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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

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# World Mining Equipment

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

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Study #2308 | March 2008 | \$5700 | 341 pages

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767 Beta Drive

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Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

World Economic Outlook.....	5
World Industrial Outlook .....	12
Industrial Output Trends.....	12
Fixed Investment Trends.....	14
World Mining Outlook .....	19
Minerals.....	20
Coal.....	21
Metals.....	22
Mining Equipment Pricing Dynamics.....	24
Mining Equipment Technology Trends .....	25
Legal & Regulatory Issues .....	27

### SUPPLY & DEMAND

General .....	30
World Mining Equipment Markets .....	31
Regional Markets.....	31
Applications .....	34
Metal Mining .....	35
Mineral Mining.....	37
Coal Mining .....	39
Mining Equipment Products by Type .....	40
Crushing, Pulverizing & Screening Equipment.....	41
Underground Mining Machinery.....	43
Drills & Breakers.....	44
Mineral Processing Machinery .....	45
Surface Mining Machinery .....	46
Parts & Attachments .....	47
World Mining Equipment Production.....	49
International Trade Flows .....	52

### NORTH AMERICA

General .....	54
United States .....	59
Canada.....	65
Mexico .....	70

### WESTERN EUROPE

General .....	76
Germany.....	81
United Kingdom.....	86
Spain.....	90
France.....	94
Italy.....	99
Other Western Europe .....	104
Netherlands.....	108
Norway.....	112
Sweden.....	116
Belgium.....	120
All Other Western Europe.....	123

### ASIA/PACIFIC

General .....	127
---------------	-----

China.....	132
Australia.....	137
India .....	142
Indonesia .....	147
Kazakhstan .....	152
Thailand.....	155
Japan.....	160
Malaysia.....	164
South Korea .....	169
Taiwan .....	174
Other Asia/Pacific .....	178

### LATIN AMERICA

General .....	184
Brazil.....	189
Chile.....	194
Argentina .....	198
Peru.....	202
Venezuela .....	206
Colombia .....	210
Other Latin America .....	213

### EASTERN EUROPE

General .....	219
Russia .....	223
Poland .....	228
Ukraine .....	232
Other Eastern Europe.....	235

### AFRICA/MIDEAST

General .....	241
South Africa.....	246
Turkey.....	251
Other Africa/Mideast .....	255

### INDUSTRY STRUCTURE

General .....	261
Industry Composition & Market Share.....	263
Sandvik .....	264
Joy Global.....	264
Bucyrus International .....	265
Atlas Copco .....	265
Metso.....	265
Terex.....	266
Other Market Leaders .....	266
Product Development & Manufacturing .....	266
Marketing & Distribution .....	267
Cooperative Agreements.....	269
Financial Issues & Requirements.....	271
Mergers, Acquisitions & Industry Restructuring .....	272

### COMPANY PROFILES

Atlas Copco.....	277
Boart Longyear.....	281
Bucyrus International .....	284
Caterpillar Incorporated .....	288
China Coal Beijing Coal Mining Machinery .....	290
CITIC Group.....	291
Downer EDI Limited.....	292
FLSmidth & Company.....	294
Furukawa Company.....	296

Gebrueder Eickhoff Maschinenfabrik und Eisengiesserei.....	297
Hebei Jinma Mine Machinery .....	299
Ingersoll-Rand Company.....	300
Joy Global Incorporated.....	301
Kawasaki Heavy Industries.....	306
Kennametal Incorporated .....	308
Komatsu Limited.....	310
Liebherr-International AG.....	313
MAN AG.....	315
Metso Corporation.....	316
Mitsubishi Heavy Industries.....	320
RAG AG.....	321
Rowan Companies .....	322
Sandvik AB .....	324
Shenyang Heavy Machinery.....	329
Sumitomo Electric Industries .....	330
Techint Group.....	331
Terex Corporation .....	333
ThyssenKrupp AG .....	336
Wirtgen Group.....	338
WIRTH GmbH.....	340

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

### MARKET ENVIRONMENT

1 World Gross Domestic Product by Region .....	11
2 World Manufacturing Value Added by Region.....	14
3 World Fixed Investment by Region .....	16
Cht Relationship Between Mining Equipment Demand per Capita & Gross Fixed Investment per Capita, 2006 .....	18
4 World Mining Output.....	20
5 World Mining Equipment Pricing Patterns .....	25

