

# **Strategic Factor Analysis Summary (SFAS) Framework Analysis - 2015 - World's 10 Leading Construction Equipment Manufacturers - Caterpillar, Komatsu, Volvo, CNH, Hitachi, Sandvik, Terex, John Deere, Kubota, Sany**

<https://marketpublishers.com/r/S52CDA8DCE1EN.html>

Date: December 2014

Pages: 100

Price: US\$ 1,295.00 (Single User License)

ID: S52CDA8DCE1EN

## **Abstracts**

### **Introduction & Overview:**

The report provides comprehensive analysis as well as strategic insights into the overarching strategic positioning of the World's 10 leading Construction Equipment Manufacturing Companies through a Strategic Factor Analysis Summary (SFAS) framework analysis. Strategic Factor Analysis Summary (SFAS); also referred to as Quantitative SWOT Analysis; is a framework developed by T. L. Wheelen and J. D. Hunger, which is used widely across organizations globally as a key business analysis tool. The framework conducts a holistic assessment as well as comprehensive analysis of each company's internal as well as external environmental factors besides incorporating analysis of Business Structure, Strategic & Market Positioning, Business Strategies & Plans and Degree of Environmental & Strategic Responsiveness against the backdrop of an evolving industry landscape & shifting global dynamics.

### **Industry Backdrop:**

The global construction equipment industry has been facing significant headwinds of late with slowing down of the world economy and stalling of economic recovery in the EU impacting activity & demand for construction equipment severely across most markets & regions. The continued construction activity & demand growth in North America has been the only bright spot in an otherwise lackluster picture. Mining activity globally, too, has been impacted significantly by the continued downturn in commodity

prices & slowing down of world economic growth resulting in acceleration of M&A activity in the mining sector which is likely to persist through 2015 adding further to the woes of leading construction & mining machinery manufacturers.

The stalling of the EU economic recovery started impeding construction activity & demand in the EU market in Q3 2014; which so far had been progressing well on recovery path this year until August 2014 with a 10% YoY growth; with fears of further escalation of Ukraine crisis and the likely impact on Russian energy exports to Europe dampening business confidence & economic activity across EU. BRIC markets, too, grapple with their unique set of challenges & issues spearheaded by China, which has been a construction behemoth over the past decade, projected to slow down with the pursuit of structural reforms impacting economic growth significantly & driving deceleration of growth momentum which is likely to persist through 2015 with the GDP growth forecast for China pegged to slow down to 6.9% by 2016. India, on the contrary, has been pacing up well with respect to economic reforms, deregulation & stronger policy focus on growth being on priority with GDP growth projected to pace up to 6.6% in 2016 as against estimates of 5.4% for 2014 with increased focus & allocation towards infrastructure development likely over near term. Economic growth in Brazil remains sluggish while Russia faces western sanctions over the Ukraine crisis, which has impacted economic growth severely.

North America, thus, remains as the sole growth driver for the construction industry with strong housing starts in 2014 & continued improvement in construction activity which is likely to see a further increase over near term with strong & high double digit growth projections for housing starts for 2015 besides likely investments towards infrastructure repair. The focus, stance & timing of fiscal & monetary policy interventions in the U.S., thus, are going to be crucial for the industry over near term.

### **Relevance & Usefulness of the Report:**

The report provides a comprehensive Strategic Factor Analysis Summary (SFAS) framework analysis on each of the world's 10 leading construction equipment manufacturers & provides an overall SFAS score based on each company's strategic positioning with reference to current as well as emerging industry & market dynamics, industry trends and the degree of responsiveness to its internal & external environment respectively. The report also provides a comparative ranking of the 10 companies with reference to their SFAS scores, thereby, making it especially useful for competitive analysis & benchmarking purposes.

The framework generates an insightful snapshot of the prevailing, overall strategic equation for each company by identifying, weighing, prioritizing & ranking strategic factors present in the internal & external environment through an Internal Factor Analysis Summary (IFAS) matrix followed by an External Factor Analysis Summary (EFAS) matrix based on their strategic significance & potential degree of impact along-with each respective company's corresponding degree of responsiveness to those factors. SFAS, as a framework, thus, scores over the traditional SWOT analysis framework, in terms, of its ability to quantify strengths, weaknesses, opportunities & threats respectively based on the potential degree of effect of each strategic factor being analyzed and the company's commensurate degree of responsiveness to that, thereby, making it much more effective from the perspective of business analysis, strategic planning and from a competitive assessment & analysis standpoint with the creation of a quantitative strategic snapshot on each company.

The framework, thus, assesses the strategic positioning & degree of responsiveness of each of the 10 leading construction machinery manufacturers and their ability to manage these headwinds effectively over near term by maintaining their competitiveness while retaining the ability to harness long-term growth drivers & tailwinds effectively.

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:**

Strategic Planning, Competitive Assessment & Analysis and Benchmarking Exercise

Identification of Key Strategic Factors classified & categorized under Strengths, Weaknesses, Opportunities & Threats for each company along-with their Quantitative Weights indicating Strategic Significance of each respective Factor through a Strategic Factor Analysis Summary (SFAS) Matrix.

Generation of an overall Strategic Equation & Quantified SFAS score for each company based on analysis of Strategic Positioning and Market Dynamics.

Assessment & evaluation of each Company's Degree of Responsiveness and Strategic Orientation towards Internal & External Environmental factors as

assessed through the Internal & External Factor Analysis Summary (EFAS) Matrices.

Relative/Comparative Ranking of the 10 Companies based on their SFAS scores and strategic analysis.

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

Gaining a Strategic Perspective on the Business & Strategic Outlook for each company.

Gaining access to Key Industry Trends, Issues, Challenges and Risk Factors & Industry Outlook.

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics through a Force Field Framework Analysis

### **For Whom:**

The SFAS Framework analysis report will be essential for those associated with and having strategic interest in the Global Construction Industry, Construction Machinery manufacturing & any of these companies. The report 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, M&A Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists & all those associated with the Global Construction Equipment Industry or any of these companies.

### **Highlight:**

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, 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.

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Komatsu Ltd.

Volvo AB

Hitachi Construction Machinery Co. Ltd.

Sany Heavy Industry Co. Ltd.

John Deere & Co.

CNH Industrial N.V.

Sandvik AB

Terex Corporation

Kubota Corporation

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