

Comparative SWOT & Strategy Focus - 2018-2023 - World's 7 Leading Construction Equipment Manufacturers - Caterpillar, CNH Industrial, Hitachi, John Deere, Komatsu, Liebherr, Volvo - Strategy Focus & Priorities, Key Strategies & Plans, Comparative SWOT, Trends & Growth Opportunities, Market Outlook

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Abstracts

The Global Construction Equipment market has made an effective comeback; after a significant downturn spanning multiple years; with demand levels for 2017 & H1 2018 witnessing a strong growth globally with resurgence seen across most key markets with an uptick in construction activity, world economy gaining traction, return of 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 with energy commodity prices projected to increase by 20% year on year in 2018. Base metal prices, too, are projected to register an increase in 2018 which is likely to provide a boost to mining activity.

The U.S. market for construction equipment has been buoyed by continued strong demand and activity levels with the economy on solid footing. The industry has witnessed strong housing starts as of late along with spurt in non-residential construction activity as well while the favorable regulatory & policy environment have given a further fillip to demand for new equipment. 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 led by strong construction activity, improving business scenarios across mining & quarrying sectors and an overall favorable low interest rate environment conducive for new investments & equipment renewal. 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 going forward.

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 continue to make significant progress towards incorporation of cutting edge technologies into their product portfolios and services. The technology is evolving and is poised to disrupt markets at a lightning pace with the industry OEMs & players; able to adopt & incorporate right technologies for right applications to deliver overall value to customers while creating significant competitive advantages for themselves by leveraging this technology led differentiation; will be at the forefront of this one of the most disruptive phases for the industry going forward.

However, regional uncertainties like BREXIT and major global developments like the onset of a global trade war could pose a serious threat to take the ameliorating world economy to the brink of another potential economic recession. However, long term growth avenues, like the proposed infrastructure development bill in the U.S., outlining massive planned investments worth over \$1 trillion cumulatively towards infrastructure repair and rebuilding, are likely to have tremendous potential for the industry over medium term once it gets the requisite approvals from the Congressional leaders.

Against this backdrop, the report provides a comprehensive Comparative SWOT

framework analysis on the World's 7 leading Construction Equipment Manufacturers besides analyzing the overall, Near to Medium Term Strategy Focus & providing insights into the Key Strategies & Plans being developed by them 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 framework analyzes the Strengths & Weaknesses of the OEMs from a standalone as well as relative perspective based on a comprehensive analysis of their Key Business Aspects, which include:

Product Portfolio Analysis & its Strategic Positioning

Breadth & Depth of Presence across Key Markets, Segments & Programs

Analysis of overall Cost Base, Structure & its Management

Analysis of Revenue streams, Resource Base & Key Competencies

Profitability, Key Profit Sources, Growth & Trend Analysis

Capital & Ownership Structure and Financial Strength

Key Competitor Analysis across Market Segments & Degree of Competitive Intensity

Competitive Market Positioning across Key Global Markets, Segments & Market Share

Overall Strategy Orientation & Focus, R&D Strategy, Technological Strength & Capabilities

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

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

For Whom: Key Decision-Makers across Industry Value Chain

Key Decision-Makers

Program & Procurement Managers

Top Management of Industry Players & Other Companies

Industry OEMs & Technology/Other Solutions Providers

Suppliers, Vendors, Sales & Distribution Channels and other Key Players in the
Industry Value Chain

Construction Contractors, Equipment Fleet Owners and Equipment Rental
Companies

Existing & potential Investors

Industry & Company Analysts

M&A Advisory Firms

Strategy & Management Consulting Firms

PE Firms, Venture Capitalists and Financing & Leasing Companies

Researchers and all those associated with the industry in general

Features, Benefits & Reasons to Procure:-

Provides Macro View and Big Picture Quickly

Blend of Quantitative & Qualitative Analysis for Strategic Planning Process

Significant Time Savings with Ready, Comprehensive Analysis

Quality & Reliability backed by Over a Decade of Research and Coverage of the Industry

Most detailed & comprehensive resource available on Strategy and Analysis with detailed, Strategic Analysis on Construction Equipment Manufacturers

Gain a Competitive Edge with Our Cutting Edge Analysis

Visual Representation enabling Easy Comprehension

Meetings & Presentation Ready Format for Quick Application

Superior & Enriched User Experience with Incorporation of Relevant Images, Graphs & Infographics

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Volvo AB
CNH Industrial N.V.
Hitachi Construction Machinery Co. Ltd.
Liebherr-International AG
John Deere & Company

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Volvo AB
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