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Power Systems Research: Data...Forecasts...Strategies

Data Point

3,200

By Carol Turner, Senior Analyst, Global Operations


This is the estimate by Power Systems Research of the number of Crawlers that will be produced in the United States in 2018. This is an increase of 3% from the 2,830 units produced in 2017; 3,000 units were built in 2016. A Crawler is defined as a heavy, driver-operated machine used for clearing and grading land. Industry leaders are **Deere** with 41% of total units produced; **Caterpillar** with 37.5% of total units produced is in second position. In third is **Case New Holland** with 16.5%.

From 2016-2017, production of Crawlers in North America (US) dropped 5.5%. Production is expected to gain 13% in 2017-2018. Construction spending in the United States is now above year-ago levels, according to a new analysis of federal data released by the Associated General Contractors of America.

The recent decrease is attributed to divergent trends however, as public sector construction activity continues to decline while private sector demand for new construction continues to strengthen. On the flip side, construction and mining activities have increased, resulting in the gain for 2018.

Expect production to remain steady over the next 3-5 years with a possible increase up to 15%.

This information comes from two proprietary databases maintained by Power Systems Research: **EnginLink™** and **OE Link™**. **PSR**

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North America Report

By *Michael Aistrup*, PSR Senior Analyst

Purchasing “Outside-the-Box” by Polaris

Polaris Industries, the \$5.4 billion maker of snowmobiles, off-road vehicles and motorcycles, says it has agreed to acquire Boat Holdings, a boat manufacturer owned by the Vogel family, management and Balmoral Funds, in an all-cash transaction valued at approximately \$805 million.



*Michael
Aistrup*

Boat Holdings is the largest manufacturer of pontoon boats in the U.S., one of the largest and fastest growing segments in the marine industry. With a full offering of pontoon, deck and cruiser boats, Boat Holdings’ four recognized brands, Bennington, Godfrey, Hurricane and Rinker, have over 200 base models across a range of price points. Boat Holdings offers boats through a network of dealers primarily in the United States and Canada. Boat Holdings reported 2017 sales of approximately \$560 million.

With this purchase Polaris could realize several benefits:

- Boat Holdings is the leading manufacturer of pontoon boats in the U.S. In a fragmented market, Boat Holdings’ experienced and loyal network of nearly 500 dealers is a competitive advantage.
- The move into the recreational marine market expands Polaris’ significant presence in the powersports market. Polaris will be able to offer customers a range of engine-powered options on land and in the water. Customer demographics across the off-road vehicle and boating segments are similar, with nearly 30% of Polaris customers owning a boat. Polaris expects that these cross-selling opportunities will increase sales and provide additional value to shareholders.
- The addition of Boat Holdings will broaden and diversify Polaris’ range of powersports offerings, and Polaris expects that it will boost its overall growth rate. The U.S. market for new powerboats is an \$8 billion market, and pontoon is one of the largest and fastest growing segments within the industry. Sales in the pontoon boat category have grown at an 11% compounded annual growth rate since 2010.

Boat Holdings has been a leader in developing high-featured, high-performance luxury boats, across price points. Boat Holdings will maintain its headquarters and manufacturing facilities in Elkhart, Indiana. **PSR**

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Brazil/South America Report

By *Fabio Ferraresi*, PSR Director, Business Development, South America

Truck Driver Strike Stops Brazil; Causes and Effects

The 10-day truck driver strike, starting May 21, was caused by the clumsy intervention of the Brazilian government in its effort to reduce oil prices through Petrobras, the state oil company, and to allow price adjustments with international commodity prices.



*Fabio
Ferraresi*

After several years with regulated prices of oil and gasoline, Petrobras started adjusting prices on a daily basis, even though the transportation/freight industry was not prepared to deal with these daily changes.

The transportation industry in Brazil is about 50% owned by individual truck drivers, who have no bargaining power or sophisticated administration skills. The other 50% is owned by big transportation companies with the assets and structure to adapt to changes in oil price policy. But the companies have been worn down in recent years due to recession, and margin reductions due to truck idleness, total cost of ownership increases and freight price fights with individual truck owners.

