



# Welcome to The Industrial Truck Association 2015 Business Trends Survey

ITA 2015 Annual Meeting  
The Breakers  
Palm Beach, Florida  
USA



# 2015 Business Trends Survey Task Group

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# 2015 Business Trends Survey

## Panel Members

Brett Wood (Toyota Material Handling N.A.)

Scott Johnson (CLARK Material Handling Company)

## Moderator

Dick Davidson (Thombert, Inc.)



- **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***

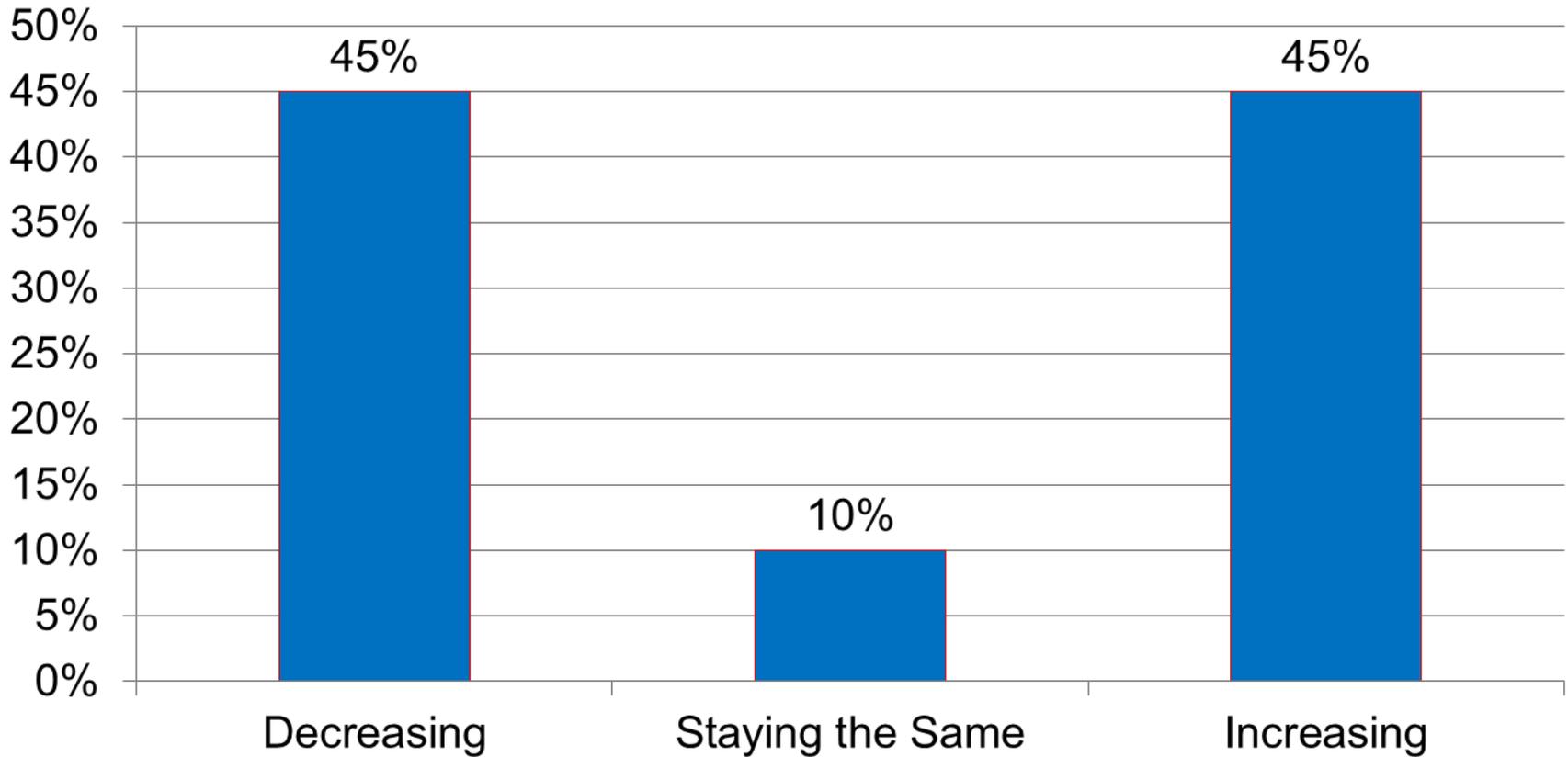
1. Which global market do you see with the greatest potential for lift truck economic growth in the next three years?

