

China Bulldozer Industry Report, 2010

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Abstracts

Bulldozer is a necessary construction machinery product in earth and stone works. With the infrastructure construction in full swing, the bulldozer industry of China developed rapidly in 2010, with the sales volume increased by 62.1% year-on-year to 13,911 sets, activating the stagnant market effectively.

In terms of market segment, crawler and standard bulldozers especially 160-179hp ones take a lion's share in the Chinese market.

By moving mechanism, bulldozers are divided into crawler bulldozers and wheeled bulldozers, and crawler bulldozers occupy over 90% of the Chinese market;

By application, bulldozers are grouped into standard bulldozers and special bulldozers. Standard bulldozers account for roughly 80% of the Chinese market, while more than 90% of the special bulldozers are wetland bulldozers;

By power, bulldozers are graded as 70-119hp, 120-119hp, 140-159hp, 160-179hp, 180-219hp, 220-319hp, and above 320hp. In particular, 160-179hp bulldozers are mostly applied in general engineering construction, and occupied 62% of the Chinese market in 2010.

In terms of market pattern, China's bulldozer industry is highly concentrated, with only about a dozen manufacturers. Among them, Shantui Construction Machinery has long been playing a dominating role, with the market share hitting 64% in H1 2010, far ahead of the runner-up - Hebei Xuangong Construction Machinery.

In terms of capital structure, domestic-funded enterprises are main force in China's bulldozer industry. Key bulldozer manufacturers include Shantui Construction Machinery, Hebei Xuangong Construction Machinery, Tianjin Yishan Construction

Machinery, Shanghai Pengpu Machine Building Plant, YTO Group Corporation, Dadi Engineering Machinery, Shaanxi Zoomlion Earth Working Machinery, Zhengzhou Yutong Heavy Industries, Caterpillar Xuzhou Limited (CXL), Xiamen XGMA Machinery and Guangxi LiuGong Machinery, among which, CXL is the only foreign-funded enterprise.

It is estimated that small bulldozers, especially those below 100hp, will become the development priority in China's bulldozer industry.

Contents

1. INDUSTRY OVERVIEW

- 1.1 Product Definition
- 1.2 Product Classification
- 1.3 Development History

2. STATUS QUO OF CHINA BULLDOZER MARKET

- 2.1 Production
- 2.2 Sales
 - 2.2.1 Overall Sales
 - 2.2.2 Sales by Type
 - 2.2.3 Sales by Power
- 2.3 Market Competition
- 2.4 Engine Manufacturers

3. IMPORT AND EXPORT

- 3.1 Import
 - 3.1.1 Import Volume and Value
 - 3.1.2 Unit Import Price
- 3.2 Export
 - 3.2.1 Export Volume and Value
 - 3.2.2 Unit Export Price

4. DEVELOPMENT ENVIRONMENT AND PROSPECT

- 4.1 Production Cost
- 4.2 Development Environment
 - 4.2.1 Economic Environment
 - 4.2.2 Policy Environment
 - 4.2.3 Influence of Japan Earthquake on Bulldozer Industry
- 4.3 Industry Risks and Opportunities
 - 4.3.1 Risks
 - 4.3.2 Opportunities
- 4.4 Industry Prospect

