

# Global and China Excavator Industry Report, 2011-2012

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## Abstracts

It is in the report that covers the followings:

The overview of global construction machinery & equipment industry

The excavator market in Brazil and India

The excavator market in China

The world's 20 leading excavator manufacturers

In 2011, the global sales volume of excavators approximated 458,000 units, of which the sales volume in Chinese market enjoyed the lion's share of 38.8% and reached 178,000 units, due to the largest number of infrastructure projects.

From January to April of 2012, 28 major Chinese excavator manufacturers sold a total of 59,457 excavators, down 42.22% YoY, while the export volume surged 100.24% YoY to 2,547 units. The first quarter of every year is the peak time for the commencement of infrastructure projects and is also the golden period for excavator sales.

Despite the sharp decline in Chinese market, the excavator sales outside of China showed robust performance, especially in developed economies such as the U.S., Japan, Germany, Sweden, Denmark and Finland. Although the Eurozone debt crisis leads to sharp depreciation of euro and greatly affects southern European countries, it is conducive to the exports of Germany and Northern European countries which boast a large quantity of excellent construction machinery manufacturers and which attained

YoY rise of nearly 20% in new orders in Q1 2012.

The excavator market features a high concentration degree in India, and the top three enterprises occupy more than 80% market share. Telcon, jointly established by TATA and Hitachi Construction Machinery in 1961, ranks No. 1 for 51% market share and mainly produces crawler excavator. The No. 2 company is co-invested by Komatsu and L& T, followed by South Korean Hyundai. The three manufacturers have set up production bases in India.

The excavator market in Brazil is also characteristic of high degree of market concentration. Large-sized excavator acts as the mainstream excavator in Brazil, and the U.S.-based Caterpillar and Japanese Komatsu are veteran manufacturers of large excavator. In terms of hydraulic excavator, Caterpillar makes up 50% market share and Komatsu 28%.

In Q1 2012, the sales volume of excavators suffered a decline in Chinese market, of which the sales volume of 13-20 ton and 1-4.5 ton excavators dropped 27%, that of 25-30 ton and 30-35 ton excavators plummeted by 57% and 61% respectively, and that of excavators with over 40 tons almost remained unchanged from the previous year, slipping a bit by 1%.

For the time being, 20-35 ton excavator boasts a greater market share, but the proportion of sales volume in the total has declined significantly, while that of excavators with less than 13 tons and over 40 tons has been increasing. On the one hand, the accelerating integration of coal mines increases the coal mines in size, so the large-tonnage (30-ton and above) excavators saw relatively robust performance in sales volume in April, down around 35.8% YoY; and on the other hand, the demand for small-tonnage (below 13-ton) excavators maintained stable driven by the construction of irrigation and water conservancy projects and municipal construction, a fall of 34.5% YoY in April. The medium-tonnage (13-30 ton) excavator for large-scale infrastructure still remained weak and slipped 49.1% YoY.

Amid the Chinese economic slowdown, people are looking forward to the government's new round of economic stimulus. China's economic stimulus policies always center on increasing investment in infrastructure and relaxing its macro-control over real estate market. However, the current government is about to expire, which means that no radical policy changes in a short term. And it is still uncertain whether the new government will implement the economic stimulus policies or not when it comes to power in 2013.

## Contents

### **1 GLOBAL CONSTRUCTION MACHINERY MARKET**

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

### **2 EXCAVATOR MARKET IN CHINA**

- 2.1 China's Investments in Infrastructure
- 2.2 Excavator Market
- 2.3 Excavator Industry
- 2.4 Used Excavator Market
- 2.5 Compact Excavator Market

### **3 EXCAVATOR MARKET IN INDIA AND BRAZIL**

- 3.1 Excavator Market in India
- 3.2 Excavator Industry in India
- 3.3 Telcon
- 3.4 Excavator Market in Brazil
- 3.5 Excavator Industry in Brazil

### **4 MAJOR GLOBAL EXCAVATOR MANUFACTURERS**

- 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
- Hitachi Construction Machinery (China)
- 4.4 Volvo Construction Equipment
- 4.5 Doosan Infracore
- 4.6 Kobelco Construction Machinery

- 4.6.1 Chengdu Kobelco Construction Machinery (Group) Co., Ltd.
- 4.6.2 Hangzhou Kobelco Construction Machinery Co., Ltd.
- 4.7 CNH
- 4.8 Hyundai Heavy Industries Construction Equipment  
Hyundai (Jiangsu) Construction Machinery Co., Ltd.
- 4.9 XCMG
- 4.10 SANY
- 4.11 Changsha Zoomlion Heavy Industry Science & Technology Development
- 4.12 Guangxi Liugong Machinery
- 4.13 Lonking Holdings
- 4.14 Xiamen XGMA Machinery
- 4.15 Sumitomo Heavy Industries
- 4.16 Wacker Neuson
- 4.17 Takeuchi
- 4.18 KATO
- 4.19 Sunward
- 4.20 JCB

## Selected Charts

### SELECTED CHARTS

Shipment of Seven Major Types of Construction Machinery in the World, 2003-2013E  
Shipment of Seven Major Types of Construction Machinery by Region in the World, 2003-2012

