**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 Company Reports, China Customs, and National Bureau of Statistics of China etc.
Abstract

In 2012, the global core drill market reached a plateau. And industrial players including Atlas Copco, Sandvik and Boart Longyear have been in a firm position to dominate the global market after a series of M&As, laying the foundation to become the flagship players. In order to further seize market share, those transnational companies spread their wings towards emerging countries such as China which is becoming an attraction.

As the world’s largest mineral resources consumer, China has seen rapid growth in terms of the demand for mineral resources of all varieties, accompanying by intensified exploration. In 2011, China’s investment in geological exploration surged by 14.6% year-on-year to RMB109.2 billion. With the increasingly growing input in mineral resources exploration, the demand for core drills are soaring, leading to ballooning market scale. In 2011, the market scale of core drill in China grew by 14.8% year-on-year to RMB7 billion. And the accelerated growth trend is expected to maintain until 2015.

In addition, full-hydraulic core drills have become the mainstream in most developed countries. By contrast, in China, spindle-type core drills are still occupying a lion’s share affected by varies of factors. The projection suggests that full-hydraulic deep-hole core drills will play a leading role in Chinese market, due to surging human resource cost as well as demanding requirements in prospecting depth and precision. And the trend has been concerned by some of Chinese industrial players which are intensifying their input in the R&D of full-hydraulic deep-hole core drill products.
The report highlights the current development of global and China core drill industry, and underlines four foreign enterprises including Atlas Copco, Sandvik, Boart Longyear, Koken, as well as 13 Chinese counterparts including Cortech Drilling Equipment, Lianyungang Huanghai Machinery and Hengyang Zhongdi Equipment Prospecting Engineering Machinery.

Sweden-based Atlas Copco boasts the world’s major core drill producer. In recent years, the company has consolidated its leading position in the core drill industry by making great efforts in M&As, intensifying input in R&D and capacity expansion, setting up joint ventures with foreign enterprises. On Nov. 28, 2012, it signed a strategic cooperation agreement with Wuxi Drilling Tools Factory in Shanghai, with an aim to fill the gap of GB standard products in Chinese market and to expand customer group and market coverage.

Another Sweden-based company, Sandvik, is not only a high-tech transnational company, but one of the three leading core drill producers in the world. In recent years, the core drill business of the company has seen rapid development. By adopting selective acquisition strategy, the company has completed its product line in a fast manner, improving the production scale and market occupancy. In 2005, the company set up a production base in Shanghai, and finished the expansion in 2007, with the annual output of mining machineries (including core drill) realizing 3,000 sets.

Lianyungang Huanghai Machinery is the only listed Chinese company in China core drill industry, with the major products including full-hydraulic power core drills and spindle-type core drills. In June 2012, it was listed on Shenzhen Stock Exchange, with the raising fund being flown to new-type high-efficient core drill technological upgrading project and drill pipe production technology upgrading project. After finished, the annual capacity of full-hydraulic core drill of the company is expected to grow 510 sets, while that of spindle-type core drill is projected to increase 3,279 sets.
• Spindle-Type Core Drill
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• Performance Parameters of Shaanxi Hechang Mechanical and Electrical Equipment’s Core Drill Products
• Performance Parameters of SDGM’s Full-Hydraulic Core Drill Products
• Major Chinese Core Drill Manufacturers and Products, 2012
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<tr>
<th>Name: Beijing Waterwood Technologies Co., Ltd (ResearchInChina)</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Contact Person: Liao Yan</td>
<td>Phone: 86-10-82600828</td>
</tr>
<tr>
<td>E-mail: <a href="mailto:report@researchinchina.com">report@researchinchina.com</a></td>
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