

# **Annual Industry Dossier - Global Construction Equipment Industry - 2013-2014 - Key Trends, Issues & Challenges, SWOT, Force Field Analysis & Strategic Outlook**

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## **Abstracts**

The global construction equipment industry has been on an uphill trajectory of-late after having been through the roller coaster ride over the years driven by rapid Chinese economic growth that was hitherto unknown to the world & which also saw the shifting of industry dynamics with the emergence & rise of Chinese players to the global industry forefront over the 2002-2012 decade with a number of Chinese companies making a foray into the industry's global Top 20. The industry, however, has been combating significant pressures with the growth rate in 2012 limited to a low, single digit value amid a difficult & uncertain global macroeconomic environment and the continued weakness in Chinese market with the economy treading on the recovery path fastidiously since Q4 2012 after the country's long bid to contain inflationary pressures through a host of monetary policy measures.

Most global OEMs are facing significant pressure on machinery sales, order intake & profitability as of the end of first quarter of 2013 amid difficult global economic conditions further compounded by the ongoing slump in mining activity indicating towards tough projections for 2013 with the industry growth projected to stay flat at best and contract by 5%-10% at worst in 2013. The industry fundamentals, however, remain solid and the long-term industry growth prospects still appear robust, driven, primarily, by the significant anticipated investments likely to be made towards infrastructure repair & rebuilding across traditional markets, especially, in the United States and rapid infrastructure development required across emerging markets to sustain economic growth & rapid urbanization.

The industry landscape, too, is witnessing the start of a shift in the industry's centre of gravity from traditional towards emerging markets with significant investments underway by almost all key industry players towards establishing & further deepening of roots across these markets. Most leading industry OEMs, however, are working towards rationalizing & optimizing their overall cost base & industrial footprint at present with competitiveness becoming critical and continue with their strong R&D focus directed at the development of new product platforms and cutting-edge technologies delivering enhanced performance features as well as optimized operating economics, especially, development of alternate fuel based powertrains and further integration of ICT technologies.

Against this backdrop, the report analyzes the global construction equipment industry and provides strategic insights into the key industry trends, challenges & risk factors that are likely to shape the future of the industry followed by an insightful industry SWOT & Force Field Analysis and strategic outlook for the industry for 2014.

### **Key Excerpts/Findings from the Report:**

1. Product portfolio renewal across OEMs driven by new product introductions incorporating cutting-edge technologies & innovations likely to be the most significant demand driver across traditional markets fuelling replacement demand. The report covers analysis of product renewal plans by OEMs.
2. Analysis of plans by OEMs to deepen existing presence as well as industrial footprint across emerging markets. Analysis of plans by key industry OEMs for expansion of their existing presence across emerging markets.
3. Analysis of the ongoing, rapid urbanization trend across emerging markets and the implications for the construction equipment industry.
4. Analysis of all key demand drivers for the industry
5. Analysis of Key Technological Trends, Innovations & Developments Likely to Shape Industry's Future

### **Usage & Relevance:**

The report provides & will be useful for:

Strategic Analysis and Vital Inputs essential for Strategic Planning & Decision-Making Process

Analysis of inherent Industry Strengths & Weaknesses

Identification & Analysis of Imminent Opportunities & Emerging Potential Threats

Gaining access to Key Industry Trends & Insights; crucial inputs for Decision-Makers

Analysis of Forces Driving and Restraining the Industry & their overall Dynamics

Identifying & highlighting areas for making Potential Strategic Changes, Adjustments and

Realignment of the internal strategy framework in-sync with emergent trends

Strategic Industry Outlook for 2014

**For Whom:**

The report would be essential for those having strategic interest in the Global Construction Equipment Industry & will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Suppliers, Distributors, Vendors and other Key Players in the Industry Value Chain as well as existing & potential Investors, industry & company analysts & those associated with the industry.

**Highlight:**

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, being built on the Microsoft PowerPoint platform; in addition, to being a ready self-reckoner as well as a quick reference guide driving, enabling & ensuring prompt and informed decision making.

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