

EDAM[®]

Enterprise Document Assessment Methodology

2018 Heavy Equipment Mfg.'s Office Documents Costs

The data represented in this report is summarized for simplicity. It is based on our independent assessments, research and computational analysis encompassing more than 250 published government, academic, and industry research data sources.

We studied 109 global heavy equipment manufacturing companies staffed by 2,850,155 full-time equivalent employees, that during 2018 will produce some 11.5 billion office documents with a predicted fully burden cost just over \$6.1 billion dollars.

This document is intended for discussion purposes and hopefully you are intrigued to learn more.

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EDAM® Global 25 Predicted Office Document Volumes & Costs

According to Grand View Research, the global heavy equipment market size in 2018 is \$195 billion in revenue. They predict industry revenues will continue to expand at a CAGR of 2.8% from 2019 to 2025. Government funding for development of advanced public infrastructure is anticipated to boost demand for heavy equipment. Additionally, development of rental market for these machineries in Europe, China and North America is expected to increase market growth.



313,000
Employees
FTE



1,701,159,742
Office Documents
Produced



\$ 985,358,775
Office Document
Costs



388,349
Trees Consumed
for Office Paper



158,128
Employees
FTE



628,641,060
Office Documents
Produced



\$ 357,600,432
Office Document
Costs



147,709
Trees Consumed
for Office Paper



98,400
Employees
FTE



363,281,593
Office Documents
Produced



\$ 206,558,867
Office Document
Costs



83,771
Trees Consumed
for Office Paper



**SCHAEFFLER
GROUP**



84,198
Employees
FTE



261,576,821
Office Documents
Produced



\$ 149,032,492
Office Document
Costs



58,966
Trees Consumed
for Office Paper



70,263
Employees
FTE



243,267,761
Office Documents
Produced



\$ 138,235,293
Office Document
Costs



56,681
Trees Consumed
for Office Paper

EDAM® Global 25 Predicted Office Document Volumes & Costs

On the basis of product, the market can be segmented into earth moving, material handling, concrete and road construction machinery. Earth moving machinery is the dominant product segment generating \$ 55 billion in 2018. Demand for large earth moving machines is escalating with increased requirement from mining sector. The concrete and road construction machinery segment alone is anticipated to expand at the highest CAGR of 7.0% from 2019 to 2025.



63,356
Employees
FTE



180,560,284
Office Documents
Produced



\$ 102,540,191
Office Document
Costs



42,069
Trees Consumed
for Office Paper



Schindler



61,019
Employees
FTE



249,491,277
Office Documents
Produced



\$ 142,712,403
Office Document
Costs



56,688
Trees Consumed
for Office Paper



JOHN DEERE



60,476
Employees
FTE



264,053,416
Office Documents
Produced



\$ 149,008,701
Office Document
Costs



61,187
Trees Consumed
for Office Paper



KOMATSU



59,632
Employees
FTE



234,096,114
Office Documents
Produced



\$ 131,882,933
Office Document
Costs



55,421
Trees Consumed
for Office Paper



**STANLEY
BLACK &
DECKER**



57,765
Employees
FTE



246,209,072
Office Documents
Produced



\$ 139,467,375
Office Document
Costs



56,337
Trees Consumed
for Office Paper

EDAM® Global 25 Predicted Office Document Volumes & Costs

During 2018, sales of 581,000 heavy equipment units have been made to North America: 161,000 / China: 157,000 / Europe: 131,000 / Japan: 72,000 and India: 60,000. Most of the deliveries are to rental and leasing companies. Renting heavy equipment, as opposed to owning it, has proven to be an effective way for construction firms to cut costs. This is known as the “power by the hour” model - where companies lease equipment for in-use hours, as opposed to owning it.



57,170
Employees
FTE



249,859,030
Office Documents
Produced



\$ 142,823,909
Office Document
Costs



58,541
Trees Consumed
for Office Paper



55,000
Employees
FTE



194,047,567
Office Documents
Produced



\$ 110,992,028
Office Document
Costs



43,523
Trees Consumed
for Office Paper



50,000
Employees
FTE



177,216,998
Office Documents
Produced



\$ 100,502,688
Office Document
Costs



41,047
Trees Consumed
for Office Paper



47,599
Employees
FTE



188,005,224
Office Documents
Produced



\$ 106,402,081
Office Document
Costs



42,526
Trees Consumed
for Office Paper



44,000
Employees
FTE



179,725,067
Office Documents
Produced



\$ 102,877,757
Office Document
Costs



41,605
Trees Consumed
for Office Paper

EDAM® Global 25 Predicted Office Document Volumes & Costs

To keep track of all the parts and pieces that move heavy equipment, manufacturers developed telematic systems to alert users of failures and preventive maintenance. This technology is becoming increasingly sophisticated and predictive, helping maximize unit uptime. The real time data aids manufacturers to optimize their service parts inventory management, eliminating excess and obsolete stock while simultaneously enhancing the customer experience.



