



# Welcome to The Industrial Truck Association 2016 Business Trends Survey

ITA 2016 Annual Meeting  
The Fairmont Scottsdale Princess  
Scottsdale, Arizona  
USA



# 2016 Business Trends Survey Task Group

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# 2016 Business Trends Survey

## Panel Members

Jay Gusler (MCFA - Caterpillar)

Tim Quellhorst (Crown Equipment Corporation)

## 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***

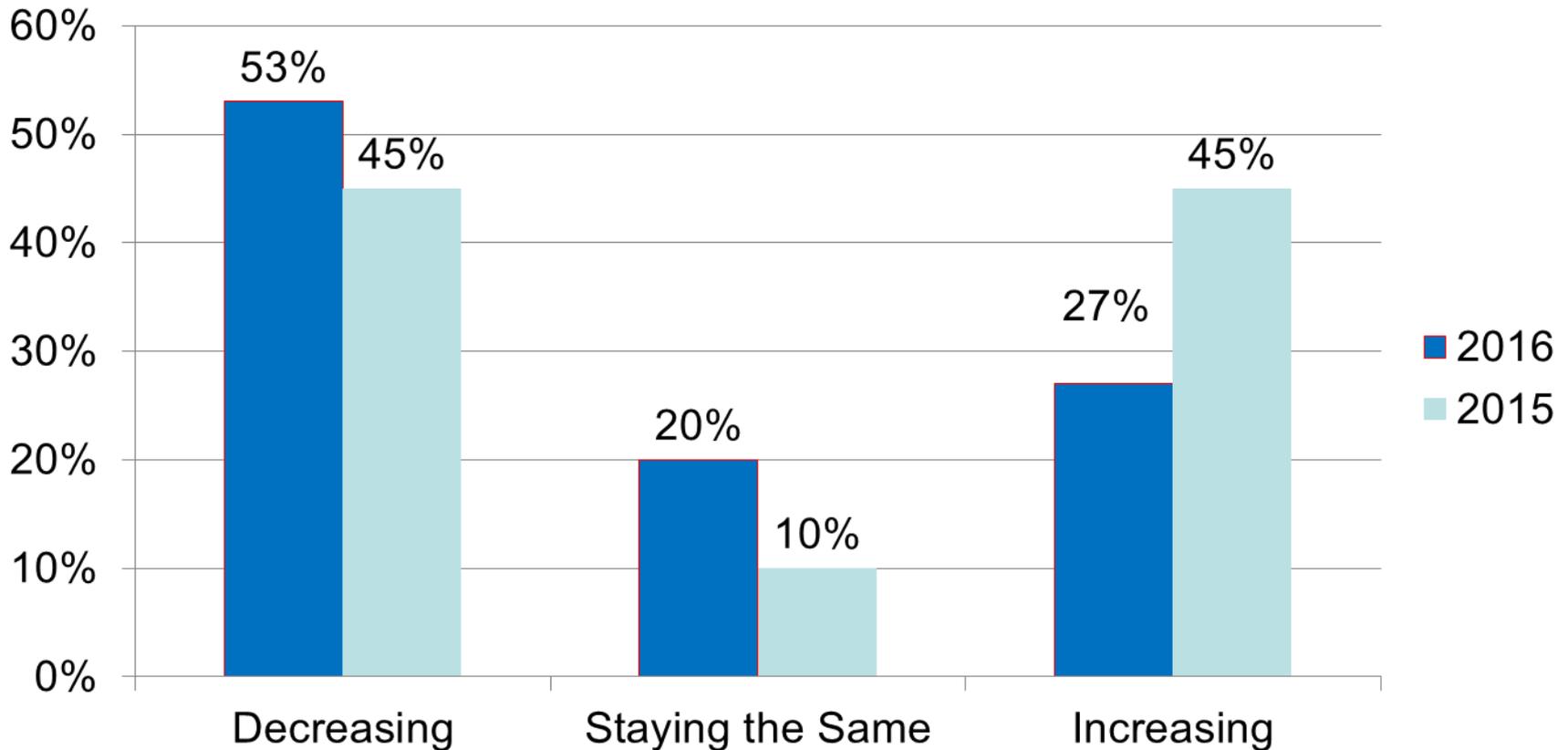
1. Which global market do you see with the greatest potential for lift truck economic growth in the next three years?

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

Country	Ranking 2016	Ranking 2015	Ranking 2014	Ranking 2013	Ranking 2012
India	1	1	3	2	9
Mexico	2	3	2	10	3
China	3	7	4	3	10
USA	4	2	6	4	4
Western European Countries	5	8	8	1	1
Eastern European Countries	6	10	7	7	2
Canada	7	5	1	6	N/A
Russia	8	13	9	9	8
Rest of Central America	9	9	11	12	7
Rest of Asia	10	4	10	8	5
Africa	11	11	12	N/A	N/A
Rest of South America	12	6	5	11	11
Brazil	13	12	13	5	4

