



China Road Maintenance Machinery Industry Report, 2013-2015

Feb. 2014

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, and National Bureau of Statistics of China etc.

Abstract

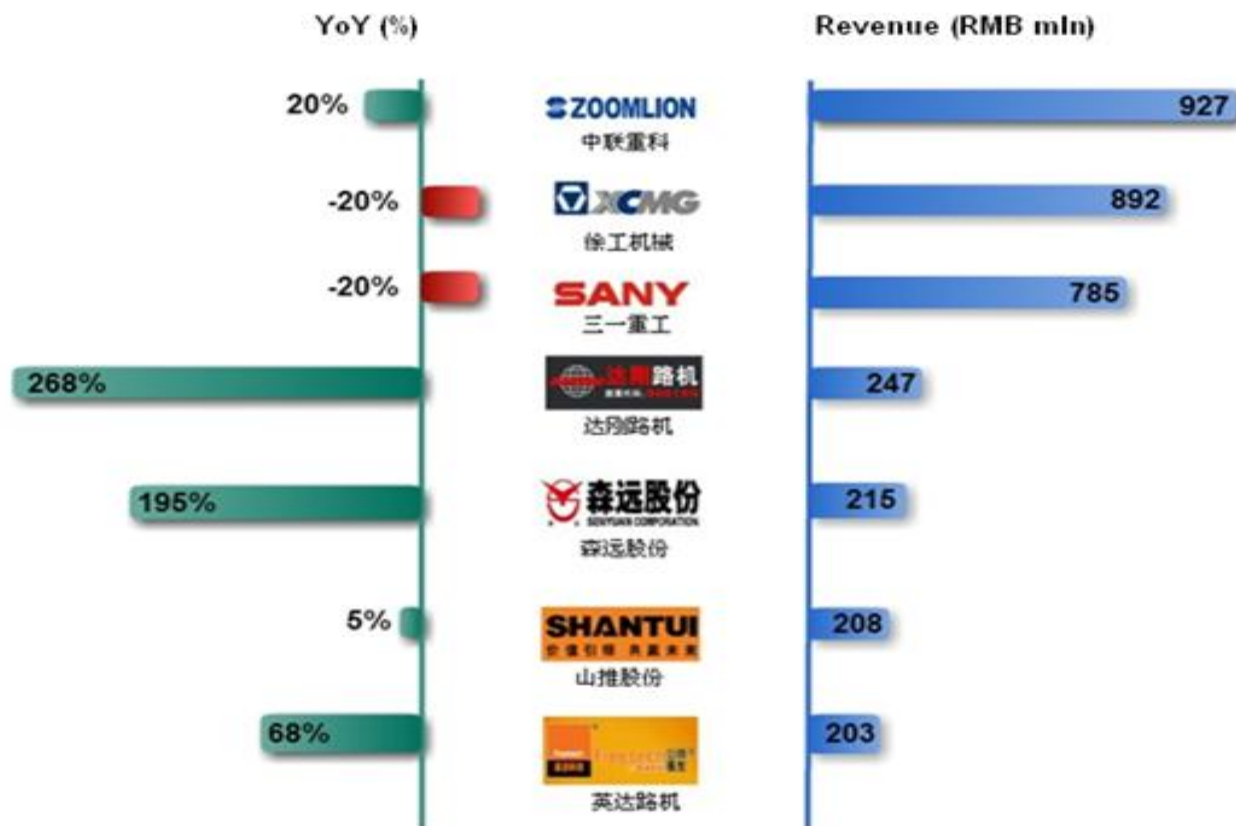
In recent years, with the constant advance of China's utilization process and sustained stability in urban fixed-asset investment, the total investment in highway construction enjoyed sustainable growth from RMB623.1 billion in 2006 to RMB1.2896 trillion in 2013, at a CAGR of 11%. In 2010-2013, China's annual investment in highway construction remained above RMB1 trillion, a lot of new roads plus the increasing mileage of old roads that had come to the end of their service lives provided a broad market space for the development of road maintenance machinery industry.

The Chinese road maintenance machinery industry has achieved leapfrog development over the recent years. According to the Road Machine Chapter of China Construction Machinery Association, gross industrial output value was approximately RMB28 billion in 2013. Currently, famous foreign companies have entered the Chinese market in succession, showing competitive technical and economic strength in

rollers, pavers, asphalt mixing plants and other products. Meanwhile, large domestic construction machinery enterprises have gradually tapped into the road maintenance machinery area, and developed towards multi-species direction. Private enterprises have grown up faster, with scale and technological strength enhanced, displaying strong competitiveness in market segments.

In terms of traditional road maintenance equipment production, leading enterprises in China mainly include SANY, ZOOMLION, XCMG and so on. With respect to the new road maintenance equipment production, Xi'an Dagang Road Machinery Co., Ltd. and Freetech Road Recycling Technology (Holdings) Limited relying on powerful R&D strength, complete range of maintenance equipment and minimum technology gap with advanced foreign equipment manufacturers are the best to meet Chinese customers' requirements in environmental protection, low energy consumption and cost saving.

Ranking of China's Leading Road Maintenance Machinery Enterprises by Road Maintenance Machinery Revenue, H1 2013



Source: ZOOMLION, XCMG, SANY, Dagang, Senyuan, Shantui, Fretech, ResearchInChina

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