Freedonia

Materials Handling Equipment - *Private Companies Report*

- *Profiles the top private US producers and distributors of materials handling equipment*
- *Analyzes outlook for materials handling equipment*
- *Reveals annual sales and employment*

An essential tool if you are involved with...

**** Mergers and Acquisitions***

**** Cooperative and Licensing Agreements***

**** Joint Ventures***

Freedonia Private Companies Report #1432

Materials Handling Equipment

Report Publication Date: May 2001
Price: $3,200
Pages: 315

Materials Handling Equipment - Private Companies Report profiles more than 140 private U.S. producers and distributors of materials handling equipment. This information will assist in making decisions concerning acquisitions, joint ventures and cooperative agreements.

Examine the report highlights, sample pages and table of contents on the following pages and see how *Materials Handling Equipment - Private Companies Report* can serve as a valuable decision making tool for your company.

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List of Contents, Tables and Charts

This new report profiles more than 140 private U.S. companies active in the materials handling equipment industry. To frame the industry, Freedonia analysts have prepared an overview of the market and general industry. The analysis explores the key indicators that drive demand, highlights company capabilities and annual sales, identifies private company characteristics and shows regional concentration.

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Companies Profiled

** Sample profiles on pages 4 and 5*

AGV Products Inc.
All-Fill Inc.
Allied Systems Co.
Amatrol Inc.
AMBEC Inc.
AMF Bakery Systems
  Pulver Systems Inc.
Angus-Palm Industries Inc.
Arrow-Master Inc.
  LDC Industries Inc.
Arrowhead Systems LLC
  Busse Inc.
ASE Industries Inc.
  Automation Service Equipment
Atlas Metal Industries Inc.
Auto Crane Co.
Auto Labe
Automated Conveyor Systems Inc.
Automated Production Systems Corp.
Automatic Feed Co.
Automatic Handling Inc.
Automation Peripherals
Automation Technologies Industries Inc.
Automotion Inc.
Autoquip Corp.
Barry-Wehmiller Companies Inc.
  Fleetwood Inc.
  Fleetwood Systems Inc.
  I&H Engineered Systems
  Jetstream Systems Inc.
  Thiele Technologies Inc.
Belco Packaging Systems Inc.
Besser Co.
Best Diversified Products Inc.
BEUMER Corp.
BluePrint Automation Inc.
Can Lines Inc.
Carrier Vibrating Equipment Inc.
Century Simplimatic Inc.
  Crown Simplimatic Inc.
  Wired Industries
Chantland-PVS Co.
Clarin
CLARK Material Handling Co.
Cozzoli Machine Co.
  MRM/Elgin
Crown Equipment Corp.
CSI Industrial Systems Corp.
Diamond Systems
Dorner Mfg. Corp.
  Autologik
Douglas Machine LLC
  AccuLift
  Dimension Industries
Drexel Industries LLC
Ducon Technologies Inc.
Dyco Inc.
Dynapace Corp.
Eagle Industrial Truck Mfg. Inc.
EISENMANN Corp. USA
Elf Machinery LLC
Enduro Systems Inc.
  InterSystems Inc.
Engineered Products
  Handling Systems International Inc.
Fairfield Engineering Co.
Foley Material Handling Co. Inc.
  Ashland Cranes of Virginia
Food Engineering Corp.
G&T Conveyor Co. Inc.
GEBO Corp. USA
Genie Industries Inc.
Gleason Industrial Products Inc.
  Milwaukee Hand Truck
Global Industries Inc.
  MFS/York/Stormer
Globe Machine Mfg. Co.
  Burelbach Industries
Goldco Industries Inc.
Goodman Packaging Equipment
Gorbel Inc.
Grob Systems Inc.
Gruber Systems Inc.
Hamilton Caster & Mfg. Co.
Harlan Corp.
Harper Trucks Inc.
Hartness International Inc.
HK Systems Inc.
  Irista
HMS Products Co.
Hoist Liftruck Mfg. Inc.
  Elwell-Parker Ltd.
Hytrol Conveyor Co. Inc.
JG Machine Works Inc.
Jorgensen Conveyors Inc.
K-D Manitou Inc.
Kardex Systems Inc.
Keith Mfg. Co.
Key Handling Systems Inc.
Knapp Logistics and Automation Inc.
KWS Mfg. Co. Inc.
Landis (Clayton H.) Co. Inc.
Lantech Inc.
The Lantis Corp.
