

Global and China Construction Equipment Industry Report, 2011-2012

Jun 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include National Bureau of Statistics of China, China Customs and China Construction Machinery Association etc.

Abstract

Since 2001, the global construction equipment industry had experienced robust development, and it embraced its peak in 2007 but saw a cumulative fall of 35.4% for two consecutive years in 2008 and 2009. In 2010, the global construction equipment industry picked up its skyrocketing growth momentum, with the growth rate exceeding 50%. In 2011, the industrial growth rate approximated 26% and the market scale was roughly USD190 billion.

There are two driving forces that guarantee the relative stability of the global construction equipment industry. On the one hand, emerging economics represented by China are lavishing on infrastructure construction. On the other hand, developed economics, except Europe, strive to conduct infrastructure construction to create job opportunities in consideration of economic stimulus.

In China, every first quarter not only marks the peak season to start infrastructure projects, but also indicates the prime season for the sale of construction equipments. In every Jan. April, the sales volume of construction equipments makes up around 55% of the throughout year. In Q1 2012, China's sales volume of excavator decreased by 41.9% year-on-year to 44,000 units, while that of loader, truck crane, bulldozer and roller declined by 27.2%, 45%, 47.35% and 48.4%, respectively.

The sharp reduction came as the monetary tightening measures launched by the government. Since the Central government worries that further hefty investment in infrastructure construction may lead to debt crisis or financial woe, it started to exercise monetary squeeze measure to control credit scale. Another contributor to the reduction lies in restriction of investments in the property market.

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Although the domestic market of China shows rather gloomy, the export market witnesses boom. In Q1 2012, the export volume of excavator reached 816, up 82.6% year-on-year, while that of loader and bulldozer increased by 38.3% and 9.4% to 7,548 and 908, respectively.

American companies, in particular, performed well. In Q1 2012, the revenue from Machinery and Power Systems division of Caterpillar surged by 25%, with the operating profit also rising 25%. In the corresponding period, the backlog order of Terex was valued at USD2.301 billion, up 28.4% over Q1 2011.

The only highlight in the Chinese market comes to concrete machinery. The market share of the two tycoons, SANY and Zoomlion, stands at around 47% each. With the respective strategy of zero down-payment and low down-payment to spur the market growth, both of them make concentrated efforts to exploit concrete machinery market.

In construction equipment market, many players have long been occupying a solid position and grow ever stronger. More than 15 M&A cases occur every year. After a decade of high-speed development, China has limited space for further development, but the Chinese businesses has been empowered to implement large-scale oversea M&As. European top 3 concrete machinery manufacturers, Putzmeister, Schwing and CIFA, were all taken over by their Chinese counterparts.

Revenue of Top 30 Construction Equipment Manufacturers, 2010-2011 (USD mln)

	REVENUE 2010	REVENUE 2011
Caterpillar	27,767	37,278
Komatsu	17,781	24,469
XCMG Group	9,736	13,470 (Revenue of the Group) 5,259 (Revenue from its Listed Company)
ZOOMLION	7,504	12,868 (Revenue of the Group) 7,171 (Revenue from its Listed Company)
SANY	7,386	12,417 (Revenue of the Group) 7,861 (Revenue from its Listed Company)
Hitachi Construction Machinery	8,398	10,086
Volvo CE	8,325	9,998
Liebherr	6,392	7,930
TEREX	4,418	6,505
Sandvik	4,981	6,382
AtlasCopco	4,127	6,328
KOBELCO	3,555	3,927
Doosan Infracore	3,509	5,692
John Deere	3,705	5,372
JCB	3,159	4,300
METSO	3,016	3,839
CNH	2,946	3,876
LIUGONG	2,270	2,768
Hyundai Heavy Industries	1,935	2,677
Oshkosh	2,586	2,052
Lonking	1,777	1,970
Wirtgen	2,112	2,448
Shantui	1,965	2,276
Manitowoc Crane Group	1,749	2,165
Sumitomo Heavy Industries	1,602	1,980
XIAMAN XGMA	1,534	1,857
Manitou	1,131	1,573
Tadano	1,068	1,320
Wacker Neuson	1,023	1,379
Ammann	882	1,081

source: RIC 'Global and China Construction Equipment Industry Report, 2011-2012'

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1. Global Construction Equipment Market

- 1.1 Overview of Construction Equipment
- 1.2 Construction Equipment Market
- 1.3 Global Hydraulic Excavator Market
- 1.4 Global Mining Equipment Market
- 1.5 Ranking of Construction Equipment Industry Worldwide

