

Fluid Management Market For Off-highway, by Equipment Type (Construction and Mining Equipment, Agricultural Equipment, and Forklifts), System Type (Engine Cooling System, Fuel Delivery System, Hydraulic System), Component Type, and Region – Global Forecast to 2032

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Abstracts

The fluid management market for off-highway is projected to grow from USD 1.21 billion in 2026 to USD 1.63 billion by 2032 at a CAGR of 4.8%. The market is driven by increasing focus on equipment uptime and reliability, as operators are demanding durable and failure-resistant fluid systems to minimize downtime in high-utilization environments. In parallel, growth in rental and leasing equipment models is pushing demand for robust and easy-to-maintain fluid handling components that can withstand continuous usage across multiple operators. The market is further supported by OEMs' shift toward integrated system sourcing, where manufacturers are preferring complete fluid handling assemblies over individual components, increasing system-level demand. Additionally, advancements in compact and high-pressure system design are driving the adoption of efficient fluid routing solutions, especially in space-constrained equipment. At the same time, rising safety and compliance requirements are encouraging the use of leak-proof and high-integrity fluid systems, particularly in environmentally sensitive and hazardous operating conditions.

“Core Role in Machine Operations Driving Hydraulic System Dominance”

The hydraulic fluid system segment leads the fluid management market for off-highway due to its critical role in enabling core machine functions and its widespread adoption across equipment types. Fundamental role in power transmission and actuation is the

primary driver, as hydraulic systems are essential for functions such as lifting, digging, loading, steering, and braking across construction, mining, and agricultural equipment, making them the backbone of off-highway machinery and driving consistent demand for fluid transfer components. High power density and efficiency advantages are supporting dominance. Hydraulic systems provide superior force output and precise control compared to mechanical or electric alternatives, making them the preferred solution for heavy-duty applications. Extensive use across multiple equipment types is increasing demand for volume across excavators, loaders, tractors, and harvesters. Hydraulic systems are universally integrated, ensuring a broad and stable demand base.

Increasing system complexity and performance requirements are further driving growth. Modern equipment is incorporating higher-pressure systems, advanced control mechanisms, and precision hydraulics, increasing the need for high-performance hoses, tubing, valves, and connectors. High wear and replacement frequency contribute significantly to continuous operation under high pressure and harsh conditions, leading to frequent maintenance and replacement of hydraulic fluid components and supporting strong aftermarket demand. Cost effectiveness and established infrastructure are also key factors. Hydraulic systems benefit from mature technology, well-developed supply chains, and lower cost than fully electric alternatives.

“Regulatory Pressure and Advanced Engineering Driving Fluid System Demand in Europe.”

The European fluid management market for off-highway is driven by regulatory pressure, advanced equipment adoption, and strong industrial capabilities. Stringent environmental and emission regulations are a primary market driver across Europe. Regulations related to fluid leakage, emissions, and equipment efficiency are pushing OEMs to adopt high-performance, low-permeability hoses, advanced sealing systems, and efficient hydraulic architectures. High focus on equipment efficiency and sustainability is increasing demand for advanced fluid systems. OEMs in countries such as Germany, France, and Italy are emphasizing fuel efficiency, reduced energy loss, and optimized hydraulic performance, driving innovation in fluid handling components. Strong presence of leading OEMs and Tier 1 suppliers is supporting market growth. Europe hosts major construction, agricultural, and industrial equipment manufacturers, creating consistent demand for high-quality and technologically advanced fluid transfer systems. The rising adoption of electric and hybrid equipment is accelerating demand for thermal management solutions. The transition to electric construction and agricultural machinery is increasing demand for coolant systems, battery thermal

management, and specialized fluid-transfer technologies. Advanced manufacturing and engineering capabilities are enabling the development of high-precision and durable systems. European suppliers are focusing on high-pressure systems, compact designs, and integrated solutions tailored to complex machinery. Stable replacement and aftermarket demand are also contributing to steady growth. A large installed base of off-highway vehicles across the region is generating continuous demand for maintenance and replacement of hoses, fittings, and seals.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: OEM – 50%, Tier 1 – 40%, Tier 2 – 10%