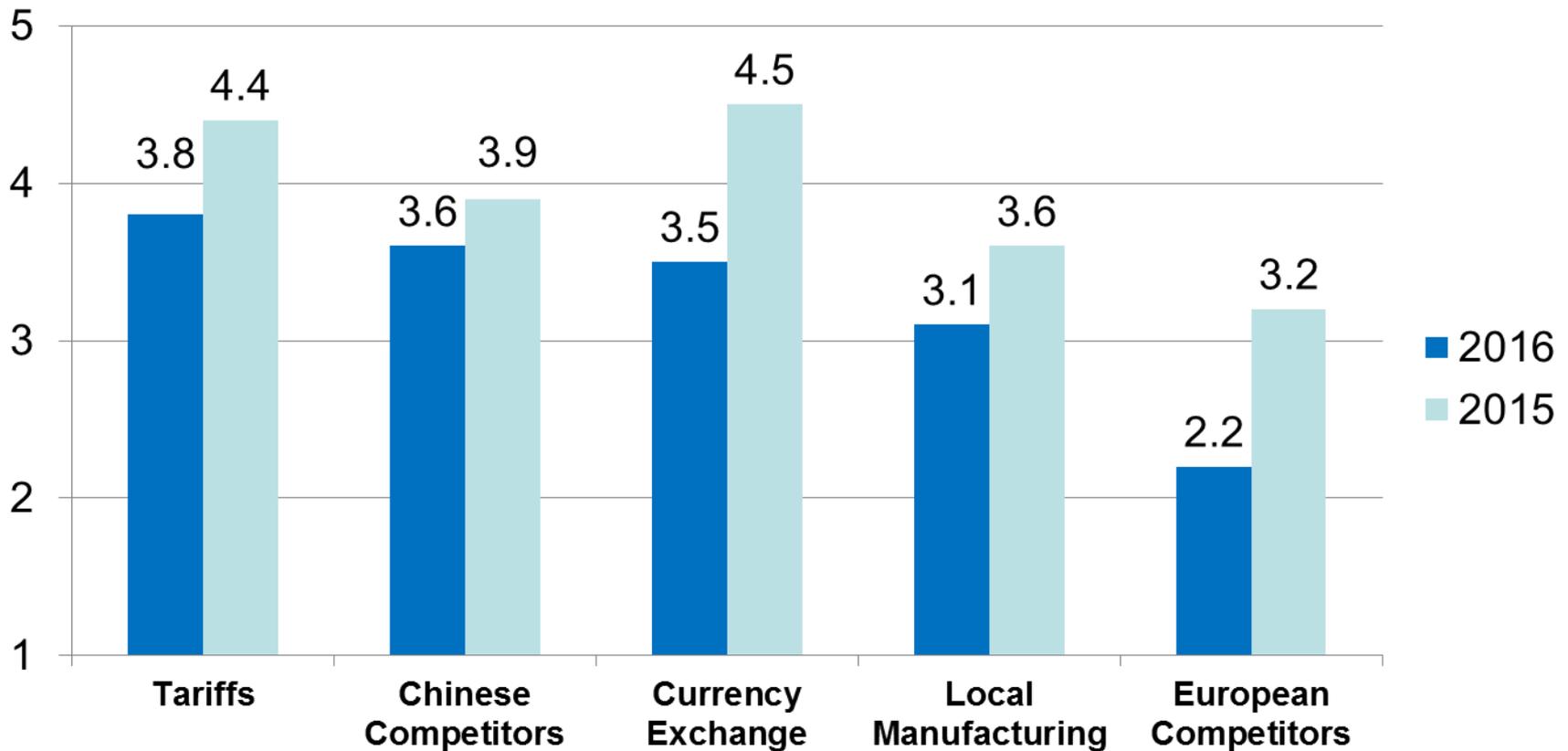
## 2. In the South American market, do you see US exports increasing, decreasing or staying the same in the next three years

