

Global Construction Equipment Market - 2016-2020 - Key Trends, Strategic Insights, Growth Opportunities, Market Outlook

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Abstracts

The Global Construction Equipment market continues to face significant headwinds with the third straight year of global demand contraction in 2015, which is likely to be followed by the fourth one in 2016, for construction equipment with sustained economic challenges & pressures across key emerging markets led by China, Brazil & Russia and a difficult global macroeconomic environment marked by financial markets volatility, continued weakness in commodity prices, plummeting of crude oil prices and continued geo-political conflict. The situation has been further exacerbated by the simultaneous downturn in mining and energy sectors making the scenario extremely difficult for most industry players facing a fourth successive year of demand slump in 2016 with most undertaking restructuring measures and having already scaled down their manufacturing portfolio.

The Chinese construction equipment market; which led the pace of the market for over a decade till 2012; almost halved in 2015 with a sharp decline in investments towards public infrastructure projects amid a slowing down of economic growth to the lowest level in over 25 years as the country strives to transition to a more consumption driven economy. The industry OEMs, however, continue to face intense competition in an oversupply driven market scenario along with pressures from the used equipment market with the scenario likely to stay over near term. The 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 U.S. Economy continues to prove itself as

the stable cornerstone of the global economy with steady economic growth momentum followed by Europe which continues to make steady economic recovery with decent demand growth registered across the construction equipment & commercial vehicle markets so far in 2016 following a positive trend in 2015. Amongst emerging markets, India continues to maintain a pole position with strong demand growth being registered across construction & mining sectors with the country's strong, sustained focus on infrastructure development accompanied by pursuit of structural & policy reforms. Europe and India, thus, are projected to be the sole growth markets for construction machinery in 2016 while traditional growth markets, North America and Saudi Arabia are witnessing demand slump in 2016.

The long-term industry fundamentals & growth drivers for the construction sector, 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 which is likely to provide a significant impetus to the construction sector & spearhead demand for construction equipment over medium term.

The pace of technology development by industry players over the years, on the contrary, has been rapid led by development of hybrid, alternate fuel based powertrains, remote precision control & guidance technologies and utilization of UAVs for construction jobsite assessment, inspection, surveying and tracking work progress marked by a foray by key industry OEMs into adjacent segments leveraging strategic alliances with core technology sector players. Additionally, OEMs also continue to strive diligently towards cost & industrial base optimization as market conditions remain difficult & challenging.

Against this backdrop, the report analyzes the evolving global market scenario for construction equipment through 2020 with focus on analysis of latest market developments and key market & technology trends which are likely to shape the industry's future. Analysis covers emerging technologies being developed by the industry players. This is followed by the identification & analysis of potential growth opportunities & avenues which could be capitalized upon by key industry OEMs as well as the value chain. The report concludes by analyzing likely market evolution over medium term and projecting demand outlook for construction equipment over medium

term.

Relevance & Usefulness: The report will be useful for

Strategic Planning, Assessment & Decision-Making Processes

Identification of & Insights into Potential Growth Opportunities & Avenues

Inputs on Market Evolution & Demand Projection over Medium Term

Analysis of Emerging Market & 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 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.

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