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

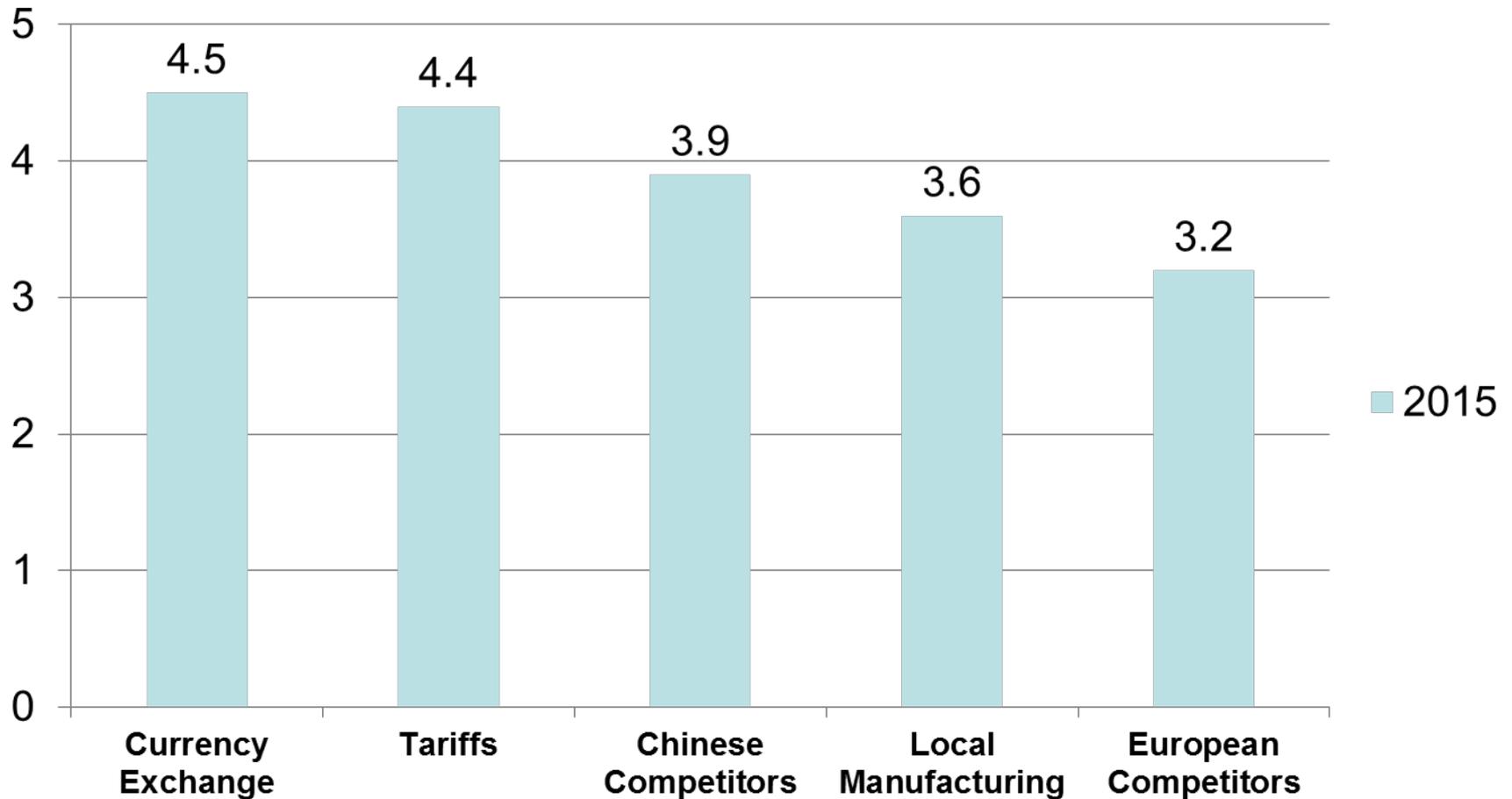
Country	Ranking 2015	Ranking 2014	Ranking 2013	Ranking 2012
India	1	3	2	9
USA	2	2	10	3
Mexico	3	4	3	10
Rest of Asia	4	6	4	4
Canada	5	8	1	1
Rest of South America	6	7	7	2
China	7	1	6	N/A
Western European Countries	8	9	9	8
Rest of Central America	9	11	12	7
Eastern European Countries	10	10	8	5
Africa	11	12	N/A	N/A
Brazil	12	5	11	11
Russia	13	13	5	4

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

2015



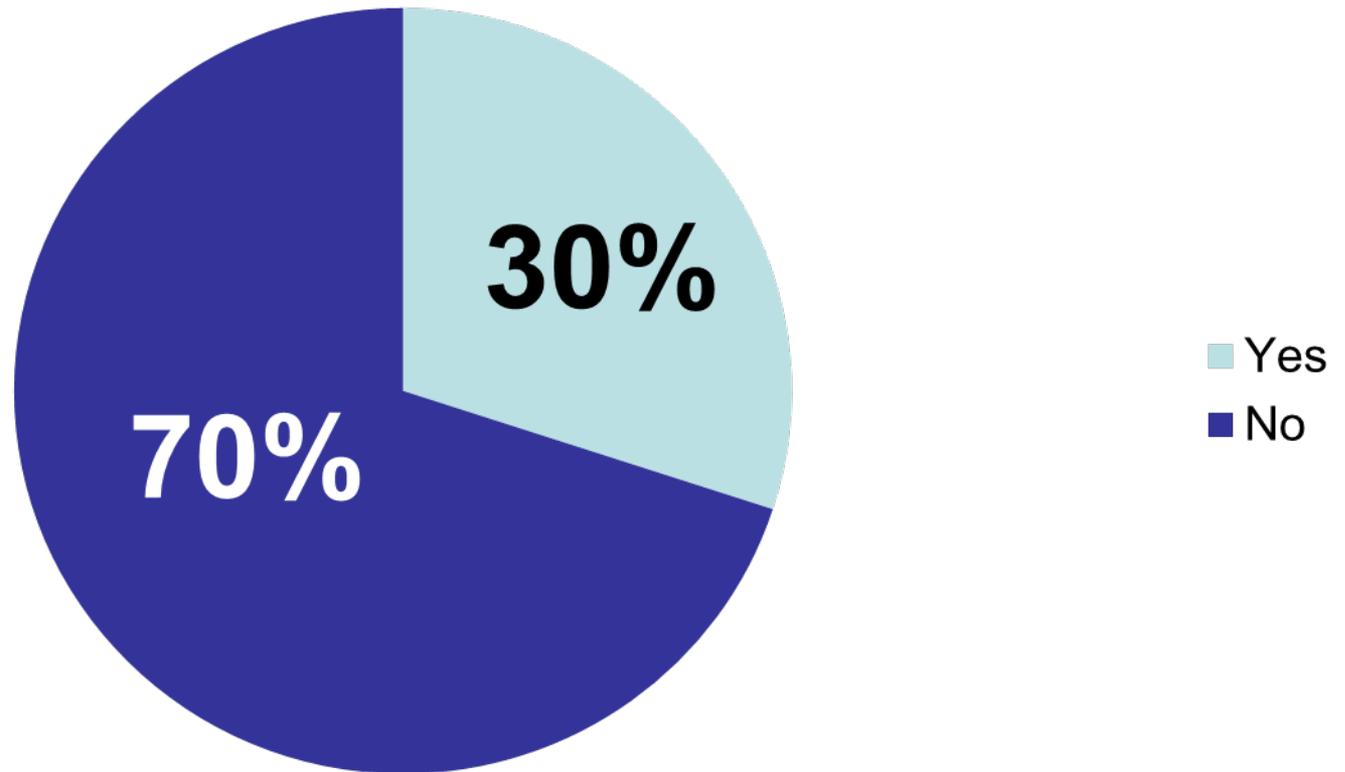
3. On a scale of 1 to 5, with 5 being High Influence and 1 being No Influence, what influences affect US exports to South America?



