



[CLICK TO VIEW](#)

[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](#)

[About Freedonia, Custom Research, Related Studies, Corporate Use License 8](#)

World Mining Equipment

Industry Study with Forecasts for **2013 & 2018**

Study #2562 | November 2009 | \$5900 | 381 pages



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Outlook	5
World Population Outlook	12
World Industrial Outlook	14
Industrial Output Trends	15
Fixed Investment Trends	16
World Mining Outlook	20
Minerals	21
Coal	22
Metals	23
Mining Equipment Pricing Dynamics	25
Mining Equipment Technology Trends	26
Legal & Regulatory Issues	28

OVERVIEW

General	32
World Mining Equipment Markets	33
Regional Markets	33
Applications	36
Metal Mining	37
Coal Mining	39
Mineral Mining	40
Mining Equipment Demand by Product	42
Surface Mining Machinery	43
Underground Mining Machinery	44
Drills & Breakers	46
Crushing, Pulverizing & Screening Equipment	47
Mineral Processing Machinery	48
Parts & Attachments	49
World Mining Equipment Production	51
International Trade Flows	54

NORTH AMERICA

General	56
United States	61
Canada	66
Mexico	71

WESTERN EUROPE

General	77
Germany	82
United Kingdom	87
Spain	92
France	97
Italy	102
Other Western Europe	107
Netherlands	111
Norway	115
Sweden	119
Belgium	123
All Other Western Europe	127

ASIA/PACIFIC

General	132
China	138
Australia	145

India	150
Indonesia	155
Kazakhstan	160
Japan	163
Thailand	168
Malaysia	173
South Korea	177
Taiwan	182
Other Asia/Pacific	187

LATIN AMERICA

General	193
Brazil	198
Chile	203
Argentina	208
Peru	212
Venezuela	216
Colombia	220
Other Latin America	224

EASTERN EUROPE

General	228
Russia	232
Poland	237
Ukraine	242
Other Eastern Europe	246

AFRICA/MIDEAST

General	251
South Africa	256
Turkey	261
Iran	265
Other Africa/Mideast	269

INDUSTRY STRUCTURE

General	274
Industry Composition & Market Share	277
Product Development & Manufacturing	280
Marketing & Distribution	282
Cooperative Agreements	283
Financial Issues & Requirements	291
Mergers, Acquisitions & Industry Restructuring	293

COMPANY PROFILES

Aker Solutions	298
Atlas Copco	300
Boart Longyear	304
Bucyrus International	306
Caterpillar Incorporated	310
China Coal Energy	312
CITIC Group	314
Doosan Infracore	315
Downer EDI	318
Fiat SpA	320
Furukawa Company	324
Gebroeder Eickhoff Maschinenfabrik und Eisengiesserei	326
Hebei Jinma Mine Machinery	327
Ingersoll-Rand plc	328
International Mining Machinery	329
Joy Global	331

Kawasaki Heavy Industries	336
Kennametal Incorporated	338
Komatsu Limited	340
Liebherr-International AG	345
Metso Corporation	348
Mitsubishi Heavy Industries	351
Northern Heavy Industries	353
Outotec Oyj	355
RCR Tomlinson	356
Rowan Companies	357
Sandvik AB	359
Shenyang Heavy Machinery	363
Smidth (FL) & Company	364
Smith International	367
Sumitomo Electric Industries	368
Techint Group	370
Terex Corporation	371
ThyssenKrupp AG	375
Tiandi Science & Technology	377
Wirtgen Group	378
Xuzhou Construction Machinery	380
Zhengzhou Coal Mining Machinery	380

List of Tables/Charts

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region	12
2 World Population by Region	14
3 World Manufacturing Value Added by Region	16
4 World Gross Fixed Investment by Region	18
Cht Relationship Between Mining Equipment Demand per Capita & Gross Fixed Investment per Capita, 2008	19
5 World Mining Output	21
6 World Mining Equipment Pricing	26

