



China Excavator Industry Report, 2010-2011

Apr. 2011

This report

- ◆ **Analyzes the status quo and development environment of China's excavator industry.**
- ◆ **Focuses on the supply & demand and competition pattern of excavator market in China.**
- ◆ **Highlights the operation and development of key enterprises in excavator industry in China .**

Please visit our website to order this report and find more information about other titles at www.researchinchina.com

Related Products

China Inverter Air Conditioner Industry Outlook Report, 2010-2015

China Low and Medium-voltage Inverter Industry Report, 2010-2011

China Inverter Industry Outlook Report, 2010-2015

Global and China Marine Diesel Engine Industry Report, 2010

Global and China Micro Motor Industry Report, 2010

Global and China Ocean Engineering Equipment Industry Report, 2010

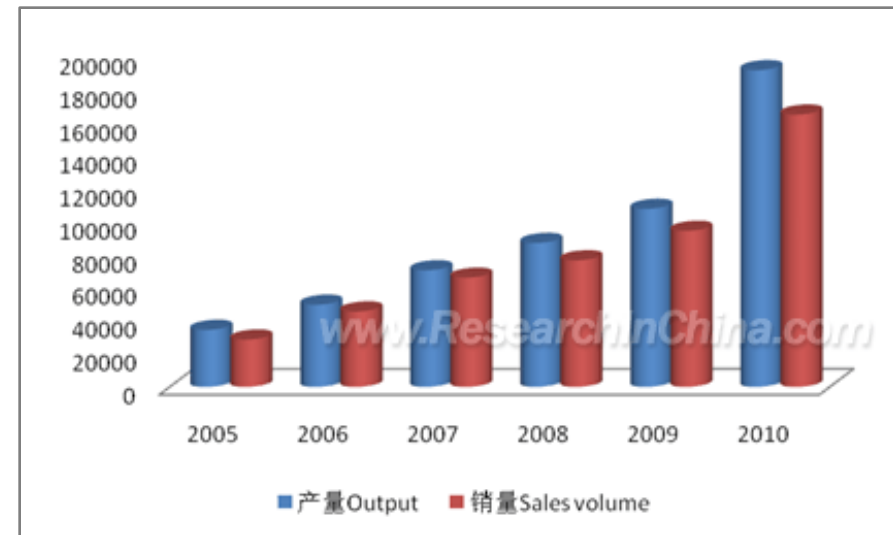
Abstract

Promoted by the rapid progress of fixed assets investment and real estate development in China, the excavator industry has taken on high-speed growth in recent years, with the output climbing to 192,811 in 2010 from 34,722 in 2005 and the sales volume rising from 28,812 to 165,804.

With the synergy of the booming excavator demand fueled by growing fixed assets investment, the consumers' recognition of excavator's performance and the prosperity of excavator leasing market, as well as the emerging effect of substituting excavator for loader (the possession quantity proportion of excavator to loader advanced to 0.68:1 in 2009 from 0.57:1 in 2006), the output and sales volume of excavator in China expanded in the past 6 years.

Based on an analysis of excavator industry environment, this report probes deeply into the supply & demand and competition pattern of excavator market.

Excavator Output and Sales Volume in China, 2005-2010



Source: National Bureau of Statistics of China;
China Construction Machinery Association (CCMA);
ResearchInChina

In regard to brand competition, Chinese excavator market is monopolized by foreign brands with the market share of 71.7% in 2010; hereinto, Japanese and South Korean brands enjoyed the total share of 60.1%. The domestic brands represented by SANY Heavy Industry and Guangxi Yuchai Heavy Industry Company Limited (YUCHAI) have expanded the market share via a breakthrough in the small-sized excavator sector ever since 2005, and the market share climbed to 28.3% in 2010, up 8.4 percentage points against 2005.

As for product competition, caterpillar excavating machine still dominated the market in 2010 with the market share exceeding 95%. Meanwhile, the sales volume of 6-10 ton and 21-22 ton excavators maintained the high level.

