



# China Bulldozer Industry Report, 2010

Apr. 2011

## ***This report***

- ◆ Analyzes the production, sales, market competition, engine manufacturers, import and export of China's bulldozer industry .
- ◆ Focuses on the development environment and prospect of bulldozer industry in China.
- ◆ Highlights the operation and development of key enterprises in China's bulldozer industry .

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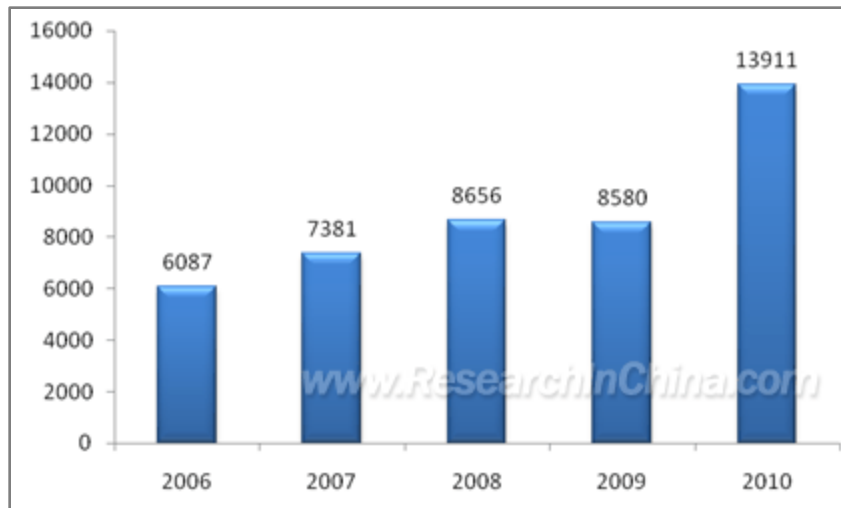
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## Abstract

Bulldozer is a necessary construction machinery product in earth and stone works. With the infrastructure construction in full swing, the bulldozer industry of China developed rapidly in 2010, with the sales volume increased by 62.1% year-on-year to 13,911 sets, activating the stagnant market effectively.

**China Bulldozer Sales Volume, 2006-2010**



Source: China Construction Machinery Association

In terms of market segment, crawler and standard bulldozers especially 160-179hp ones take a lion's share in the Chinese market.

- By moving mechanism, bulldozers are divided into crawler bulldozers and wheeled bulldozers, and crawlerbulldozers occupy over 90% of the Chinese market;
- By application, bulldozers are grouped into standard bulldozers and special bulldozers. Standard bulldozers account for roughly 80% of the Chinese market, while more than 90% of the special bulldozers are wetland bulldozers;
- By power, bulldozers are graded as 70-119hp, 120-119hp, 140-159hp, 160-179hp, 180-219hp, 220-319hp, and above 320hp. In particular, 160-179hp bulldozers are mostly applied in general engineering construction, and occupied 62% of the Chinese market in 2010.

In terms of market pattern, China's bulldozer industry is highly concentrated, with only about a dozen manufacturers. Among them, Shantui Construction Machinery has long been playing a dominating role, with the market share hitting 64% in H1 2010, far ahead of the runner-up - Hebei Xuangong Construction Machinery.

In terms of capital structure, domestic-funded enterprises are main force in China's bulldozer industry. Key bulldozer manufacturers include Shantui Construction Machinery, Hebei Xuangong Construction Machinery, Tianjin Yishan Construction Machinery, Shanghai Pengpu Machine Building Plant, YTO Group Corporation, Dadi Engineering Machinery, Shaanxi Zoomlion Earth Working Machinery, Zhengzhou Yutong Heavy Industries, Caterpillar Xuzhou Limited (CXL), Xiamen XGMA Machinery and Guangxi LiuGong Machinery, among which, CXL is the only foreign-funded enterprise.

It is estimated that small bulldozers, especially those below 100hp, will become the development priority in China's bulldozer industry.

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