2. China Construction Equipment Market

- 2.1 Investment in Infrastructure Construction of China
- 2.2 Sales Volume of Excavator
- 2.3 Excavator Market Pattern
- 2.4 Loader Market
- 2.5 Crane Market
- 2.6 Crane Industry
- 2.7 Bulldozer Market
- 2.8 Road Roller Market
- 2.9 Forklift Market
- 2.10 Concrete Equipment Market

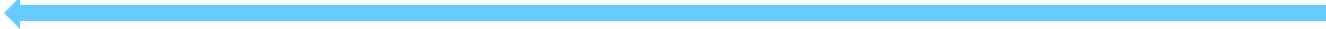
3. Construction Equipment Market in India and Brazil

- 3.1 Indian Construction Equipment Market
- 3.2 Market Share of Major Construction Equipment Manufacturers in India
- 3.3 Brazilian Construction Equipment Market
- 3.4 Market Share of Construction Equipment Manufacturers in Brazil

4. Major Construction Equipment Manufacturers Worldwide

- 4.1 Komatsu
 - 4.1.1 Komatsu (Changzhou) Construction Machinery
 - 4.1.2 Komatsu Shantui Construction Machinery
- 4.2 Caterpillar
- 4.3 Hitachi Construction Machinery
 - 4.3.1 Hitachi Construction Machinery China
- 4.4 VolvoCE
 - 4.4.1 ShanDong Lingong Engineering Machinery
- 4.5 Liebherr
- 4.6 Terex
- 4.6.1 Inner Mongolia North Hauler Joint Stock
- 4.7 Sandvik
- 4.8 Doosan Infracore
- 4.9 KOBELCO Construction Machinery
 - 4.9.1 Chengdu Kobelco Construction Machinery Group
- 4.10 Atlas Copco
 - 4.10.1 Atlas Copco Shenyang Construction & Mining Equipment
- 4.11 John Deere
- 4.12 JCB
- 4.13 CNH
- 4.14 Hyundai Heavy Industries Construction Equipment
 - 4.14.1 Hyundai (Jiangsu) Heavy Industries
- 4.15 XCMG
- 4.16 SANY
- 4.17 Changsha Zoomlion Heavy Industry Science & Technology Development
- 4.18 Guangxi Liugong Machinery
- 4.19 Shantui Construction Machinery
- 4.20 Lonking Holdings
- 4.21 Xiamen XGMA Machinery

- 
- Shipment of Seven Major Construction Equipments Worldwide, 2003-2013
 - Shipment of Seven Major Construction Equipments Worldwide by Region, 2003-2013
 - Demand for Seven Major Construction Equipments Worldwide by Region, 2007Q2-2012Q1
 - Distribution of Manufacturers of Seven Major Construction Equipments Worldwide, 1980-2012
 - US New Housing Starts & US Demand for Construction Equipments, 1970-2012
 - Demand for Hydraulic Excavators Worldwide, 2003-2013
 - Regional Demand for Hydraulic Excavators Worldwide, 2003-2012
 - Monthly Demand for Hydraulic Excavators Worldwide, Apr.2008-Mar.2012
 - Regional Demand for Mining Equipments Worldwide, 2003-2012
 - Regional Distribution of Global Mining Equipment Market, 2003-2012
 - Output Value of Construction Equipment Industry by Region, 2007-2011
 - Ranking of Global Top 50 Construction Equipment Manufacturers by Revenue, 2010-2011
 - Completed Investment in Fixed Assets of China, 2001-2011
 - Monthly Completed Investment in Fixed Assets of China, Jan.2008-Mar.2012
 - Monthly Investment in Fixed Assets of China Railway Transportation Industry and Growth Rate, Jan.2008-Mar.2012
 - Monthly Investment in Fixed Assets of China Road Transportation Industry and Growth Rate, Jan.2008-Mar.2012
 - Monthly Investment in Fixed Assets of China Water Conservancy and Environment Industry and Growth Rate, Jan.2008-Mar.2012
 - Monthly Investment in Fixed Assets of China Coal Mining Industry and Growth Rate, Jan.2008-Mar.2012
 - Monthly Investment in Fixed Assets of China Real Estate Industry and Growth Rate, Jan.2008-Mar.2012
 - New Housing Starts Area of Commodity House and YoY Growth Rate in China, Jan.2008-Mar.2012
 - Monthly Sales Volume of Chinese Excavator, Jan.2009-Mar.2012
 - Monthly Export Volume of Chinese Excavator, Jan.2009-Mar.2012
 - Monthly Excavator Sales Volume of SANY, Jan.2009-Mar.2012
 - Excavator Sales Volume of SUNWARD, Jan.2010-Mar.2012