### SUPPLY & DEMAND

1 World Mining Equipment Demand by Region ...	33
Cht World Mining Equipment Demand by Region, 2006.....	33
2 World Mining Equipment Demand by Application .....	34
Cht World Mining Equipment Demand by Application, 2006.....	35
3 World Metal Mining Equipment Demand by Region.....	37
4 World Mineral Mining Equipment Demand by Region .....	38
5 World Coal Mining Equipment Demand by Region.....	40
6 World Mining Equipment Demand by Product....	41
7 World Crushing, Pulverizing & Screening Equipment Demand by Region .....	42
8 World Underground Mining Machinery Demand by Region.....	44

(continued on next page)

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## List of Tables/Charts

(continued from previous page)

9	World Drill & Breaker Demand by Region .....	45
10	World Mineral Processing Machinery Demand by Region .....	46
11	World Surface Mining Machinery Demand by Region .....	47
12	World Mining Equipment Parts & Attachments Demand by Region .....	49
13	World Mining Equipment Shipments by Region .	51
Cht	World Mining Equipment Shipments by Region, 2006 .....	52
14	World Mining Equipment Net Exports by Region	53

### NORTH AMERICA

1	North America Mining Equipment Supply & Demand .....	57
2	North America Mining Equipment Demand by Application .....	59
3	United States Mining Equipment Supply & Demand .....	62
4	United States Mining Equipment Demand by Application .....	65
5	Canada Mining Equipment Supply & Demand ....	68
6	Canada Mining Equipment Demand by Application .....	70
7	Mexico Mining Equipment Supply & Demand ....	73
8	Mexico Mining Equipment Demand by Application .....	75

### WESTERN EUROPE

1	Western Europe Mining Equipment Supply & Demand .....	79
2	Western Europe Mining Equipment Demand by Application .....	81
3	Germany Mining Equipment Supply & Demand ..	84
4	Germany Mining Equipment Demand by Application .....	86
5	United Kingdom Mining Equipment Supply & Demand .....	88
6	United Kingdom Mining Equipment Demand by Application .....	90
7	Spain Mining Equipment Supply & Demand .....	92
8	Spain Mining Equipment Demand by Application .....	94
9	France Mining Equipment Supply & Demand .....	97
10	France Mining Equipment Demand by Application .....	99
11	Italy Mining Equipment Supply & Demand .....	102
12	Italy Mining Equipment Demand by Application .....	104
13	Other Western Europe Mining Equipment Supply & Demand .....	106
14	Other Western Europe Mining Equipment Demand by Application .....	107
15	Netherlands Mining Equipment Supply & Demand .....	110
16	Netherlands Mining Equipment Demand by Application .....	112
17	Norway Mining Equipment Supply & Demand..	114

18	Norway Mining Equipment Demand by Application .....	115
19	Sweden Mining Equipment Supply & Demand .	118
20	Sweden Mining Equipment Demand by Application .....	119
21	Belgium Mining Equipment Supply & Demand	121
22	Belgium Mining Equipment Demand by Application .....	123
23	All Other Western Europe Mining Equipment Supply & Demand .....	125
24	All Other Western Europe Mining Equipment Demand by Application .....	126

### ASIA/PACIFIC

1	Asia/Pacific Mining Equipment Supply & Demand .....	130
2	Asia/Pacific Mining Equipment Demand by Application .....	132
3	China Mining Equipment Supply & Demand ....	135
4	China Mining Equipment Demand by Application .....	137
5	Australia Mining Equipment Supply & Demand .....	140
6	Australia Mining Equipment Demand by Application .....	142
7	India Mining Equipment Supply & Demand ....	145
8	India Mining Equipment Demand by Application .....	147
9	Indonesia Mining Equipment Supply & Demand .....	150
10	Indonesia Mining Equipment Demand by Application .....	152
11	Kazakhstan Mining Equipment Supply & Demand .....	154
12	Kazakhstan Mining Equipment Demand by Application .....	155
13	Thailand Mining Equipment Supply & Demand	158
14	Thailand Mining Equipment Demand by Application .....	160
15	Japan Mining Equipment Supply & Demand ...	162
16	Japan Mining Equipment Demand by Application .....	164
17	Malaysia Mining Equipment Supply & Demand	167
18	Malaysia Mining Equipment Demand by Application .....	169
19	South Korea Mining Equipment Supply & Demand .....	172
20	South Korea Mining Equipment Demand by Application .....	174
21	Taiwan Mining Equipment Supply & Demand ..	176
22	Taiwan Mining Equipment Demand by Application .....	178
23	Other Asia/Pacific Mining Equipment Supply & Demand .....	181
24	Other Asia/Pacific Mining Equipment Demand by Application .....	183