### 2016 vs. 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?

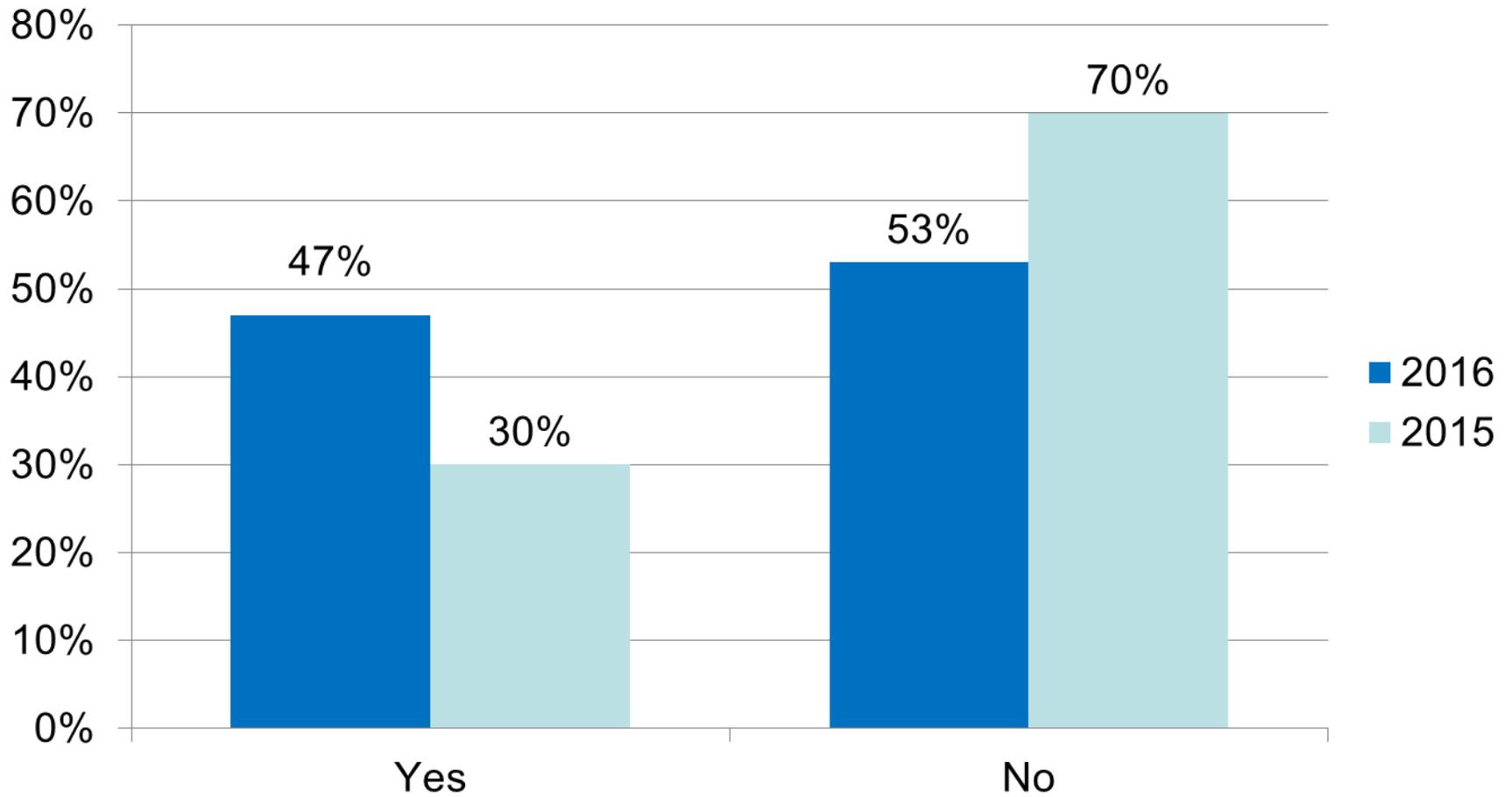
2016 vs. 2015



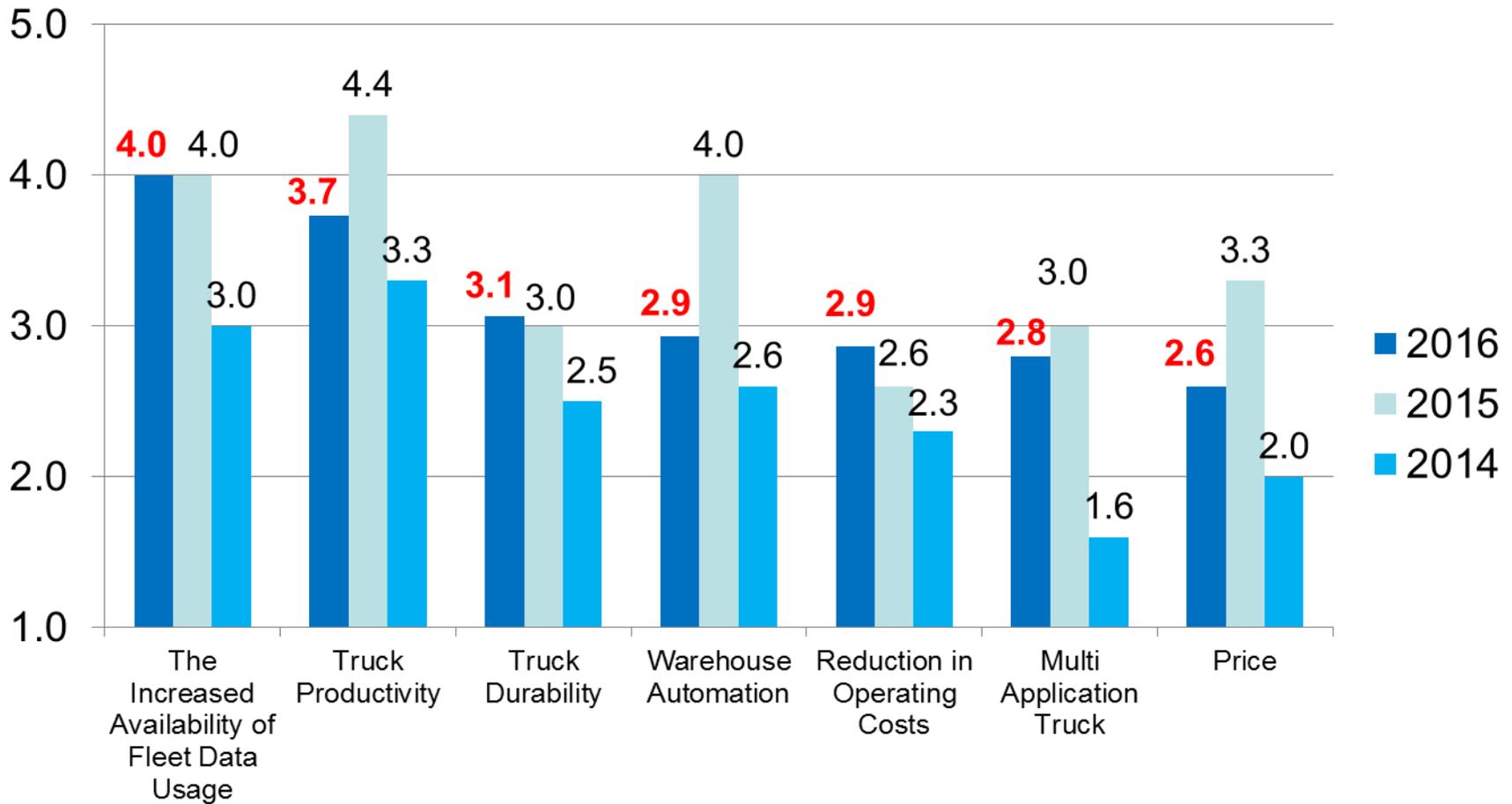
***1. Qualitative Question – What South American countries do you see increasing imports of US goods and what countries do you see decreasing imports of US goods?***

***1A. Qualitative Question – How will the United Kingdom's exit from the European Union affect/impact market conditions in the UK? In the EU? In the US?***

