

# Global and China Construction Equipment Industry Report, 2011-2012

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## Abstracts

Since 2001, the global construction equipment industry had experienced robust development, and it embraced its peak in 2007 but saw a cumulative fall of 35.4% for two consecutive years in 2008 and 2009. In 2010, the global construction equipment industry picked up its skyrocketing growth momentum, with the growth rate exceeding 50%. In 2011, the industrial growth rate approximated 26% and the market scale was roughly USD190 billion.

There are two driving forces that guarantee the relative stability of the global construction equipment industry. On the one hand, emerging economics represented by China are lavishing on infrastructure construction. On the other hand, developed economics, except Europe, strive to conduct infrastructure construction to create job opportunities in consideration of economic stimulus.

In China, every first quarter not only marks the peak season to start infrastructure projects, but also indicates the prime season for the sale of construction equipments. In every Jan.-April, the sales volume of construction equipments makes up around 55% of the throughout year. In Q1 2012, China's sales volume of excavator decreased by 41.9% year-on-year to 44,000 units, while that of loader, truck crane, bulldozer and roller declined by 27.2%, 45%, 47.35% and 48.4%, respectively.

The sharp reduction came as the monetary tightening measures launched by the government. Since the Central government worries that further hefty investment in infrastructure construction may lead to debt crisis or financial woe, it started to exercise monetary squeeze measure to control credit scale. Another contributor to the reduction lies in restriction of investments in the property market.

Although the domestic market of China shows rather gloomy, the export market witnesses boom. In Q1 2012, the export volume of excavator reached 816, up 82.6% year-on-year, while that of loader and bulldozer increased by 38.3% and 9.4% to 7,548 and 908, respectively.

American companies, in particular, performed well. In Q1 2012, the revenue from Machinery and Power Systems division of Caterpillar surged by 25%, with the operating profit also rising 25%. In the corresponding period, the backlog order of Terex was valued at USD2.301 billion, up 28.4% over Q1 2011.

The only highlight in the Chinese market comes to concrete machinery. The market share of the two tycoons, SANY and Zoomlion, stands at around 47% each. With the respective strategy of zero down-payment and low down-payment to spur the market growth, both of them make concentrated efforts to exploit concrete machinery market.

In construction equipment market, many players have long been occupying a solid position and grow ever stronger. More than 15 M&A cases occur every year. After a decade of high-speed development, China has limited space for further development, but the Chinese businesses has been empowered to implement large-scale oversea M&As. European top 3 concrete machinery manufacturers, Putzmeister, Schwing and CIFA, were all taken over by their Chinese counterparts.

## Contents

### **1. GLOBAL CONSTRUCTION EQUIPMENT MARKET**

- 1.1 Overview of Construction Equipment
- 1.2 Construction Equipment Market
- 1.3 Global Hydraulic Excavator Market
- 1.4 Global Mining Equipment Market
- 1.5 Ranking of Construction Equipment Industry Worldwide

### **2. CHINA CONSTRUCTION EQUIPMENT MARKET**

- 2.1 Investment in Infrastructure Construction of China
- 2.2 Sales Volume of Excavator
- 2.3 Excavator Market Pattern
- 2.4 Loader Market
- 2.5 Crane Market
- 2.6 Crane Industry
- 2.7 Bulldozer Market
- 2.8 Road Roller Market
- 2.9 Forklift Market
- 2.10 Concrete Equipment Market

### **3. CONSTRUCTION EQUIPMENT MARKET IN INDIA AND BRAZIL**

- 3.1 Indian Construction Equipment Market
- 3.2 Market Share of Major Construction Equipment Manufacturers in India
- 3.3 Brazilian Construction Equipment Market
- 3.4 Market Share of Construction Equipment Manufacturers in Brazil

### **4. MAJOR CONSTRUCTION EQUIPMENT MANUFACTURERS WORLDWIDE**

- 4.1 Komatsu
  - 4.1.1 Komatsu (Changzhou) Construction Machinery
  - 4.1.2 Komatsu Shantui Construction Machinery