### LATIN AMERICA

1	Latin America Mining Equipment Supply & Demand .....	187
2	Latin America Mining Equipment Demand by Application .....	189
3	Brazil Mining Equipment Supply & Demand ....	192
4	Brazil Mining Equipment Demand by Application .....	194

5	Chile Mining Equipment Supply & Demand .....	196
6	Chile Mining Equipment Demand by Application .....	198
7	Argentina Mining Equipment Supply & Demand .....	200
8	Argentina Mining Equipment Demand by Application .....	202
9	Peru Mining Equipment Supply & Demand .....	204
10	Peru Mining Equipment Demand by Application .....	206
11	Venezuela Mining Equipment Supply & Demand .....	208
12	Venezuela Mining Equipment Demand by Application .....	209
13	Colombia Mining Equipment Supply & Demand .....	212
14	Colombia Mining Equipment Demand by Application .....	213
15	Other Latin America Mining Equipment Supply & Demand .....	216
16	Other Latin America Mining Equipment Demand by Application .....	218

### EASTERN EUROPE

1	Eastern Europe Mining Equipment Supply & Demand .....	221
2	Eastern Europe Mining Equipment Demand by Application .....	223
3	Russia Mining Equipment Supply & Demand ...	226
4	Russia Mining Equipment Demand by Application .....	228
5	Poland Mining Equipment Supply & Demand ..	230
6	Poland Mining Equipment Demand by Application .....	232
7	Ukraine Mining Equipment Supply & Demand .	234
8	Ukraine Mining Equipment Demand by Application .....	235
9	Other Eastern Europe Mining Equipment Supply & Demand .....	238
10	Other Eastern Europe Mining Equipment Demand by Application .....	240

### AFRICA/MIDEAST

1	Africa/Mideast Mining Equipment Supply & Demand .....	244
2	Africa/Mideast Mining Equipment Demand by Application .....	246
3	South Africa Mining Equipment Supply & Demand .....	249
4	South Africa Mining Equipment Demand by Application .....	251
5	Turkey Mining Equipment Supply & Demand ...	253
6	Turkey Mining Equipment Demand by Application .....	255
7	Other Africa/Mideast Mining Equipment Supply & Demand .....	258
8	Other Africa/Mideast Mining Equipment Demand by Application .....	260

### INDUSTRY STRUCTURE

Cht	Global Mining Equipment Market Share, 2006.	264
1	Selected Cooperative Agreements .....	270
2	Selected Acquisitions & Divestitures .....	274

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*Rising prices for mineable commodities such as iron ore and copper, and the ongoing global thirst for coal as a source of energy, will boost global mining equipment demand through 2011.*

## Global mining equipment demand to grow 5.9% annually through 2011

Global demand for specialized mining machinery and equipment (including separately sold parts and attachments) is projected to increase 5.9 percent per year through 2011 to \$33.6 billion. Advances will be fueled by continued demand for mineable commodities such as iron ore and copper, the prices of which have increased significantly in recent years. This has led to intensified efforts to mine metal ores, and thus has generated healthy demand for mining machinery. In addition, the ongoing global thirst for energy will boost global coal output in an era of high oil and gas prices. Demand for industrial minerals (clays, sand and gravel, stone and many others) has benefitted from the general upsurge in commodities markets.

## China, India, developing regions to be leading sources of demand

China has shown strong growth in mining equipment demand, a direct result of investment in its local mining industry. For example, coal output nearly doubled from 2001 to 2006, reflecting the nation's intense need for energy. China is also a major source of commodities such as iron ore and bauxite. Other major Asia/Pacific markets for mining equipment include Australia and India. Like China, India has experienced



major growth in coal output in recent years. Australia, a leading producer of bauxite and iron ore, is a major source of commodities for its developing Asian neighbors.

