

Telescopic Handler Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Telescopic Handler Market Summary

Introduction

Telescopic Handlers, also known as telehandlers, are versatile lifting machines used in agriculture, construction, shipbuilding, manufacturing, mining and quarrying, and other industries. These machines are valued for their ability to lift heavy loads to significant heights, offering flexibility with various attachments. The industry is characterized by its critical role in material handling across diverse sectors, driven by construction growth and agricultural mechanization. Key trends include the adoption of electric and hybrid telehandlers, advanced safety systems, and telematics for operational efficiency. The market is propelled by global construction booms, particularly in Asia Pacific, and increasing demand for versatile, eco-friendly equipment.

Market Size and Growth Forecast

The global Telescopic Handler market was valued at USD 3.1–4.9 billion in 2024, with an estimated CAGR of 5.0%–7.0% from 2025 to 2030, driven by demand in construction and agriculture.

Regional Analysis

North America is projected to grow at a CAGR of 4.8%–6.8%, with the U.S. leading due to its construction and agricultural sectors, focusing on automated telehandlers.

Europe is expected to achieve a CAGR of 4.5%–6.5%, with France driving demand through its emphasis on sustainable equipment for construction.

Asia Pacific is anticipated to record the highest growth at 5.5%–7.5%, led by China and India, where construction and mining fuel demand, with trends toward high-capacity telehandlers.

Rest of the World, particularly Australia, is expected to grow at 4.3%–6.3%, with trends toward mining and agricultural applications.

Application Analysis

Agriculture applications are estimated to grow at a CAGR of 5.0%–7.0%, driven by mechanization, with trends toward versatile attachments.

Construction applications are projected to expand at 5.3%–7.3%, supported by infrastructure projects, with innovations in hybrid telehandlers.

Shipbuilding, manufacturing, mining and quarrying, and other applications are expected to grow at 4.8%–6.8%, with trends toward high-lift capacities and safety features.

Key Market Players

Oshkosh, headquartered in Oshkosh, Wisconsin, USA, produces telehandlers through its JLG brand, known for its advanced lifting solutions.

Liebherr, based in Bulle, Switzerland, offers telehandlers for construction, emphasizing high-capacity and durable designs.

Haulotte, headquartered in L'Horme, France, provides telehandlers for manufacturing, focusing on compact and versatile machines.

Manitou, based in Ancenis, France, produces telehandlers for agriculture, known for its innovative attachments.

JCB, headquartered in Rocester, UK, offers telehandlers for construction, emphasizing robust and efficient systems.

Doosan Bobcat, based in West Fargo, North Dakota, USA, provides telehandlers for

mining, focusing on rugged designs.

Merlo, headquartered in Cuneo, Italy, produces telehandlers for agriculture, known for its advanced technology integrations.

CNH Industrial, based in London, UK, offers telehandlers for construction, emphasizing sustainable solutions.

Skyjack/Linamar Corporation, headquartered in Guelph, Canada, provides telehandlers for manufacturing, focusing on high-lift systems.

Caterpillar, based in Deerfield, Illinois, USA, produces telehandlers for construction, known for its durable machines.

Wacker Neuson, headquartered in Munich, Germany, offers telehandlers for agriculture, emphasizing compact designs.

XCMG, based in Xuzhou, China, provides telehandlers for mining, known for its cost-competitive solutions.

Magni, headquartered in Castelfranco Emilia, Italy, produces telehandlers for construction, focusing on high-capacity machines.

Xtreme Manufacturing, based in Henderson, Nevada, USA, offers telehandlers for industrial applications, emphasizing innovative designs.

Porter's Five Forces Analysis

The threat of new entrants is moderate; moderate capital costs attract niche players, but brand loyalty and technical expertise create barriers.

The threat of substitutes is moderate; forklifts and cranes compete, but telehandlers' versatility maintains their edge.

Buyer power is moderate; construction firms negotiate pricing, but specialized features limit leverage.

Supplier power is low; components like hydraulics and engines are widely available, reducing supplier influence.

Competitive rivalry is high; players differentiate through hybrid technologies, safety features, and global distribution.

Market Opportunities and Challenges

Opportunities

Growth in global construction projects drives demand for telehandlers.

Adoption of electric and hybrid telehandlers enhances market potential.

Emerging markets in Asia Pacific offer growth due to infrastructure development.

Challenges

High costs for advanced telehandlers limit adoption by smaller firms.

Regulatory scrutiny on emissions increases compliance costs.

Operator training requirements for automated systems pose challenges.

Growth Trend Analysis

The Telescopic Handler market is growing steadily, driven by demand in construction and agriculture. On September 4, 2024, Oshkosh Corporation, through its JLG brand, completed the acquisition of AUSA, adding compact all-terrain telehandlers to its portfolio. On May 21, 2025, HDW acquired Kwak Hoogwerker Centrum, expanding its telehandler distribution in the Netherlands. On June 4, 2025, Mateco acquired Induma Rent, enhancing its telehandler rental capabilities in Germany, effective retroactively from December 31, 2024. These developments align with a projected CAGR of 5.0%–7.0% through 2030, reflecting the industry's focus on versatility and sustainability.

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