

Annual Strategy Guide - 2016 - World's 7 Leading Construction Equipment Manufacturers - Strategic Focus & Priorities, OEM Strategies & Plans, SWOT Analysis, Trends & Market Outlook - Caterpillar, Komatsu, Volvo, CNH, Hitachi, Sandvik, John Deere

<https://marketpublishers.com/r/AF91ADB0C24EN.html>

Date: March 2016

Pages: 145

Price: US\$ 1,097.00 (Single User License)

ID: AF91ADB0C24EN

Abstracts

Difficult Economic & Market Conditions with a Vulnerable Global Economy; U.S. remains the Stable Cornerstone

The global construction equipment market continues to face significant headwinds with the market having witnessed its third straight year of demand contraction in 2015 with continued economic challenges across China, Brazil & Russia impacting investments towards infrastructure development across these markets. The Chinese growth engine; which has led the pace of the market for over a decade now; is seemingly undergoing a major overhaul with the Chinese market for construction equipment having almost halved in 2015 with economic growth slowing down to the lowest in over 25 years amid continued financial markets volatility as the country strives to transition to a more consumption driven economy with limited reliance on manufacturing & heavy industries which has impacted the industry significantly. Brazil & Russian economies, on the contrary, have been impacted severely by the energy sector downturn, in addition, to the ongoing political crisis in Brazil with pressures likely to prevail across these economies over near term. Additionally, the ongoing mining slump with continued weakness in commodity prices and the downturn in energy sector with oversupply driven, sustained slide in crude oil prices have collectively further exacerbated and worsened the situation for the industry. The North American market has been the only saving grace as of-late with the U.S. Economy continuing to prove itself as the stable cornerstone of the global economy with steady economic growth momentum followed by Europe which continues to make slow economic recovery. The OECD & IMF,

however, have already cut their global economic growth forecasts for 2016 to 3.4% and the IMF has termed the global economy as highly vulnerable to adverse shocks in its latest outlook with market turbulence, oil price crash, weak commodity prices & continued geo-political conflict as key threats & risk factors.

Near Term Strategy Focus across OEMs remains on Optimization & Rationalization while Investing for Long-Term Growth

The near term strategy focus of the industry OEMs remains cautious with focus on restructuring of operations aimed at rationalization & optimization of their industrial & overall cost base in-line with the prevailing, difficult market environment aimed at protecting & managing profitability amid rapidly contracting topline. Almost all industry OEMs have deployed a slew of measures, which include, massive production cuts, prudent inventory & cost base management, workforce downsizing and consolidation as well as optimization of industrial footprint along with share repurchase programs to manage this difficult industry downswing. Also, further industry consolidation is on the cards with near term, broader market outlook remaining grim. The, OEMs, however, continue to make significant investments towards technological development & R&D activity; as evinced by their steady R&D expenditure levels; aimed at enhancing their competitive positioning from a long-term perspective.

Strong, Long-Term Fundamentals & Growth Drivers despite Significant, Near Term Pressures & Challenges

The long-term industry fundamentals & growth drivers, however, remain strong and robust with significant role played by the industry in economic growth and significant investments likely to be made by emerging nations towards infrastructure development over medium term to support economic growth and with rapid urbanization trend. Amongst traditional markets, the U.S. market is likely to spearhead market direction going forward & will hold the key to shaping the near to medium term global market outlook. Additionally, massive investments are going to be required in the U.S. towards infrastructure rebuilding & repair over medium term. The advent of a long term transportation bill, after over a decade, with the passing of the FAST Act in December 2015 provides over \$300 billion in federal funding towards transportation projects in the U.S. through 2020 which is likely to give a significant boost to the industry in the U.S. Additionally, Fed's monetary policy stance in 2016 & the outcome of the U.S. presidential elections will be significant for the industry over near term. In Europe, the economy entered deflation in February with lower crude oil prices and witnessed slowing down of manufacturing activity amid fears of sluggish growth in 2016 which is

likely to lead to quantitative easing by the ECB over near term. China's growth forecast for 2016 has been set at the lower 6.5%-7% range along with Moody's downgrading the outlook for China from stable to negative. The country has already been focusing on rolling out stimulus measures to boost economic growth amid massive planned layoffs in the steel & coal sectors. The effectiveness of stimulus measures & overall policy focus in China over near term, thus, are likely to be decisive for the economic activity and the construction equipment market.

Against this backdrop, the report analyzes 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 the industry faces a complex, challenging & rapidly evolving global macroeconomic environment. The initial sections of the report provide a snapshot & overview on the business operations & market positioning of each industry OEM while the SWOT framework analyzes the core Strengths & Weaknesses for each of the construction equipment manufacturers. The SWOT framework subsequently analyzes & identifies potential growth opportunities & avenues and imminent/emerging threats for each key industry OEM based on their strategic product portfolio & market positioning, core strengths & weaknesses and overall strategy focus & orientation. The concluding sections of the report provide insights into 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 Strategic Outlook for Construction Machinery along-with Inputs on Market Evolution & Growth Projections.

Report Excerpts:

Analysis of Caterpillar's significant measures to rationalize & optimize cost base & boost operating efficiency aimed at protecting profitability with the company triangulated between difficult market conditions in the mining & construction equipment segments while the energy sector simultaneously faces a significant downturn. Also, insights into CAT's near to medium term technology & marketing strategy focus led by data analytics & digitalization efforts.

Analysis of Komatsu' long-term technology strategy focusing on significant broadening the scope of ICT technologies integration program across core business functions & processes aimed at enhancing overall effectiveness.

Analysis of Volvo's pursuit of a two-pronged equipment production & branding strategy across markets and Outline of Volvo's product portfolio plans for 2016

Analysis of Hitachi's ambitious plans to gain market share in the global wheeled loader market over near to medium term with expansion of product portfolio & reinforcement of sales & distribution network.

Insights into John Deere's continued broadening & renewal of product portfolio, optimization of North America based industrial footprint and pursuit of an end-user driven new product development strategy

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 industry and/or the 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.

Features, Benefits & Reasons to Procure:

Provides Macro View and Big Picture Quickly

Blend of Quantitative & Qualitative Analysis

Significant Time Savings

Visual Representation enables Easy Comprehension

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Superior & Enriched User Experience with Incorporation of Relevant Images

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Komatsu Limited
Volvo AB
CNH Industrial N.V.
Hitachi Construction Machinery Co. Ltd.
Sandvik AB
John Deere & Company

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