Source: ANP / Folha de São Paulo. **Source:** ANP

PSR Analysis: The variation in oil prices in Brazil was amplified by the currency devaluation, and the situation reached a tipping point when freight contracts and freight prices threatened transportation players with losses. At that point, the truckers just stopped running, and demanded four items:

- Reduction in oil prices
- End of daily adjustments of oil prices
- Reduction of toll prices for trucks running with no load
- Approval of a minimum freight price policy by congress.

As the strike continued, consumers started running out of gasoline and ethanol for cars, affecting taxi drivers and other drivers, such as Uber and Cabify; fresh groceries were sold out at the markets, and people began to panic. Doctors could not commute, surgeries, medical procedures and routine consulting had to be postponed.

Car and truck OEMs, receiving supplies just in time, were the first to stop production. Then the consumer-packaged goods industry and some others that depend heavily on inbound and outbound constant material flow were affected.

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Brazil/South America Report

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The public pressure made government attend to truck driver claims. Diesel prices are about 13% less expensive today than they were prior to the strike, and they have been frozen for 60 days. After this period, diesel prices will be adjusted monthly, giving transportation players an opportunity to adapt to new prices.

The price of tolls has been reduced for trucks running with no load. The minimum price of freight has been established by Presidential arbitration, but it depends on the deployment adjustments as it affects other important industries, such as the grains commodity market.

Petrobras stocks fell drastically but started to climb back as the government announced changes. It is expected the impact of the strike will be US\$ 3 billion in government accounts and hundreds of billions at the GDP.

What about the effects on the power products industry? In the short term, car sales and truck sales stopped the recent growth trend. Since gasoline prices were not reduced, there may be a move to push sales of diesel rather than gasoline SUVs.

Diesel Power Generation will be slightly cheaper than it would be if the diesel price were not reduced, but not cheaper than recent months due to oil price increases.

Construction and Agricultural Machines are not affected directly.

Truck OEMs didn't change their perception of 2018 growth because of the strike. When we talked with major players, they were not positive, and they continued to complain about the short-term drop in revenue. Many were more concerned with the Argentina recession, which could jeopardize exports, than they were optimistic about the transportation industry's recent win.

On the other hand, we talked with transportation industry players, and they are optimistic following the industry's demonstration of power and the increased respect it won from the government and the population, in general. This situation and the improved business predictability are favorable for investment in fleet renewal and expansion. The outlook for sales of used trucks is favorable because of the optimism of individual truck owners.

The PRS perspective is that the combination of slight reduction in TCO (diesel is the major component) and slight freight price increase with the minimum price policy adoption will affect positively the truck market in the medium term. Other variables, such as the Argentina economy and the elections in Brazil, also are important.

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Brazil/South America Report

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Although the Argentina economy is facing severe challenges, Brazilian OEMs are making inroads in other export destinations, such as Colombia and Chile, and some offset is likely.

Crisis in Argentina Jeopardizes Brazilian Exports

As the Argentina economy continues to weaken, many Brazilian truck and car OEMs voice concerns regarding forecasted export volumes to the biggest trade partner in these segments.

Source: Valor Economico [Read The Article](#)

PSR Analysis: Although the Argentina economy is facing severe challenges, Brazilian OEMs are making inroads in other export destinations, such as Colombia and Chile, and some offset is likely. Volumes should be reviewed carefully, but it is too early for severe cuts in production, especially because of the good performance of the Brazilian internal market, despite the political instability and truck drivers' strike. **PSR**

China Report

By Qin Fen, PSR Business Development Manager-China.

China Plans Tier 4 in 2020



Qin Fen

MEE (Ministry of Ecology and Environment), China's environment authority, plans to enforce Tier 4 emission standard by 2020.