OVERVIEW

1 World Mining Equipment Demand by Region	35
Cht World Mining Equipment Demand by Region, 2008	35
2 World Mining Equipment Demand by Application	36
Cht World Mining Equipment Demand by Application, 2008	37
3 World Metal Mining Equipment Demand by Region	39
4 World Coal Mining Equipment Demand by Region	40
5 World Mineral Mining Equipment Demand by Region	41
6 World Mining Equipment Demand by Product	43
7 World Surface Mining Machinery Demand by Region	44
8 World Underground Mining Machinery Demand by Region	45

(continued on following page)

[Click here to purchase online](#)

List of Tables/Charts

(continued from previous page)

9	World Drill & Breaker Demand by Region	47
Cht	World Mining Equipment Shipments by Region, 2008	53
10	World Crushing, Pulverizing & Screening Equipment Demand by Region	48
11	World Mineral Processing Machinery Demand by Region	49
12	World Mining Equipment Parts & Attachments Demand by Region	50
13	World Mining Equipment Shipments by Region ..	53
14	World Mining Equipment Net Exports by Region	55

NORTH AMERICA

1	North America Mining Equipment Supply & Demand	59
2	North America Mining Equipment Demand by Application	61
3	United States Mining Equipment Supply & Demand	64
4	United States Mining Equipment Demand by Application	66
5	Canada Mining Equipment Supply & Demand	69
6	Canada Mining Equipment Demand by Application	71
7	Mexico Mining Equipment Supply & Demand	74
8	Mexico Mining Equipment Demand by Application	76

WESTERN EUROPE

1	Western Europe Mining Equipment Supply & Demand	80
2	Western Europe Mining Equipment Demand by Application	82
3	Germany Mining Equipment Supply & Demand ..	85
4	Germany Mining Equipment Demand by Application	87
5	United Kingdom Mining Equipment Supply & Demand	90
6	United Kingdom Mining Equipment Demand by Application	92
7	Spain Mining Equipment Supply & Demand	95
8	Spain Mining Equipment Demand by Application	97
9	France Mining Equipment Supply & Demand ...	100
10	France Mining Equipment Demand by Application	102
11	Italy Mining Equipment Supply & Demand	105
12	Italy Mining Equipment Demand by Application	107
13	Other Western Europe Mining Equipment Supply & Demand	109
14	Other Western Europe Mining Equipment Demand by Application	110
15	Netherlands Mining Equipment Supply & Demand	113
16	Netherlands Mining Equipment Demand by Application	114
17	Norway Mining Equipment Supply & Demand ..	117
18	Norway Mining Equipment Demand by Application	118
19	Sweden Mining Equipment Supply & Demand .	121

20	Sweden Mining Equipment Demand by Application	122
21	Belgium Mining Equipment Supply & Demand	125
22	Belgium Mining Equipment Demand by Application	126
23	All Other Western Europe Mining Equipment Supply & Demand	129
24	All Other Western Europe Mining Equipment Demand by Application	131

ASIA/PACIFIC

1	Asia/Pacific Mining Equipment Supply & Demand	136
2	Asia/Pacific Mining Equipment Demand by Application	138
3	China Mining Equipment Supply & Demand	142
4	China Mining Equipment Demand by Application	145
5	Australia Mining Equipment Supply & Demand	148
6	Australia Mining Equipment Demand by Application	150
7	India Mining Equipment Supply & Demand	153
8	India Mining Equipment Demand by Application	155
9	Indonesia Mining Equipment Supply & Demand	158
10	Indonesia Mining Equipment Demand by Application	160
11	Kazakhstan Mining Equipment Supply & Demand	162
12	Kazakhstan Mining Equipment Demand by Application	163
13	Japan Mining Equipment Supply & Demand ...	166
14	Japan Mining Equipment Demand by Application	168
15	Thailand Mining Equipment Supply & Demand	171
16	Thailand Mining Equipment Demand by Application	173
17	Malaysia Mining Equipment Supply & Demand	175
18	Malaysia Mining Equipment Demand by Application	177
19	South Korea Mining Equipment Supply & Demand	180
20	South Korea Mining Equipment Demand by Application	182
21	Taiwan Mining Equipment Supply & Demand ..	185
22	Taiwan Mining Equipment Demand by Application	186
23	Other Asia/Pacific Mining Equipment Supply & Demand	190
24	Other Asia/Pacific Mining Equipment Demand by Application	192