By Designation: Directors – 30%, Managers – 40%, Others – 30%

By Country: Asia Pacific – 50%, North America – 20%, Europe – 30%

Major players in the fluid management market for off-highway are Parker Hannifin Corp. (US), Gates Corporation (US), Cooper Standard (US), Sumitomo Riko (Japan), and ADM Group (India). These players have been adopting various strategies to sustain their positions in the market. Major strategies adopted are product launches, deals, and expansions. These strategies have been analyzed to understand the positions of these companies in the market. Manufacturers focus on maintaining their strategic position in the market by offering advanced, various fluid management systems for off-highway vehicles to meet evolving regulatory and consumer demands.

Key Benefits of Buying the Report:

This report will help market leaders/new entrants in this market with information on the closest approximations of revenue numbers for the fluid management market for the off-highway ecosystem and its subsegments.

This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies.

This report will also help stakeholders understand the market's pulse and

provide information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:

Analysis of key drivers (rising equipment utilization in construction, mining, and agriculture, growth in hydraulic system complexity with improved features), restraints (high price sensitivity in cost-driven equipment segments, harsh operating environments leading to frequent failures), opportunities (electrification-driven thermal management systems), and challenges (supply chain volatility in raw materials like rubber and metals)

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and product launches in the fluid management market for off-highway

Market Development: Comprehensive information about lucrative markets (the report analyzes the fluid management market for off-highway across varied regions)

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the fluid management market for off-highway

Competitive Assessment: In-depth assessment of market ranking, growth strategies, and service offerings of leading players like Parker Hannifin Corp. (US), Gates Corporation (US), Cooper Standard (US), Sumitomo Riko (Japan), and ADM Group (India) in the fluid management market for off-highway

Contents

1. GLOSSARY

- 1.1 LIST OF ABBREVIATIONS
- 1.2 MARKET DEFINITION
- 1.3 INCLUSIONS AND EXCLUSIONS
- 1.4 PICTORIAL REPRESENTATION OF SELECTED COMPONENTS UNDER STUDY SCOPE

2. EXECUTIVE SUMMARY

- 2.1 OFF-HIGHWAY VEHICLE GLOBAL & INDIA SALES FORECAST (2024–2030)
- 2.2 OFF-HIGHWAY INDIA VS. REST OF WORLD FTP MARKET FORECAST (2024–2030)
- 2.3 INDIA CONSTRUCTION & MINING EQUIPMENT FTP MARKET, BY PROPULSION (2024 VS. 2030)
- 2.4 INDIA AGRICULTURAL EQUIPMENT AND FORKLIFT FTP MARKET, BY PROPULSION (2024 VS. 2030)
- 2.6 OPPORTUNITIES IN FTP MARKET FOR INDIA CONSTRUCTION & MINING EQUIPMENT
- 2.7 OPPORTUNITIES IN FTP MARKET FOR INDIA AGRICULTURAL EQUIPMENT
- 2.8 OPPORTUNITIES IN FTP MARKET FOR INDIA FORKLIFT
- 3. OFF-HIGHWAY VEHICLE: ELECTRIFICATION & LOCALIZATION ANALYSIS
- 3.1 INDIA: CONSTRUCTION EQUIPMENT OEMS – ZERO-EMISSION VEHICLE RELATED DEVELOPMENTS AND LOCALIZATION PLANS
- 3.2 INDIA: AGRICULTURE EQUIPMENT OEMS – ZERO-EMISSION VEHICLE RELATED DEVELOPMENTS AND LOCALIZATION PLANS
- 3.3 INDIA: FORKLIFTS OEMS – ZERO-EMISSION VEHICLE RELATED DEVELOPMENTS AND LOCALIZATION PLANS
- 3.4 FLUID TRANSFER PRODUCT SHIFT WITH ELECTRIFICATION FOR FORKLIFT

4. MARKET DYNAMICS & REGULATORY LANDSCAPE 4.1 MNM PERSPECTIVES ON KEY MARKET DRIVERS AND CONSTRAINTS

- 4.2 POLICY IMPACT ASSESSMENT ON IMPERIAL AUTO'S OHV COMPONENTS SEGMENT
- 4.3 REGULATORY FRAMEWORK: INDIA CEV STAGE V EMISSION STANDARDS FOR CONSTRUCTION EQUIPMENT
- 4.4 REGULATORY FRAMEWORK: INDIA TREM STAGE V EMISSION STANDARDS