  CHL Systems
Lumsden Corp.
  Wiremation Conveyor Belting
MAC Equipment Inc.
Magline Inc.
Mark One Corp.
MMH Holdings Inc.
  Morris Material Handling Inc.
  P&H Material Handling
Modern Equipment Co. Inc.
  Meco Omaha
Moellers North America Inc.
Motion Systems
Murata Automated Systems Inc.
  Muratec
Nercon Engineering and Mfg. Inc.
NESCO Inc.
  Continental Conveyor & Equipment Co.
  Goodman Conveyor Co.
NJM/CLI Packaging Systems International
  Lapierre (Charles) Inc.
  New Jersey Machine Inc.
NKC of America Inc.
NMC-Wollard Co.
  Northwestern Motor Co. Inc.
  Wollard Airport Equipment Co. Inc.
Ohio Industries Inc.
  Ohio Locomotive Crane Co.
  Plymouth Industries Inc.
Omaha Standard Inc.
  Eagle Lift
Payson Casters Inc.
  American Overhead Conveyor
  Nagel Chase Inc.
  Roll-A-Way Conveyors Inc.
Pearson Packaging Systems
  Pearson (RA) Co.
Pettibone LLC
  Ardco/Traverse Lift LLC
  Barko Hydraulics LLC
  Tiffin Parts LLC
Premier Pneumatics Inc.
R&M Materials Handling Inc.
Rapid Industries Inc.
Rehrig International Inc.
Richards-Wilcox Inc.
Roach Mfg. Corp.
The Robbins Co. Inc.
Safeworks LLC
Schaeff Inc.
Schneider Packaging Equipment Co. Inc.
SDI Industries Inc.
Sentry Equipment Inc.
Shepard Niles Inc.
Shick Tube-Veyor Corp.
Shuttleworth Inc.
Simplicity Engineering
Slidell Inc.
SNS Properties Inc.
  Mentor AGVS
Southco Industries Inc.
Southern Systems Inc.
Streator Dependable Mfg. Co.
  Anthony Liftgates Inc.
  Mushro Machine & Tool Co.
  US Truck Body Inc.
Strutz Internatioal Inc.
Systems Material Handling Co.
Taylor-Dunn Corp.
The Taylor Group Inc.
TBM Holdings Inc.
  Blue Giant
  Lee Engineering Co.
  Long Reach Inc.
  Presto-Lifts Inc.
  Specialty Retail Group Inc.
TC/American Monorail Inc.
  Tilt-Lock Inc.
Tekno Inc.
Therma-Tron-X Inc.
Toter Inc.
Unex Mfg. Inc.
Vector Design Inc.
Versa Conveyor Ltd.
Vulcan Engineering Co.
Waltco Truck Equipment Co. Inc.
Watkins Aircraft Support Products Inc.
  WASP Inc.
Webb (Jervis B.) Co.
  Control Engineering Co.
  New Hudson Mfg.
  Webb Airport Services
  Webb-Materials Handling Equipment
  Webb-Triax Co.
Webster Industries Inc.
Wes-Tech Automation Systems Inc.
Wesco Industrial Products Inc.
Western Pneumatics Inc.
Whallon Machinery Inc.
Whiting Corp.
Yukon Mfg. Inc.
Zenar Corp.
Ziniz Inc.

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Detailed Company Profile

More than 140 private company profiles are compiled and range from detailed to brief company descriptions. (See Samples)

All companies are individually contacted and the majority of the companies verify the data.

Hard to obtain sales and employment figures, key products and services and an overview of corporate operations are provided.

AGV Products Incorporated
8012 Tower Point Drive
Charlotte, NC 28227
County: Mecklenburg
County Code: 37119

Phone: 704-845-1110
Fax: 704-845-1111
Web Address: http://www.agvproducts.com

Annual Sales
Employmen
Key Executive

SAMPLE PROFILE

Key Products: manufacture of automated guided vehicle systems and vehicle control software; and distribution of automation equipment and related components

Census Code SIC(s): 3537; 5084; 7372

SIC Description(s): industrial trucks, tractors, trailers and stackers; wholesale industrial machinery and equipment; prepackaged software

AGV Products is a provider of automated guided vehicle (AGV) system solutions. The Company designs and manufactures AGVs and vehicle control software, as well as distributes automation equipment and related components. AGV Products also provides integration, consulting and refurbishment services. The Company serves the manufacturing, distribution and warehousing markets. In 2000, AGV Products combined its corporate and manufacturing operations into a new 40,000-square-foot facility located in Charlotte, North Carolina. The new building provides the Company with an expanded manufacturing capability.