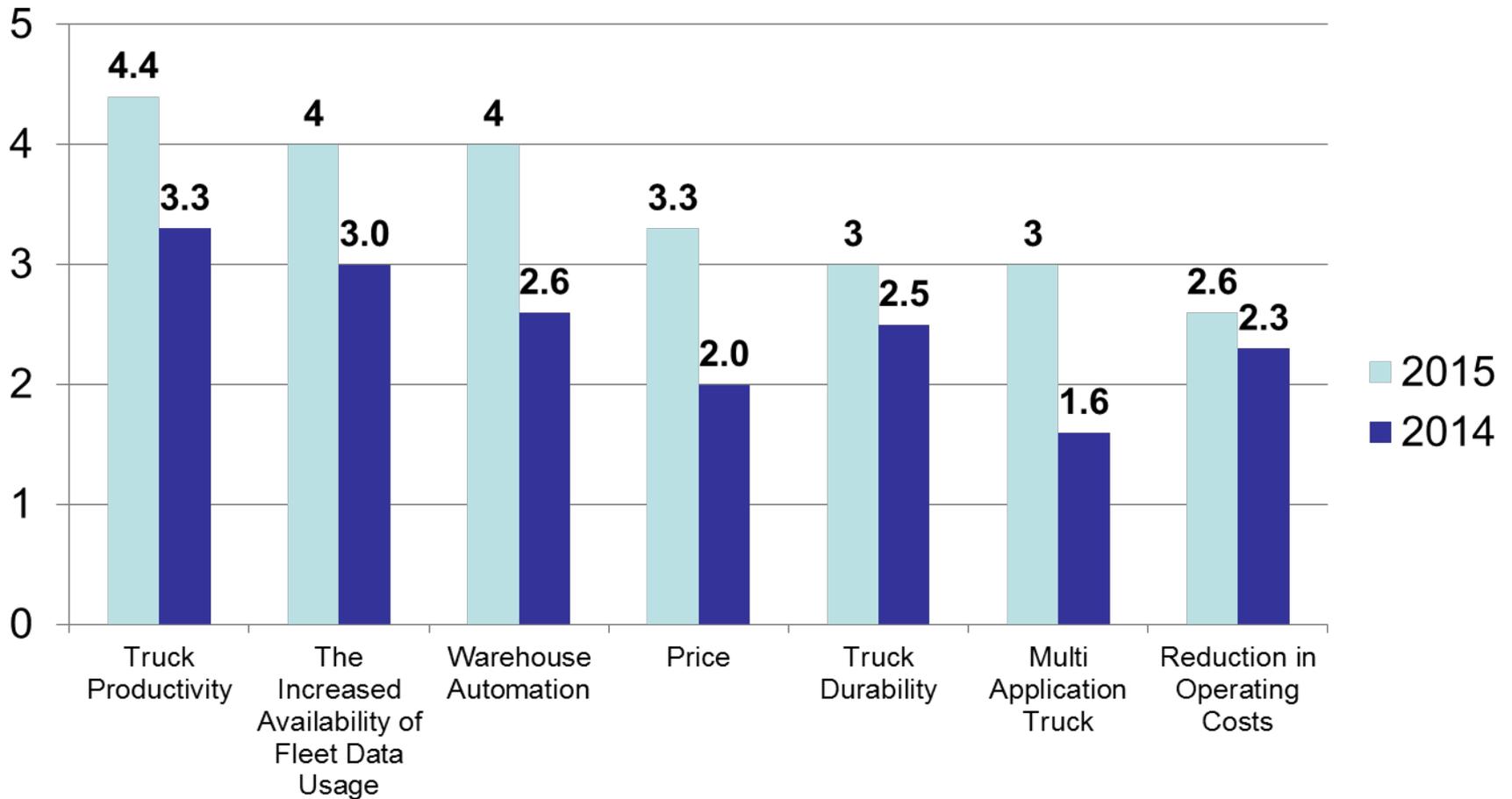
***1. Qualitative Question – What South American countries do you see increasing imports of US goods and what countries do you see decreasing imports of US goods?***



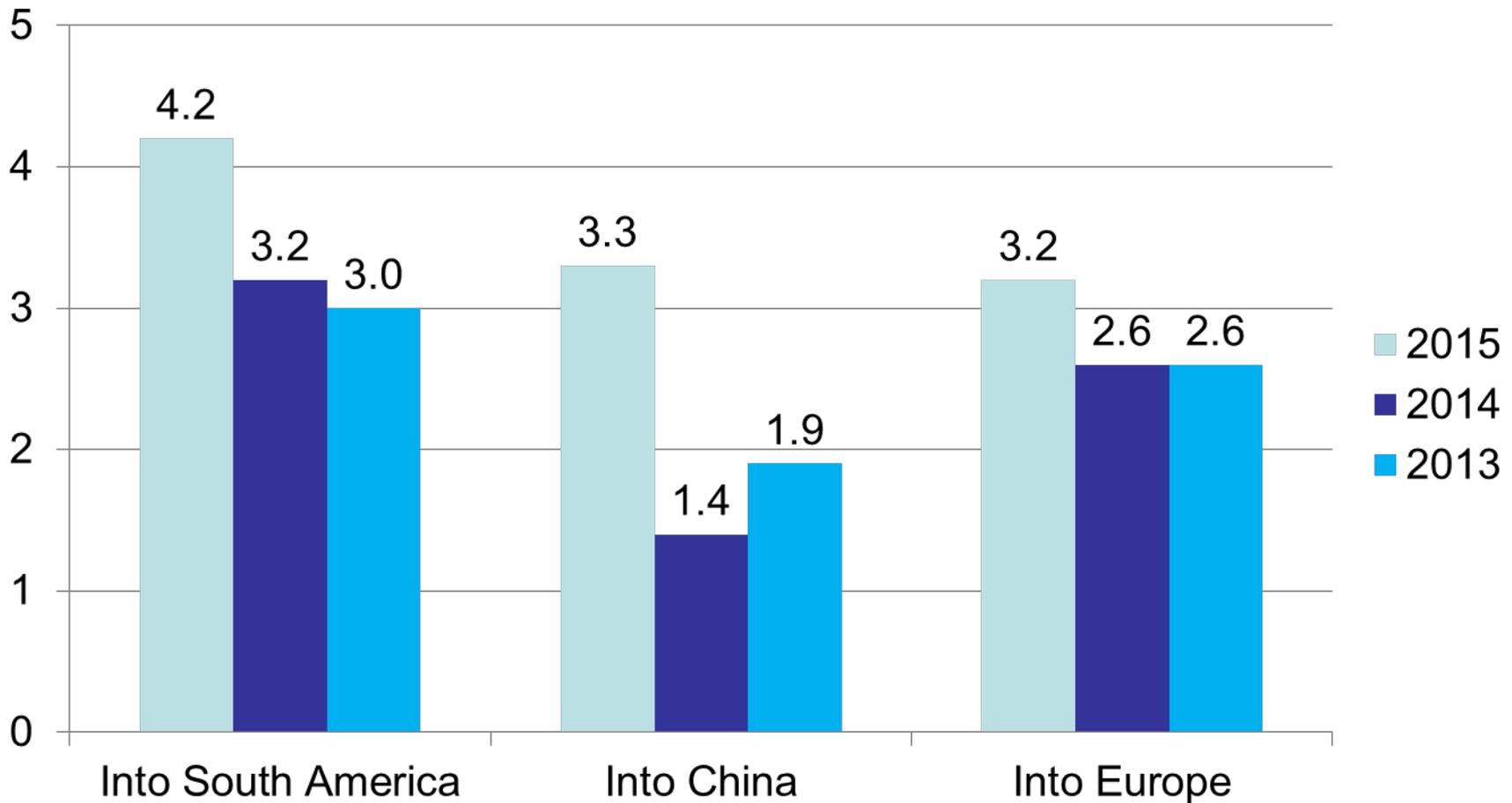
#### 4. Do you see lift truck fleet size being reduced in general?