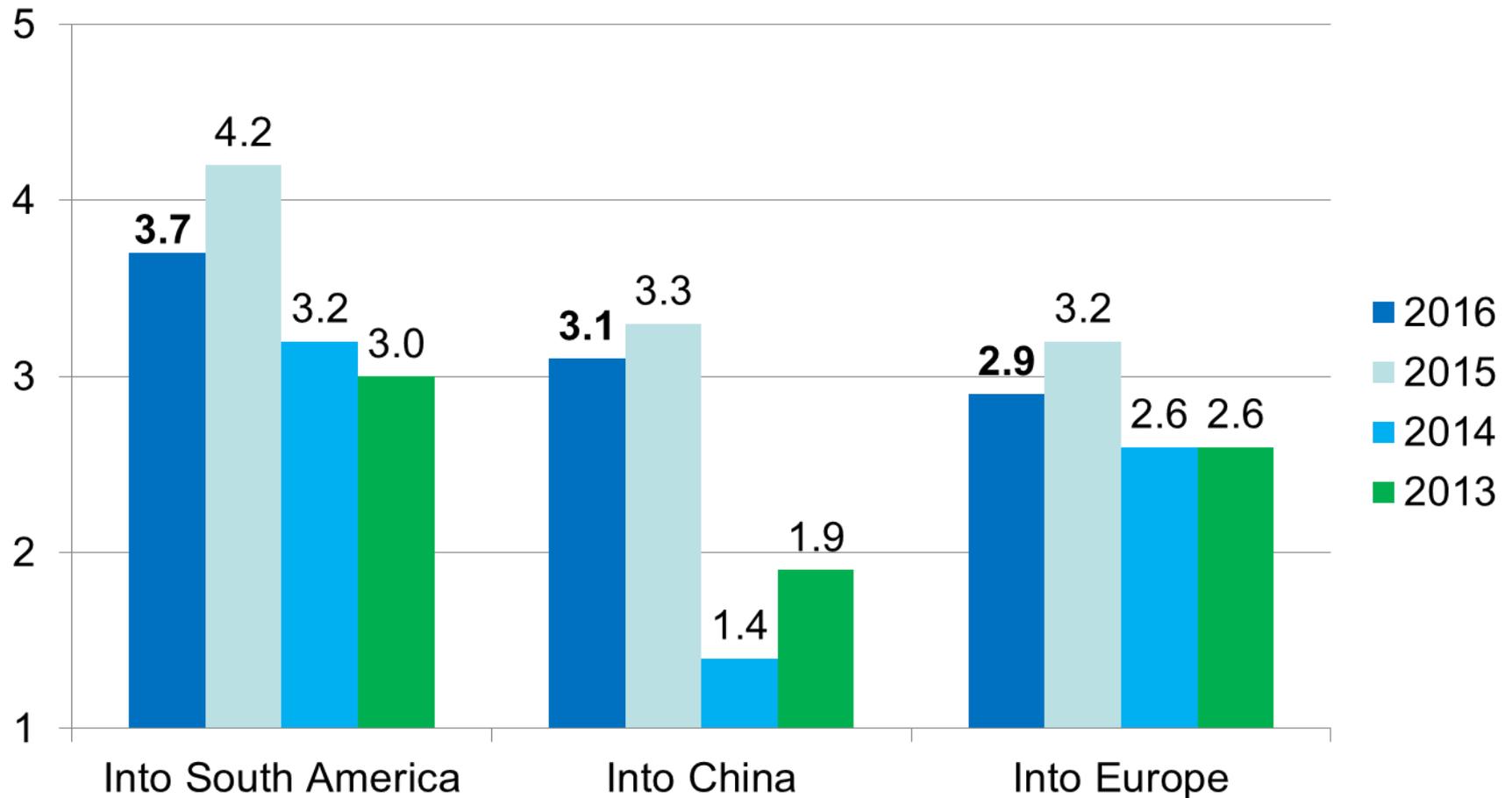
## 4. Do you see lift truck fleet size being reduced in general?



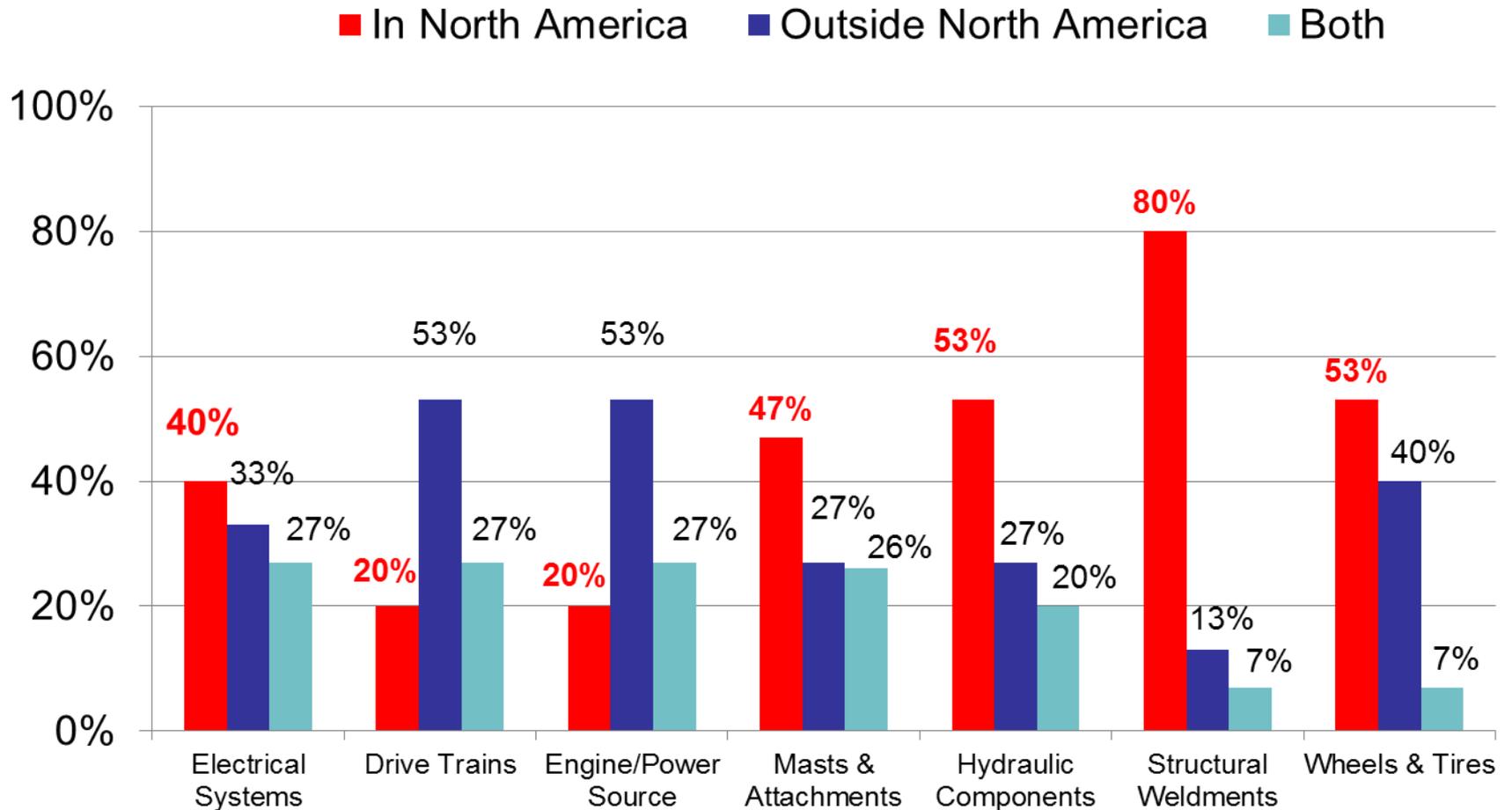
**5. On a scale of 1 to 5, with 5 being High Influence and 1 being No Influence, please rate the influence of the following factors on lift truck fleet size reduction.**



