

Industrial Vehicles Market by Vehicle Type (Forklifts, Aisle Trucks, Tow Tractors, Container Handlers), Drive Type (ICE, Battery-operated, Gas-powered), Application, Capacity, Level of Autonomy, & Region - Global Forecast to 2030

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Abstracts

The global industrial vehicles market size is projected to grow from USD 49.2 Billion in 2024 to USD 64.3 Billion by 2030, at a CAGR of 4.6%. The industrial vehicles market is expanding globally due to the growing complexity of supply chain operations and the adoption of automation technologies. This shift necessitates advanced industrial vehicles such as AGVs and autonomous forklifts to enhance efficiency. Additionally, the integration of smart warehousing technologies, such as IoT integration and AI-driven analytics, further accelerates market growth by enabling real-time inventory tracking and optimized route planning.

“The Internal Combustion Engine Industrial vehicles segment is expected to grow substantially during the forecast period.”

ICE-operated industrial vehicles are renowned for their efficiency, making them a preferred choice across numerous industries. Unlike electric counterparts that require frequent recharging, ICE vehicles can operate for extended periods. Moreover, they excel in lifting and transporting heavy loads, enhancing the efficiency of loading and unloading tasks in warehouses, factories, and distribution centers. Their high-power output, swift acceleration, and superior top speeds further contribute to their effectiveness in transportation and material handling operations. Factors such as lower initial costs, high operational speeds, ease of refueling, and suitability for heavy-duty applications are anticipated to propel the demand for ICE industrial vehicles. Substantial revenue growth is expected for ICE forklifts over the forecast period, primarily attributed

to the robust product portfolios offered by industrial vehicle manufacturers. Companies such as Toyota Industries Corporation (Japan), Jungheinrich AG (Germany), KION Group AG (Germany), Hyster-Yale Materials Handling, Inc. (US), Crown Equipment Corporation (US), and Mitsubishi Logisnext Co., Ltd. (Japan) provide ICE forklifts to end-users. Toyota's IC counterbalance lift truck '8FG/D Series'. Cat DP20- 35N3 compact diesel-powered forklifts, and Cat DP60-100N3 diesel forklifts are some of the models of ICE forklifts. In May 2021, Mitsubishi Logisnext Co., Ltd. launched new heavy-duty ICE forklift trucks with a 22,000 – 40,000 lbs capacity. These attributes are anticipated to propel the growth of the ICE segment within the global industrial vehicles market over the forecast period.

“Metals & Heavy Machinery application segment to have notable opportunities during the forecast period.”

The global growth of the metals and heavy machinery industry is propelled by increased infrastructural development, construction activities, and automotive production. The repetitive handling and transportation of large and heavy components or assembly parts characterizes this industry. Manual handling of such weighty metal sheets and machinery poses risks of worker injuries and potential damage to products. To address these concerns, plant operators are inclined to enhance operational efficiency, ensuring the smooth movement of heavy equipment within manufacturing and warehousing facilities. Industrial vehicles are crucial in handling these substantial products, ensuring the safe and efficient intralogistic movement of heavy loads. Utilizing industrial vehicles with heavy payload capacity enables facility owners to lift and handle large parts and components with heightened speed, accuracy, and efficiency, thereby preventing injuries to the workforce and potential damages. These industrial vehicles are adept at moving palletized loads along predetermined routes.

The anticipated growth in production capacity within the metals and heavy machinery industry is poised to drive the industrial vehicles market during the forecast period. Companies such as Cargotec Corporation (Finland), Hubtex Maschinenbau GmbH & Co. KG (Germany), Linamar Corporation (Canada), Mitsubishi Logisnext Co., Ltd. (Japan), Crown Equipment Corporation (US), Hangcha Group Co., Ltd. (China), Anhui Heli Co., Ltd. (China), Hyundai Construction Equipment India Pvt. Ltd. (India), and Svetruck AB (Sweden) offer a range of industrial vehicles tailored for the metal and heavy machinery industry.

“China poised for considerable growth in the Asia Pacific industrial vehicles market.”