The Company also distributes automation equipment and related components from other manufacturers. Among these products are DC motor-in-wheel drives, DC motors, differential drives, motor pumps and throttle control handles from Metalroto and wireless optical communication devices from Hokuyo Automatic Company for materials handling and factory automation applications.

Brief Company Profile

These profiles give you insight into the operations of private companies, and can help you:

- Identify companies for investment, merger, and/or acquisition opportunities based on size, products, and location.
- Evaluate the position of your competitors based on sales and/or employment figures.

PRIVATE COMPANY PROFILES

SDI Industries Incorporated
13000 Pierce Street
Pacoima, CA 91331
County: Los Angeles
County Code: 06037

Phone: 818-890-6002
Fax: 818-890-2858
Web Address: http://www.sdiindustries.com

Annual Sales
Employmen
Key Executive … CEO

SAMPLE PROFILE

Key Products: unit sortation systems, conveyors, hydraulic lift platforms, straddle carriers and loading dock equipment

Census Code SIC(s): 3535; 3537

SIC Description(s): conveyors and conveying equipment; industrial trucks, tractors, trailers and stackers

SDI Industries designs and manufactures materials handling systems for the merchandise distribution industry. Products include unit sortation systems, including flat and hang sorters; conveyors; hydraulic lift platforms; straddle carriers; and loading dock equipment. The Company provides consultation, engineering and installation services. SDI Industries operates a manufacturing facility in Pacoima, California, as well as offices in France, Italy, Chile and Australia. Customers include specialty retail stores, specialty merchandisers, off-price retailers, discount stores, sporting goods and footwear stores, manufacturers, wholesalers, third party logistics, mass merchants, catalog firms, department stores and grocery markets. The Company has installed its materials handling systems in over 300 locations worldwide and installs an additional 15 annually.

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Market Overview

The Market Overview Section discusses factors influencing supply and demand, including construction expenditures and the outlook for industrial trucks and lifts.

This information helps you:

- Determine what external factors will impact future supply and demand
- Measure your market and sales potential based on supply and demand forecasts.
- Propose new areas for product development based on market trends & innovations.

MARKET OVERVIEW

Conveying Equipment

US demand for conveying ... will increase five percent per year through 2005 to ... eleration from the gains posted between 1995 ... SAMPLE PAGE ...g US economy bolstered demand for conveyors ...s. The economic expansion, however, has slowed at the ... century, and with it, demand for conveyors. Despite the current slowing trend, conveying equipment and systems are expected to advance long term, benefitting from capacity expansions in the manufacturing and wholesale industries; and the increasing popularity of Internet shopping (e-commerce). Product upgrades including lighter units, higher accuracy in load accumulation, adjustable size and improved ergonomics will create additional demand. However, conveyors are extremely durable and rarely need replacement due to product failure. Most replacements are upgrades of existing systems designed to bolster productivity; however, replacements also include the purchase of individual parts to repair or refurbish existing lines.

Conveyors accounted for the second largest share of materials handling equipment demand in 2000, with 35 percent. These systems are designed to provide a continuous or intermittent flow of materials from one point to another along a fixed path. Conveyors are classified by their power source, such as gravity, powered and automated; conveying mechanism, such as rollers, wheels, belts, trolleys, tow, slats, chains, buckets and screws; functional type (unit or bulk); and ...

OUTLOOK FOR INDUSTRIAL TRUCKS & LIFTS BY TYPE

Type	Factors Spurring Growth	Factors Restraining Growth
Forklifts and Other Lift Trucks	Increasing demand for safer and more ergonomically designed products. Widening use and ... construction acti... warehousing, dis... home retail cente...	Continuing competition from automated equipment, particularly automated guided vehicles. ...quipment rental market.
Work Trucks and Tractors	Ability to handle heavy load capacities, coupled with simple designs and ease of operation.	Long product life and durable construction. (continued)

SAMPLE TABLE

Industry Structure

Gain a better understanding of your competition and analyze your company's position in the industry with information about the characteristics of leading materials handling equipment manufacturers including total sales, capabilities and regional concentration.