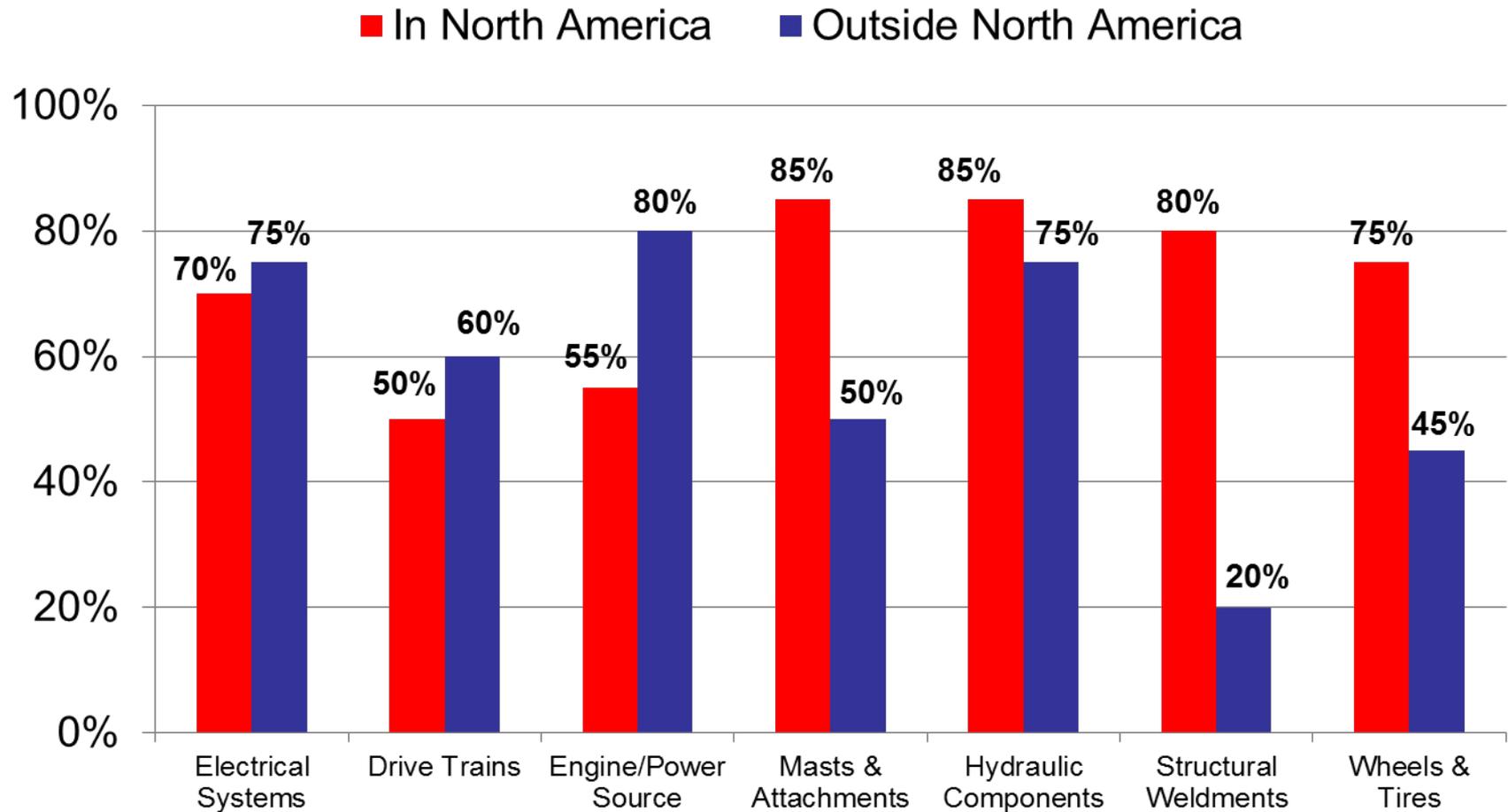
5. On a scale of 1 to 5, with 5 being High Influence and 1 being No Influence, please rate the influence of the following factors on lift truck fleet size reduction.