5. KEY ENTERPRISES

5.1 Shantui Construction Machinery

5.1.1 Profile

5.1.2 Main Business

5.1.3 Operation

5.1.4 Strategic Development

5.2 Hebei Xuangong Construction Machinery

5.2.1 Profile

5.2.2 Main Business

5.2.3 Operation

5.2.4 Strategic Development

5.3 Tianjin Yishan Construction Machinery

5.3.1 Profile

5.3.2 Bulldozer Business

5.3.3 Operation

5.4 Shanghai Pengpu Machine Building Plant

5.4.1 Profile

5.4.2 Bulldozer Business

5.4.3 Operation

5.5 YTO Group Corporation

5.5.1 Profile

5.5.2 Bulldozer Business

5.5.3 Operation

5.6 Dadi Engineering Machinery

5.6.1 Profile

5.6.2 Bulldozer Business

5.6.3 Operation

5.7 Shaanxi Zoomlion Earth Working Machinery

5.7.1 Profile

5.7.2 Bulldozer Business

5.7.3 Operation

5.8 Zhengzhou Yutong Heavy Industries

5.8.1 Profile

5.8.2 Bulldozer Business

5.8.3 Operation

5.9 Caterpillar Xuzhou Limited (CXL)

5.9.1 Profile

5.9.2 Bulldozer Business

- 5.10 Xiamen XGMA Machinery
 - 5.10.1 Profile
 - 5.10.2 Bulldozer Business
 - 5.10.3 Operation
- 5.11 Guangxi LiuGong Machinery
 - 5.11.1 Profile
 - 5.11.2 Bulldozer Business
 - 5.11.3 Operation

Selected Charts

SELECTED CHARTS

China Bulldozer Output, 2007-2009

China Bulldozer Sales Volume, 2006-2010

China Bulldozer Sales Volume by Type, 2006-2010

China Bulldozer Sales Structure by Power, 2006-2010

Application of Bulldozer by Power

China Sales Volume of 160-179hp Bulldozers, 2006-2010

China Bulldozer Market Pattern, H1 2010

Engine Suppliers of Major Bulldozer Manufacturers

Import Volume & Import Value of Bulldozer in China, 2007-2010

Import Volume & Import Value of Bulldozer with P>235.36kw (320hp) in China, 2007-2010

Average Unit Import Price of Bulldozer in China, 2007-2010

Average Unit Import Price of Bulldozer with P>235.36kw (320hp) in China, 2007-2010

Import Volume & Import Value of Bulldozer in China, 2007-2010

Bulldozer Export Structure in China, 2006-2009

Export Volume & Export Value of Bulldozer with P>235.36kw (320hp) in China, 2007-2010

Average Unit Export Price of Bulldozer in China, 2007-2010

Average Unit Export Price of Bulldozer with P>235.36kw (320hp) in China, 2007-2010

Bulldozer Production Cost Structure

Bulldozer Downstream Demand

Sales Volume and Proportion of 70-119hp Bulldozers in China, 2006-2010

Operating Income and Net Income of Shantui Construction Machinery, 2007-2010

Operating Income of Shantui Construction Machinery by Region, H1 2010

Revenue and Gross Margin from Bulldozer Business of Shantui Construction Machinery, 2007-2010

Bulldozer Sales Volume of Shantui Construction Machinery, 2007-2010

Average Price of Bulldozer of Shantui Construction Machinery, 2007-2010

Major Parts Providers of Shantui Construction Machinery

Major Bulldozer Models of Hebei Xuangong Construction Machinery

Operating Income and Net Income of Hebei Xuangong Construction Machinery, 2007-2010

Revenue from Bulldozer Business of Hebei Xuangong Construction Machinery In China and Beyond, 2007-2010

Revenue and Profit from Bulldozer Business of Hebei Xuangong Construction

Machinery, 2007-2010

Major Bulldozer Models of Tianjin Yishan Construction Machinery

Business Indicators of Tianjin Yishan Construction Machinery, 2004-2008

Major Bulldozer Products of Shanghai Pengpu Machine Building Plant

Business Indicators of Shanghai Pengpu Machine Building Plant, 2007-2008

Major Bulldozer Products of YTO Group Corporation

Business Indicators of YTO Group Corporation, 2004-2008

Major Bulldozer Products of Dadi Engineering Machinery

Business Indicators of Dadi Engineering Machinery, 2007-2008

Major Bulldozer Products of Shaanxi Zoomlion Earth Working Machinery

Operating Income and Operating Cost of Shaanxi Zoomlion Earth Working Machinery,
2008-2010

Business Indicators of Zhengzhou Yutong Heavy Industries, 2004-2008

Production and R&D Center of Caterpillar China

Major Bulldozer Products of Caterpillar China

Operating Income and Net Income of Xiamen XGMA Machinery, 2007-2009

Major Bulldozer Products of LiuGong

Operating Income and Net Income of LiuGong, 2007-2010

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