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World Construction Machinery

Industry Study with Forecasts for **2011 & 2016**

Study #2264 | December 2007 | \$5500 | 392 pages

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China, India, Mexico and Russia will register some of the strongest sales gains, with China alone accounting for 31% of all additional construction machinery demand through 2011.

Global demand to rise 6% annually through 2011

Global demand for construction machinery is forecast to climb 6.0 percent per year to \$131 billion in 2011. Sales will be fueled by healthy economic growth, ongoing industrialization efforts, rising populations and higher standards of living in developing parts of the world, leading to substantial increases in construction spending. Products such as cable type excavators and off-highway trucks are also used in open pit mining operations, and mining activity in mineral-rich developing countries will expand as global economic conditions continue to improve, supporting overall construction equipment market gains. China, India, Mexico and Russia will register some of the strongest sales increases, with China alone accounting for 31 percent of all additional construction machinery demand through 2011. Growth is also expected to exceed seven percent annually in lower-volume markets like Iran, Malaysia, Indonesia, Ukraine, Turkey, Poland and South Africa.

Although advances will be less robust than in developing nations, construction equipment sales in developed countries will rise as well. Demand will be stimulated by generally favorable economic climates and further increases in construction activity in these areas. More stringent off-road diesel engine emission standards in the European Union, Japan and US will also make new machinery

World Construction Machinery Demand, 2011 (\$131 billion)



more expensive and contribute to value gains through 2011. However, new housing starts are expected to decline in the US and Japan, dampening increases in construction equipment demand in these nations.

Mixers, pavers, loaders among best opportunities

The strongest sales advances will be recorded by mixers, pavers and related products, benefitting from ongoing infrastructure development efforts in industrializing parts of the world. The comparatively low cost of some of the items included here (such as small towable concrete mixers) will also

contribute to market gains, as contractors are more likely to replace these items than they are high-ticket machinery because of the more modest financial requirements. Demand for loaders will also grow at an above-average pace through 2011 because of their versatility, spurring increased sales as construction expenditures continue to climb, especially in faster growing developing countries.

Market conditions will remain fundamentally sound as well for other types of construction equipment, which include cranes, draglines and excavators; graders, rollers and related products; off-highway trucks and tractors; and separately sold parts and attachments.

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Sample Text, Table & Chart

ASIA/PACIFIC

In 2006, Indonesia's shipments of construction machinery were valued at \$240 million. Domestic production has outperformed demand in recent years -- doubling in dollar volume between 2001 and 2006 -- from generally healthy local and export market conditions, as well as from investment in local manufacturing facilities by foreign investors. Nevertheless, industry output remains insufficient to meet the nation's needs, and Indonesia had a trade deficit equivalent to 1.5 percent of product demand in 2006. Leading external sources of supply for construction machinery in 2006 were China, Japan, South Korea and the US.

Sales of construction equipment in Indonesia are forecasted to grow at a rate of 11.3 percent annually to \$2.2 billion, more than double the \$1.1 billion demand in a near-term forecast. Domestic production will benefit from increased government construction spending. For instance, the government is planning a 30-kilometer suspension bridge connecting the islands of Java and Sumatra (scheduled for completion in 2014), as well as four nuclear power plants in central Java (with the first facility expected to go online by 2015). Future market growth will be constrained somewhat by continuing ethnic and religious conflicts in the nation, which will limit the availability of foreign funding for large-scale construction projects.

Construction equipment shipments from producers in Indonesia are projected to expand 11.3 percent annually to \$2.2 billion, more than double the \$1.1 billion demand in a near-term forecast. Domestic production will benefit from increased government construction spending. For instance, the government is planning a 30-kilometer suspension bridge connecting the islands of Java and Sumatra (scheduled for completion in 2014), as well as four nuclear power plants in central Java (with the first facility expected to go online by 2015). Future market growth will be constrained somewhat by continuing ethnic and religious conflicts in the nation, which will limit the availability of foreign funding for large-scale construction projects.