Demand for mining equipment in Asia is expected to post strong gains, as the region's rising population and industrial output will lead to increased energy and raw material needs. Africa will post healthy gains, benefitting from rising demand for precious metals and copper. Growth in demand for mining equipment in Latin America will reflect increased mining investment in nations like Peru and Chile. Eastern Europe will also post gains, benefitting from gains in the large Russian market.

Growth in North America and Western Europe will lag the industry average, reflecting the maturity of these markets. However, the largest producers of mining equipment are generally found in the United States and the industrialized nations of Western Europe. Such countries have a long history and extensive expertise in the development of capital equipment industries of all types, which many have leveraged in mining machinery. China has quickly emerged as a major producer, due in large part to the nation's growing mining industry. China has become a net exporter of mining equipment, shipping products to both developing nations and mature markets such as the US.

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## Sample Text, Table & Chart

### MARKETS

#### China: Mining Equipment Supply & Demand

In 2006, demand for mining equipment in China totaled 1.2 billion, making the country the largest producer of mining equipment in the world, nearly fivefold between 2001 and 2006. Market demand in the region. Market demand is driven by China's rapid industrialization, which has led to a massive increase in mining. China has large deposits of iron, copper, aluminum, lead, tin, uranium, and other minerals, including precious metals (especially gold and silver).

The influx of external capital, a torrid pace of energy consumption (fostering strong demand for coal), generic growth in mining and development of downstream industries (aluminum, steel), and the fostering of secular expansion of the mining sector, fueling strong demand for related capital inputs like mining equipment. Prior to the late 1990s, growth in China's mining machinery market was relatively slow due to overinvestment in energy production capacity (and the depreciating steel and other metals prices).

China has also emerged as a major manufacturer of mining equipment over the last decade. Industry shipments totaled \$7 billion in 2006, making the country the largest producer in the world. Although China had historically been a net importer of mining equipment, domestic output grew more than sevenfold between 1996 and 2006, and in 2006 the nation had a trade surplus, equivalent to nearly ten percent of total production. Major export markets include the US, Japan and India. However, unlike many other Chinese manufacturing industries -- which tend to be export-driven -- most of the mining equipment made locally is consumed internally, reflecting the country's heavy domestic requirements. China is also a major importer, supplied by its major regional producing counterparts such as Japan and Australia, as well as by the US

134

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SAMPLE  
TEXT

TABLE VI-3

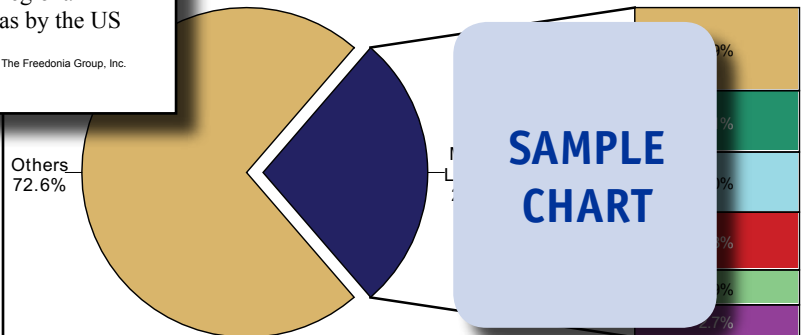
CHINA MINING EQUIPMENT SUPPLY & DEMAND  
(million dollars)

Item	1996	2001	2006	2011	2016
Population (million persons)	1,200	1,275	1,310	1,350	1,392
2005\$ GDP/capita	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2005\$)	1,200	1,913	2,613	3,375	4,180
% GFI	10	12	15	18	20
Gross Fixed Investment (bil 2005\$)	120	230	392	608	836
\$ mining equipment/000\$ GFI	0.8	1.3	2.0	3.0	4.0
Mining Equipment Demand					
Crushing/Pulverizing/Screening:					
Stationary	5	10	15	20	25
Portable	5	10	15	20	25
Underground Mining Machinery	5	10	15	20	25
Drills & Breakers	5	10	15	20	25
Mineral Processing Machinery	5	10	15	20	25
Surface Mining Machinery	5	10	15	20	25
Parts & Attachments	5	10	15	20	25
net exports	0	0	0	0	0
Mining Equipment Shipments	600	1,375	2,613	3,375	4,180