#### **4. 2 CATERPILLAR**

- 4.3 Hitachi Construction Machinery

- 4.3.1 Hitachi Construction Machinery China
- 4.4 VolvoCE
  - 4.4.1 ShanDong Lingong Engineering Machinery
- 4.5 Liebherr
- 4.6 Terex
  - 4.6.1 Inner Mongolia North Hauler Joint Stock
- 4.7 Sandvik
- 4.8 Doosan Infracore
- 4.9 KOBELCO Construction Machinery
  - 4.9.1 Chengdu Kobelco Construction Machinery Group
- 4.10 Atlas Copco
  - 4.10.1 Atlas Copco Shenyang Construction & Mining Equipment
- 4.11 John Deere
- 4.12 JCB
- 4.13 CNH
- 4.14 Hyundai Heavy Industries Construction Equipment
  - 4.14.1 Hyundai (Jiangsu) Heavy Industries
- 4.15 XCMG
- 4.16 SANY
- 4.17 Changsha Zoomlion Heavy Industry Science & Technology Development
- 4.18 Guangxi Liugong Machinery
- 4.19 Shantui Construction Machinery
- 4.20 Lonking Holdings
- 4.21 Xiamen XGMA Machinery

## Selected Charts

### SELECTED CHARTS

Shipment of Seven Major Construction Equipments Worldwide, 2003-2013  
Shipment of Seven Major Construction Equipments Worldwide by Region, 2003-2013  
Demand for Seven Major Construction Equipments Worldwide by Region, 2007Q2-2012Q1  
Distribution of Manufacturers of Seven Major Construction Equipments Worldwide, 1980-2012  
US New Housing Starts & US Demand for Construction Equipments, 1970-2012  
Demand for Hydraulic Excavators Worldwide, 2003-2013  
Regional Demand for Hydraulic Excavators Worldwide, 2003-2012  
Monthly Demand for Hydraulic Excavators Worldwide, Apr.2008-Mar.2012  
Regional Demand for Mining Equipments Worldwide, 2003-2012  
Regional Distribution of Global Mining Equipment Market, 2003-2012  
Output Value of Construction Equipment Industry by Region, 2007-2011  
Ranking of Global Top 500 Construction Equipment Manufacturers by Revenue, 2010-2011  
Completed Investment in Fixed Assets of China, 2001-2011  
Monthly Completed Investment in Fixed Assets of China, Jan.2008-Mar.2012  
Monthly Investment in Fixed Assets of China Railway Transportation Industry and Growth Rate, Jan.2008-Mar.2012  
Monthly Investment in Fixed Assets of China Road Transportation Industry and Growth Rate, Jan.2008-Mar.2012  
Monthly Investment in Fixed Assets of China Water Conservancy and Environment Industry and Growth Rate, Jan.2008-Mar.2012  
Monthly Investment in Fixed Assets of China Coal Mining Industry and Growth Rate, Jan.2008-Mar.2012  
Monthly Investment in Fixed Assets of China Real Estate Industry and Growth Rate, Jan.2008-Mar.2012  
New Housing Starts Area of Commodity House and YoY Growth Rate in China, Jan.2008-Mar.2012  
Monthly Sales Volume of Chinese Excavator, Jan.2009-Mar.2012  
Monthly Export Volume of Chinese Excavator, Jan.2009-Mar.2012  
Monthly Excavator Sales Volume of SANY, Jan.2009-Mar.2012  
Excavator Sales Volume of SUNWARD, Jan.2010-Mar.2012  
China Excavator Market Distribution by Tonnage, 2006-2012Q1  
China Excavator Market Distribution by Region, 2010-2012Q1

