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Annual Strategy Dossier - 2018 - World's 7 Leading Construction Equipment Manufacturers - Strategic Focus, Key Strategies & Plans, SWOT, Trends & Growth Opportunities, Market Outlook - Caterpillar, Komatsu, Volvo, CNH, Hitachi, Liebherr, John Deere

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Abstracts

The Global Construction Equipment market has made an effective comeback, after a downturn spanning across multiple years, with demand levels for 2017 witnessing a strong growth globally with resurgence seen across most key markets with an uptick in construction activity, world economy gaining traction, return of China factor in the equation with significant Chinese spending on infrastructure development projects after an extended hiatus and uptick in the energy sector activity post recovery in global crude oil prices to their regular levels, which have more than doubled since bottoming out in early 2016, with energy commodity prices projected to increase by 20% year on year in 2018, as per the World Bank. Base metal prices, too, are projected to register an increase in 2018 which is likely to provide a boost to mining activity. However, regional uncertainties like BREXIT and major global developments like the virtual onset of a global trade war with the planned imposition of import tariffs by the U.S. on Steel and Aluminium followed by announcement of retaliatory measures by China, in form of countervailing duties, could pose a serious threat to take the ameliorating world economy to the brink of another potential economic recession.

The U.S. market for construction equipment has been buoyed by continued strong demand and activity levels with the economy on solid footing despite the pursuit of a tightening monetary policy stance by the Fed. The industry has witnessed strong housing starts as of late along with spurt in no-residential construction activity as well while the favourable regulatory & policy environment have given a further fillip to demand for new equipment. Further, the proposed infrastructure development bill,

outlining massive planned investments worth $1.5 trillion towards infrastructure repair and rebuilding, are likely to have tremendous potential for the industry over medium term once the modalities are thoroughly fine-tuned and if it gets the green light from the Congressional leaders. However, the construction activity is projected to pick up further momentum in the second half of 2018 with the year likely to shape up to be a great year with the industry optimism & confidence at record high levels. Rising operational costs with increasing input & wage costs and limited availability of skilled construction workforce remain key concern areas going forward.

European markets, too, have been on a steady growth path over the recent years with the EU economy revving up. The demand for construction equipment registered a strong 15% year on year growth in 2017, with sales at strong levels but still almost 20% below the pre-crisis peak level of 2007; led by strong construction activity, improving business scenarios across mining & quarrying sectors and an overall favourable low interest rate environment conducive for new investments. Equipment renewals across fleet rentals continue to spearhead demand growth for new construction equipment across Europe with the European market projected to register a further demand growth of up to 10% in 2018.

The Chinese market made a quick turnaround in 2017 after a 5 year downswing with massive year on year increase in sales of excavators & wheel loaders led by China's spending on infrastructure development projects across second rung cities and to support increasing urbanization. Further, China's plan to revive the ancient silk trade routes, spanning across multiple continents, under its One Belt One Road (OBOR) initiative, involving planned total spending outlays of around $1 trillion, has already been providing & is likely to provide a further, significant boost to sales of construction equipment within China given the tax rebates available for the purchase of equipment under the initiative. Indian market, too, has witnessed a strong growth in sales of excavators driven by a vibrant economy and the ongoing spending towards infrastructure development projects.

The OEMs are busy ramping up their production rate at war footage to minimize the demand supply gaps across their dealer networks given the low inventory levels and production rates being maintained by the industry over the past couple of years as demand levels remained dismal. The OEMs are also renewing their product portfolios in alignment with the market upturn through new product introductions incorporating cutting edge technologies and features focused on enhanced performance as well as productivity while optimizing the total cost of ownership. The wave of a set of key disruptive technologies clubbed under the gamut of CASE (Connected, Automated,

Shared & Services and Electric) are finding their way into the construction equipment domain as well.

The industry OEMs; who have already been operating Autonomous Haulage Systems (AHS) across mining sites globally for a long time now; have continued to make significant progress with reference to the incorporation of technologies into their product portfolios and services with the industry having rolled out electric compact excavators, fully connected equipment as well as connected jobsite concepts, usage of robotic arms for heavy lifting tasks apart from a range of technology driven niche services, like drone based site surveys & usage of 3D printing technology for parts etc. as of late. The technology is evolving and is poised to disrupt markets at a lightning pace with the industry players able to adopt & incorporate right technologies for right applications to create significant competitive advantages leveraging technology led differentiation will be at the forefront of this one of the most disruptive phases for the industry going forward.

Against this backdrop, the report analyses the Overarching Strategic Focus & Priorities and provides comprehensive insights into the Key Strategies & Plans being conceptualized, formulated & implemented by the World's 7 leading Construction Equipment Manufacturers for the near to medium term horizon as they gear up their industrial bases and supply chains to meet the inflection in global demand for construction equipment. The initial sections of the report provide a snapshot & overview on the market positioning & financial performance of each industry OEM while the SWOT Analysis framework analyses the core Strengths & Weaknesses and identifies potential Growth Opportunities & avenues and imminent/emerging Threats for each construction equipment manufacturer. The middle sections of the report provide comprehensive analysis of the overall Strategy Focus as well as Insights into the Key Strategies and Plans for the OEMs. The concluding sections of the report provide analysis of key & emerging market & technology trends, issues & challenges and risk factors. The report concludes by providing a Force Field framework analysis on the Global Construction Equipment Market and assessing the medium term Demand Outlook for Construction Machinery along-with Inputs on Market Evolution & Growth Projections.

Relevance & Usefulness: The report will be useful for:

Strategic Planning, Assessment & Decision-Making Processes

Competitor Analysis & Comparative Analysis of covered Industry OEMs

Identification of & Insights into Potential Growth Opportunities & Avenues

Analysis of Near to Medium Term Strategy Focus and Key Strategies & Plans for all OEMs

Medium Term Strategic Outlook, Inputs on Market Evolution & Growth Projections

Analysis of Emerging Market, Sector-specific & Technology Trends

Contingency planning for current Strategies & Programs

Identifying & highlighting areas for making potential Strategic Changes, Adjustments & Realignment

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics

For Whom: Key Decision-Makers across Industry Value Chain

The report will be essential for those having strategic interest in the Global Construction Equipment Market. The report will be especially useful for Key Decision-Makers, Program Managers, Procurement Managers, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, Sales & Distribution Channels, Construction Contractors, Equipment Fleet Owners, Equipment Rental Companies, Technology Solutions Providers and other Key Players in the Industry Value Chain. The report will also be useful for existing & potential Investors, Industry & Company Analysts, Industry Service Suppliers, M&A Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists, Financing & Leasing Companies, Researchers and all those associated with the industry or any of these companies.

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