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SAMPLE TEXT

TABLE VI-14

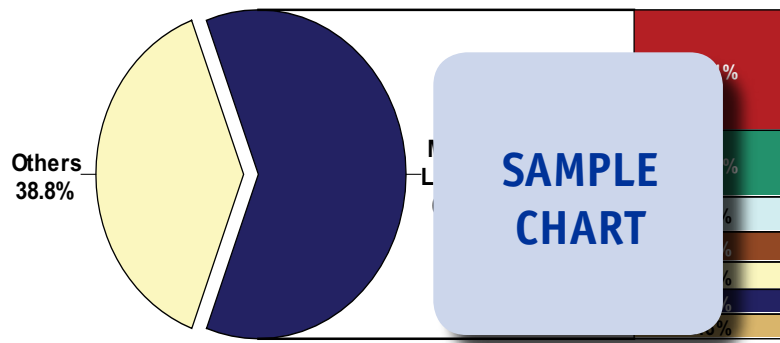
INDONESIA CONSTRUCTION MACHINERY SUPPLY & DEMAND (million dollars)

Item	1996	2001	2006	2011	2016
Construction Expenditures (bil 2005\$)	71	140	280	560	1120
\$ demand/000\$ construction	1	2	4	8	16
Construction Machinery Demand					
Cranes, Draglines & Excavators					
Loaders					
Off-Highway Trucks & Tractors					
Graders, Rollers & Related Equipment					
Mixers, Pavers & Related Equipment					
Parts & Attachments					
net exports					
Construction Machinery Shipments					
% Indonesia					
Asia/Pacific Construction Mach Shtpt	18100	17500	22000	22000	20050

SAMPLE TABLE

CHART VIII-1

WORLD CONSTRUCTION MACHINERY MARKET SHARE BY COMPANY, 2006 (\$97.7 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-13
INDONESIA - ECONOMIC INDICATORS

Item	1996	2001	2006	2011	2016
Population (millions)	195.0	207.0	219.0	231.0	243.0
per capita GDP	1,050	1,150	1,250	1,350	1,450
Gross Domestic Product (bil 2005\$)	150	170	190	210	230
% construction	1.6	1.6	1.6	1.6	1.6
Construction Expenditures (bil 2005\$)	2.9	3.9	4.9	5.9	6.9
Nonbuilding	1.9	2.9	3.9	4.9	5.9
Residential Building	0.2	0.2	0.2	0.2	0.2
Nonresidential Building	1.8	2.7	3.7	4.7	5.7
\$ demand/capita	1.7	1.7	1.7	1.7	1.7
\$ demand/000\$ GDP	1.1	1.1	1.1	1.1	1.1
\$ demand/000\$ construction	1.1	1.1	1.1	1.1	1.1
Construction Mchnry Demand (mil \$)	30	30	30	30	30
% Indonesia	1.4	1.4	1.4	1.4	1.4
A/P Construct Mchnry Dmnd (mil \$)	175	175	175	175	175



COMPANY PROFILES

Concern Tractor Plants
 Eleven Novinskiy Boulevard
 Moscow 121099 RUSSIA
 7-495-252-53-71
 http://www.ktz.com.ru

Annual Sales (2007) \$100 million
 Employees (2007) 1,000

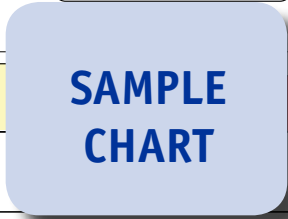
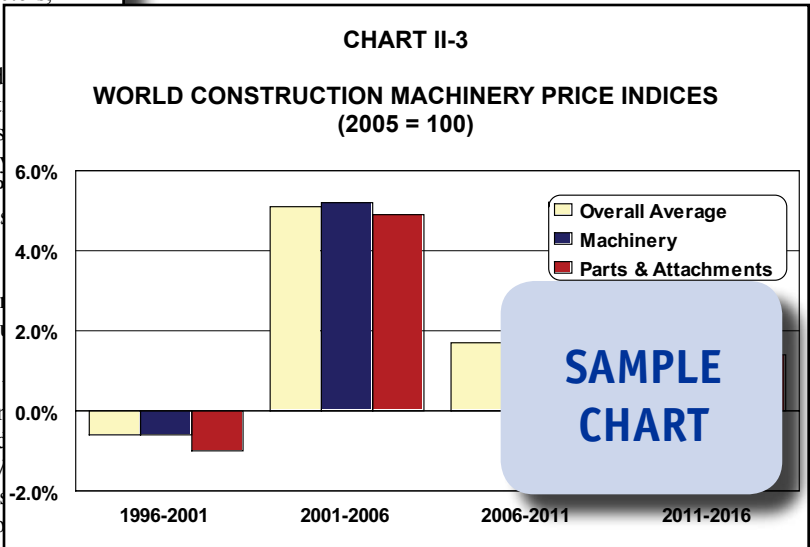
Key Products: bulldozers, excavators, wheel loaders, wheel compactors, hydrostatic trans-
 missions, pipelayer