China Excavator Market Occupancy by Brand, 2012Q1  
China Excavator Market Occupancy by Country, 2008-2012Q1  
Monthly Sales Volume of Chinese Loaders, Jan.2009-Mar.2012  
Monthly Export Volume of Chinese Loaders, Jan.2009-Mar.2012  
Monthly Loader Sales Volume of Guangxi Liugong Machinery, Jan.2009-Mar.2012  
Monthly Loader Sales Volume of Xiamen XGMA Machinery, Jan.2009-Mar.2012  
Tonnage Distribution of China Loader Market, Jan.2008-Mar.2012  
Market Occupancy of Major Loader Manufacturers in China, 2012Q1  
Monthly Truck Crane Sales Volume in China, Jan.2009-Mar.2012  
Monthly Mounted Crane Sales Volume in China, Jan.2009-Mar.2012  
Monthly Crawler Crane Sales Volume in China, Jan.2009-Mar.2012  
Monthly Truck Crane Sales Volume of XCMG, Jan.2009-Mar.2012  
Monthly Mounted Crane Sales Volume of XCMG, Jan.2009-Mar.2012  
Monthly Truck Crane Sales Volume of ZOOMLION, Jan.2009-Mar.2012  
Monthly Truck Crane Sales Volume of SANY, Jan.2009-Mar.2012  
Market Occupancy of Major Truck Crane Manufacturers, 2012Q1  
Bulldozer Sales Volume in China, Jan.2009-Mar.2012  
Bulldozer Sales Volume of Shantui Construction Machinery, Jan.2009-Mar.2012  
Bulldozer Export Volume of China, Jan.2009-Mar.2012  
Proportion of China's Export Volume of Bulldozer in Total Sales Volume, Jan.2009-Mar.2012  
Road Roller Sales Volume in China, Jan.2009-Mar.2012  
Road Roller Sales Volume of XCMG, Jan.2009-Mar.2012  
Road Roller Export Volume of China, Jan.2009-Mar.2012  
Proportion of China's Export Volume of Road Roller in Total Sales Volume, Jan.2009-Mar.2012  
Monthly Forklift Sales Volume in China, Jan.2010-Mar.2012  
Market Occupancy of Major Forklift Manufacturers in China, 2012Q1  
China's Output of Ready-mixed Concrete, Jan.2011-Feb.2012  
Indian Investment in Infrastructure, FY2008-FY2012  
Indian Investment in Highway & Bridge Facilities, FY2008-FY2012  
Shipment of Construction Equipments by Type in India, 2010-2014  
Market Occupancy of Major Indian Construction Equipment Manufacturers by Shipment, FY2011  
Market Occupancy of Major Indian Construction Equipment Manufacturers by Sales, FY2011  
Shipment of Construction Equipments by Type in Brazil, 2006-2012  
Output of Major Construction Equipments in Brazil, 2001-2011  
Output of Major Construction Equipments in Brazil by Type, 2010-2011

