

China Concrete Machinery Industry Report, 2008-2009

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Abstracts

Concrete machinery refers to the equipment applied in modern concrete mechanical engineering for production, transportation, and concrete paving, etc., including concrete mixers, concrete mixing plants, concrete pumps, concrete mixing trucks, concrete jets, concrete vibrators, and steel processing machinery. The general concept of the concrete machinery means "one plant, three vehicles", namely concrete mixing plant, concrete mixer truck, concrete pump and concrete pumping vehicle. Concrete machinery is the important equipment in great demand for infrastructure, widely used in industrial and civil construction, national defense construction and other projects. After decades of development, concrete machinery has become a key part of engineering machinery in China, with considerable production capacity and accounting for 6% of the whole construction machinery industry.

Even faced with global economic slowdown in 2008, Chinese concrete machinery export still maintained a good growth. In 2008, 2,149 concrete pumps were exported, valuing at US\$102.92 million. In quantity, the export increased 13.5%; but in capital, the export decreased 24.1%; the average export prices rose somewhat. Only 3,263 concrete mixers were exported, up 21.9% from 2007; the export valued US\$ 188.42 million, 37.4% up over 2007, maintaining continuous increase.

Currently, in Chinese concrete machinery industry, there are more than 200 enterprises, producing diversified products. China has the leading status in the production of concrete pumps. In 2007, SANY Heavy Industry Co., Ltd participated in the construction of Shanghai World Financial Center with 492 meters in height. At the end of Dec 2008, Zoomlion Heavy Industry Science & Technology Development Co., Ltd. transferred super viscous C100 high-performance concrete pumps to Guangzhou International Financial Center (West Tower) with the height of 432 meters by super high-pressure concrete pump. In 2008, SANY successfully manufactured a 72-meter pump, the highest pump in the world.

In addition to the conventional specifications of 32m, 37m, 42m, 45m, 48m, 52m and 56m, SANY also produces the products of 38m and 40m. In January, 2007, SANY produced the super long-arm pump with 66m. However, the main specifications of SANY are 37m, 45m, 48 and 56m. The specifications of Zoomlion's pumps ranges from 37m to 56m, but the specifications applied most widely are 37m, 44m and 47m. Putzmeister Shanghai factory produces such key models as 36m, 38m, 42m and 46m. The mainstream models of Shanghai Hold Machinery Co., Ltd. are 22m, 37m, 40m, 43m and 47m. It is worth mentioning that the short-arm pumps with the length of below 27m only include the ones of 25m produced by SANY and 22m by Shanghai Hold Machinery. The current sale of short-arm pumps account for less than 2% of that of the overall pumps, but the cost of short-arm pumps is low, which benefits the construction of buildings in dense urban areas, so the development of short-arm pumps is promising.

Concrete machinery is technology-intensive, capital-intensive and personnel-intensive, so it is difficult to enter the field. The main barriers for entering the concrete machinery industry lie in technical capabilities, qualifications, financial strength and customer service. Concrete trucks, concrete pumps and vehicle pumps are the modified automobiles, which are subject to the industrial policies of China. The manufacturers must be qualified for the production of civil converted vehicles, and they must complete test reports and apply for bulletin catalog to the government before marketing each vehicle. In general, the application period lasts long.

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