SAMPLE  
TABLE

CHART X-1

CHINA'S MINING EQUIPMENT MARKET SHARE, 2006  
(\$25.2 billion)

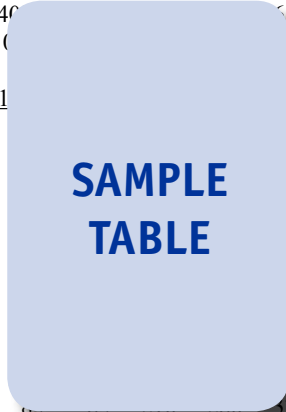


SAMPLE  
CHART

## Sample Profile, Table & Forecast

**TABLE VI-4**  
**CHINA MINING EQUIPMENT DEMAND BY APPLICATION**  
 (million dollars)

Item	1996	2001	2006	2011	2016
Gross Domestic Product (bil 2005\$)	40	50	60	70	80
\$ mining equipment/000\$ GDP	0	0	0	0	0
Mining Equipment Demand	1	1	1	1	1
Metal Mining:					
Copper Ore					
Precious Metal Ores					
Other					
Mineral Mining:					
Stone					
Chemicals & Fertilizer					
Other					
Coal Mining:					
Bituminous & Sub-Bituminous					
Anthracite & Other					



**COMPANY PROFILES**

**Shenyang Heavy Machinery Group Company Limited**  
 Eight Xinghua Bei Street, Tiesi District  
 Shenyang, Liaoning 110025  
 China  
 86-24-2585-5420  
 http://www.china-sz.com

Annual Sales  
 Employment

Key Products: Crushers, mills, excavation machines

Shenyang Heavy Machinery Group Company Limited manufactures 300 types and more than 10,000 units of heavy machinery mainly for the mining, metallurgical, chemical, engineering, construction, environment protection, forestry, manufacturing, excavating and military sectors. The privately held company comprises eleven subsidiaries and joint ventures.

The Company's heavy machinery for the mining industry includes crushers, mills and excavation machines. In particular, Shenyang Heavy Machinery Group's crushers encompass jaw, gyratory, cone, gyradisc, impact, roll and hammer types. Among the mills from the Company are mining ball, rod, autogenous and damp varieties. The Company produces excavation machines for various mining and other excavation activities. These machines include bucket wheel models.

Production operations for Shenyang Heavy Machinery Group are conducted primarily at facilities in Shenyang, Liaoning, China. The Company sells products to customers in 20 Chinese provinces, as well as customers in over 30 countries and regions worldwide.

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"Looking forward, demand for mining equipment in China is forecast to expand at an 8.0 percent annual rate through 2011 to \$9.2 billion, moderating from the 2001-2006 period but still representing the fastest growing market in the world. Product demand will be driven by healthy increases in mining expenditures as industrialization efforts continue. Increases will be ..."

--Section VI, pg. 136

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US drilling product and service demand will reach \$48.4 billion in 2012. Rising oil prices have made more projects profitable, and drilling them often involves higher costs (e.g., horizontal and directional drilling, deepwater fields). Services and fluids will be the fastest growing areas, while the Southern and Western regions lead gains. This study analyzes the US drilling product and service industry, with forecasts for 2012 and 2017 by type and region. It also evaluates market share and profiles major players.  
 #2288 ..... 03/2008..... \$4500

**World Water Treatment Products**

Global demand for water treatment products will grow 6.4% annually through 2011. Advances will be the fastest in the developing world, especially China and India. Gains in more established markets will be driven by technology upgrades such as higher-end membranes in desalination and other uses. This study analyzes the \$29.3 billion world water treatment product industry, with forecasts for 2011 and 2016 by product, market, world region and 20 countries. It also details market share and profiles major players.  
 #2276 ..... 01/2008..... \$5800

**World Construction Machinery**

Global construction machinery demand will rise 6% annually through 2011 based on healthy construction spending. China, India, Mexico and Russia will see some of the fastest gains. Mixers and pavers will be the strongest segment, driven by ongoing infrastructure development in industrializing regions. This study analyzes the \$97.7 billion world construction machinery industry, with forecasts for 2011 and 2016 by product, world region and for 33 countries. It also evaluates market share and profiles major players.  
 #2264 ..... 12/2007..... \$5500

**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

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