- 
- China Excavator Market Distribution by Tonnage, 2006-2012Q1
 - China Excavator Market Distribution by Region, 2010-2012Q1
 - China Excavator Market Occupancy by Brand, 2012Q1
 - China Excavator Market Occupancy by Country, 2008-2012Q1
 - Monthly Sales Volume of Chinese Loaders, Jan.2009-Mar.2012
 - Monthly Export Volume of Chinese Loaders, Jan.2009-Mar.2012
 - Monthly Loader Sales Volume of Guangxi Liugong Machinery, Jan.2009-Mar.2012
 - Monthly Loader Sales Volume of Xiamen XGMA Machinery, Jan.2009-Mar.2012
 - Tonnage Distribution of China Loader Market, Jan.2008-Mar.2012
 - Market Occupancy of Major Loader Manufacturers in China, 2012Q1
 - Monthly Truck Crane Sales Volume in China, Jan.2009-Mar.2012
 - Monthly Mounted Crane Sales Volume in China, Jan.2009-Mar.2012
 - Monthly Crawler Crane Sales Volume in China, Jan.2009-Mar.2012
 - Monthly Truck Crane Sales Volume of XCMG, Jan.2009-Mar.2012
 - Monthly Mounted Crane Sales Volume of XCMG, Jan.2009-Mar.2012
 - Monthly Truck Crane Sales Volume of ZOOMLION, Jan.2009-Mar.2012
 - Monthly Truck Crane Sales Volume of SANY, Jan.2009-Mar.2012
 - Market Occupancy of Major Truck Crane Manufacturers, 2012Q1
 - Bulldozer Sales Volume in China, Jan.2009-Mar.2012
 - Bulldozer Sales Volume of Shantui Construction Machinery, Jan.2009-Mar.2012
 - Bulldozer Export Volume of China, Jan.2009-Mar.2012
 - Proportion of China's Export Volume of Bulldozer in Total Sales Volume, Jan.2009-Mar.2012
 - Road Roller Sales Volume in China, Jan.2009-Mar.2012
 - Road Roller Sales Volume of XCMG, Jan.2009-Mar.2012
 - Road Roller Export Volume of China, Jan.2009-Mar.2012

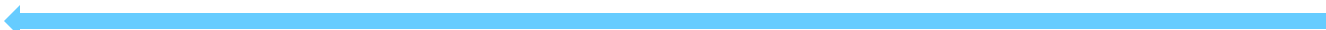
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- Proportion of China's Export Volume of Road Roller in Total Sales Volume, Jan.2009-Mar.2012
 - Monthly Forklift Sales Volume in China, Jan.2010-Mar.2012
 - Market Occupancy of Major Forklift Manufacturers in China, 2012Q1
 - China's Output of Ready-mixed Concrete, Jan.2011-Feb.2012
 - Indian Investment in Infrastructure, FY2008-FY2012
 - Indian Investment in Highway & Bridge Facilities, FY2008-FY2012
 - Shipment of Construction Equipments by Type in India, 2010-2014
 - Market Occupancy of Major Indian Construction Equipment Manufacturers by Shipment, FY2011
 - Market Occupancy of Major Indian Construction Equipment Manufacturers by Sales, FY2011
 - Shipment of Construction Equipments by Type in Brazil, 2006-2012
 - Output of Major Construction Equipments in Brazil, 2001-2011
 - Output of Major Construction Equipments in Brazil by Type, 2010-2011
 - Sales Volume of Major Construction Equipments in Brazil, 2001-2011
 - Sales Volume of Major Construction Equipments by Type in Brazil, 2010-2011
 - Regional Distribution of Construction Equipment Market in Brazil
 - Market Occupancy of Major Brazil-Based Bulldozer Manufacturers, 2011
 - Market Occupancy of Major Brazil-Based Backhoe Manufacturers, 2011
 - Market Occupancy of Major Brazil-Based Wheel Loader Manufacturers, 2011
 - Market Occupancy of Major Brazil-Based Hydraulic Excavator Manufacturers, 2011
 - Market Occupancy of Major Brazil-Based Motor Graders Manufacturers, 2011
 - Market Occupancy of Major Brazil-Based Roller Compact Manufacturers, 2011
 - Sales and Net Profit Margin of Komatsu, FY2006-FY2012
 - Revenue of Komatsu by Region, FY2010-FY2012
 - Quarterly Sales of Komatsu, FY2008Q1-FY2011Q4
 - Operating Income of Komatsu, FY2008Q1-FY2011Q4