FOR AGRICULTURAL EQUIPMENT

4.5 SAE INDIA STANDARDS FOR HYDRAULIC HOSES IN OFF-HIGHWAY EQUIPMENT

5. COUNTRY & REGION-WISE OHV SALES AND FTP MARKET ANALYSIS

5.1 INDIA

5.1.1 INDIAN CONSTRUCTION & MINING EQUIPMENT SALES

5.1.2 INDIAN CONSTRUCTION & MINING EQUIPMENT WISE EXPORTS 2024

5.1.3 INDIA AGRICULTURAL EQUIPMENT-WISE SALES

5.1.4 INDIA AGRICULTURAL TRACTOR & COMBINE HARVESTER EXPORT SALES, 2024

5.1.5 INDIA FORKLIFT CLASS-WISE SALES

5.1.6 FTP COMPONENTS – INDIA CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.1.7 FTP COMPONENTS – INDIA AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.1.8 FTP COMPONENTS – INDIA FORKLIFT PRODUCT MIX, 2024 VS. 2030

5.2 CHINA

5.2.1 CHINA OFF-HIGHWAY EQUIPMENT FTP MARKET, BY EQUIPMENT TYPE AND BY SYSTEM, 2024 VS. 2030

5.2.2 FTP COMPONENTS – CHINA CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.2.3 FTP COMPONENTS – CHINA AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.2.4 FTP COMPONENTS – CHINA FORKLIFT PRODUCT MIX, 2024 VS. 2030

5.3 REST OF ASIA PACIFIC

5.3.1 REST OF ASIA PACIFIC FTP PRODUCT MARKET FOR OFF-HIGHWAY EQUIPMENT, BY EQUIPMENT CATEGORY, 2024 VS. 2030

5.3.2 FTP COMPONENTS – REST OF ASIA PACIFIC CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.3.3 FTP COMPONENTS – REST OF ASIA PACIFIC AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.3.4 FTP COMPONENTS – REST OF ASIA PACIFIC FORKLIFT PRODUCT MIX 2024 VS. 2030

5.4 EUROPE

5.4.1 EUROPE CONSTRUCTION & MINING EQUIPMENT SALES – 2024 VS. 2030

5.4.2 EUROPE AGRICULTURAL EQUIPMENT-WISE SALES – 2024 VS. 2030

5.4.3 EUROPE FORKLIFT WISE SALES – 2024 VS. 2030

5.4.4 EUROPE OFF-HIGHWAY EQUIPMENT FTP MARKET , BY EQUIPMENT CATEGORY, 2024 VS. 2030

5.4.5 FTP COMPONENTS – EUROPE CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.4.6 FTP COMPONENTS – EUROPE AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.4.7 FTP COMPONENTS – EUROPE FORKLIFT PRODUCT MIX, 2024 VS. 2030

5.5 NORTH AMERICA

5.5.1 CONSTRUCTION & MINING EQUIPMENT SALES – NORTH AMERICA

5.5.2 AGRICULTURAL EQUIPMENT & FORKLIFT SALES – NORTH AMERICA

5.5.3 NORTH AMERICA OFF-HIGHWAY EQUIPMENT FTP MARKET, BY EQUIPMENT CATEGORY, 2024 VS. 2030

5.5.4 FTP COMPONENTS – NORTH AMERICA CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.5.5 FTP COMPONENTS – NORTH AMERICA AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

