



**Global and China Excavator 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

It is in the report that covers the followings:

- The overview of global construction machinery & equipment industry
- The excavator market in Brazil and India
- The excavator market in China
- The world's 20 leading excavator manufacturers

In 2011, the global sales volume of excavators approximated 458,000 units, of which the sales volume in Chinese market enjoyed the lion's share of 38.8% and reached 178,000 units, due to the largest number of infrastructure projects.

From January to April of 2012, 28 major Chinese excavator manufacturers sold a total of 59,457 excavators, down 42.22% YoY, while the export volume surged 100.24% YoY to 2,547 units. The first quarter of every year is the peak time for the commencement of infrastructure projects and is also the golden period for excavator sales.

Despite the sharp decline in Chinese market, the excavator sales outside of China showed robust performance, especially in developed economies such as the U.S., Japan, Germany, Sweden, Denmark and Finland. Although the Eurozone debt crisis leads to sharp depreciation of euro and greatly affects southern European countries, it is conducive to the exports of Germany and Northern European countries which boast a large quantity of excellent construction machinery manufacturers and which attained YoY rise of nearly 20% in new orders in Q1 2012.

The excavator market features a high concentration degree in India, and the top three enterprises occupy more than 80% market share. Telcon, jointly established by TATA and Hitachi Construction Machinery in 1961, ranks No. 1 for 51% market share and mainly produces crawler excavator. The No.2 company is co-invested by Komatsu and L& T, followed by South Korean Hyundai. The three manufacturers have set up production bases in India.

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The excavator market in Brazil is also characteristic of high degree of market concentration. Large-sized excavator acts as the mainstream excavator in Brazil, and the U.S.-based Caterpillar and Japanese Komatsu are veteran manufacturers of large excavator. In terms of hydraulic excavator, Caterpillar makes up 50% market share and Komatsu 28%.

In Q1 2012, the sales volume of excavators suffered a decline in Chinese market, of which the sales volume of 13-20 ton and 1-4.5 ton excavators dropped 27%, that of 25-30 ton and 30-35 ton excavators plummeted by 57% and 61% respectively, and that of excavators with over 40 tons almost remained unchanged from the previous year, slipping a bit by 1%.

For the time being, 20-35 ton excavator boasts a greater market share, but the proportion of sales volume in the total has declined significantly, while that of excavators with less than 13 tons and over 40 tons has been increasing.

On the one hand, the accelerating integration of coal mines increases the coal mines in size, so the large-tonnage (30-ton and above) excavators saw relatively robust performance in sales volume in April, down around 35.8% YoY; and on the other hand, the demand for small-tonnage (below 13-ton) excavators maintained stable driven by the construction of irrigation and water conservancy projects and municipal construction, a fall of 34.5% YoY in April. The medium-tonnage (13-30 ton) excavator for large-scale infrastructure still remained weak and slipped 49.1% YoY.

Amid the Chinese economic slowdown, people are looking forward to the government's new round of economic stimulus. China's economic stimulus policies always center on increasing investment in infrastructure and relaxing its macro-control over real estate market. However, the current government is about to expire, which means that no radical policy changes in a short term. And it is still uncertain whether the new government will implement the economic stimulus policies or not when it comes to power in 2013.

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