43,277
Employees
FTE



166,061,831
Office Documents
Produced



\$ 94,811,544
Office Document
Costs



39,217
Trees Consumed
for Office Paper



43,000
Employees
FTE



141,767,952
Office Documents
Produced



\$ 80,589,533
Office Document
Costs



33,314
Trees Consumed
for Office Paper



39,410
Employees
FTE



140,650,689
Office Documents
Produced



\$ 79,736,302
Office Document
Costs



32,898
Trees Consumed
for Office Paper



38,000
Employees
FTE



147,373,748
Office Documents
Produced



\$ 86,016,423
Office Document
Costs



32,709
Trees Consumed
for Office Paper



37,540
Employees
FTE



100,993,219
Office Documents
Produced



\$ 57,547,014
Office Document
Costs



23,642
Trees Consumed
for Office Paper

EDAM® Global 25 Predicted Office Document Volumes & Costs

With global GDP at 3% industrial, residential, and commercial construction activities, economic growth, and rising public-private partnerships (PPP) is expected to drive the heavy equipment manufacturing marketplace. Rising government investments for infrastructure development and repair is expected to offer lucrative opportunities as this topic will be the main agenda item for global governments beyond 2018.



37,000
Employees
FTE



132,336,383
Office Documents
Produced



\$ 75,521,626
Office Document
Costs



30,707
Trees Consumed
for Office Paper



35,805
Employees
FTE



201,558,837
Office Documents
Produced



\$ 115,078,801
Office Document
Costs



44,471
Trees Consumed
for Office Paper



35,000
Employees
FTE



84,680,081
Office Documents
Produced



\$ 48,900,618
Office Document
Costs



18,374
Trees Consumed
for Office Paper



34,500
Employees
FTE



139,696,036
Office Documents
Produced



\$ 80,156,841
Office Document
Costs



32,378
Trees Consumed
for Office Paper



33,860
Employees
FTE



125,355,832
Office Documents
Produced



\$ 71,721,155
Office Document
Costs



29,427
Trees Consumed
for Office Paper

Additional EDAM® 2018 Heavy Equipment Mfg.'s Researched

National Oilwell Varco	Alfa Laval
NSK	Konecranes
Kion Group	Ebara Corporation
IHI Corporation	Xylem
Shanghai Electric Group	Makita Corporation
Weatherford International	A.O. Smith Corporation
Dover Corporation	Hyundai Heavy Industries
Danfoss Group	Jungheinrich
Andritz Group	Trinity Industries
NTN Corporation	KSB Group
Hilti Corporation	Brunswick Corporation
Knorr-Bremse Group	Oerlikon Group
Regal Beloit Corporation	Weir Group
Hitachi Construction Machinery	Sulzer
Sumitomo Heavy Industries	Colfax Corporation
AGCO Corporation	Crown Equipment Corporation
ASML Holding	Sany Heavy Industry
Voith	Zoomlion Heavy Industry
Pentair	Mitsui Engineering & Shipbuilding
Wartsila Corporation	Husqvarna Group
Westinghouse Air Brake Technologies	Donaldson Company
GEA Group	METSO Corporation
Grundfos Group	Vaillant Group
Kostal Group	Tokyo Electron
Flowserve Corporation	Greenbrier Companies

Additional EDAM® 2018 Heavy Equipment Mfg.'s Researched

Samsung Heavy Industries

Heidelberger Druckmaschinen

Lennox International

Lincoln Electric Holdings

Lam Research Corporation

Terex Corporation

Kennametal

Hitachi Zosen Corporation

Harsco Corporation

Middleby Corporation

Rexnord Corporation

Nordson Corporation

Spirax Sarco Engineering

IDEX Corporation

SPX Flow

Woodward

Toro Company

Hyster-Yale Materials Handling

Gardner Denver

BWX Technologies

Screen Holdings

Rieter Group

Japan Steel Works

Briggs & Stratton Corporation

SPX Corporation

Manitowoc Company

Exterran Corporation

Advantest Corporation

Entegris

Schweiter Technologies

Jenoptik

OKUMA Corporation

Murata Machinery

Furukawa Company

Hunting



EDAM® Cost Modeling

ALL Associates Group uses exhaustive research, mathematical and scientific processes, predictive analytics, and techniques to combine global data on employment and industry statistics. EDAM® databases and algorithms can compute the **fully burdened costs** of any document system, within any organization, anywhere in the world.

This 2018 Top 25 global heavy equipment manufacturers summary report was generated using EDAM® Predictive Modeling Tools. To obtain a predictive profile of any one of these companies listed call **(919) 917-7600** or send an email to: **edam@allassociates.com**

Insights

- **Document Volumes**
 - Office & Production
- **Document Costs**
 - Print / Copy / Digital
- **Impact Analysis**
 - Energy & Resources
 - FTE Workforce Dynamics
 - Machine in Field (MIF)
 - Regulatory Impact Analysis