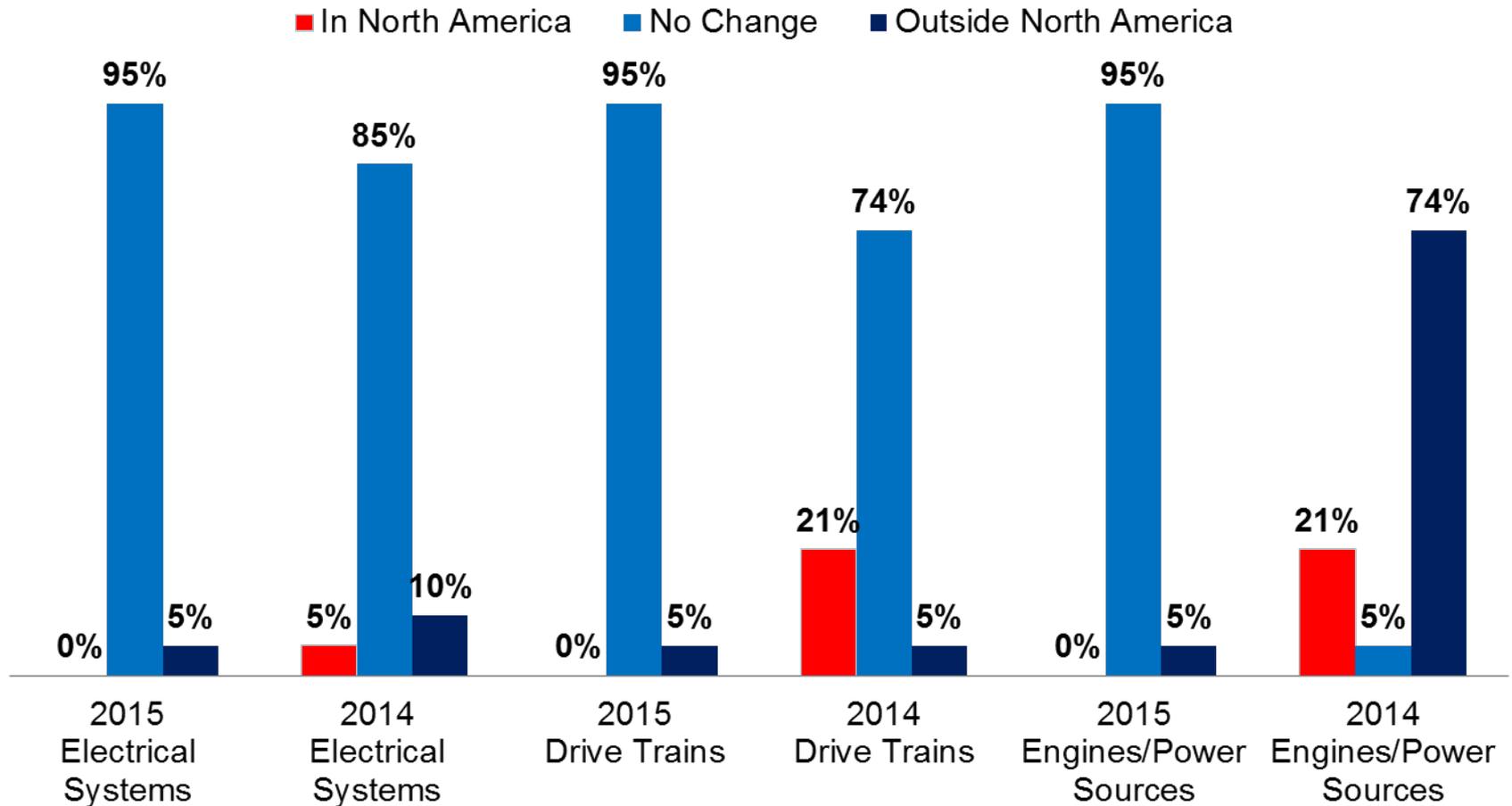
6. On a scale of 1 to 5, with 5 indicating Very Significant Impact and 1 indicating No Impact, if you foresee the duties imposed on imported US manufactured forklifts being eliminated, what impact would that have on market growth in the next three years?



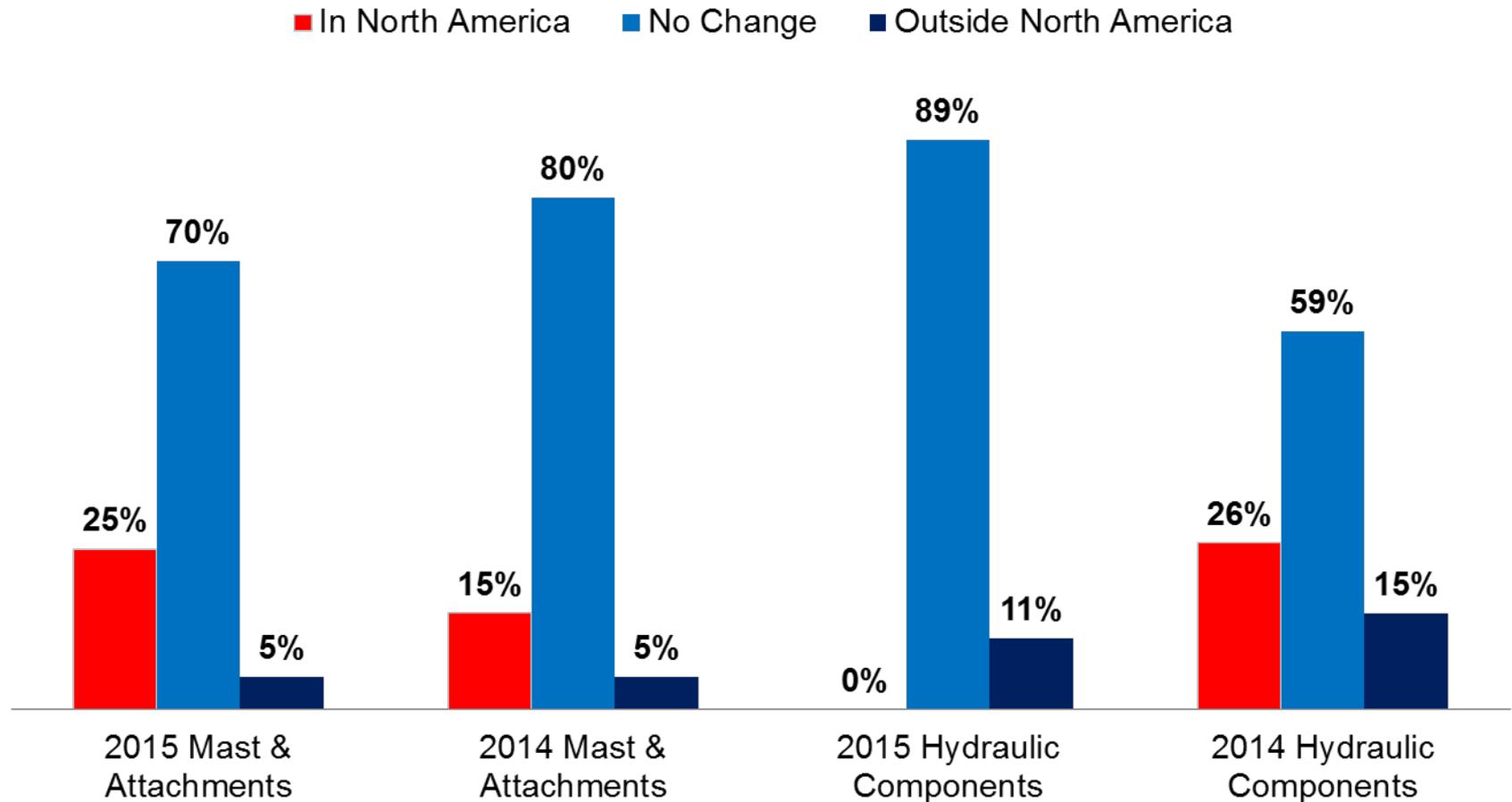
## 7a. Where do you currently source the following items?