Sales Volume of Major Construction Equipments in Brazil, 2001-2011  
Sales Volume of Major Construction Equipments by Type in Brazil, 2010-2011  
Regional Distribution of Construction Equipment Market in Brazil  
Market Occupancy of Major Brazil-Based Bulldozer Manufacturers, 2011  
Market Occupancy of Major Brazil-Based Backhoe Manufacturers, 2011  
Market Occupancy of Major Brazil-Based Wheel Loader Manufacturers, 2011  
Market Occupancy of Major Brazil-Based Hydraulic Excavator Manufacturers, 2011  
Market Occupancy of Major Brazil-Based Motor Graders Manufacturers, 2011  
Market Occupancy of Major Brazil-Based Roller Compact Manufacturers, 2011  
Sales and Net Profit Margin of Komatsu, FY2006-FY2012  
Revenue of Komatsu by Region, FY2010-FY2012  
Quarterly Sales of Komatsu, FY2008Q1-FY2011Q4  
Operating Income of Komatsu, FY2008Q1-FY2011Q4  
Construction Equipment of Komatsu by Region, FY2008Q1-FY2011Q4  
Revenue and Net Income of Komatsu (Changzhou) Construction Machinery, 2007-2011  
Revenue and Net Income of Komatsu Shantui Construction Machinery, 2006-2011  
Revenue and Operating Margin of Caterpillar, 2006-2012  
Revenue of Caterpillar by Business, 2006-2011  
Revenue of Caterpillar by Business, 2010-2012Q1  
Operating Income of Caterpillar by Business, 2010-2012Q1  
Revenue of Caterpillar by Region, 2010-2012Q1  
Regional Revenue of Caterpillar by Business, 2011  
Regional Revenue of Caterpillar by Business, 2012Q1  
Footprint of Caterpillar in China  
Sales and Operating Margin of Hitachi Construction Machinery, FY2004-FY2012  
Sales of Hitachi Construction Machinery by Region, FY2007-FY2012  
Revenue and Net Income of Hitachi Construction Machinery China, 2005-2011  
Workforce of VolvoCE by Region, Late 2011  
Sales Value and Operating Income of VolvoCE, 2003-2011  
Global Production Bases of VolvoCE  
Client Distribution of VolvoCE, 2011  
Product Distribution of VolvoCE by Application, 2011  
Output of VolvoCE by Plant, 1991-2011  
Sales of VolvoCE by Product, 2011  
Sales of VolvoCE by Region, 2011  
Revenue and Net Income of ShanDong Lingong Engineering Machinery, 2007-2011  
Revenue of Liebherr by Business, 2007-2010  
Revenue of Liebherr by Region, 2007-2010  
Revenue and Operating Margin of Terex, 2007-2012



Sales of TEREX by Division, 2010-2012Q1  
Backlog of TEREX by Division, 2011Q1-2012Q1  
Regional Sales from AWP Division of TEREX, 2012Q1  
Regional Sales from AWP Division of TEREX, 2005-2011  
Regional Sales from Construction Division of TEREX, 2012Q1  
Regional Sales from Construction Division of TEREX, 2005-2011  
Regional Sales from Crane Division of TEREX, 2012Q1  
Regional Sales from Crane Division of TEREX, 2005-2011  
Regional Sales from Material Handling & Port Solutions Division of TEREX, 2012Q1  
Regional Sales from Material Processing Division of TEREX, 2012Q1  
Regional Sales from Material Processing Division of TEREX, 2005-2011  
Revenue and Operating Margin of Inner Mongolia North Hauler Joint Stock, 2006-2011  
Sales of Sandvik by Application, 2011  
Contractual Income and EBIT of Sandvik Mining and Construction, 2000Q1-2011Q4  
Quarterly Contract Sales and EBIT of Sandvik Construction, 2007Q1-2012Q1  
Quarterly Contract Sales and EBIT of Sandvik Mining, 2007Q1-2012Q1  
Revenue and Operating Margin of Doosan Infracore, 2005-2012  
Revenue of Doosan Infracore by Business, 2009Q4-2012Q1  
Revenue of Doosan Infracore by Region, 2011 vs. 2012Q1  
Revenue and Operating Margin of KOBELCO, FY2004-FY2011  
Revenue of KOBELCO by Business, 2009-2011  
Operating Income of KOBELCO by Business, 2010-2011  
Revenue and Operating Margin of Atlas Copco, 2007-2011  
Revenue of Atlas Copco by Business, 2008-2011  
Operating Income of Atlas Copco by Business, 2008-2011  
Quarterly Revenue and Operating Income from Mining Machinery Division of Atlas Copco, 2010Q1-2012Q1  
Orders of Mining Machinery Division of Atlas Copco by Client, 2011  
Revenue from Mining Machinery Division of Atlas Copco by Region, 2011  
Sales and Operating Margin of John Deere, 2002-2011  
Revenue of John Deere by Region, 2006-2011  
Revenue of John Deere by Business, 2002-2011  
Operating Income of John Deere by Business, 2002-2011  
Revenue of CNH by Region, 2007-2011  
Sales and Operating Income of CNH, 2007-2008  
Revenue from Construction Equipment Division of CNH by Product and Region, 2011  
Revenue of Hyundai Heavy Industries Construction Equipment by Business, 2011-2012  
Sales from Construction Equipment Division of Hyundai Heavy Industries Construction Equipment, 2004-2012



