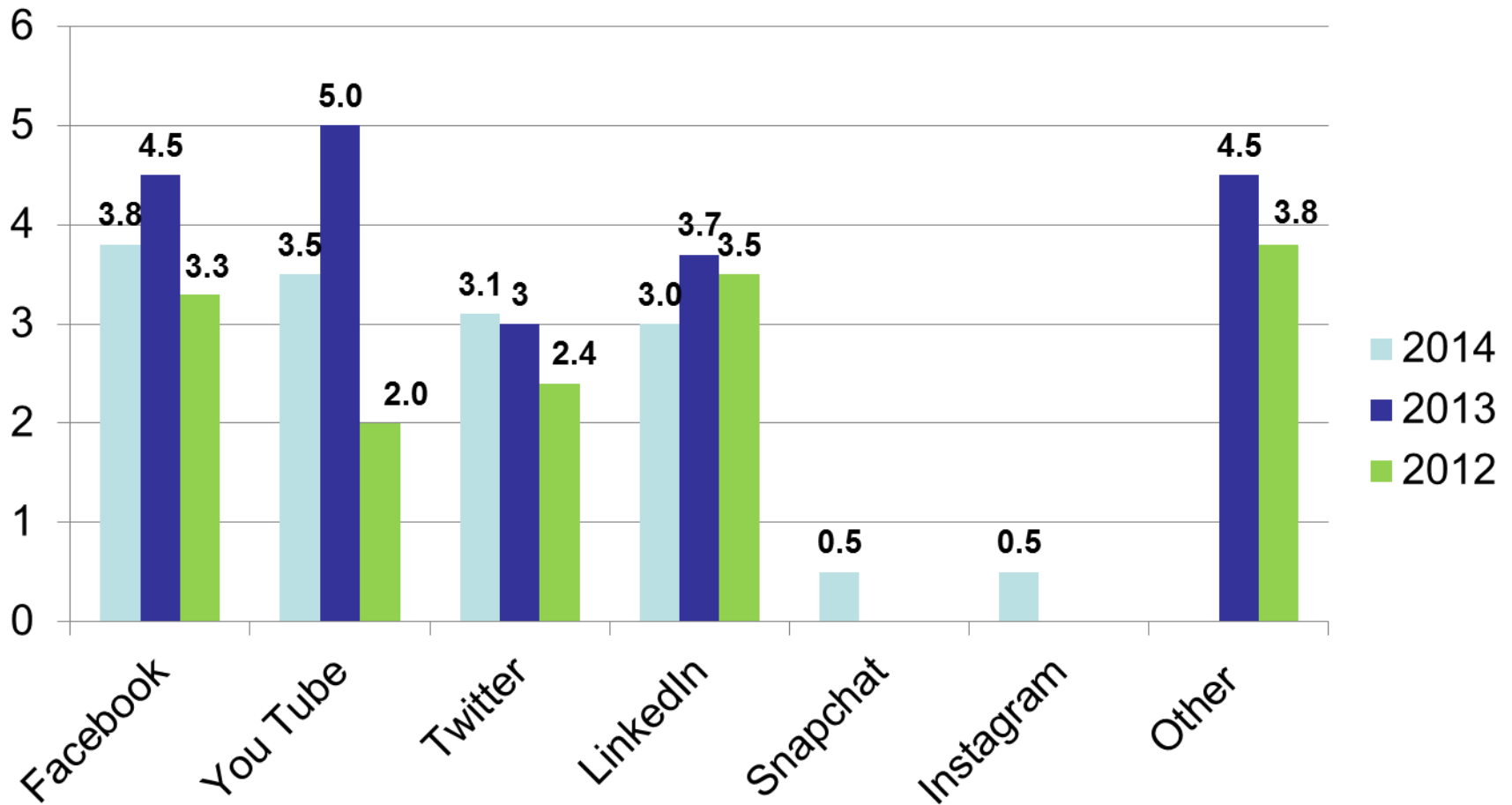
**9. What sources of energy technology will be used in electric forklift trucks in the next three years?
Please rank 1 to 5 with 5 being the highest.**



10. What will be the North American market demand for the following types of Internal Combustion powered forklifts in the next three years? Please rate the following on a scale of 1 to 5 (where 1=Up 5%, 2=Up 3%, 3=Same, 4=Down 3%, 5=Down5%)

Internal Combustion Source	1 Up 5%	2 Up 3%	3 Same	4 Down 3%	5 Down 5%
LPG		2.2			
Diesel				3.8	
Gasoline		2.4			
Compressed Natural Gas			2.5		
Hybrid			2.5		

**11. Which form of social media do you use as a communication and marketing tool to reach out to your customers?
Please rank 1 to 6, with 6 being the highest.**



3. Qualitative Question – With the introduction of new technology into the forklift market, do you foresee the need for new (or changes to existing) regulations that govern the industry today?

- Safety
- Regulations
 - New
 - Modifications to Existing
 - Changes
- Product Liability



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Questions?

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Thank You For Your
Attention And Participation.

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