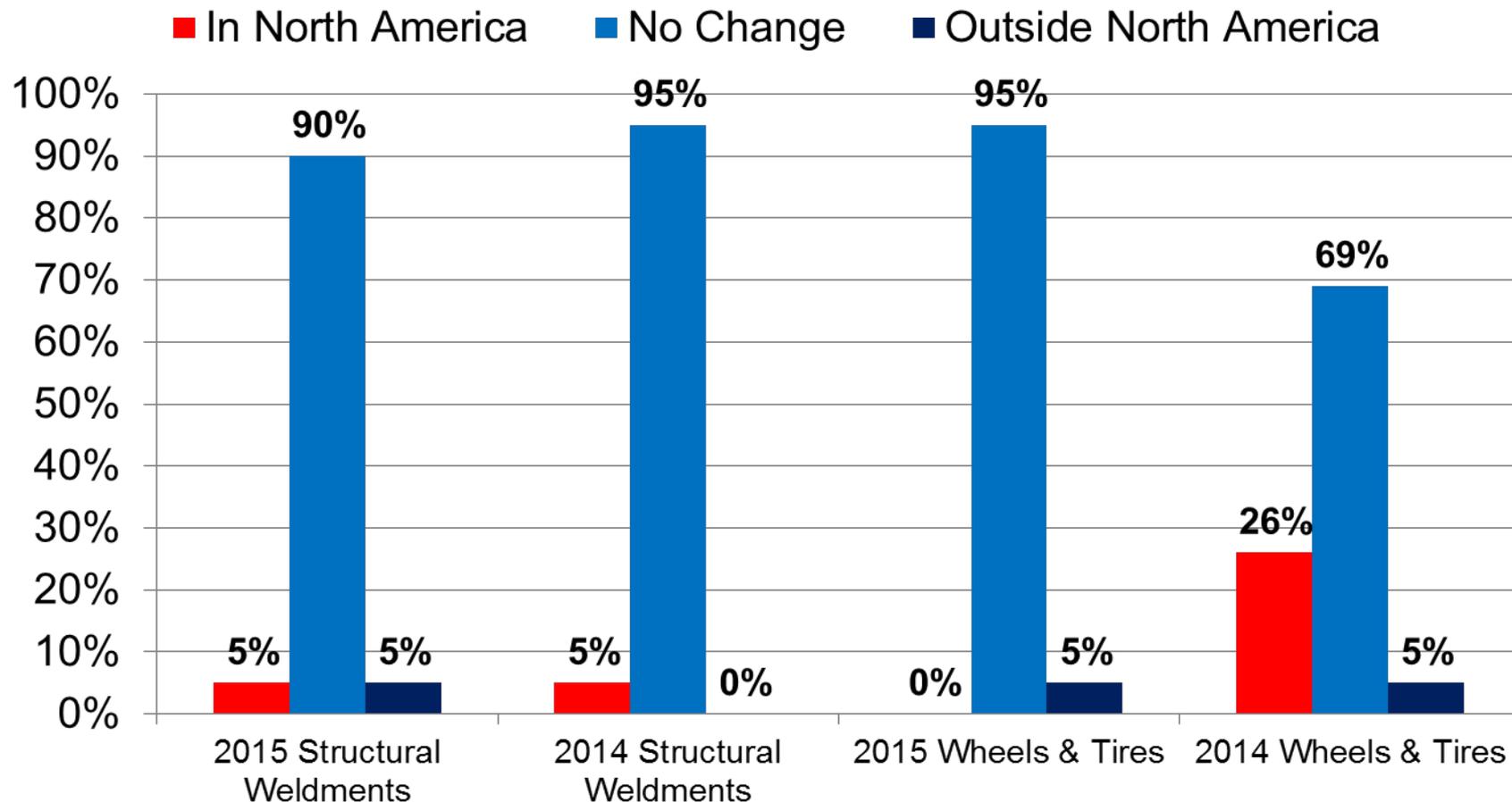
**7(b)(1). Do you anticipate changing the source of the following items in North America, Outside North America or No Change in the next three years?**