Sales from Construction Equipment Division of Hyundai Heavy Industries Construction Equipment by Product, 2011

Excavator Sales Volume of Hyundai Heavy Industries Construction Equipment in Chinese Market, 2005-2011

Construction Equipment Sales of Hyundai Heavy Industries Construction Equipment by Region, 2007-2011

Revenue and Net Income of Hyundai (Jiangsu) Heavy Industries, 2007-2011

Revenue and Operating Margin of XCMG, 2005-2012

Revenue and Growth Rate of XCMG, 2009Q1-2012Q1

Net Income and Growth Rate of XCMG, 2009Q1-2012Q1

General Expenses of XCMG, 2009Q1-2012Q1

Revenue of XCMG by Product, 2011

Monthly Truck Crane Sales Volume of XCMG, Jan.2010-Mar.2012

Revenue and Operating Margin of SANY, 2006-2012

Oversea Revenue Proportion of SANY, 2005-2011

Revenue of SANY by Product, 2011

Excavator Sales Volume of SANY, Jan.2010-Mar.2012

Excavator Market Occupancy of SANY in Chinese Market, Jan.2006-Mar.2012

Monthly Truck Crane Sales Volume of SANY, Jan.2010-Mar.2012

Revenue of Putzmeister, 1996-2011

Footprint of Putzmeister Worldwide

Revenue and Operating Margin of ZOOMLION, 2006-2012

Revenue and Growth Rate of ZOOMLION, 2010Q2-2012Q1

Net Profit Margin of ZOOMLION, 2010Q2-2012Q1

Gross Margin of ZOOMLION, 2010Q2-2012Q1

General Expenses of ZOOMLION, 2010Q2-2012Q1

Revenue of ZOOMLION by Product, 2011

Gross Profit of ZOOMLION by Product, 2011

Crane Sales Volume of ZOOMLION, Jan.2010-Mar.2012

Crane Sales Volume & Growth Rate of ZOOMLION, 2010Q1-2012Q1

Revenue and Operating Margin of Liugong, 2006-2012

Quarterly Revenue and Growth Rate of Liugong, 2010Q2-2012Q1

Quarterly Gross Margin of Liugong, 2010Q2-2012Q1

Quarterly Net Profit Margin of Liugong, 2010Q2-2012Q1

General Expenses of Liugong, 2010Q2-2012Q1

Excavator Sales Volume of Liugong, 2010Q1-2012Q1

Bulldozer Sales Volume of Liugong, 2010Q1-2012Q1

Loader Sales Volume of Liugong, 2010Q1-2012Q1

Crane Sales Volume of Liugong, 2010Q1-2012Q1

Revenue and Operating Margin of Shantui Construction Machinery, 2006-2012  
Bulldozer Sales Volume of Shantui Construction Machinery, Jan.2010-Mar.2012  
Bulldozer Market Occupancy of Shantui Construction Machinery, Aug.2006-Dec.2011  
Revenue of Shantui Construction Machinery by Business, 2006-2011  
Export Revenue Proportion of Shantui Construction Machinery, 2006-2011  
Revenue and Operating Margin of Lonking, 2006-2011  
Revenue and Operating Margin of XGMA, 2006-2012  
Quarterly Revenue and Growth Rate of Xiamen XGMA Machinery, 2007Q1-2011Q4  
Quarterly Net Income and Growth Rate of Xiamen XGMA Machinery, 2007Q1-2011Q4  
Monthly Excavator Sales Volume of Xiamen XGMA Machinery, Jan.2009-Nov.2011  
Monthly Loader Sales Volume of Xiamen XGMA Machinery, Jan.2009-Nov.2011

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