Concern Tractor Plants is a cooperative of industrial and agricultural machinery manufacturers comprising 15 product companies and two research institutes in Russia. The Company's products are sold in over 20 countries, including Russia, Iraq, Egypt, Madagascar, India and Canada, as well as nations in the Balkan Peninsula, the Commonwealth of Independent States (CIS), other Eastern European countries and Latin America.

The Company produces and sells construction machinery through three Russian subsidiaries: Promtractor Joint Stock Company, Kurganmashzavod Joint Stock Company and Altai Motor Plant Joint Stock Company. According to Concern Tractors Plants, Promtractor is the largest producer of heavy ripper-dozers and pipe laying equipment in Russia and the CIS. Specific products from Promtractor include CHETRA 9, CHETRA 11, CHETRA 11C-1 and CHETRA HEAVY heavy ripper-dozers; CHETRA 11S tractors with hydrostatic transmissions; CHETRA 11M heavy ripper-dozers for land reclamation jobs.

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OTHER STUDIES

World Mining Equipment

This study analyzes the global mining equipment industry. It presents historical demand data (1996, 2001, 2006) and forecasts for 2011 and 2016 by equipment type (e.g., underground machinery; crushing, pulverizing and screening; drills and breakers; mineral processing; surface mining); mining market (coal, mineral, metal); world regional market and for 32 major national markets. The study also considers market environment factors, evaluates company market share and profiles leading industry competitors.
 #2308 03/2008..... \$5700

Drilling Products

This study analyzes the US market for products used in drilling oil and natural gas wells. It presents historical US demand data (1996, 2001, 2006) and forecasts for the years 2011 and 2016 by equipment and consumables (e.g., drilling rigs, drill bits, downhole pipe, measuring and control equipment); services (contract drilling, directional control, logging, chemical); and drilling fluids. This study also considers market environment factors, evaluates market share and profiles leading industry competitors.
 #2288 02/2008..... \$4500

World Elevators

World elevator and escalator demand will rise 5.1% yearly through 2011. Gains will be driven by the ongoing migration to cities in developing regions, and by mandated retrofit services and nonresidential construction in developed markets. Escalators and moving walkways will outpace elevators. This study analyzes the \$44.5 billion world elevator and escalator industry, with forecasts for 2011 and 2016 by type, market, world region and for 15 countries. It also details market share and profiles major players.
 #2248 09/2007..... \$5500

World Material Handling Products

Global material handling product demand will grow 4.5% yearly through 2010, led by developing countries such as China, India, Turkey, Mexico and Russia. Western Europe and Japan will show renewed strength and the US market will accelerate. Automated products such as robots and AGVs will lead gains. This study analyzes the \$93.8 billion world material handling industry for 2010 and 2015 by product, market, world region and for 37 countries. It also details market share and profiles major players.
 #2113 11/2006..... \$5300

World Agricultural Equipment

Global demand for agricultural equipment will grow 4.8% annually through 2010. Strongest gains will occur in developing countries (e.g., China, India, Brazil, Russia) as farmers further automate and replace older equipment and draft animals. Demand in industrialized regions will be replacement in nature. This study analyzes the \$70.2 billion world agricultural equipment industry for 2010 and 2015 by product, world region and for 26 countries. It also details company market share and profiles major players.
 #2089 09/2006..... \$5300

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