**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?**

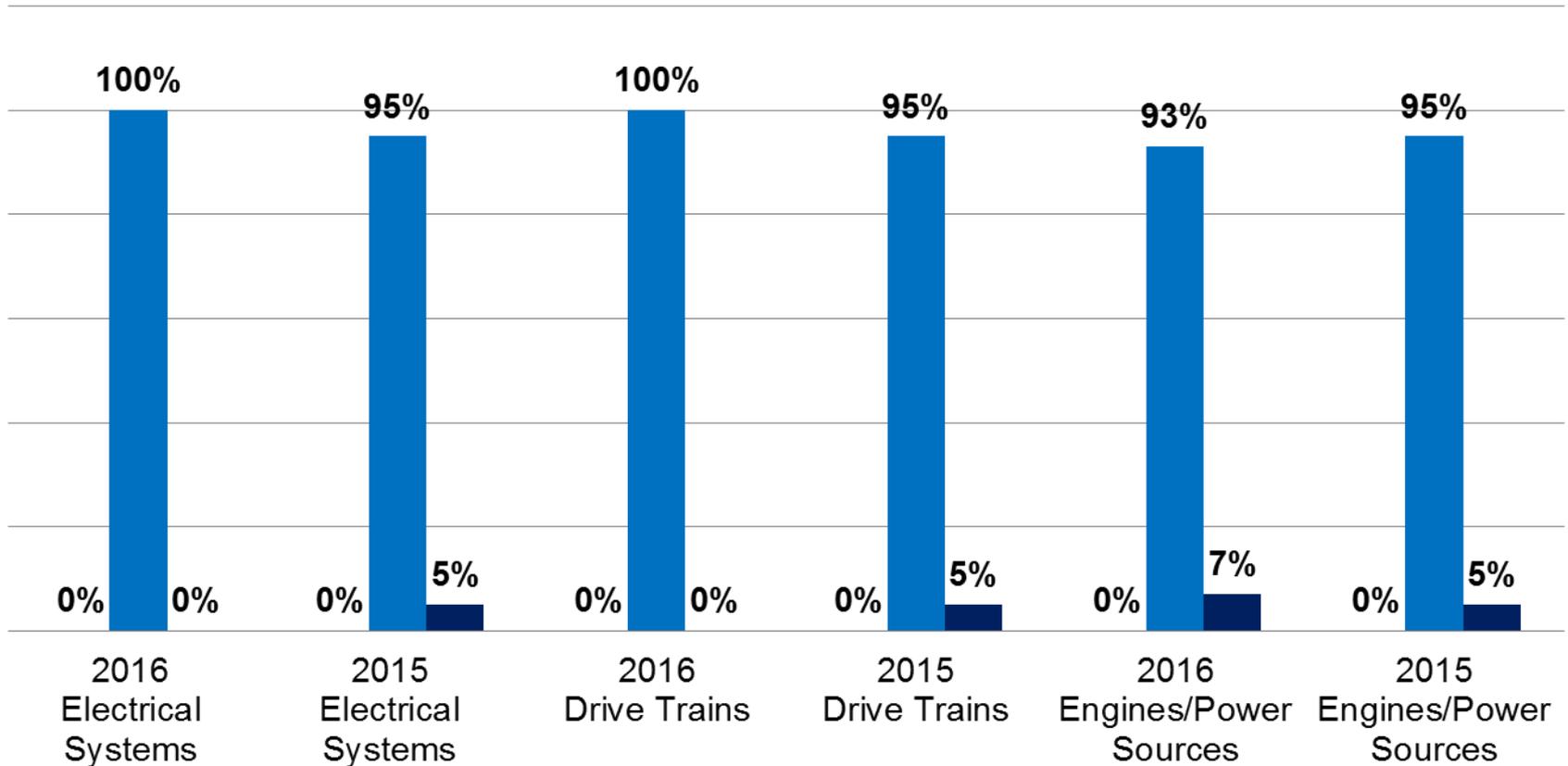


## 7a. Where do you currently source the following items?

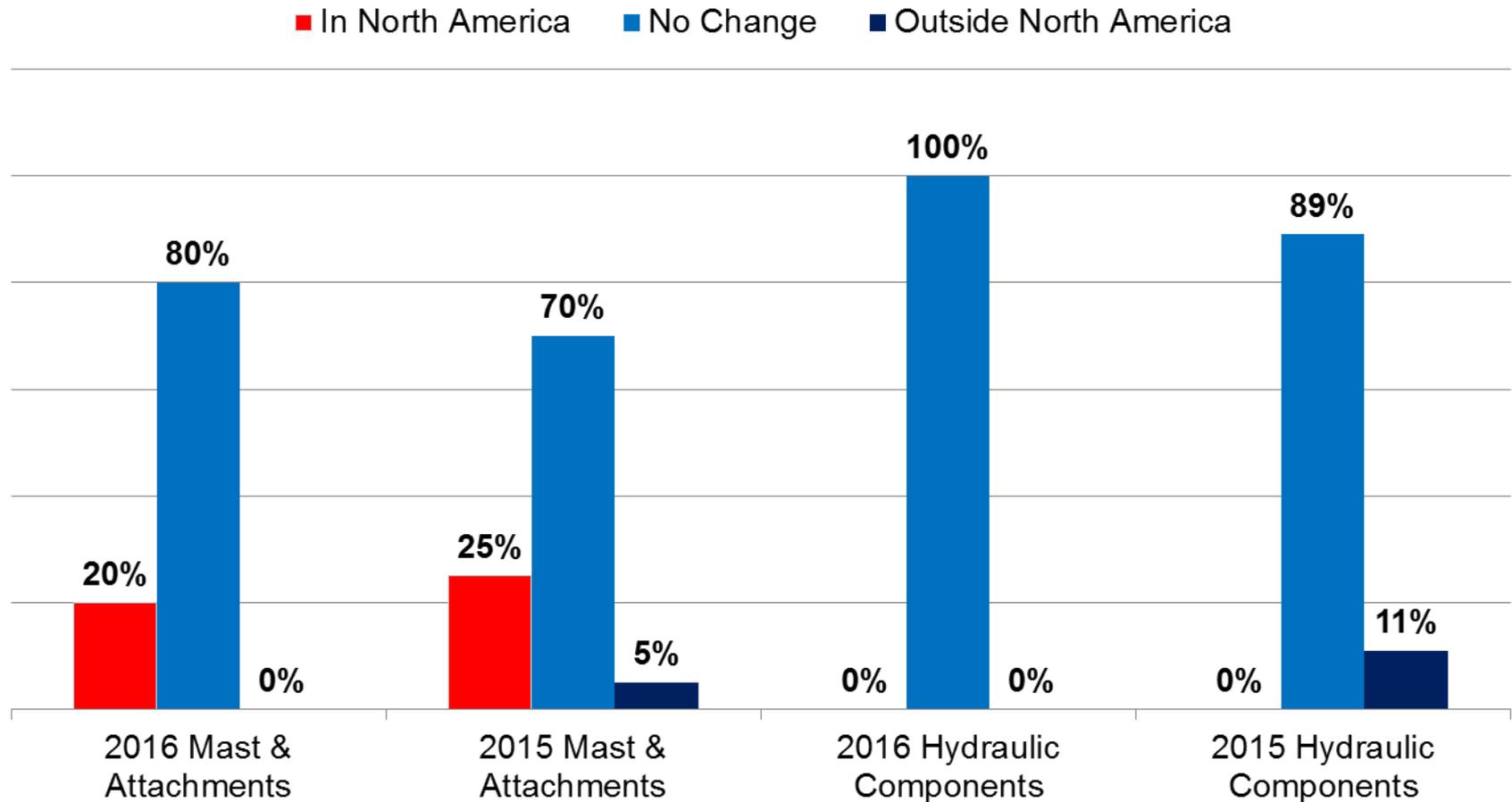


**7(b)(1). Do you anticipate changing the source of the following items in North America, Outside North America or No Change in the next three years?**