LATIN AMERICA

1	Latin America Mining Equipment Supply & Demand	196
2	Latin America Mining Equipment Demand by Application	198
3	Brazil Mining Equipment Supply & Demand	201
4	Brazil Mining Equipment Demand by Application	203
5	Chile Mining Equipment Supply & Demand	206
6	Chile Mining Equipment Demand by Application	208

7	Argentina Mining Equipment Supply & Demand	210
8	Argentina Mining Equipment Demand by Application	212
9	Peru Mining Equipment Supply & Demand	214
10	Peru Mining Equipment Demand by Application	216
11	Venezuela Mining Equipment Supply & Demand	218
12	Venezuela Mining Equipment Demand by Application	220
13	Colombia Mining Equipment Supply & Demand	222
14	Colombia Mining Equipment Demand by Application	223
15	Other Latin America Mining Equipment Supply & Demand	226
16	Other Latin America Mining Equipment Demand by Application	227

EASTERN EUROPE

1	Eastern Europe Mining Equipment Supply & Demand	230
2	Eastern Europe Mining Equipment Demand by Application	232
3	Russia Mining Equipment Supply & Demand ...	235
4	Russia Mining Equipment Demand by Application	237
5	Poland Mining Equipment Supply & Demand ..	240
6	Poland Mining Equipment Demand by Application	241
7	Ukraine Mining Equipment Supply & Demand .	244
8	Ukraine Mining Equipment Demand by Application	245
9	Other Eastern Europe Mining Equipment Supply & Demand	248
10	Other Eastern Europe Mining Equipment Demand by Application	250

AFRICA/MIDEAST

1	Africa/Mideast Mining Equipment Supply & Demand	254
2	Africa/Mideast Mining Equipment Demand by Application	256
3	South Africa Mining Equipment Supply & Demand	259
4	South Africa Mining Equipment Demand by Application	261
5	Turkey Mining Equipment Supply & Demand ..	263
6	Turkey Mining Equipment Demand by Application	264
7	Iran Mining Equipment Supply & Demand	267
8	Iran Mining Equipment Demand by Application	268
9	Other Africa/Mideast Mining Equipment Supply & Demand	271
10	Other Africa/Mideast Mining Equipment Demand by Application	273

INDUSTRY STRUCTURE

1	Mining Equipment Sales for Selected Manufacturers, 2008	276
Cht	Global Mining Equipment Market Share, 2008.	277
2	Selected Cooperative Agreements	286
3	Selected Acquisitions & Divestitures	295

[Click here to purchase online](#)

A recovery is expected in the mining industry due to rising demand for commodities such as iron ore and copper, as well as to the ongoing thirst for energy sources such as coal.

Global demand to increase 4.9% yearly through 2013

Global demand for mining equipment (including separately sold parts and attachments) is projected to increase 4.9 percent per year through 2013 to \$58 billion. Despite a sluggish outlook in the shorter term, recovery is expected in the mining industry due to rising demand for commodities such as iron ore and copper. In addition, the ongoing thirst for energy will boost global coal output. China and India will be leading sources of mining equipment demand. However, just as importantly, these nations will continue to fuel demand for mined products throughout the world, stimulating mining equipment demand in other countries as well. Prices for mineable commodities increased significantly during the 2003-2008 period, leading to intensified efforts to mine materials and subsequent demand for mining machinery. Commodity prices dropped during the 2008-2009 world macroeconomic slowdown, but recovery is expected by 2013.

China to be primary driver of demand gains

China has shown strong growth in mining equipment demand, a direct result of investment in its local mining industry. For example, coal output more than doubled from 1998 to 2008, 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 region markets

World Mining Equipment Demand by Region, 2008 (\$45.4 billion)



for mining equipment include India and Australia. 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.

China will be the primary driver of demand gains, accounting for one-half of new mining equipment demand through 2013. Other developing nations in Asia, the Africa/Mideast region and Latin America which have extensive mineable resources are projected to exhibit solid growth in mining equipment demand, with the mature markets of Western Europe and North America trailing. However, these regions are home to

some fairly notable global mining powers, including the US and Canada in North America, each with an abundance of natural resources; and Germany, which is a major source of coal, in Western Europe.