- 
- Construction Equipment of Komatsu by Region, FY2008Q1-FY2011Q4
 - Revenue and Net Income of Komatsu (Changzhou) Construction Machinery, 2007-2011
 - Revenue and Net Income of Komatsu Shantui Construction Machinery, 2006-2011
 - Revenue and Operating Margin of Caterpillar, 2006-2012
 - Revenue of Caterpillar by Business, 2006-2011
 - Revenue of Caterpillar by Business, 2010-2012Q1
 - Operating Income of Caterpillar by Business, 2010-2012Q1
 - Revenue of Caterpillar by Region, 2010-2012Q1
 - Regional Revenue of Caterpillar by Business, 2011
 - Regional Revenue of Caterpillar by Business, 2012Q1
 - Footprint of Caterpillar in China
 - Sales and Operating Margin of Hitachi Construction Machinery, FY2004-FY2012
 - Sales of Hitachi Construction Machinery by Region, FY2007-FY2012
 - Revenue and Net Income of Hitachi Construction Machinery China, 2005-2011
 - Workforce of VolvoCE by Region, Late 2011
 - Sales Value and Operating Income of VolvoCE, 2003-2011
 - Global Production Bases of VolvoCE
 - Client Distribution of VolvoCE, 2011
 - Product Distribution of VolvoCE by Application, 2011
 - Output of VolvoCE by Plant, 1991-2011
 - Sales of VolvoCE by Product, 2011
 - Sales of VolvoCE by Region, 2011
 - Revenue and Net Income of ShanDong Lingong Engineering Machinery, 2007-2011
 - Revenue of Liebherr by Business, 2007-2010
 - Revenue of Liebherr by Region, 2007-2010

- 
- Revenue and Operating Margin of Terex, 2007-2012
 - Sales of TEREX by Division, 2010-2012Q1
 - Backlog of TEREX by Division, 2011Q1-2012Q1
 - Regional Sales from AWP Division of TEREX, 2012Q1
 - Regional Sales from AWP Division of TEREX, 2005-2011
 - Regional Sales from Construction Division of TEREX, 2012Q1
 - Regional Sales from Construction Division of TEREX, 2005-2011
 - Regional Sales from Crane Division of TEREX, 2012Q1
 - Regional Sales from Crane Division of TEREX, 2005-2011
 - Regional Sales from Material Handling & Port Solutions Division of TEREX, 2012Q1
 - Regional Sales from Material Processing Division of TEREX, 2012Q1
 - Regional Sales from Material Processing Division of TEREX, 2005-2011
 - Revenue and Operating Margin of Inner Mongolia North Hauler Joint Stock, 2006-2011
 - Sales of Sandvik by Application, 2011
 - Contractual Income and EBIT of Sandvik Mining and Construction, 2000Q1-2011Q4
 - Quarterly Contract Sales and EBIT of Sandvik Construction, 2007Q1-2012Q1
 - Quarterly Contract Sales and EBIT of Sandvik Mining, 2007Q1-2012Q1
 - Revenue and Operating Margin of Doosan Infracore, 2005-2012
 - Revenue of Doosan Infracore by Business, 2009Q4-2012Q1
 - Revenue of Doosan Infracore by Region, 2011 vs. 2012Q1
 - Revenue and Operating Margin of KOBELCO, FY2004-FY2011
 - Revenue of KOBELCO by Business, 2009-2011
 - Operating Income of KOBELCO by Business, 2010-2011
 - Revenue and Operating Margin of Atlas Copco, 2007-2011
 - Revenue of Atlas Copco by Business, 2008-2011

