

Global Construction Equipment Industry - Force Field Framework Analysis - 2014

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Abstracts

1. Backdrop & Overview:

The report analyses & provides Key Insights into the Global Construction Equipment Industry through a comprehensive, quantitative Force Field Framework analysis. The framework:

- Identifies Key Driving & Restraining Forces Impacting the Global Construction Equipment Industry

- Quantifies Strength, Magnitude & Potential Degree of Impact of each Driving & Restraining Force

- Assesses the Overall Dynamics & Interplay of Driving & Restraining Forces

- Generates an Overall, Quantitative Strategic Snapshot of Industry Forces

The framework thus identifies key forces that are driving & restraining the industry and their overall dynamics in a quantitative format that provides useful inputs to be incorporated into the medium term strategic planning & decision-making process.

2. Global Construction Equipment Industry on an Uphill Trajectory amid Continued Weakness & Uncertainty in Global Economy:

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, primarily, by the rapid

Chinese economic growth over the 2002-2012 decade with the commensurate rise of China as the world's largest & most strategically significant construction market. The industry, however, has been combating significant pressures since 2012 with the industry 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 after the country's long bid to contain inflationary pressures through a host of monetary policy measures. The recent spurt in economic growth in China during Q3 with a mostly investment driven 7.5% GDP growth has been a much needed change ensued by a difficult outlook for 2014 with shooting inflation level and the currency being on a 20 year high that is likely to bring monetary policy measures to forefront over near term.

Additionally, sporadic fluctuations in global currency exchange rates have been putting significant pressure on profitability across OEMs. The magnitude of impact of the strengthening of Swedish Krona on Volvo's profits has been to the tune of SEK 1 billion during Q3 2013 while weakening of Japanese Yen against the USD eroded Caterpillar's profitability by \$181 million during Q3 2013.

Industry's Long-Haul to Recovery Spearheaded by Strong U.S. Housing Starts in 2013:

Most global OEMs are facing pressure on revenues & profitability amid difficult global macroeconomic conditions with continued, weak demand & activity in Europe & China further compounded by the ongoing slump in mining activity that has impacted profitability by altering the product sales mix across OEMs. The industry leader, Caterpillar saw topline declining by \$11 billion for the first 3 quarters of the year with its resource industries segment registering a 75% contraction with low demand for mining equipment.

The industry & macro-environmental developments indicate towards tough projections for 2013 with the industry growth projected to stay flat at best and contract by 5%-10% at worst in 2013. In the U.S., housing starts have been encouraging so far in 2013 compensating well for the dip in non-residential public construction activity coupled with the Fed's intent to keep short term credit rates artificially low through 2014, which augurs well for the industry. The U.S. housing starts are likely to touch 1 million in 2013 while the projections for 2014 indicate towards the 1.18 million mark. The strong housing starts & modest non-residential construction activity are likely to drive replacement demand in North America and partially offset continued weakness in Europe & China.

3. Relevance & Usefulness: Provides Inputs for Strategic Planning & Decision Making Process

The report will provide & would be useful for:

Strategic, Quantitative Snapshot on the Dynamics of Industry Driving & Restraining Forces

Gaining access to Key Inputs for Strategic Planning & Decision-Making Process

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

Gaining a Strategic Perspective on the Industry's Strategic Outlook for 2014

Gaining access to Key Industry Trends, & Insights; Crucial Inputs for Decision-Makers

4. For Whom: Key Decision-Makers across Industry Value Chain

The report would be essential for those having strategic interest in the Global Construction Equipment Industry & 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.

5. Report Highlights: Visual Representation/Orientation with a Slide based Architecture

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations with visual representation & orientation based on a slide architecture, 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.

6. Key Takeaways: Enhanced Scope of Utilization & Application with Visual Representation

This PowerPoint architecture based report provides high readability & ease of navigation and saves significant amount of time by saving the end-user the effort of sifting through voluminous pages of text besides enhancing the scope of retention, utilization & application of analysis with visual representation and incorporation of relevant images to support & supplement the analysis.

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