Demand for Seven Major Types of Construction Machinery by Region in the World, Q2 2007-Q1 2012

Distribution of Seven Major Types of Construction Machinery by Owner in the World, 1980-2012

New House Starts and Demand for Construction Machinery Equipment in the U.S., 1970-2012

Global Demand for Hydraulic Excavators, 2003-2013E

Global Demand for Hydraulic Excavators by Region, 2003-2012

Monthly Demand for Hydraulic Excavators in China, Apr. 2008 –Mar. 2012

Demand for Mining Equipment by Region Worldwide, 2003-2012

Global Mining Equipment Market by Region, 2003-2012

Output Value of Machinery Equipment Industry by Region, 2007-2011

Ranking of Global Top 50 Construction Machinery Manufacturers by Revenue, 2010-2011

Total Fixed Investment in China, 2001-2011

Monthly Fixed Investment in China, Jan. 2008-Mar. 2012

Monthly Fixed Investment in China's Railway Transportation Industry and Growth Rate, Jan. 2008-Mar. 2012

Monthly Fixed Investment in China's Road Transport Industry and Growth Rate, Jan. 2008-Mar. 2012

Monthly Fixed Investment in China's Water Conservancy and Environment Industry and Growth Rate, Jan. 2008-Mar. 2012

Monthly Fixed Investment in China's Coal Mining Industry and Growth Rate, Jan. 2008-Mar. 2012

Monthly Fixed Investment in China's Real Estate Industry and Growth Rate, Jan. 2008-Mar. 2012

New Construction Area of Commodity Houses and Monthly YoY Growth Rate in China, Jan. 2008-Mar. 2012

Monthly Sales Volume of Excavators in China, Jan. 2009- Mar. 2012

Monthly Export Volume of Excavators in China, Jan. 2009- Mar. 2012

Monthly Sales Volume of Sany's Excavators, Jan. 2009- Mar. 2012

Monthly Sales Volume of Sunward's Excavators, Jan. 2010-Mar. 2012

Excavator Market in China by Tonnage, 2006-Q1 2012  
Excavator Market in China by Region, 2010-Q1 2012  
Market Share of Major Excavator Brands in China, Q1 2012  
Market Share of Excavators in China by Country, 2008-Q1 2012  
Planned Investment in Infrastructure in India, FY2008-FY2012  
Investment in Road and Bridge Facilities in India, FY2008-FY2012  
Shipment of Construction Machinery in India, FY2010-FY2014  
Market Share of India's Major Construction Machinery Manufacturers by Sales, FY2011  
Market Share of India's Major Excavator Producers, 2004, 2008 and 2011  
Shipment of Various Construction Machinery in India, 2006-2012  
Construction Machinery Market in Brazil by Region  
Output and Sales Volume of Excavators in Brazil, 2001-2011  
Market Share of Major Hydraulic Excavator Producers in Brazil, 2011  
Sales and Net Profit Margin of Komatsu, FY2006-FY2012  
Revenue of Komatsu by Region, FY2010-FY2012  
Quarterly Sales of Komatsu, Q1 FY2008-Q4 FY2011  
Quarterly Operating Income of Komatsu, Q1 FY2008-Q4 FY2011  
Sales of Komatsu's Construction Machinery by Region, Q1 FY2008-Q4 FY2011  
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-Q1 2012  
Operating Income of Caterpillar by Business, 2010-Q1 2012  
Revenue of Caterpillar by Region, 2010-Q1 2012  
Regional Revenue of Caterpillar by Business, 2011  
Footprint of Caterpillar in China  
Sales and Operating Margin of Hitachi Construction Machinery, FY2004-FY2012  
Sales of Hitachi Construction Machinery, FY2007-FY2012  
Revenue and Net Income of Hitachi Construction Machinery (China), 2005-2011  
Employees of Volvo Construction Equipment by Region, by the End of 2011  
Sales and Operating Income of Volvo Construction Equipment, 2003-2011  
Global Manufacturing Bases of Volvo Construction Equipment  
Customers of Volvo Construction Equipment, 2011  
Products of Volvo Construction Equipment by Application, 2011  
Output of Volvo Construction Equipment's Plants, 1991-2011  
Sales of Volvo Construction Equipment by Product, 2011  
Sales of Volvo Construction Equipment by Region, 2011  
Revenue and Operating Margin of Doosan Infracore, 2005-2012

