

China Coal Mine Machinery Industry Report, 2010-2011

<https://marketpublishers.com/r/CDD12828816EN.html>

Date: April 2011

Pages: 67

Price: US\$ 1,700.00 (Single User License)

ID: CDD12828816EN

Abstracts

The coal mine machinery involved in this report refers to hydraulic support, coal winning machine, scraper conveyor, and roadheader. Against the booming demand and output of coal in China, Chinese coal mine machinery industry has progressed rapidly in recent years. In H1 2010, Chinese coal mine machinery enterprises produced 18,920 hydraulic supports, up 35.12% YoY; 176 coal winning machines, up 2.3% YoY; 221 roadheaders, down 11.6% YoY; and 671 scraper conveyors, up 25% YoY.

Along with the ever increasing coal output and the rising level of coal winning equipment in China, the demand for coal mine machinery will maintain the relatively high growth rate in the following years. Promisingly in 2015, the output value of coal machinery industry will reach RMB149.9 billion, with the CAGR of 22.8%.

Besides the analysis on status quo and market demand of coal mine machinery industry, this report probes deeply into the market competition pattern, segment market competition, and key enterprises.

In regard to competition pattern, Chinese coal mine machinery industry characterizes comparatively low market concentration ratio. In 2009, the market share of Top 10 coal mine machinery enterprises by sales turned out to be 27.9%; hereinto, Zhengzhou Coal Mining Machinery (Group) Co., Ltd enjoyed the lion's share of 7.1%.

From the perspective of product segments, hydraulic support composes the value core of fully mechanized coal mining equipment and is also the segmented sector that features the most fierce market competition. Zhengzhou Coal Mining Machinery (Group) Co., Ltd, the leading enterprise in hydraulic support industry all along, possesses the steady market share of 25% or so, and it manufactured 13,444 hydraulic supports in

2010.

As for the field of coal winning machine, in 2009, Jixi Coal Mining Machinery Co., Ltd. and Taiyuan Mining Machinery Group Co., Ltd seized the respective market share of over 20%; together with such coal mine machinery enterprises as Wuxi Shengda Machinery Manufacturing Co., Ltd., Xi'an Coal Mining Machinery Co., Ltd., and Shanghai Chuangli Machinery Manufacturing Co., Ltd., they took the total share of 88% of the coal winning machine market.

As the leading company in scraper conveyor field, China Coal Zhangjiakou Coal Mining Machinery Co., Ltd. under ChinaCoal Group acquired the sales of RMB1.89 billion in 2009, accounting for 23% market share, followed by Ningxia Tiandi Benniu, Shandong Mining Machinery Group, Shanxi Coal Mine Machinery, etc.

Roadheader industry features comparatively high market concentration ratio. SANYHE International Holdings ranks the first with the market share of 32%, followed by JCMMC.

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