■ In North America   ■ No Change   ■ Outside North America

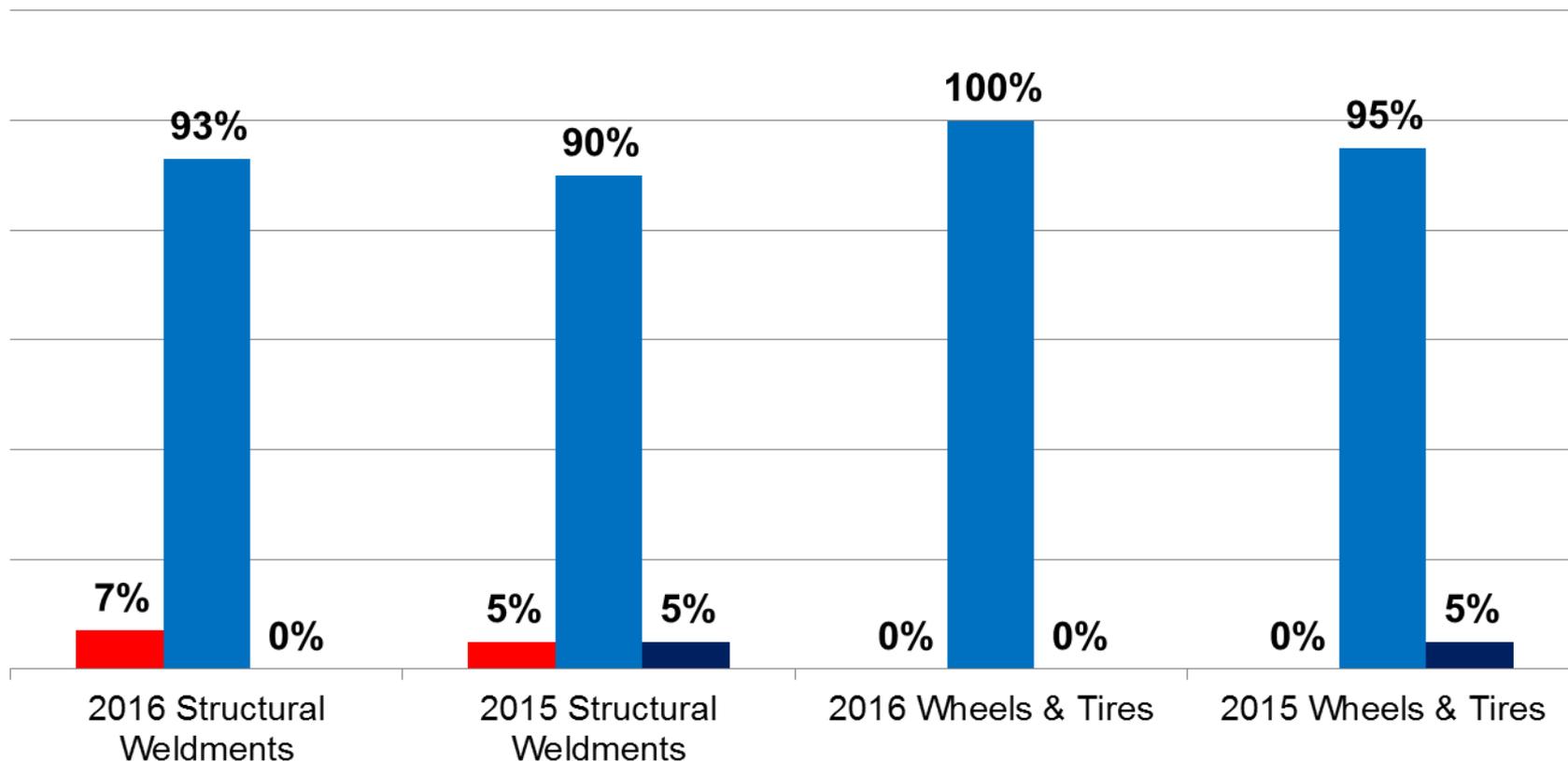


## 7(b)(2). Do you anticipate changing the source of the following items in North America, Outside North America or No Change in the next three years?



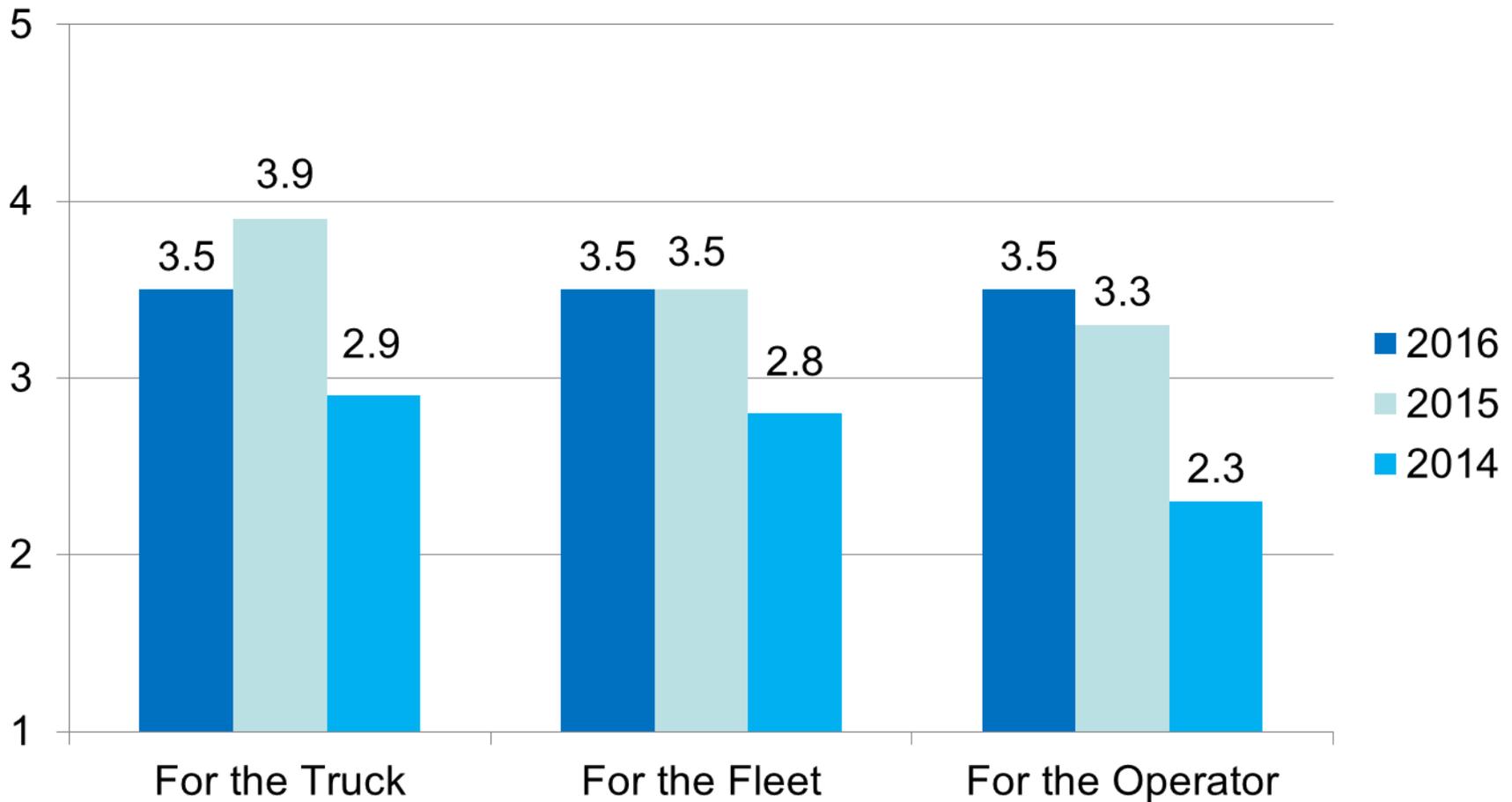
## 7(b)(3). Do you anticipate changing the source of the following items in North America, Outside North America or No Change in the next three years?

