

Annual Strategy Dossier - 2022 - World's 10 Leading Construction Equipment Manufacturers - Caterpillar, Komatsu, Volvo, CNH, Hitachi, Deere & Co., Liebherr, Hyundai Doosan Infracore, Kobelco & Kubota - Strategy Focus, Key Strategies & Plans, SWOT, Trends & Growth Opportunities, Market Outlook

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Abstracts

The Global Construction Equipment market has been on a roll since late 2020 with booming demand for equipment across North America & Europe (despite the slump in China) with continued infrastructure investments, strong residential construction in the U.S., strong demand from the commodities segment and robust fleet utilization across operators back to pre-COVID levels while facing continued challenges from the COVID-19 pandemic marked by supply chain disruptions & bottlenecks, limited freight capacity & semi-conductor chip shortages which continue to impede the pace of overall recovery momentum.

Residential construction segment in North America continues to be robust given strong housing starts while ongoing fiscal stimulus measures, in form of investments in infrastructure development, across most key global markets continue to drive industry confidence & fresh investments. The industry also continues to make steady progress towards transitioning to sustainable technologies with the rapid development & commercialization of battery electric, hybrid, hydrogen powered fuel cells & other alternate fuel powered equipment which are likely to receive a further push from the volatility in global crude oil prices providing significant growth opportunity in terms of fleet replacements & recapitalizations.

The introduction of remote & fully autonomous construction equipment, development &

roll-out of niche services based on cutting edge technologies & innovative business models, like autonomous mobility as a service for mining sites & construction workplaces, are set to transform the construction equipment market landscape going forward. Further, the latest \$1.2 trillion Infrastructure Investment & Jobs Act in the U.S. and the launch of EU's major Infrastructure Investment, under its Global Gateway Strategy in late 2021, aimed at mobilizing & investing EUR 300 billion through 2027 towards development of global infrastructure apart from huge planned investments towards infrastructure in the world's fastest growing economy, India, over near term are likely to provide a massive boost to the construction industry over medium term. That's despite projections for the slowdown of global economic recovery over near term owing to uncertainty over the likely direction of the pandemic and rising inflation levels necessitating monetary policy tightening by the central banks

Overall, the CE industry is likely to continue riding the ongoing market rally in 2022 with most key markets projected to register steady growth, with the exception of China, which continues to be in the correction mode following real estate woes and a zero-tolerance policy towards COVID-19.

Against this backdrop, the 2022 edition of the report analyses the overall strategy focus and provides insights into & comprehensive analysis of the Strategies & Plans being conceptualized & pursued by the World's Top 10 Construction Equipment manufacturers for the near to medium term horizon.

Report Excerpts:

1. Analysis of CAT's overall strategy focus pivoted around profitable growth, expansion of product offerings, scaling up of services business and active pursuit of technological innovations.
2. Decryption of Komatsu's medium term strategy focusing on digitalization with the development of a scaled & integrated solutions business for construction workplaces and value creation through technological innovations with laser focus on sustainability & autonomy.
3. CNH's aggressive push on the development of alternate fuel based powertrains under its 'Clean Energy Leader' strategy. Further, the approval of latest business restructuring focusing on the spin-off of on-highway businesses is likely to enable CNH to invest significantly towards next generation technologies going forward.
4. Hitachi to go solo in North & South America from March 2022 with plans to establish its own sales & distribution network from scratch with significant investments following the recent dissolution of its long-standing production & distribution JV with Deere & Co.

5. Massive investments in infrastructure across most key global markets likely to provide a major boost to construction industry over medium term.
6. The emerging energy transition towards sustainability is likely to create a demand supercycle for the mining & metals industry over medium term.
7. Construction activity projected to maintain its overall growth momentum across most key markets in 2022, with the exception of China, with strong drivers, indicators & fundamentals.
8. Supply Chain disruptions, continued semi-conductor chip shortages, pandemic's likely direction & inflationary pressures across key markets could become potential speed humps on the industry's recovery momentum over near term.

Relevance & Usefulness:

Strategic Planning & Decision-Making process

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

Identification of & Insights into Potential Growth Opportunities & Avenues

Market Evolution & Demand Growth Projections

Analysis of Key Industry Trends, Issues & Challenges, Risk Factors & Market Outlook for 2022

For Whom:

The report, with its unique disposition & strategy focus, is a niche, key & vital information resource on the Global Construction Equipment Market. It would be indispensable for those having interest, stakes or investments in any of the Construction Equipment OEMs covered and all those with operational or strategic involvement and/or stakes in the Global Construction Equipment market. The report will be extremely useful for Key Decision-Makers, Program Managers, Global Procurement Managers, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, Associated Equipment Manufacturers and other Key Players in the Industry Value Chain. The report will also be useful for existing & potential Investors, Industry & Company Analysts, M&A Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists, Financing & Leasing Companies, Researchers and all those associated with the Construction industry.

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