

Annual Strategy Dossier - 2013 - World's 10 Leading Construction Equipment Manufacturers - Key Strategies, Plans, SWOT, Trends & Strategic Outlook - Caterpillar, Komatsu, Volvo, Hitachi, Sany, John Deere, CNH, Sandvik, Terex, Kubota

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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 macroeconomic environment in the western hemisphere 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 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 report analyzes, looks into & provides strategic insights into the key strategies &

plans crafted & being pursued by these 10 key, Global Construction Equipment manufacturing companies to navigate their way through the present macroenvironmental uncertainty & difficult global economic conditions as the U.S. economy continues to tread cautiously on the recovery path; the Euro-zone debt crisis refuses to abate & the efforts underway across most emerging markets to stoke up economic growth momentum with a slight shift in overarching focus from merely combating inflation to adoption of a more balanced approach. 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.

Key Strategies & Plans included in the Report for each OEM:

1. Product Portfolio Strategies & Plans
2. Market Specific Strategies & Plans - Traditional & Emerging Markets
3. R&D Strategies & Plans
4. Growth Strategies & Plans
5. Business and Corporate Strategies & Plans
6. Sales & Marketing Strategies & Plans
7. Production/Manufacturing Strategies & Plans

Key Excerpts/Findings from the Report:

1. Analysis of Caterpillar's Technology Strategy Featuring Development of Alternate Fuel-based Drivetrains.
2. Volvo's Plans of Deepening Industrial Footprint in North America & Expansion Plans for BRIC.
3. Analysis of John Deere's 2018 Growth Strategy driven by BRIC Expansion & Capabilities Integration.
4. Analysis of Komatsu's 2013-2016 Mid-Range Strategic Plan and New Product Development Strategy focusing on Development & Further Integration of a Range of ICT Technologies & Applications.

5. CNH's Plans to Grow Latin American Presence Significantly.
6. Analysis of Key Technological Trends, including, Material Science Innovations likely to Shape the Industry's Future.
7. Analysis of Plans Chalked out by Key Global OEMs to Partially Offset Slump in Construction & Mining Segments.

Relevance & Usefulness: The report will be useful for

Strategic Planning, Competitive Analysis & Benchmarking Exercise

Comprehensive Strategic & Competitive Assessment & Analysis for each key OEM

Strategic Insights into key Business Strategies & Plans being pursued by each key OEM

Gaining a Strategic Perspective on the Business & Strategic Outlook for all key players for 2013

Gaining access to Key Industry as well as Market Trends, Insights & Growth Opportunities

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics through a Force Field Analysis

Identifying & highlighting areas for Potential Strategic Changes, Adjustments & Realignment

For Whom:

The report would be essential for those having strategic interest in the Global Construction, Construction Equipment Industry or any of these companies & 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 or any of these companies.

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.

Report Updates:

For purchases made beyond 3 months from the month of original publication, the report would be updated with latest financial data as well as strategic developments for all the OEMs included in the report, prior to dispatch, in order, for the analysis to be most relevant & useful for the end-users.

Companies included in the Report:

Caterpillar Inc.

Komatsu Ltd.

Volvo AB

Hitachi Construction Machinery Co. Ltd.

Sany Heavy Industry Co. Ltd.

John Deere & Co.

CNH Global N.V.

Sandvik AB

Terex Corporation

Kubota Corporation

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