- 
- Operating Income of Atlas Copco by Business, 2008-2011
 - Quarterly Revenue and Operating Income from Mining Machinery Division of Atlas Copco, 2010Q1-2012Q1
 - Orders of Mining Machinery Division of Atlas Copco by Client, 2011
 - Revenue from Mining Machinery Division of Atlas Copco by Region, 2011
 - Sales and Operating Margin of John Deere, 2002-2011
 - Revenue of John Deere by Region, 2006-2011
 - Revenue of John Deere by Business, 2002-2011
 - Operating Income of John Deere by Business, 2002-2011
 - Revenue of CNH by Region, 2007-2011
 - Sales and Operating Income of CNH, 2007-2008
 - Revenue from Construction Equipment Division of CNH by Product and Region, 2011
 - Revenue of Hyundai Heavy Industries Construction Equipment by Business, 2011-2012
 - Sales from Construction Equipment Division of Hyundai Heavy Industries Construction Equipment, 2004-2012
 - Sales from Construction Equipment Division of Hyundai Heavy Industries Construction Equipment by Product, 2011
 - Excavator Sales Volume of Hyundai Heavy Industries Construction Equipment in Chinese Market, 2005-2011
 - Construction Equipment Sales of Hyundai Heavy Industries Construction Equipment by Region, 2007-2011
 - Revenue and Net Income of Hyundai (Jiangsu) Heavy Industries, 2007-2011
 - Revenue and Operating Margin of XCMG, 2005-2012
 - Revenue and Growth Rate of XCMG, 2009Q1-2012Q1
 - Net Income and Growth Rate of XCMG, 2009Q1-2012Q1
 - General Expenses of XCMG, 2009Q1-2012Q1
 - Revenue of XCMG by Product, 2011
 - Monthly Truck Crane Sales Volume of XCMG, Jan.2010-Mar.2012
 - Revenue and Operating Margin of SANY, 2006-2012
 - Oversea Revenue Proportion of SANY, 2005-2011

- 
- Revenue of SANY by Product, 2011
 - Excavator Sales Volume of SANY, Jan.2010-Mar.2012
 - Excavator Market Occupancy of SANY in Chinese Market, Jan.2006-Mar.2012
 - Monthly Truck Crane Sales Volume of SANY, Jan.2010-Mar.2012
 - Revenue of Putzmeister, 1996-2011
 - Footprint of Putzmeister Worldwide
 - Revenue and Operating Margin of ZOOMLION, 2006-2012
 - Revenue and Growth Rate of ZOOMLION, 2010Q2-2012Q1
 - Net Profit Margin of ZOOMLION, 2010Q2-2012Q1
 - Gross Margin of ZOOMLION, 2010Q2-2012Q1
 - General Expenses of ZOOMLION, 2010Q2-2012Q1
 - Revenue of ZOOMLION by Product, 2011
 - Gross Profit of ZOOMLION by Product, 2011
 - Crane Sales Volume of ZOOMLION, Jan.2010-Mar.2012
 - Crane Sales Volume & Growth Rate of ZOOMLION, 2010Q1-2012Q1
 - Revenue and Operating Margin of Liugong, 2006-2012
 - Quarterly Revenue and Growth Rate of Liugong, 2010Q2-2012Q1
 - Quarterly Gross Margin of Liugong, 2010Q2-2012Q1
 - Quarterly Net Profit Margin of Liugong, 2010Q2-2012Q1
 - General Expenses of Liugong, 2010Q2-2012Q1
 - Excavator Sales Volume of Liugong, 2010Q1-2012Q1
 - Bulldozer Sales Volume of Liugong, 2010Q1-2012Q1
 - Loader Sales Volume of Liugong, 2010Q1-2012Q1
 - Crane Sales Volume of Liugong, 2010Q1-2012Q1
 - Revenue and Operating Margin of Shantui Construction Machinery, 2006-2012

- 
- Bulldozer Sales Volume of Shantui Construction Machinery, Jan.2010-Mar.2012
 - Bulldozer Market Occupancy of Shantui Construction Machinery, Aug.2006-Dec.2011
 - Revenue of Shantui Construction Machinery by Business, 2006-2011
 - Export Revenue Proportion of Shantui Construction Machinery, 2006-2011
 - Revenue and Operating Margin of Lonking, 2006-2011
 - Revenue and Operating Margin of XGMA, 2006-2012
 - Quarterly Revenue and Growth Rate of Xiamen XGMA Machinery, 2007Q1-2011Q4
 - Quarterly Net Income and Growth Rate of Xiamen XGMA Machinery, 2007Q1-2011Q4
 - Monthly Excavator Sales Volume of Xiamen XGMA Machinery, Jan.2009-Nov.2011
 - Monthly Loader Sales Volume of Xiamen XGMA Machinery, Jan.2009-Nov.2011

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