5.5.6 FTP COMPONENTS – NORTH AMERICA FORKLIFT PRODUCT MIX, 2024 VS. 2030

6. FTP PRODUCTS KIT SIZE ANALYSIS, BY EQUIPMENT

6.1 BACKHOE LOADERS – KIT SIZES

6.2 EXCAVATORS LOADERS – KIT SIZES

6.3 MOTOR GRADERS LOADERS – KIT SIZES

6.4 CRAWLER DOZERS LOADERS – KIT SIZES

6.5 AGRICULTURE TRACTORS - KIT SIZERS

6.6 FORKLIFTS (CLASS 1-3) – KIT SIZES 6.7 FORKLIFTS (CLASS 4-5) – KIT SIZES

7.COMPETITIVE LANDSCAPE

7.1 EQUIPMENT TYPE OEM MARKET SHARE

7.1.1 CONSTRUCTION & MINING EQUIPMENT OEM-WISE MARKET SHARE (2024)

7.1.1.1 INDIA

7.1.1.2 GLOBAL

7.1.2 AGRICULTURE TRACTOR OEM-WISE MARKET SHARE (2024)

7.1.2.1 INDIA

7.1.2.2 GLOBAL

7.1.3 FORKLIFT OEM-WISE MARKET SHARE (2024)

7.1.3.1 INDIA

7.1.3.2 GLOBAL

7.2 FLUID TRANSFER PRODUCT COMPARISON BY KEY SUPPLIERS 8.

COMPETITOR ANALYSIS**8.1 PARKER HANNIFIN CORP.****8.2 GATES CORPORATION****8.3 COOPER STANDARD****8.4 SUMITOMO RIKO****8.5 JAYSHREE POLYMERS PVT. LTD.****8.6 JK FENNER****8.9 ADM GROUP****8.8 BONY POLYMERS (P) LTD.****8.9 POLYHOSE****8.10 TVH PARTS HOLDING NV 8.11 JAYEM AUTO INDUSTRIES PVT. LTD.****8.12 SEBROS GROUP****8.13 MANULI HYDRAULICS****8.14 DAYCO****8.15 ARTH RUBBERS****8.16 BHATIA PIPE INDUSTRIES****8.19 KINGDAFLEX****8.18 ALFAGOMMA****8.19 BRIDGESTONE****8.20 AR HYDRAULIC**

List Of Tables

LIST OF TABLES

TABLE 1 GLOSSARY – LIST OF ABBREVIATIONS

TABLE 2 GLOSSARY – MARKET DEFINITION

TABLE 3 GLOSSARY – INCLUSIONS AND EXCLUSIONS

TABLE 4 INDIA VS. GLOBAL OFF-HIGHWAY VEHICLE SALES, BY EQUIPMENT (UNITS)

TABLE 5 INDIA DOMESTIC SALES VS. EXPORTS OF OFF-HIGHWAY VEHICLES, BY EQUIPMENT (UNITS)

TABLE 6 INDIA CONSTRUCTION & MINING EQUIPMENT FTP MARKET, BY EQUIPMENT (INR CRORE)

TABLE 7 INDIA AGRICULTURAL EQUIPMENT FTP MARKET, BY EQUIPMENT (INR CRORE)

TABLE 8 REST OF THE WORLD CONSTRUCTION & MINING EQUIPMENT FTP MARKET, BY EQUIPMENT (INR CRORE)

TABLE 9 REST OF THE WORLD AGRICULTURAL EQUIPMENT FTP MARKET, BY EQUIPMENT (INR CRORE)

TABLE 10 INDIA FORKLIFT FTP MARKET, BY CLASS (INR CRORE)

TABLE 11 REST OF THE WORLD FORKLIFT FTP MARKET, BY CLASS (INR CRORE)

TABLE 12 INDIA CONSTRUCTION & MINING EQUIPMENT SALES, BY PROPULSION (UNITS)

TABLE 13 INDIA CONSTRUCTION & MINING FTP MARKET VALUE, 2024 VS. 2030 (INR CRORE)

TABLE 14 INDIA AGRICULTURAL EQUIPMENT SALES, BY PROPULSION (UNITS)

TABLE 15 INDIA AGRICULTURAL EQUIPMENT FTP MARKET VALUE, BY EQUIPMENT TYPE, 2024 VS. 2030 (INR CRORE)

TABLE 16 INDIA FORKLIFT SALES, BY PROPULSION (UNITS)

TABLE 17 INDIA FORKLIFT FTP MARKET VALUE, BY PROPULSION (INR CRORE)