China has quickly emerged as the world's leading producer of mining equipment, due in large part to the nation's growing mining industry. The other leading producers of mining equipment are 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 equipment.

Copyright 2009 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

AFRICA/MIDEAST

South Africa: Outlook & Suppliers

Demand for mining equipment in South Africa is projected to increase 2.2 percent per year through 2013 to \$1.2 billion, below the 2008 level of \$1.1 billion. The recent historical forecast shows a sluggish outlook for mining equipment investment in the country, which will result from a combination of factors.

SAMPLE TEXT

South African factors such as the advance 5.2 percent per year through 2013 to \$890 million, for domestic demand but still resulting in a widening of the current account deficit in these products.

Prior to June 2009, Boart Longyear was involved in the African mining equipment industry via production sites in Claremont and Roodepoort. The Chamdor plant made underground drilling and other items, while the Roodepoort site manufactured coring and cutting tools. In May 2008, the company sold the Chamdor local product line to the Nedbank Capital group of Nedbank Group Limited. In June 2009, Boart Longyear sold the Roodepoort plant and its product line to the Tranter Energy and Mining Services subsidiary of Tranter Holdings.

Not surprisingly, many of the world's other major mining equipment multinationals are well represented in South Africa, many through production and related operations. Among the major companies with manufacturing capacity in the country are Atlas Copco, Bucyrus, Caterpillar, Downer EDI, FLSmidth, Joy Global, Metso Minerals and Sandvik. Numerous other multinationals are represented through sales/distribution/servicing operations.

260

Copyright 2009 The Freedonia Group, Inc.

TABLE IX-3

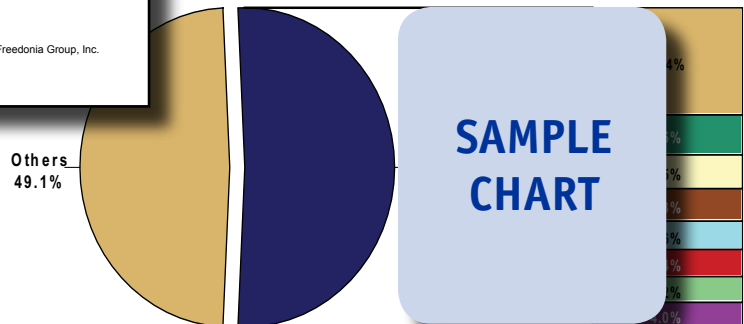
SOUTH AFRICA MINING EQUIPMENT SUPPLY & DEMAND (million dollars)

Item	1998	2003	2008	2013	2018
Population (million persons)	42.1	44.1	46.5	48.9	50.0
2007\$ GDP/capita	1,000	1,000	1,000	1,000	1,000
Gross Domestic Product (bil 2007\$)	42,100	44,100	46,500	48,900	50,000
% GFI	10.0	10.0	10.0	10.0	10.0
Gross Fixed Investment (bil 2007\$)	4,210	4,410	4,650	4,890	5,000
\$ mining equipment/000\$ GFI	2.4	2.4	2.4	2.4	2.4
Mining Equipment Demand					
Surface Mining Machinery	1,000	1,000	1,000	1,000	1,000
Underground Mining Machinery	1,000	1,000	1,000	1,000	1,000
Drills & Breakers	1,000	1,000	1,000	1,000	1,000
Crushing/Pulverizing/Screening:					
Stationary	1,000	1,000	1,000	1,000	1,000
Portable	1,000	1,000	1,000	1,000	1,000
Mineral Processing Machinery	1,000	1,000	1,000	1,000	1,000
Parts & Attachments	1,000	1,000	1,000	1,000	1,000
net exports	1,000	1,000	1,000	1,000	1,000
Mining Equipment Shipments	519	580	690	890	1150

SAMPLE TABLE

CHART X-1

MINING EQUIPMENT MARKET SHARE, 2008 (\$45.4 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IX-4
SOUTH AFRICA
MINING EQUIPMENT DEMAND BY APPLICATION
 (million dollars)

Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil 2007\$)					5
\$ mining equipment/000\$ GDP					3
Mining Equipment Demand					0
Metal Mining					5
Coal Mining					5
Mineral Mining					0



COMPANY PROFILES

RCR Tomlinson Limited
 239 Planet Street
 Welshpool, Western Australia 6106
 Australia
 61-8-93...
 http://w...