This information helps you:

- Evaluate diversification opportunities based on product lines of other private companies.

- Understand barriers to entry based on industry concentration.

- Develop positioning strategies based on size of competitors.

Automated Systems & Robots

Automated systems and robots require si[...] [...]ological expertise, particularly in the area of compute[...] [...] therefore, barriers to entry in this segment are hig[...] [...]ndling segments. As a result, private fi[...] [...]nt when compared to the industrial trucks a[...] [...]ment segments. A trend toward increased computerization and a[...] in both manufacturing and distribution operations, however, in order to improve efficiency and customer service and lower unit production costs, will open opportunities for private firms to enter the automated system and robot arena.

SAMPLE PAGE

Private companies engaged in the production of automated guided vehicles (AGVs), automated storage/retrieval systems (AS/RS) and materials handling robots range in size from under $10 million to hundreds of millions of dollars in annual sales. Each of these product types represents a distinct market in itself, with relatively little cross participation by companies (public or private). Levels of participation and

Selected Private Hoist, Crane & Monorail Companies

Company	Corporate Sales (mil $)*	Principal Products: Hoists	Overhead Cranes	Monorails	Parts & Attachments	Materials Handling Equipment Markets: Construction	Governmental/Institutional	Manufacturing	Trade & Distribution	Other/Unspecified
Allied Systems	40		•				•	•		•
Automatic Handling	35	•			•			•		•
Foley Material Handling	15	•	•				•	•		•
Gorbel	20	•	•	•				•	•	•
Gruber Systems	[illegible]	[illegible]	•					•		•
Key Handling Systems	[illegible]	[illegible]	[illegible]	•					•	•
MMH Holdings	[illegible]	[illegible]	[illegible]		•			•		
Murata Automated Systems	[illegible]	[illegible]	[illegible]	•				•	•	
Ohio Industries	25		•			•		•	•	•
R&M Materials Handling	30	•	•		•					•
Richards-Wilcox	50			•				•	•	
Shepard Niles	25	•	•	•	•			•	•	•

SAMPLE CHART

* Sales are 2000 estimates of total corporate sales including products other than hoists, cranes and monorails.

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Report Highlights

- Private firms in the $17.7 billion materials handling equipment market manufacture industrial lifts and trucks, conveying equipment, automated systems and robots, hoists, cranes and monorails, with some integrated into the production of more than one type.

- One private producer had total materials handling equipment sales of $1 billion in 2000 and accounted for four percent of the US market.

- An additional five private players each have materials handling equipment sales in excess of $100 million.

- Smaller private concerns are often attractive acquisition candidates for large- and medium-sized manufacturers, although several larger private companies have also been recently forced to sell operations as part of bankruptcy-induced restructuring efforts.

- California, Michigan, Ohio and Texas have the highest concentrations of private materials handling equipment manufacturing sites, with over 200 each.

- US demand for materials handling equipment is forecast to increase 5.7 percent per year through 2005 to $23.3 billion.

About The Freedonia Group

The Freedonia Group, Inc. is a leading international industry report/database company.

Since 1985, Freedonia has published over 1,600 titles covering areas such as building materials, chemicals, plastics, industrial components and equipment, household goods, coatings and adhesives, health care, packaging, security, and many other industries.

Private companies reports encompass not only Freedonia's notable industry forecasts, but also market shares, product information and sales and employment figures for **private companies**. Corporate analysts are constantly monitoring privately-held companies to provide the most up-to-date and comprehensive profiles. Freedonia is able to gather and prepare this proprietary information based on our reputation as a leading market research firm.

Advantages of Freedonia Reports

By obtaining Freedonia's report on private companies in the materials handling equipment industry, you will be able to:

- **Identify companies for possible investment, merger, and /or acquisition opportunities** based on size, products and location.
- **Measure your market and sales potential** based on demand forecasts.
- **Propose new areas for product development** based on material trends.
- **Develop positioning strategies** based on size and geographic location of competitors.
- **Evaluate diversification opportunities** based on product lines of other private companies.
- **Understand barriers to entry** based on industry concentration and market shares.

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Our Customers

Freedonia's clients include major US and international companies in the manufacturing, services, consulting and financial sectors.