In addition, this report casts light on 15 key enterprises, including 7 domestic enterprises and 8 foreign enterprises in China.

In 2010, there were seven enterprises whose excavator sales volume surpassed 10 thousand in China, i.e. Komatsu, Doosan, Hyundai,

Hitachi, KOBELCO, SANY Heavy Industry, and Caterpillar; SANY Heavy Industry was the only domestic brand among them, and ranked the 6th with a sales volume of 14,154 throughout the year. YUCHAI, LiuGong, and FOTON LOVOL International Heavy Industry Co., Ltd. (FOTON LOVOL H.I.) all boasted an annual sales volume of over 5,000.

In 2011, the first year of China's "12th Five-Year Plan", Chinese Government will continue to increase the efforts in such projects as road, railway, municipal construction, and low-income housing, so the sales volume of excavators throughout the year is predicted to witness the YoY growth of 15% to 190 thousand or so. However, the Japan earthquake has exerted negative influence on the import of hydraulic parts, the core components of excavator, and subject to various factors like the potential overcapacity, the development of excavator industry will encounter certain risks.



1. Profile of Excavator Industry in China

- 1.1 Definition and Classification
- 1.2 Function
- 1.3 Industry Chain
- 1.4 Development History

2. Development Environment

- 2.1 Industry Environment
- 2.2 Policy Environment

3. Market Analysis

- 3.1 Supply
- 3.2 Demand
 - 3.2.1 Actual Demand
 - 3.2.2 Sales Volume
- 3.3 Import & Export
 - 3.3.1 Import
 - 3.3.2 Export

4. Competition

- 4.1 Regional Competition
 - 4.1.1 Major Production Areas
 - 4.1.2 Major Consumption Regions
- 4.2 Enterprise Competition
 - 4.2.1 Domestic and Foreign Enterprises
 - 4.2.2 Domestic Enterprises
 - 4.2.3 Enterprise Pattern
- 4.3 Product Substitution

4.4 Segmented Product Competition

- 4.4.1 Caterpillar Excavating Machine
- 4.4.2 Mini Excavator

5. Key Enterprises

- 5.1 SANY Heavy Industry
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Development Strategy
- 5.2 Guangxi Yuchai Heavy Industry Company Limited (YUCHAI)
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Development Strategy
- 5.3 Guangxi Liugong Machinery Co., Ltd. (LiuGong)
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Development Strategy
- 5.4 FOTON LOVOL International Heavy Industry Co., Ltd. (FOTON LOVOL H.I.)
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 R&D
- 5.5 Hunan Sunward Intelligent Machinery Co., Ltd. (Sunward Intelligent)
 - 5.5.1 Profile
 - 5.5.2 Operation

5.5.3 Competitive Edge

5.6 Xiamen XGMA Machinery Co., Ltd. (XGMA)

- 5.6.1 Profile
- 5.6.2 Operation
- 5.6.3 Development Strategy
- 5.7 Lonking
 - 5.7.1 Profile
 - 5.7.2 Operation
- 5.8 Foreign Enterprises in China
 - 5.8.1 Komatsu (China)
 - 5.8.2 Doosan (China)
 - 5.8.3 Hyundai (Jiangsu) Construction Machinery Co., Ltd.
 - 5.8.4 Hyundai (Beijing) Construction Machinery Co., Ltd.
 - 5.8.5 Hitachi Construction Machinery Co., Ltd.
 - 5.8.6 Chengdu Kobelco Construction Machinery (Group) Co., Ltd.
 - 5.8.7 Caterpillar China
 - 5.8.8 Volvo Construction Equipment

