

Investigation Report on the Chinese Construction Machinery Industry Market 2021-2025

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Abstracts

The production and export volume of China's construction machinery industry has been ranked first in the world. By the first half of 2021, 11 Chinese companies have been listed among the top 50 construction machinery companies in the world. Also, China's sales and growth rate of the sales have risen to the first place in the world.

According to CRI's market research, the development cycle of the construction machinery industry is basically consistent with the macroeconomic development trend. The prosperity of China's construction machinery is affected by many factors such as the domestic market demand, exports and government policies, which in general are supportive.

The demand in the Chinese construction and machinery market is oriented by investments in fixed assets like the real estate and infrastructure. In general, when China's real estate and infrastructure investment increases, the demand for construction machinery will follow the step. Fixed asset investment demand is the main factor affecting the development of the domestic construction machinery industry. By 2020, infrastructure accounted for the largest proportion of construction machinery demand (about 45%), and mining and real estate took up about 20% respectively.

CRI's market research shows that China's whole set of construction machinery products are mainly exported to countries and regions including the United States, Russia, Japan, Australia, India, and Vietnam, while the machinery parts are mainly exported to the United States Europe and European countries. In 2017, the export value reached USD 20.969 billion, with a reduction of 13.6% YOY. The main reason for this reduction is the target market was greatly affected by the outbreak of COVID-19. In 2020, China's construction machinery exports to major export target countries fell by

about 8.6% YOY. Exports to countries along the “Belt and Road” were US\$8.973 billion, accounting for 42.8% of total exports. The decline rate of exports is 16.8%, which was higher than the decline of total exports. Exports to the BRICS countries amounted to US\$2.511 billion, accounting for 12%, with a year-on-year decrease of 9.29%. Among them, the Brazilian market share showed a rare increase, with a growth rate of 0.1%.

According to CRI’s analysis, with the improving strength of China’s construction machinery manufacturing, many Chinese companies have entered the international market through mergers and acquisitions, which enables them to make use of the brand, technology and sales channels of the acquired targets so as to make inroads into the global arena

By 2020, the urbanization level in China was about 63.9%, which was above the middle level in the world, far lagging behind that of developed countries. During 2018-2022, the urbanization rate is expected to reach 65.5%, namely, an increment of more than 80 million urban population. The rise of urbanization will promote the development of the real estate and infrastructure construction, and further drive the demand for construction machines. In addition, the Report on Digital Development in Rural China 2020 pointed out that rural areas in China will continue to develop during the 14th Five-Year Plan period (2021-2025). Therefore, the modernization of rural infrastructure and other modernization will promote the demand for construction machinery in China. At the same time, with the alleviation of the new crown epidemic, overseas sales of Chinese construction machinery will have a recovery growth, and export value may see great growth. Overall, from 2021 to 2025, the construction machinery industry in China will continue to develop.

Main content:

Government policies of China’s construction machinery industry

Supply and demand of China’s construction machinery industry

Analysis on the import and export of China’s construction machinery industry

Major construction machinery manufacturers in the Chinese market

Competition landscape of China’s construction machinery

The driving forces and market opportunities of China's construction machinery industry, 2021-2025

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