Typical purchasers of Freedonia studies :

- **Key Executives**
- **Corporate Planners**
- **Market Researchers**
- **Financial Analysts**
- **Information Centers**
- **New Product Developers**
- **Merger & Acquisition Specialists**

Since 1985 we have provided research to customers ranging in size from global conglomerates to one person consulting firms. More than 90% of the industrial companies in the Fortune 500 use Freedonia research to help with their strategic planning.

Some of Freedonia's customers in the materials handling equipment industry include: Siemens, Mannesmann and Rockwell Automation.

Because Freedonia is a source for reliable information, our forecasts have been cited in numerous publications such as *The Wall Street Journal, Material Handling Engineer, Plastics News* and *Purchasing.*

Related Studies and Reports

For more information about these or other Freedonia titles, please contact us at:

The Freedonia Group, Inc.
Phone: (440) 684-9600
(800) 927-5900
Fax: (440) 646-0484

Plastics Processing Machinery

US demand for plastics processing machinery will reach $2.8 billion in 2005, driven by further inroads plastics make against competitive materials. Growth will also result from more advanced machine designs which will benefit higher-end equipment as plastics processors seek to improve efficiency and quality. This study analyzes the US plastics processing machinery industry to 2005 and 2010 by type, including plastics demand by resin, process and market. It also presents market share data and profiles key firms.

#1422. . . . . 5/01. . . . . $3,600

Industrial Controls

US demand for industrial controls will grow 6% annually, driven by continuing innovation in solid-state controls and rising demand for software and system integration services. Advanced controls will outpace conventional devices. Durable goods industries will remain the largest market, while services, chemicals and utilities grow the fastest. This study analyzes the $14.5 billion US industrial controls industry to 2005 and 2010 by product and market. It also includes key company profiles and market share.

#1400. . . . . 3/01. . . . . $3,700

World Commercial Refrigeration Equipment

World demand for commercial refrigeration equipment will grow over 6% annually, driven by rising demand in developing countries. Japan will lead gains among developed countries. Reach-in and walk-in coolers and freezers, vending machines, display cases and ice machines will be the fastest growing products. This study analyzes the US$18.6 billion commercial refrigeration equipment industry to 2004 and 2009 in six world regions and 22 countries. It also evaluates market share and profiles key firms.

#1367. . . . . 1/01. . . . . $4,500

Materials Handling Equipment

Demand for materials handling equipment in the US will grow over 5% annually. Gains will be fueled by strength in key end-use markets such as the aerospace and electronics industries, as well as by the rapid growth in e-commerce. Industrial trucks and automated systems, particularly robots, will experience the strongest growth. This study analyzes the $16 billion US materials handling equipment industry to 2004 and 2009 by type and market. It also evaluates market shares and profiles key companies.

#1324. . . . . 9/00. . . . . $3,500

Packaging Machinery - Private Companies Report

Six private US firms each generate total packaging machinery sales of over $75 million. Two of these have worldwide sales of at least $200 million and are among the five top US producers overall. Twelve other private companies have total corporate sales of over $75 million. This report profiles over 130 privately-held firms (e.g., Automated Packaging, Barry-Wehmiller, Bosch, Crown Simplimatic, Lantech, Pro Mach) and lists them by product and location. It also forecasts industry demand and reviews acquisitions.

#1316. . . . . 8/00. . . . . $3,200

Industrial Rubber Products

Sales of industrial rubber products in the US will grow over 6% annually. Gains will be driven by expanded use of geomembranes and rubber roofing and flooring. The aerospace and other transportation market will also post rapid gains, while mechanical rubber goods remains the largest product group, with most demand related to motor vehicles. This study analyzes the $15.5 billion US industrial rubber products industry to 2004 and 2009 by type and market. It also evaluates market shares and profiles key firms.

#1309. . . . . 8/00. . . . . $3,600

Plastics Processing Machinery - Private Companies Report

By selling custom made machines, many small private firms compete in a variety of niche segments. Among the top private US competitors, seven have at least a one percent market share-with three bringing in over $75 million in related sales. This report profiles over 120 privately-held producers of plastics processing machinery (e.g., American Kuhne, Brown Plastics Machinery, Engel Canada, Graham Engineering, HPM-Stadco, Lyle Industries, Welex), forecasts industry demand and details market share.

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