Source: CV News [Read The Article](#)

PSR Analysis: It is very possible that China will enforce Tier 4 ahead of schedule, possibly in 2019. This change may not be nationwide, but only in some metro areas such as Beijing-Tianjin, Shanghai and Guangzhou-Shenzhen. These are areas where people are better informed and more concerned about air quality. Also, these areas get more media attention and resources to tackle the air pollution problem. **PSR**

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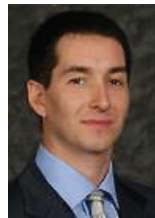
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Europe Report

By *Emiliano Marzoli*, PSR Business Development Manager-Europe
Natasa Mulahalilovic contributed to this report

Editor's Note: This article was compiled using information contained in the Power Systems Research proprietary database **MarineLink**, the definitive source of pleasure craft production information throughout the world.

European Pleasure Boat Market Changing Rapidly



*Emiliano
Marzoli*

The pleasure boat market in Europe has changed significantly since last year, and it remains very dynamic even though there have been rapid changes in the relative position of specific boat types, engine power ranges and OEMs. Boat builders need to be flexible but prudent when making important marketing and strategy decisions.

Demand in the traditional market for sailboats with auxiliary drive has significantly decreased in recent years. While Beneteau Group, the largest supplier, claims that sales are stable, Bavaria Yachtbau, the second biggest sailboat manufacturer, is in financial difficulty. It is uncertain how the total market value will be influenced by this situation, but we estimate that the production of sailboats with auxiliary engines will be down by 3% to 5% by the end of the year.

The news, however, is not all bad. The small niche for multihulls (catamarans) is gaining popularity since these boats are comfortable, spacious and easy to navigate. This year, their estimated growth is 10%. For sailboats with auxiliary power, the main engine supplier continues to be Volvo Penta with more than 60% of all installations.

Production of the smaller motoryachts (up to, say, 15 meters in length) is expected to be similar to last year. These craft are generally powered by engines in the 200kW to 750kW range and are generally a mix of inboard and pod drives. While production volume remains essentially level, we expect the Volvo Penta IPS pod drive to take an increasing share.

The European market for larger motoryachts (over 15 meters) is expected to be 6% above last year's level. The leading manufacturers, Princess, Sunseeker and the Azimut-Benetti group, make up almost one-third of the production in this region. Power Systems Research data shows that MAN is becoming the main supplier of marine engines in the range of 750 kW to 1500 kW with their high performance V8 and V12 diesels.

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Europe Report

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Poland is the fourth largest medium and heavy vehicles manufacturer in Europe, and there is a long way to go to reach the government goal.

The superyachts (yachts above 24 meters) production is estimated to grow by 3%. Italian manufacturers Azimut-Benetti Group, Sanlorenzo and Ferretti Group cover almost half of all global production. The most popular engine supplier is MTU, followed by Caterpillar and MAN. The latest and the most powerful Volvo Penta D13-IPS1350 engine is expected to take some market share at the bottom end of this segment.

Power Systems Research data shows that this year production of boats fitted with inboard, stern drive and saildrive engines in Europe will be around 13,500 units – up about 5% from 2017. In particular, the Italian, French and the United Kingdom pleasure marine industry will remain strong.

New boat registrations throughout Europe is recovering and sales are expected to be positive over the next two years. European manufacturers are expected to retain their leading position in supplying the overseas market with luxury motor yachts and cruisers. --**Natasa Mulahalilovic**


Poland Pushes EV Revolution

Poland is moving to the forefront of the e-mobility revolution. At the end of May, the Polish government adopted a new law on electromobility in order to promote vehicle electrification. The objective is to have one million EVs running by 2025. While light duty vehicles will be the majority of the fleet, medium and heavy vehicles, and buses also will play an important role. The new law also will support the creation of more charging stations and will require local authorities have at least 30% of their fleet be EVs.

PSR Analysis: Poland is the fourth largest medium and heavy vehicles manufacturer in Europe, and there is a long way to go to reach the government goal. Several OEMs are investing in developing and expanding their EV products. According to our proprietary database **CV Link™**, Ursus and Volvo are the two largest producers of EVs in Poland today.

The Polish Development Fund (PFR) (along with several ministries and others) signed an agreement with 41 local governments for the purchase of 780 electric buses. This alone will quadruple 2017 EV buses production in the country. Considering this is the first order sustained by the fund, we expect to see more demand coming in the next years.

