

# China Concrete Machinery Industry Report, 2008-2009



Concrete machinery refers to the equipment applied in modern concrete mechanical engineering for production, transportation, and concrete paving, etc., including concrete mixers, concrete mixing plants, concrete pumps, concrete mixing trucks, concrete jets, concrete vibrators, and steel processing machinery. The general concept of the concrete machinery means "one plant, three vehicles ", namely concrete mixing plant, concrete mixer truck, concrete pump and concrete pumping vehicle. Concrete machinery is the important equipment in great demand for infrastructure, widely used in industrial and civil construction, national defense construction and other projects. After decades of development, concrete machinery has become a key part of engineering machinery in China, with considerable production capacity and accounting for 6% of the whole construction machinery industry. Concrete machinery refers to the equipment applied in modern concrete mechanical engineering for production, transportation, and concrete paving, etc., including concrete mixers, concrete mixing plants, concrete pumps, concrete mixing trucks, concrete jets, concrete vibrators, and steel processing machinery. The general concept of the concrete machinery means "one plant, three vehicles ", namely concrete mixing plant, concrete mixer truck, concrete pump and concrete pumping vehicle.

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### Sale of Construction Machinery

Unit: Set	2008	2007
Excavator	77,096	66,507
Compaction Machinery	18,032	21,250
Loader	165,335	159,363
Bulldozers	8,669	7,382
Grader	4,120	3,817
Crane	21,500	19,545
Concrete Machinery	18,720	19,899
Total	313,472	297,763
Sale of Concrete Machinery/Total Sale (%)	5.97%	6.68%

Note: concrete machinery includes concrete mixing plants, concrete mixer trucks, concrete pumps and concrete pumping vehicles.

Source: China National Construction Machinery Association, ResearchInChina

Even faced with global economic slowdown in 2008, Chinese concrete machinery export still maintained a good growth. In 2008, 2,149 concrete pumps were exported, valuing at US\$102.92 million. In quantity, the export increased 13.5%; but in capital, the export decreased 24.1%; the average export prices rose somewhat. Only 3,263 concrete mixers were exported, up 21.9% from 2007; the export valued US\$ 188.42 million, 37.4% up over 2007, maintaining continuous increase.

Currently, in Chinese concrete machinery industry, there are more than 200 enterprises, producing diversified products. China has the leading status in the production of concrete pumps. In 2007, SANY Heavy Industry Co., Ltd participated in the construction of Shanghai World Financial Center with 492 meters in height. At the end of Dec 2008, Zoomlion Heavy Industry Science & Technology Development Co., Ltd. transferred super viscous C100 high-performance concrete pumps to Guangzhou International Financial Center (West Tower) with the height of 432 meters by super high-pressure concrete pump. In 2008, SANY successfully manufactured a 72-meter pump, the highest pump in the world.

In addition to the conventional specifications of 32m, 37m, 42m, 45m, 48m, 52m and 56m, SANY also produces the products of 38m and 40m. In January, 2007, SANY produced the super long-arm pump with 66m. However, the main specifications of SANY are 37m, 45m, 48 and 56m. The specifications of Zoomlion's pumps ranges from 37m to 56m, but the specifications applied most widely are 37m, 44m and 47m. Putzmeister Shanghai factory produces such key models as 36m, 38m, 42m and 46m. The mainstream models of Shanghai Hold Machinery Co., Ltd. are 22m, 37m, 40m, 43m and 47m. It is worth mentioning that the short-arm pumps with the length of below 27m only include the ones of 25m produced by SANY and 22m by Shanghai Hold Machinery. The current sale of short-arm pumps account for less than 2% of that of the overall pumps, but the cost of short-arm pumps is low, which benefits the construction of buildings in dense urban areas, so the development of short-arm pumps is promising.

Concrete machinery is technology-intensive, capital-intensive and personnel-intensive, so it is difficult to enter the field. The main barriers for entering the concrete machinery industry lie in technical capabilities, qualifications, financial strength and customer service. Concrete trucks, concrete pumps and vehicle pumps are the modified automobiles, which are subject to the industrial policies of China. The manufacturers must be qualified for the production of civil converted vehicles, and they must complete test reports and apply for bulletin catalog to the government before marketing each vehicle. In general, the application period lasts long.

# Table of Contents

- **1. Overview of Concrete Machinery Industry**
  - 1.1 History of Concrete Machinery in China
  - 1.2 Investment in Concrete Machinery Industry
    - 1.2.1 Development Prospects
    - 1.2.2 Barriers to Entry
  - 1.3 Introduction to Upstream Resources
- **2. Development of International Concrete Machinery Industry**
  - 2.1 Overview of Global Concrete Machinery Market
    - 2.1.1 Overview of Global Concrete Machinery Market
    - 2.1.2 Changes of Global Concrete Machinery Market
    - 2.1.3 Chinese Concrete Machinery Manufacturing Enterprises in Global Market
  - 2.2 Supply and Demand Outlook for Global Concrete Machinery
- **3. Development of Chinese Concrete Machinery Industry**
  - 3.1 Status Quo of Industry Development
    - 3.1.1 Development Stages
    - 3.1.2 Production and Sale
    - 3.1.3 Boom of Concrete Machinery Industry
  - 3.2 Import & Export of Concrete Machinery
    - 3.2.1 Import, 2006-2008
    - 3.3.2 Export, 2006-2008
- **4. Market Supply and Demand**
  - 4.1 Production of Chinese Concrete Machinery
    - 4.1.1 Overall Production
    - 4.1.2 Output Forecast
  - 4.2 Demand Factors
    - 4.2.1 World Economic Development Analysis, 2008
    - 4.2.2 World Economic Outlook, 2009-2012
    - 4.2.3 Operation of China's Economy in 2008
  - 4.3 Demand Analysis of Concrete Machinery
    - 4.3.1 Demand Analysis
    - 4.3.2 Prices of Concrete Machinery
    - 4.3.3 Supply and Demand of Products
    - 4.3.4 Concrete Boom Pump Market
- **5. Market and Major Enterprises**
  - 5.1 Market Analysis on Chinese Concrete Machinery Industry