TABLE 18 OPPORTUNITIES IN FTP MARKET FOR INDIA CONSTRUCTION & MINING EQUIPMENT

TABLE 19 OPPORTUNITIES IN FTP MARKET FOR INDIA AGRICULTURAL EQUIPMENT

TABLE 20 OPPORTUNITIES IN FTP MARKET FOR INDIA FORKLIFT

TABLE 21 INDIA AGRICULTURE EQUIPMENT OEMS – ZERO-EMISSION VEHICLE DEVELOPMENTS (TIMELINE 1)

TABLE 22 INDIA AGRICULTURE EQUIPMENT OEMS – ZERO-EMISSION VEHICLE DEVELOPMENTS (TIMELINE 2)

TABLE 23 MNM PERSPECTIVES ON KEY MARKET DRIVERS

TABLE 24 MNM PERSPECTIVES ON KEY MARKET CONSTRAINTS

TABLE 25 CEV STAGE V REGULATION OVERVIEW

TABLE 26 EMISSION STANDARDS: CEV V – CONSTRUCTION EQUIPMENT

TABLE 27 TREM STAGE V REGULATION OVERVIEW

TABLE 28 EMISSION STANDARDS: TREM V – TRACTOR AND RELATED EQUIPMENT

TABLE 29 TREM STAGE V ADDITIONAL STANDARDS

TABLE 30 SAE INDIA STANDARDS FOR HYDRAULIC HOSES

TABLE 31 PARKER HANNIFIN – SEGMENT OVERVIEW

TABLE 32 EATON CORPORATION – SEGMENT OVERVIEW

TABLE 33 GATES INDUSTRIAL CORPORATION – SEGMENT OVERVIEW

TABLE 34 CONTINENTAL AG – SEGMENT OVERVIEW

TABLE 35 DANFOSS – SEGMENT OVERVIEW

TABLE 36 BOSCH REXROTH – SEGMENT OVERVIEW

TABLE 37 BRIDGESTONE CORPORATION – SEGMENT OVERVIEW

TABLE 38 SEMPERIT AG – SEGMENT OVERVIEW

TABLE 39 MANULI HYDRAULICS – SEGMENT OVERVIEW

List Of Figures

LIST OF FIGURES

FIGURE 1 PICTORIAL REPRESENTATION OF SELECTED COMPONENTS UNDER STUDY SCOPE

FIGURE 2 FTP COMPONENTS – INDIA CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 3 FTP COMPONENTS – INDIA AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 4 FTP COMPONENTS – INDIA FORKLIFT PRODUCT MIX, 2024 VS. 2030

FIGURE 5 INDIA CONSTRUCTION EQUIPMENT OEMS – ZERO-EMISSION VEHICLE DEVELOPMENTS

FIGURE 6 INDIA AGRICULTURE EQUIPMENT OEMS – ZERO-EMISSION VEHICLE DEVELOPMENTS

FIGURE 7 INDIA FORKLIFTS OEMS – ZERO-EMISSION VEHICLE DEVELOPMENTS

FIGURE 8 FLUID TRANSFER PRODUCT SHIFT WITH ELECTRIFICATION FOR FORKLIFT

FIGURE 9 POLICY IMPACT ASSESSMENT ON IMPERIAL AUTO'S OHV COMPONENTS SEGMENT

FIGURE 10 INDIAN CONSTRUCTION & MINING EQUIPMENT SALES

FIGURE 11 INDIAN CONSTRUCTION & MINING EQUIPMENT-WISE EXPORTS, 2024

FIGURE 12 INDIA AGRICULTURAL EQUIPMENT-WISE SALES

FIGURE 13 INDIA AGRICULTURAL TRACTOR & COMBINE HARVESTER EXPORT SALES, 2024

FIGURE 14 INDIA FORKLIFT CLASS-WISE SALES

FIGURE 15 INDIA CONSTRUCTION & MINING EQUIPMENT OEM-WISE MARKET SHARE, 2024

FIGURE 16 INDIA AGRICULTURAL TRACTOR OEM-WISE MARKET SHARE (2024) AND HP-WISE TREND

FIGURE 17 INDIA CONSTRUCTION & MINING EQUIPMENT OEM-WISE MARKET SHARE (2024) AND CLASS-WISE TREND

FIGURE 18 CHINA OFF-HIGHWAY EQUIPMENT FTP MARKET, BY EQUIPMENT TYPE AND SYSTEM, 2024 VS. 2030

FIGURE 19 FTP COMPONENTS – CHINA CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 20 FTP COMPONENTS – CHINA AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 21 FTP COMPONENTS – CHINA FORKLIFT PRODUCT MIX, 2024 VS. 2030