LG Chem, one of the leading battery producers, is expanding its Polish plant capacity, increasing its capacity from 100,000 batteries a year to 300,000. The Polish market and industry for EVs is set for strong performances in the coming years. **PSR**

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Far East/Southeast Asia Report

By *Akihiro Komuro*, PSR Research Analyst, Far East and Southeast Asia

Far East: Japan

Nissan To Focus on EV Development



*Akihiro
Komuro*

Nissan Motor will stop developing diesel engines. UK, France, China and other national authorities are considering sales restrictions in order to improve the environment. Nissan has two kinds of diesel engines it is producing at the Yokohama Plant. These are being installed in a small number of commercial vehicles for the domestic market. It is expected that production of the two engines will end in the 2020s.

Source: Nikkei [Read The Article](#)

PSR Analysis: Last month, in *PowerTALK* I reported that Nissan is withdrawing from the European diesel market. This news clearly shows that focusing on the development of EV is the main theme for the car OEM. While only Mazda is focusing on diesel development, Nissan already has knowledge of EV as it developed LEAF. Development competition will intensify.

Crane Maker Tadano Acquires 14.9% Stake in Manitex

Manitex International, a leading international provider of truck and knuckle boom cranes, announced an investment by Tadano of approximately \$32.7 million in Manitex through the purchase of 2,918,542 shares of the company's common stock. Upon closing the transaction, Tadano will own 14.9% of Manitex's outstanding shares of common stock. In connection with the transaction, Tadano has the right to designate one member to the company's board of directors.

Read The Article

PSR Analysis: Japanese OEM Tadano is a global leader in all-terrain and rough-terrain cranes and aerial work platforms. This is a part of their action based on their "LE (Lifting Equipment) No.1". Manitex manufactures and sells construction boom trucks and vehicle-mounted cranes in North America and Europe. The move gives Tadano a wider product lineup, and it enables Manitex to sell its products through Tadano's sales channel. This is another example of Japanese OEMs, whose domestic market is saturated, moving into overseas markets. **PSR**

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Far East/Southeast Asia Report

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GM Korea, which has been in financial difficulties, has been saved for the moment, until it develops a long-term vision for the region.

Far East: South Korea

GM Agrees To Rescue Deal

General Motors (GM.N) will stay in South Korea for at least 10 years and set up its Asia-Pacific headquarters in the country, government officials said, revealing terms of a deal aimed at rescuing the U.S. automaker's struggling GM Korea unit. The U.S. car maker's Korean unit averted a bankruptcy filing with a wage deal clinched, but analysts and customers, as well as the South Korean government, have had doubts about GM's commitment and about how long the company will remain in business.

Source: Reuters [Read The Article](#)

PSR Analysis: GM Korea, which has been in financial difficulties, has been saved for the moment, until it develops a long-term vision for the region. However, this news does not mean a stable growth of American brands in the Asian region. China's quality and technology improvement speeds are remarkable, and Japanese forces are growing in overseas markets. In order for GM to have a stronger presence in Asia, a more specific and aggressive strategy will be required. **PSR**

Southeast Asia: Thailand

Thailand Anxious To Join TPP

Thailand wants to join the Trans-Pacific Partnership "as soon as possible," Deputy Prime Minister Somkid Jatusripitak said recently. Thailand had previously expressed interest in joining the free trade deal between 11 nations but had hung back after President Donald Trump pulled the U.S. out of the pact.