**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?**



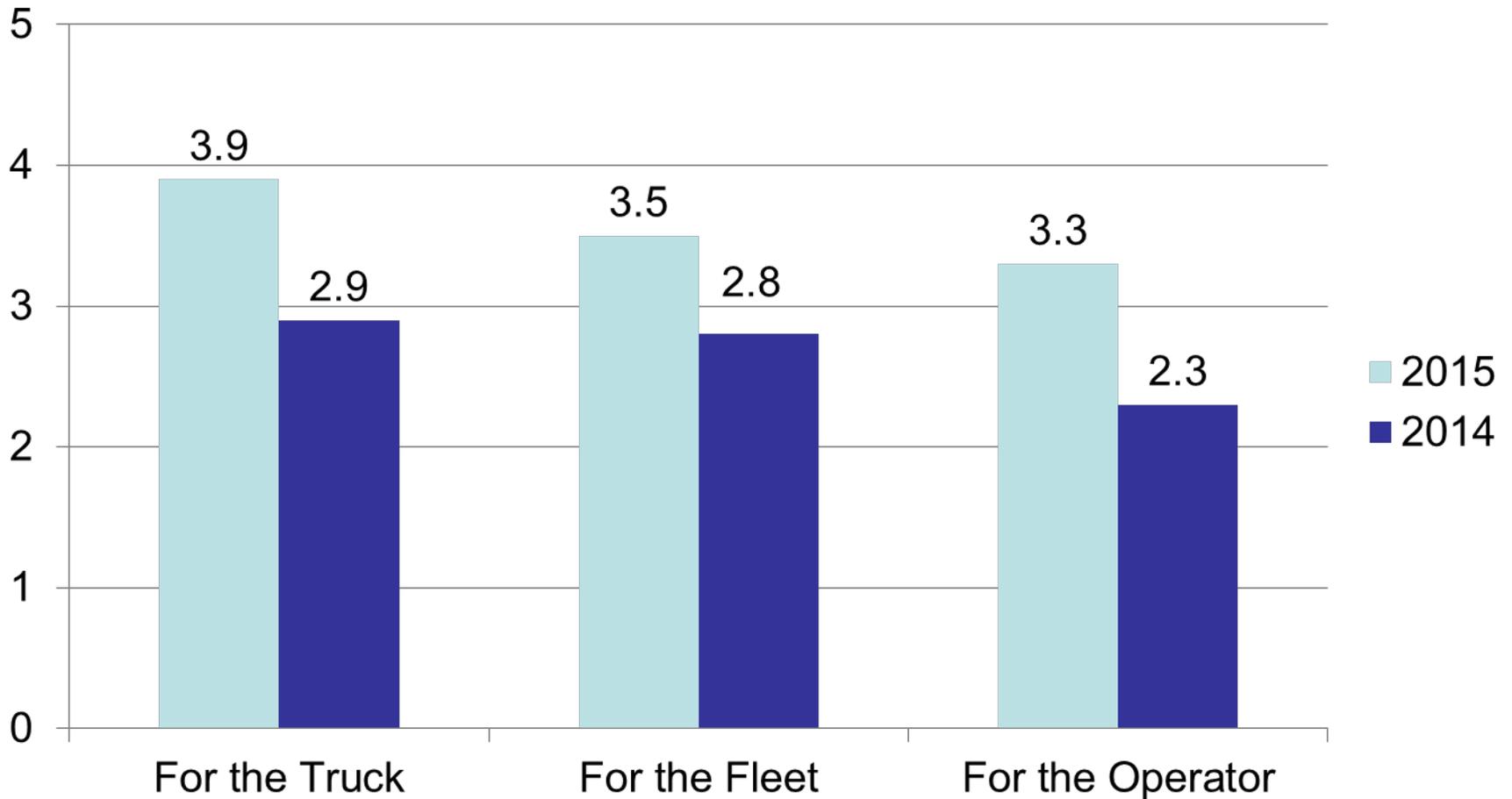
## 7(b)(3). Do you anticipate changing the source of the following items in North America, Outside North America or No Change in the next three years?



