Vocational Truck/Body Industry in North America: Concrete Mixers & Pumps

Description: This report presents data and information on the market size and competitive positions in the truck-mounted concrete mixer and boom pump industry in North America. Key information includes size of the market in 2015, including market size by mixer type; competitive positions and market shares; production by region; and market outlook for each category. Also included are profiles on sixteen industry participants.

The delivery and placement of concrete with over-the-road vehicles is accomplished by three types of vehicles—concrete mix trucks, concrete pump trucks and volumetric mixers. Traditional rear discharge mixers accounted for almost 70% of units produced in 2015. Front discharge mixers offer several advantages over rear discharge mixers—one-man operation, better view of target, higher discharge rate, longer reach—but these vehicles, being built from the ground up, have a considerably higher initial purchase price than rear discharge mixers, thus limiting their popularity.

Concrete boom pump trucks are used in large pour jobs; traditional concrete mixer trucks discharge their loads into the chute of a concrete pump for placement. The market for these units has been restricted in recent years, as large construction projects have been limited by economic considerations. This is the only segment with significant import content. Volumetric mixer trucks are primarily suitable for small jobs. Truck-mounted bins discharge materials into the vehicle's hopper, allowing the concrete to be mixed on site. The advantages of these units are that there are no production overruns or waste of materials, and custom blends for each pour allow for different deliveries on each run. However the market (and the number of participants) remains small, and the major players do not participate in this segment.

The North American concrete delivery and placement market was valued at nearly $725 million in 2015 and involved 16 manufacturers. McNeilus continues to dominate the industry. It has major advantages in its huge direct distribution network and parent OshKosh's in-house chassis production capability. Smaller players remain viable, however, through regional focus and product customization.

Economic events impacting the construction industry in recent years resulted in several consolidations, closures and acquisition activity. However this market has become increasingly stable due to growth in the economy and an upward trend in the housing and infrastructure sectors.

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