Source: Nikkei Asian Review [Read The Article](#)

PSR Analysis: The population and GDP of participating TPP 11 countries (Japan, Australia, Brunei, Canada, Chile, Malaysia, Mexico, New Zealand, Peru, Singapore, Vietnam) is about 500 million people and about US\$ 10 trillion, respectively. Exports to Thailand's participating countries are about US\$ 70 billion, equivalent to 30% of total exports, 15% of the nominal GDP. Since the negotiations over the TPP will take some time to become effective, the impact of boosting the economy won't appear immediately. However, it is extremely important for Thailand, where exports account for 60% of GDP, to avoid adverse effects of protectionism. **PSR**

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Far East/Southeast Asia Report

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Regional Show Information

INTERMAT ASEAN Planned for Bangkok Sept. 6-8, 2018

INTERMAT ASEAN will be held in Bangkok, Thailand. Sept. 6-8, 2018. This Southeast Asian trade exhibition on construction and infrastructure, focuses on five key sectors - Earthmoving & Demolition, Roads, Minerals & Foundations, Building Industry and Lifting, and Handling & Transportation. Providing opportunities to explore the latest trends and to source products, the trade exhibition brings together more than 5,000 leading companies and brands in a strategic location – Bangkok, Thailand.

For more information:

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India Report

By *Jinal Shah*, Regional Director, South Asia Operations

Kia To Produce EVs, Hybrids in India



*Jinal
Shah*

South Korean auto maker Kia plans to roll out electric and hybrid vehicles from its upcoming plant at Anantpur in Andhra Pradesh and plans to launch an electric vehicle in India by 2021. **Read The Article**

PSR Analysis: The Indian passenger car segment is growing and is poised to become the world's third largest hatchback market by 2020. It isn't surprising that we see many new entrants, including Chinese carmaker SAIC Motor Corp. selling the MG Brand; France's PSA group, and South Korean automaker Kia Motors, which has decided to take the plunge into the crowded and competitive Indian small car market with its plans to produce a premium hatchback and SUVs in India. Success in India is essential for Kia after losing ground in China and in the US, where consumers prefer bigger SUVs.

We believe the current EV infrastructure issues facing India will be addressed to some extent by 2021. That sets the ground for many OEMs to launch their EV fleets into the market.

M&M To Return To China, Tap \$25-billion Ag Market

Mahindra & Mahindra, the world's largest tractor maker by volume, quit a Chinese joint venture last year, but now is planning to return to the \$25-billion agriculture equipment market in that country.

Read The Article

PSR Analysis: Mahindra has been in overdrive recently, expanding its global farm machinery product portfolio beyond tractors and into rice trans-planters and harvesters. As part of its growth strategy, it appears M&M is looking for larger markets, apart from tractors. The re-entry into the China market will give it an opportunity to increase its international business share and keep it reasonably insulated from the downturns in agriculture equipment space caused by tepid economic growth and uncertain rainfall.

M&M is no stranger to the Chinese market; it was already part of two alliances with local manufacturers and this knowledge of local market in past decade may turn out to be biggest advantage as it plans on a new business model and re-entry into China. **PSR**

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The advantages of these locomotives is reduced fuel expenses by 30-40%, smaller impact on the ecology, and extended service intervals.

Russia Report

By *Maxim Sakov*, Market Consultant, Russia

KAMAZ Robo Truck Possible in 2019



*Maxim
Sakov*

Russian OEM KAMAZ says project Odyssey to create drone trucks is being stepped up. The first unit one will be the diesel KAMAZ-43083. Tests will start this summer, and the vehicle will be available for regular use in 2019.

The robo-truck will be used in OEM plant territories and serve inter-plant logistics. The small number of vehicles and pedestrians in this area will reduce the risk of accidents.

Read The Article

PSR Analysis: Driverless technologies have been under development by Russian OEMs for several years. After drone buses, recently shown by GAZ Group, this is another project, coming to practical implementation.

Production of Locomotives Powered by LNG Planned

The new contract between Gazpromtrans and Sinara Transport Machines calls for the delivery of 24 gas-powered locomotives. Sinara will supply 8-axle locomotives of 1860 kWt and 4-axle locomotives of 856 kWt. The lifetime of machinery is 50 years.

The advantages of these locomotives is reduced fuel expenses by 30-40%, smaller impact on the ecology, and extended service intervals.

The next stage planned is to split civil and military parts of the OEM.

Read The Article

PSR Analysis: NG powered locomotive projects have a good future, according to Russian locomotive developers. There are several similar projects being developed. The biggest of them is the gas turbine locomotive GT1h of 10,000 hp. **PSR**

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