■ In North America   ■ No Change   ■ Outside North America



***2. Qualitative Question – Does the value or devaluation of your currency influence what regional area you source items and components? 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 motive power will show the most growth in electric forklift trucks in the next three years? Please rate the following on a scale of 1 to 3 ( where 1=-10% to 0%, 2=>0% to 10%, 3=11% to 20%)**

<b>Motive Power Source</b>	<b>1 -10% to 0%</b>	<b>2 &gt;0% to 10%</b>	<b>3 11% to 20%</b>
Lithium Ion	1	10	4
Lead Acid Battery	5	8	2
Fuel Cells	7	8	0

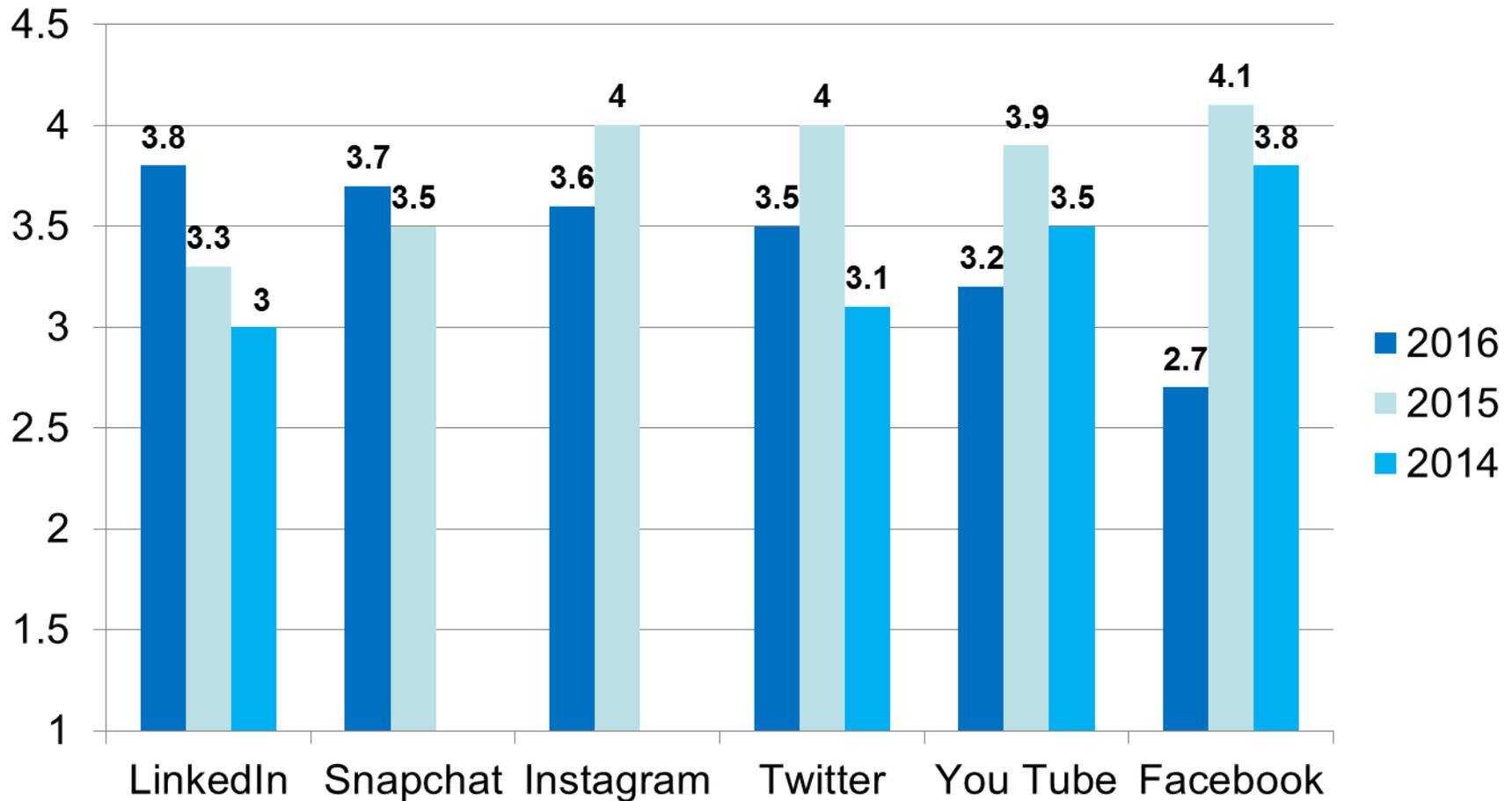
# of respondents

**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	0	6	5	4
Gasoline	0	1	2	6	6
Compressed Natural Gas	1	1	12	1	0
LPG	1	4	5	2	3
Hybrid	0	2	12	1	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?***

***3A. Qualitative Question – How do you foresee the presidential election impacting US markets with a Trump victory? With a Clinton victory?***



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# Questions?

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Thank You For Your  
Attention And Participation.

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