Revenue of Doosan Infracore by Business, Q4 2009-Q1 2012  
Revenue of Doosan Infracore by Region, 2011 and Q1 2012  
Revenue and Operating Income of Kobelco, FY2004-FY2011  
Kobelco's Revenue by Business, 2009-2011  
Operating Income of Kobelco by Business, 2010-2011  
CNH's Revenue by Region, 2007-2011  
CNH's Sales and Operating Income, 2007-2008  
Revenue of CNH's Construction Equipment Division by Product and Region, 2011  
Revenue of Hyundai Heavy Industries by Business, 2011-2012  
Sales of Hyundai Heavy Industries Construction Equipment, 2004-2012  
Sales of Hyundai Heavy Industries Construction Equipment by Product, 2011  
Sales Volume of Excavators of Hyundai Heavy Industries Construction Equipment in China, 2005-2011  
Sales of Hyundai Heavy Industries Construction Equipment by Region, 2007-2011  
Market Share of Excavators of Hyundai Heavy Industries Construction Equipment  
Revenue and Net Income of Hyundai (Jiangsu) Construction Machinery Co., Ltd., 2007-2011  
Revenue and Operating Margin of XCMG, 2005-2012  
Revenue and Growth Rate of XCMG, Q1 2009-Q1 2012  
Net Income and Growth Rate of XCMG, Q1 2009-Q1 2012  
Expenditures of XCMG, Q1 2009-Q1 2012  
Revenue of XCMG by Product, 2011  
Monthly Sales Volume of Truck Cranes of XCMG, Jan. 2010-Mar. 2012  
Revenue and Operating Margin of Sany, 2006-2012  
Proportion of Overseas Revenue in Total Revenue of Sany, 2005-2011  
Sany's Revenue by Product, 2011  
Monthly Sales Volume of Sany's Excavators, Jan. 2010-Mar. 2012  
Market Share of Sany's Excavator in China, Jan. 2006-Mar. 2012  
Monthly Sales Volume of Sany's Truck Cranes, Jan. 2010-Mar. 2012  
Putzmeister's Revenue, 1996-2011  
Footprint of Putzmeister Worldwide  
Revenue and Operating Margin of Zoomlion, 2006-2012  
Revenue and Growth Rate of Zoomlion, Q2 2010-Q1 2012  
Net Profit Margin of Zoomlion, Q2 2010-Q1 2012  
Gross Margin of Zoomlion, Q2 2010-Q1 2012  
Expenditures of Zoomlion, Q2 2010-Q1 2012  
Zoomlion's Revenue by Product, 2011  
Zoomlion's Gross Profit by Product, 2011  
Sales Volume of Zoomlion's Cranes, Jan. 2010-Mar. 2012



Sales Volume and Growth Rate of Zoomlion's Cranes, Q1 2010-Q1 2012  
Revenue and Operating Margin of Guangxi Liugong Machinery, 2006-2012  
Quarterly Revenue and Growth Rate of Guangxi Liugong Machinery, Q2 2010-Q1 2012  
Quarterly Gross Margin of Guangxi Liugong Machinery, Q2 2010-Q1 2012  
Net Profit Margin of Guangxi Liugong Machinery, Q2 2010-Q1 2012  
Expense Rates of Guangxi Liugong Machinery, Q2 2010-Q1 2012  
Sales Volume of Excavators of Guangxi Liugong Machinery, Q1 2010-Q1 2012  
Sales Volume of Bulldozers of Guangxi Liugong Machinery, Q1 2010-Q1 2012  
Sales Volume of Loaders of Guangxi Liugong Machinery, Q1 2010-Q1 2012  
Sales Volume of Cranes of Guangxi Liugong Machinery, Q1 2010-Q1 2012  
Revenue and Operating Margin of Lonking, 2006-2011  
Revenue and Operating Margin of Xiamen XGMA Machinery, 2006-2012  
Quarterly Revenue and Growth Rate of Xiamen XGMA Machinery, Q1 2007-Q4 2011  
Quarterly Net Income and Growth Rate of Xiamen XGMA Machinery, Q1 2007-Q4 2011  
Monthly Sales Volume of Excavators of Xiamen XGMA Machinery, Jan. 2009-Nov. 2011  
Monthly Sales Volume of Loaders of Xiamen XGMA Machinery, Jan. 2009-Nov. 2011  
Organizational Structure of Sumitomo Heavy Industries  
Revenue and Operating Income of Sumitomo Heavy Industries, FY2006-FY2012  
Orders and Employees of Sumitomo Heavy Industries, FY2006-FY2011  
Orders of Sumitomo Heavy Industries by Division, FY2007-FY2012  
Revenue of Sumitomo Heavy Industries by Division, FY2007-FY2012  
Operating Margin of Sumitomo Heavy Industries by Division, FY2007-FY2012  
Orders of SHI's Construction Machinery, 2006-2012  
Revenue and Operating Margin of SHI's Construction Machinery Division, FY2006-FY2012  
Revenue of SHI's Construction Machinery Division by Product, 2006-2012  
Revenue and EBITDA of Wacker Neuson, 2005-2012  
Revenue of Wacker Neuson by Region, Q1 2012  
Revenue of Wacker Neuson by Business, Q1 2012  
Revenue and Operating Margin of Takeuchi, FY2006-FY2012  
Revenue of Takeuchi by Region, FY2007-FY2012  
Revenue and Operating Margin of KATO, 2006-2011  
Revenue of KATO by Product, 2006-2011  
Quarterly Sales Volume and Growth Rate of Sunward's Excavators, Q1 2010-Q1 2012  
Three Expenses Rates of Sunward, Q1 2010-Q1 2012  
Quarterly Revenue of Sunward, Q2 2010-Q1 2012  
Quarterly Gross Margin of Sunward, Q2 2010-Q1 2012



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