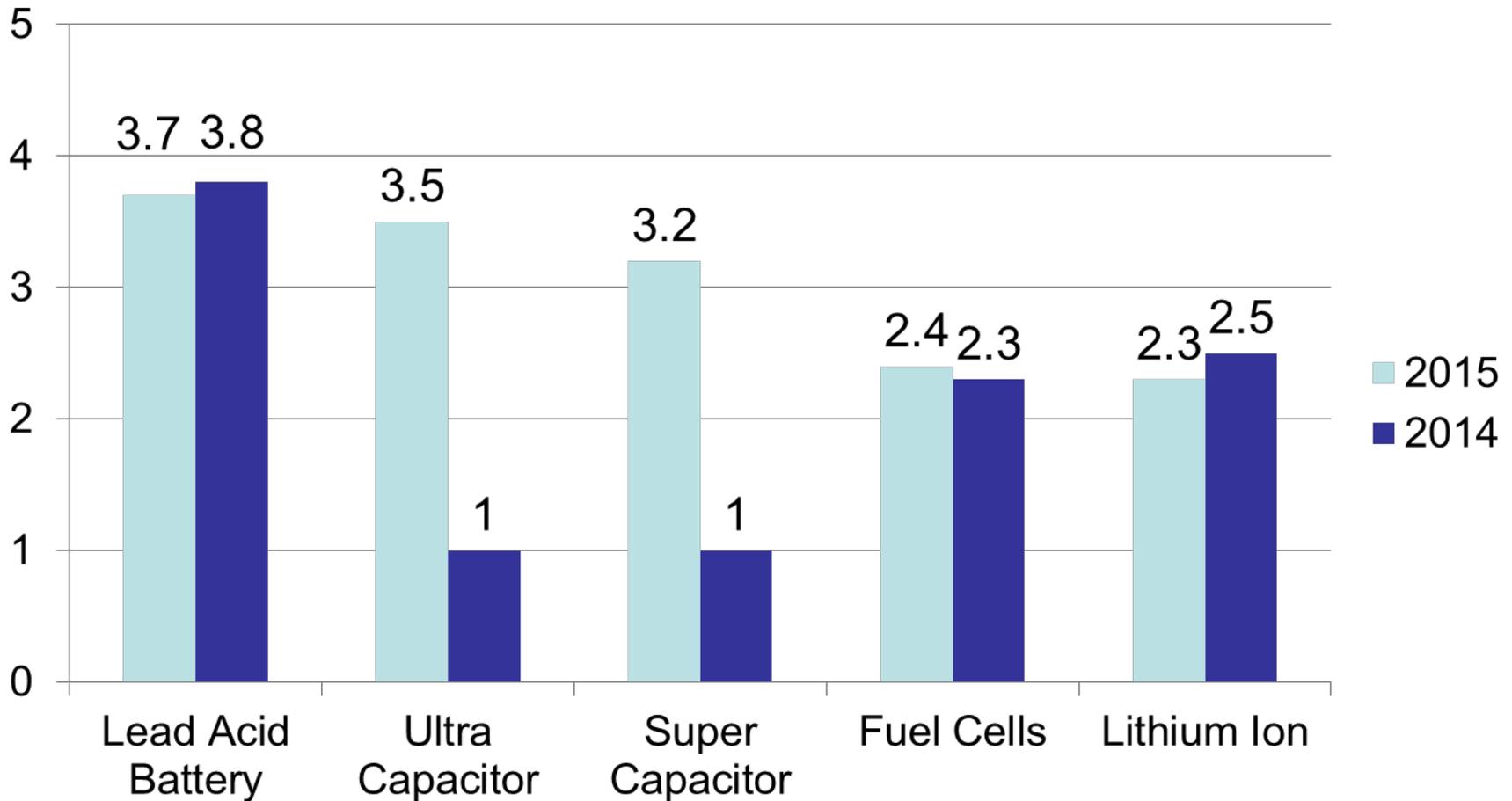


**2. Qualitative Question – Does the value or devaluation of your currency influence what regional area you source items and components? If so, is there a qualifying process to verifying the vendor? Is this an area of exploration to vertically integrate and build in-house?**

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 that 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.

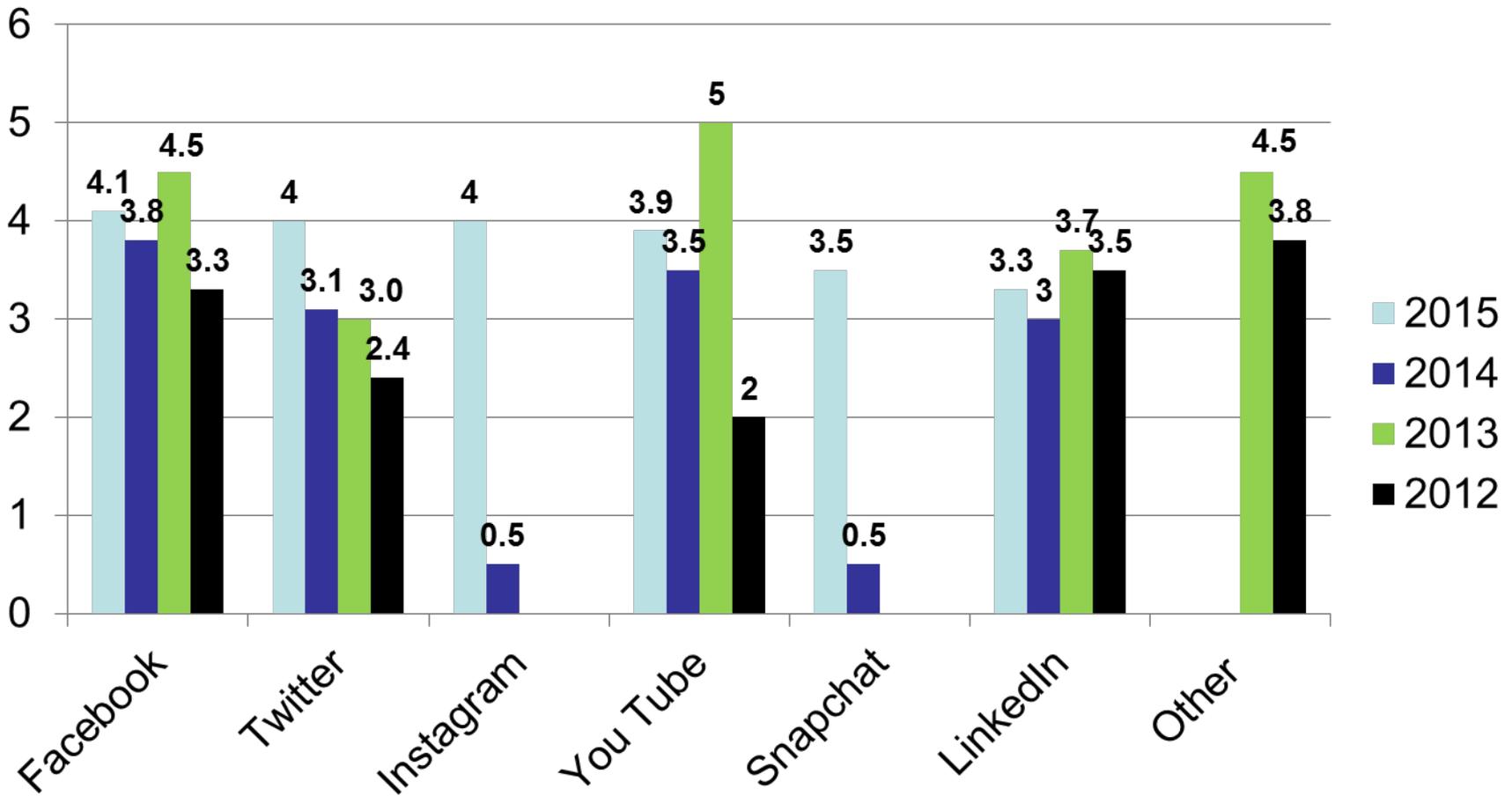


**10. What will be the North American market demand for the following types of Internal Combustion powered forklifts in the next three years? Please rate the following on a scale of 1 to 5 ( where 1=Up 5%, 2=Up 3%, 3=Same, 4=Down 3%, 5=Down5%)**

<b>Internal Combustion Source</b>	<b>1 Up 5%</b>	<b>2 Up 3%</b>	<b>3 Same</b>	<b>4 Down 3%</b>	<b>5 Down 5%</b>
Diesel	0	1	6	5	6
Gasoline	0	2	8	3	5
Compressed Natural Gas	1	6	10	1	0
LPG	5	5	8	0	0
Hybrid	1	5	12	0	0

# of respondents

**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?***



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# Questions?

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**Thank You For Your  
Attention And Participation.**

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