SAMPLE PROFILE

Sales: .../Pacific region 100%
 Geogra...
 Employ...
 Key Pr... mobile crushing and
 screeni... or crushers

RCR Tomlinson designs and manufactures heavy equipment and industrial boilers. It also offers on-site electrical and mechanical maintenance. RCR Tomlinson operates through four segments: RCR Engineering, RCR Energy Systems and Industrial Services, RCR Construction and Maintenance, and RCR Positron Electrical Services.

The Company is active in the world mining equipment industry through the RCR Engineering segment, which generated FY 2009 revenues of US\$152 million, including eliminations. Via this segment, RCR Tomlinson manufactures materials handling products, and mobile crushing and screening plants, among other items. Among the Company's materials handling products are feeders and conveyors. Feeders, which are offered in apron and belt models, feature stainless steel piped lubrication systems and hydraulic take-up systems. Conveyors from RCR Tomlinson are stacking types for mobile and fixed plant applications. These conveyors have hydraulic feed out and retract systems. The Company's mobile crushing plants are track-mounted varieties that are made in jaw, cone and impactor configurations. Mobile screening plants, which are marketed under the ROCKSCREEN brand name, are

356 Copyright 2009 The Freedonia Group, Inc.

"South Africa comprised a \$1.7 billion market for mining equipment in 2008, largest by far in the Africa/Mideast region and sixth largest in the world. This is hardly surprising, as South Africa is among the world's major global mining powers, as attested to by the list of mineable natural resources the country contains. In addition, unlike many developing countries, South Africa's economy is advanced enough to afford relatively high-ticket productivity-enhancing capital inputs where needed."
 --Section IX, pg. 257

OTHER STUDIES

World Construction Machinery

Global demand for construction machinery is projected to increase 5.3% annually through 2013. The developing Asia market, including India, China, Indonesia and South Korea, will see the most rapid growth. Mixers, pavers and related equipment will be the fastest growing product segment. This study analyzes the \$108 billion world construction machinery industry, with forecasts for 2013 and 2018 by product, market, world region and for 23 countries. It also evaluates company market share and profiles industry players.

#2543 09/2009..... \$5700

World Elevators

Global elevator and related product demand will rise 4.3% annually through 2013. China will account for nearly half of all new demand, mainly for equipment, while Western Europe remains the largest market for services. Equipment will outpace services, with escalators and moving walkways growing the fastest. This study analyzes the \$63.7 billion world elevator industry, with forecasts for 2013 and 2018 by product, service, market, world region and for 16 countries. It also evaluates market share and profiles industry players.

#2539 08/2009..... \$5800

Agricultural Equipment in China

Demand for agricultural equipment in China is projected to grow 6.8% yearly through 2012. Gains will be driven by ongoing farm mechanization efforts as rural incomes rise and labor is lost to urban migration. Tractors and harvesting machines will remain key segments while parts and attachments grow the fastest. This study analyzes the 85 billion yuan agricultural equipment industry in China, with forecasts for 2012 and 2017 by product and regional market. It also evaluates market share and profiles industry players.

#2475 06/2009..... \$5200

World Oilfield Equipment

Global oilfield equipment demand will reach \$85 billion by 2012, as growth accelerates from a slowdown in 2009. The best opportunities exist in Brazil, China and Kazakhstan, as well as in the offshore regions of Western Africa. Fixed-cutter drill bits and advanced well logging equipment will grow the fastest. This study analyzes the world oilfield equipment industry, with forecasts for 2012 and 2017 by product, world region and for 23 countries. It also evaluates market share and profiles industry players.

#2431 12/2008..... \$5600

World Material Handling Products

Global demand for material handling products will grow 5% annually through 2012, with the strongest gains in rapidly developing areas such as China and India. Growth in the nondurable goods sector will outpace the larger durable goods manufacturers market. Advanced/automated products will grow the fastest. This study analyzes the \$104.6 billion world material handling product industry, with forecasts for 2012 and 2017 by type, market, world region and 37 countries. It also evaluates market share and profiles industry players.

#2392 09/2008..... \$5700

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)