FIGURE 22 REST OF ASIA PACIFIC FTP PRODUCT MARKET FOR OFF-HIGHWAY

EQUIPMENT, 2024 VS. 2030

FIGURE 23 FTP COMPONENTS – REST OF APAC CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 24 FTP COMPONENTS – REST OF APAC AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 25 FTP COMPONENTS – REST OF APAC FORKLIFT PRODUCT MIX, 2024 VS. 2030

FIGURE 26 EUROPE CONSTRUCTION & MINING EQUIPMENT SALES – 2024 VS. 2030

FIGURE 27 EUROPE AGRICULTURAL EQUIPMENT-WISE SALES – 2024 VS. 2030

FIGURE 28 EUROPE FORKLIFT-WISE SALES – 2024 VS. 2030

FIGURE 29 EUROPE OFF-HIGHWAY EQUIPMENT FTP MARKET, BY EQUIPMENT CATEGORY, 2024 VS. 2030

FIGURE 30 FTP COMPONENTS – EUROPE CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 31 FTP COMPONENTS – EUROPE AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 32 FTP COMPONENTS – EUROPE FORKLIFT PRODUCT MIX, 2024 VS. 2030

FIGURE 33 CONSTRUCTION & MINING EQUIPMENT SALES – NORTH AMERICA

FIGURE 34 AGRICULTURAL EQUIPMENT & FORKLIFT SALES – NORTH AMERICA

FIGURE 35 NORTH AMERICA OFF-HIGHWAY EQUIPMENT FTP MARKET, BY EQUIPMENT CATEGORY, 2024 VS. 2030

FIGURE 36 FTP COMPONENTS – NORTH AMERICA CONSTRUCTION & MINING EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 37 FTP COMPONENTS – NORTH AMERICA AGRICULTURAL EQUIPMENT PRODUCT MIX, 2024 VS. 2030

FIGURE 38 FTP COMPONENTS – NORTH AMERICA FORKLIFT PRODUCT MIX, 2024 VS. 2030

FIGURE 39 KIT SIZE PRICE BREAKDOWN FOR BACKHOE LOADERS

FIGURE 40 KIT SIZE PRICE BREAKDOWN FOR CRAWLER EXCAVATORS

FIGURE 41 KIT SIZE PRICE BREAKDOWN FOR MOTOR GRADERS

FIGURE 42 KIT SIZE PRICE BREAKDOWN FOR CRAWLER DOZER

FIGURE 43 KIT SIZE PRICE BREAKDOWN FOR AGRICULTURE TRACTORS

FIGURE 44 KIT SIZE PRICE BREAKDOWN FOR FORKLIFTS CLASS 1–3

FIGURE 45 KIT SIZE PRICE BREAKDOWN FOR FORKLIFTS CLASS 4 & 5

FIGURE 46 FLUID TRANSFER PRODUCT KEY SUPPLIERS

FIGURE 47 PARKER HANNIFIN – FINANCIAL ANALYSIS

FIGURE 48 EATON CORPORATION – FINANCIAL ANALYSIS

FIGURE 49 GATES INDUSTRIAL CORPORATION – FINANCIAL ANALYSIS

FIGURE 50 CONTINENTAL AG – FINANCIAL ANALYSIS

FIGURE 51 GATES INDUSTRIAL CORPORATION – REVENUE CHARTS

FIGURE 52 CONTINENTAL AG – REVENUE CHARTS

FIGURE 53 DANFOSS – FINANCIAL ANALYSIS

FIGURE 54 BOSCH REXROTH – FINANCIAL ANALYSIS

FIGURE 55 SEMPERIT AG – FINANCIAL ANALYSIS

FIGURE 56 MANULI HYDRAULICS – FINANCIAL ANALYSIS

FIGURE 57 POLYHOSE – FINANCIAL ANALYSIS

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