- **5.2 Key Overseas Manufacturers**

- 5.2.1 PUTMEISTER
- 5.2.2 SCHWING
- 5.2.3 Japan Ishikawajima
- 5.3 Key Chinese Concrete Machinery Manufacturers
- 5.3.1 SANY
- 5.3.2 Zoomlion
- 5.3.3 Shanghai Hold Heavy Industry
- 5.3.4 Anhui CAMC
- 5.3.5 Fangyuan Group
- 5.3.6 XCMG
- 5.3.7 Foton Heavy Machinery
- 5.3.8 Shandong Hongda
- 5.3.9 NFLG
- 5.3.10 Xinyu Construction Machinery
- 5.3.11 Xuzhou Liebherr

- **6. Chinese Concrete Machinery Industry Outlook**

- 6.1 Market Environment Outlook
- 6.1.1 Chinese Macro-economic Outlook
- 6.1.2 Prospect of Industrial Policies
- 6.2 Supply and Demand Outlook

- 6.3 Forecast of Import and Export
- 6.4 Development Trend
- 6.5 Problems and Solutions

# Selected Charts

- Utilization and Financial Calculations of RMB 4 trillion Investment, Q4 of 2008 to the end of 2010
- Qualified Franchise Companies of Vehicle Refitting
- Market Shares of Major Concrete Machinery Manufacturers, 2008
- Prices of Steel, 2005-2008
- Engineering Machinery Parts & Components and Major Manufacturers
- Downstream Industries of Chinese Concrete Machinery
- Market Shares of Concrete Pump Truck Manufacturers in the World, 2008
- Market Shares of Concrete Mixer Manufacturers in the World, 2008
- Expected Growth Rate of Global Concrete Machinery, 2009
- Expected Growth Rate of American Concrete Machinery, 2009
- Fixed Asset Investment of Cities and Towns in China, 2002-2009
- Production of Concrete Machinery in Provinces in China, 2007-2008
- Investment in Real Estate Development, 2008-2009
- Prosperity Period of Downstream Demand of Concrete Machinery
- Import of Concrete Machinery, 2006-2008 (US\$: 10,000)
- Export of Concrete Machinery, 2006-2008 (US\$: 10,000)
- Forecast of World Economy Growth Rate
- Correlation between Revenue of Concrete Machinery and Urban Fixed-asset Investment, 2000-2008
- Analysis on Demand for Concrete Machinery
- Sale of Concrete Pump Truck in China, 2000-2008



- Sale of Concrete Mixer in China, 2000-2008
- Sale of Concrete Pump in China, 2000-2008
- Sale of Concrete Mixing Plant in China, 2000-2008
- Sale of Concrete Boom Pump in China, 2008
- Market of Concrete Pump Truck in China, 2008
- Market of Concrete Pump in China, 2008
- Market of Concrete Mixer in China, 2008
- Market of Concrete Mixing Plant in China, 2008
- Putzmeister's Financial Results, 2003-2007
- Putzmeister Concrete Company's Financial Results, 2007
- Sales Revenue of Putzmeister by Product and Technology, 2006-2007
- Sales Revenue of Putzmeister's Main Business by Regions, 2007
- Financial Results of Putzmeister Machinery (Shanghai) Co., Ltd., 2004-2008
- Financial Results of Shanghai Schwing Machinery Manufacturing Co., Ltd., 2004-2007
- Ishikawajima's Revenue, FY2003-FY2009
- Ishikawajima's Revenue in Fields, first 3 quarters of 2009
- Distribution of Ishikawajima's Revenue, first 3 quarters of 2009
- Financial Results of IHISCE (Xiamen) Construction Machinery Co., Ltd., 2006-2007
- Operating Profit and Net Profit of SANY, 2002-2008
- Monthly Sale of SANY's Pump Truck, 2007-2009
- Zoomlion's Operating Revenue Structure
- Zoomlion's Revenue from Concrete Machinery , 2006-2008
- Sales Revenue of Zoomlion's Products, 2006-2009
- Main Business Revenue of Shanghai Hold Machinery Co., Ltd, 2004-2008
- Anhui CAMC 's Revenue of Concrete Machinery, 2006-2008
- Revenue of Main Products and Capacity Utilization, 2008
- Financial Results of XCMG, 2004-2008
- Financial Results of Foton Lovol Heavy Machinery Co., Ltd., 2005-2007



- Financial Results of Shandong Hongda Construction Engineering Group Co., Ltd., 2004-2007
- Financial Results of Shaoguan Xinyu Construction Machinery Co., Ltd., 2004-2007
- Financial Results of Liebherr in Regions, 2004-2007
- Forecast for Sale of Concrete Pump Truck in China, 2009-2012
- Development Trend of Concrete Boom Pump in China, 2008-2012
- Forecast for Sale of Concrete Mixer in China, 2009-2012
- Forecast for Sale of Concrete Pump in China, 2009-2012
- Forecast for Sale of Concrete Mixing Plant in China, 2009-2012



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