China is expected to be the largest market in terms of value and volume in the Asia Pacific industrial vehicles market during the forecast period. The industrial vehicles market is anticipated to experience significant growth in China due to government incentives for industrial infrastructure development, positioning China as the fastest-growing market for material handling equipment. Additionally, major manufacturers are expanding their product portfolio in the country to capitalize on its burgeoning industrial sector. For instance, in May 2023, Hangcha Group Co., Ltd. released the XE series of electric forklifts. These forklifts will have a load-carrying capacity of 1.5-3.8 tons. The availability of a diverse range of electric forklift models from leading manufacturers is expected to fuel the growth of the industrial vehicles market, catering to the evolving needs of industries across China.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in the industrial vehicles market. The break-up of the primaries is as follows:

By Company Type: OEMs – 75%, Tier 1 – 10% and Others – 15%,

By Designation: CXO's – 50%, Managers – 30%, and Executives – 20%

By Region: North America – 40%, Europe – 25%, Asia Pacific – 30%, and Rest of the World – 5%

The industrial vehicles market comprises major manufacturers such as Toyota Industries Corporation (Japan), KION Group AG (Germany), Mitsubishi Logisnext Co., Ltd. (Japan), Jungheinrich AG (Germany), Crown Equipment Corporation (US), and Hyster-Yale Materials Handling, Inc. (US), etc.

Research Coverage:

The study covers the industrial vehicles market across various segments. It aims to estimate the market size and future growth potential across different segments such as vehicle type & capacity, drive type, application, level of autonomy, aerial work platform market by type, and region. The study also includes an in-depth competitive analysis of key market players, their company profiles, key observations related to product and business offerings, recent developments, and acquisitions.

This research report categorizes the industrial vehicles market by Vehicle Type &

Industrial Vehicles Market by Vehicle Type (Forklifts, Aisle Trucks, Tow Tractors, Container Handlers), Drive...

Capacity (Forklifts (36 ton), Aisle trucks (2 ton), Tow tractors (30 ton), Container handlers (40 ton), Automated Guided Vehicles, and Personnel Carriers), Drive Type (Internal Combustion Engine Industrial Vehicles, Battery-operated Industrial Vehicles, and Gas-powered Industrial Vehicles), Application (Manufacturing (Chemical, Food & Beverages, Mining, Automotive, Metals & Heavy Machinery, and Others), Warehousing, Freight & Logistics, and Others), Level of Autonomy (Non/Semi-autonomous and Autonomous), Aerial Work Platforms market based on type (Scissor Lifts (Scissor Lifts by Drive Type), Boom Lifts (Articulating AWP, Telescopic AWP), and Boom Lifts by Drive Type) and Region (Asia Pacific, Europe, North America, and Rest of the World).

The report's scope covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the industrial vehicles market. A detailed analysis of the key industry players provides insights into their business overview, solutions, and services; key strategies; contracts, partnerships, agreements, new product & service launches, mergers and acquisitions; and recent developments associated with the industrial vehicles market. This report covers a competitive analysis of SMEs/startups in the industrial vehicles market ecosystem.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall industrial vehicles market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (E-commerce expansion and warehousing dynamics, Impact of warehouse automation and industry 4.0, Role of JIT inventory management in industrial logistics, Growing infrastructure developments, Industrial vehicles as catalysts for enhancing workplace safety), restraints (Financial implications of automation in forklifts & AGVs, High maintenance and repair costs for industrial vehicles), opportunities (Emergence of rental and leasing in industrial vehicles sector, Rise of battery-powered industrial vehicles, Emerging applications in non-traditional industries, Technological advancements in autonomous industrial vehicles), and challenges (Workplace safety concerns

and government regulations, Cost-competitive workforce in emerging markets) influencing the growth of the industrial vehicles market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the industrial vehicles market.

Market Development: Comprehensive information about lucrative markets – the report analyses the industrial vehicles market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the industrial vehicles market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Toyota Industries Corporation (Japan), KION Group AG (Germany), Mitsubishi Logisnext Co., Ltd. (Japan), Jungheinrich AG (Germany), Crown Equipment Corporation (US), and Hyster-Yale Materials Handling, Inc. (US) among others in the industrial vehicles market.

Strategies: The report also helps stakeholders understand the pulse of the industrial vehicles market and provides them with information on key market drivers, restraints, challenges, and opportunities

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