- Excavator Downstream Industry Structure in China, 2009
- Growth Rate of Major Engineering Machinery in China by Sales Volume, 2010
- Urban Fixed Assets Investment of Major Industries in China, 2010
- Excavator Output in China, 2005-2010
- Excavator Output of Key Provinces and Cities in China, 2008-2010
- Capacity Expansion Plan of Domestic Excavator Enterprises in China, 2010-2011
- Actual Demand of Excavator in China, 2000-2010
- Excavator Sales Volume in China, 2006-2010
- Monthly Sales Volume and YoY Growth of Excavator in China, 2010
- Excavator Sales Volume (by Model) in China, 2010
- Import & Export Volume of Excavator in China, 2005-2010
- Import Volume, Import Value, and YoY Growth of Excavator (by Product) in China, 2010
- Export Volume, Export Value, and YoY Growth of Excavator (by Product) in China, 2010
- Major Production Areas and Output Proportion of Excavator in China, 2010
- TOP 10 Chinese Provinces/Cities by Excavator Sales Volume, 2010Q1-Q3
- Sales Volume and Market Share of Excavator (by Brand) in China, 2010
- Market Share of Domestic Excavator Brands in China, 2007-2010
- Sales Volume and YoY Growth of Major Domestic Excavator Enterprises in China, 2010
- Competition Pattern of Excavator Enterprises in China (by Sales Volume), 2010
- Excavator and Loader Possession Quantity and Their Proportions in China, 2006-2009
- Sales Volume of Mini Excavator in China, 2002-2010
- Market Share of Domestic and Foreign Brands in Chinese Mini Excavator Market, 2006-2009
- Revenue and Total Profit of SANY Heavy Industry, 2007-2010
- Revenue Structure of SANY Heavy Industry (by Product), 2009-2010

- Excavator Sales Volume of SANY Heavy Industry, 2005-2010
- Excavator Sales Volume of YUCHAI, 2006-2010
- YUCHAI Revenue, 2007-2010
- Operating Income Structure of LiuGong (by Product), 2008-2009
- Excavator Sales Volume of LiuGong, 2005-2010
- Engineering Machinery Business Development History of FOTON LOVOL H.I.
- Excavator Sales Volume of FOTON LOVOL H.I., 2006-2010
- Operating Income and YoY Growth of Sunward Intelligent, 2006-2010
- Revenue of Sunward Intelligent (by Product), 2007-2010
- Excavator Sales Volume of Sunward Intelligent, 2006-2010
- XGMA Operating Income and Total Profit, 2007-2010
- Excavator Sales Volume of XGMA, 2007-2010
- XGMA Excavator Product Structure
- Lonking Operating Income Structure (by Product), 2008-2010
- Operating Income and Total Profit of Top 3 Excavator Enterprises of Komatsu in China, 2008
- Excavator Sales Volume of Komatsu (China), 2006-2010
- Excavator Sales Volume of Doosan (China), 2003-2010
- Excavator Sales Volume and Revenue of Hyundai (Jiangsu) Construction Machinery Co., Ltd., 2007-2010
- Excavator Sales Volume of Hyundai (Beijing) Construction Machinery Co., Ltd., 2006-2010
- Revenue of Hitachi Construction Machinery (China) Co., Ltd., 2004-2010
- Excavator Sales Volume of Chengdu Kobelco Construction Machinery (Group) Co., Ltd., 2008-2011
- Excavator Sales Volume of Caterpillar Xuzhou, 2006-2010
- Excavator Sales Volume of Volvo Construction Equipment, 2006-2010

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82600893

| | | | |
|-----------------|--|-----|--|
| Party A: | | | |
| Name: | | | |
| Address: | | | |
| Contact Person: | | Tel | |
| E-mail: | | Fax | |

| | | | |
|-----------------|---|--------|----------------|
| Party B: | | | |
| Name: | Beijing Waterwood Technologies Co., Ltd (ResearchInChina) | | |
| Address: | Room 1008, A2, Tower A, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080 | | |
| Contact Person: | Liao Yan | Phone: | 86-10-82600828 |
| E-mail: | report@researchinchina.com | Fax: | 86-10-82601570 |
| Bank details: | Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG | | |

| Title | Format | Cost |
|--------------|--------|------|
| | | |
| <i>Total</i> | | |

Choose type of format

- Hard copy 1600 USD
- PDF (Single user license) 1500 USD
- PDF (Enterprisewide license)..... 2300 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via Paypal.