

Excavator Industry Overview in China, 2011-2020

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Abstracts

Description

Excavators are earthmoving machines digging materials below or above the bearing surface with buckets and loading them on trucks or unloading to the stockyard. Major excavated materials include soil, coal, sand as well as soil and rocks after preliminary loose. Excavators develop rapidly and become one of the major engineering machinery in construction in recent years.

The sales revenue of the construction industry increased from CNY 11,773.42 billion in 2011 to CNY 18,075.75 billion in 2015 with a declining annual growth rate, which is consistent with the overall economic trend in China.

The output volume of Chinese excavators decreased from 194.961 thousand in 2011 to 92.592 thousand in 2015 mainly for the saturation of the excavator market and the slump growth of new constructions.

According to CRI, major purchasers of excavators include construction units, mining ones and some individuals. With the yearly increase of manpower costs, most construction units use excavators instead of manpower to perform the mechanical work. The demand of the mining industry for excavators increases for rising manpower costs and personnel safety problems. Meanwhile, Chinese government speeds up the construction of urbanization and infrastructure. Most construction units outsource part of projects to individuals to reduce the investment in fixed assets and personnel, which also leads to a higher demand for engineering machinery like excavators.

Chinese government restructures the economy and supports the development of the construction machinery industry. In the process of urbanization, the construction and planning of infrastructures increase the demand for excavators as well. The excavator

manufacturers improve the procurement industry chain in the globe, which effectively enhances the development of the overall market.

In terms of competition, brands of Japan and South Korea dominated Chinese excavator market before 2010, which was followed by that of Europe, the U.S.A. and China. However, the market structure transferred from 2010 to 2015, and Chinese brands became dominants while market shares of Europe and the U.S.A. brands shrank and Japan and South Korea Brands lost major shares. Meanwhile, excavators of Chinese brands remain dominants. According to CRI, the aggregate market shares of the sales volume of top 5 excavator manufacturers was about 50% in China in 2015, while there was certain development space of this market for some small and medium-sized enterprises.

In terms of product structure, the sales volume of mini-excavators increased rapidly from 2013 to 2015 and will continue to grow in the future. The sales volume of medium-sized excavators decreased while that of large-scale ones remained stable, which will continue in the future.

As Chinese government increases the investment in the western region development and infrastructure construction, the sales volume of excavators increases accordingly while that remains stable in the central regions and decreases in the eastern regions, which will continue for a while.

CRI estimates that excavator products will occupy certain advantages in the global market and the export volume is expected to grow due to the complete industry chain in China in the next few years. Meanwhile, Chinese government increases the investment in the high speed rail, urban transit and municipal engineering to promote the development of the economy and the excavator industry in China.

Through this report, the readers can acquire the following information:

Definition and Classification of Excavators

Research Methods of the Report

Analysis on Supply and Demand in Excavator Industry in China

Analysis on Export of Excavators in China

Competition of Excavator Industry in China

Analysis on Top 5 Enterprises in Excavator Industry in China

Development Opportunities and Driving Forces Faced by Excavator Industry in China

Risks and Challenges in Development of Excavator Industry in China

Production Costs and Prices of Excavators in China, 2013-2015

Prediction on Development of Excavator Industry in China, 2016-2020

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