

# Sany Group - Strategy Brief - Q1 2014 - Strategic Initiatives, Developments, SWOT, Trends & Outlook

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## Abstracts

### 1. Overview & Rationale:

The report provides comprehensive analysis as well as holistic assessment of the Strategic Initiatives, Strategic Measures, Business & Strategic Developments and Strategic Activities as well as Moves for Sany Group for Q1 2014 and provides an analysis of how they integrate with & fit into the medium term strategic picture & overall business strategy against the backdrop of an evolving industry landscape and difficult global macroeconomic environment as well as conditions with the industry impacted by significant reduction in mining & construction activity across most traditional markets.

### 2. Industry Backdrop: Global Construction Equipment Industry on a Tough Terrain:

The Global Construction Equipment industry has been on a tough terrain with most OEMs facing significant pressure on machinery sales, order intake & profitability amid difficult & uncertain global macroeconomic environment & conditions further compounded by the ongoing slump in mining activity that has altered the product sales mix across OEMs and has subsequently impacted profitability. The EU economy is slowly making an egress from the slump and making steady recovery while the U.S. economy is poised to move towards more stability in 2014 with a favourable fiscal & monetary policy stance & outlook. The construction activity in the U.S. has been improving-of-late driven by strong housing starts which touched the 1 million level in 2013 while projections for 2014 indicate towards the 1.18 million mark. Strong housing starts & modest non-residential construction activity are likely to be key drivers of replacement demand in North America over near term.

Chinese Economy Likely to Stay Steady at around 7.5% GDP Growth Rate for 2014:

The economic growth in China; which has been of strategic significance for the global construction equipment industry; registered a decent 7.5% growth for 2013, driven mostly by fiscal measures which had been a much needed change. Overall, the GDP growth target for the World's second largest economy for 2014 is at around 7.5% despite the ongoing economic tightening which is likely to match the 2013 level more or less.

#### Improved Construction Activity Likely in 2014:

Thus, 2014 is likely to be much better for the construction equipment industry with a number of variables favouring construction activity across Traditional Markets & China. However, managing cost base efficiently & optimally besides sporadic currency fluctuations that pose a significant threat of profitability erosion across OEMs remain key challenges for the industry.

#### Strong, Long-Term Industry Fundamentals:

The industry fundamentals, however, remain solid and the long-term industry growth prospects still appear robust, driven, primarily, by the significant anticipated investments likely to be made towards infrastructure repair & rebuilding across traditional markets, especially, in the United States and rapid infrastructure development required across emerging markets to sustain economic growth & rapid urbanization.

### **3. Scope of Analysis:** Strategic Initiatives, Developments, Plans, SWOT, Key Industry Trends & Force Field Analysis

The report provides Key Insights into the Key Strategic Initiatives, Developments & Plans being pursued by Sany Group. The report also includes an incisive SWOT framework analysis on the company; which is used extensively for an assessment of the internal as well as external business environment of an organization as part of the strategic planning process. The framework generates a snapshot of the company's inherent strengths & weaknesses as part of the internal environment assessment and outlines potential growth opportunities as well as threats as part of the external environment assessment.

The report concludes by providing comprehensive insights into the key industry trends, issues, challenges, risk factors besides identifying key driving & restraining forces & assessing their potential degree of impact through a force field analysis followed by

industry outlook for 2014.

#### **4. Relevance & Usefulness:** Strategic Business Analysis, Planning & Decision-Making Process

The report provides insights & inputs to be incorporated into the broader strategic planning & decision making processes and will be essential from a competitive analysis standpoint as well.

#### **The report will be useful for:**

Competitive Assessment as well as Comprehensive Strategic Business Analysis

Assessment of degree of environmental responsiveness as well as strategic orientation

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

Identification of opportunities which could be capitalized upon

Identification of potential threats in the business environment

Analysis of and Insights into key Strategies & Plans being pursued by the company

Identifying & highlighting areas for Strategic Changes, Adjustments & Realignment

Gaining a Strategic Perspective on the Business & Strategic Outlook for 2014

Access to Key Industry Trends, Issues & Challenges, Risk Factors & Industry Outlook for 2014

#### **5. For Whom:** Key Decision-Makers across Industry Value Chain

The report would be essential for those having strategic interest in Sany Group and 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 or the Company.

**6. 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.

**7. Key Takeaways:** Enhances Scope of Utilization/Application with Visual Representation & Saves Time

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, immediate utilization & application of analysis with visual representation and incorporation of relevant images to support & supplement the analysis.

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