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World Mining Equipment

Industry Study with Forecasts for **2015 & 2020**

Study #2840 | January 2012 | \$6200 | 513 pages

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Demand will be stimulated by a pickup in mining output growth in a favorable economic climate, and by historically high commodity prices spurring resource exploration and development.

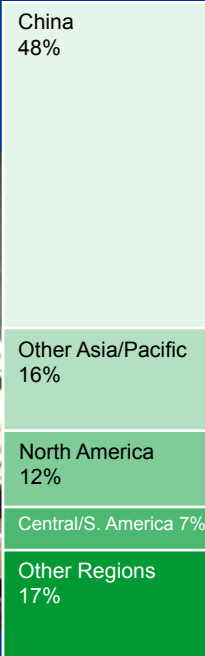
World demand to rise 8.5% annually through 2015

The world market for mining equipment is projected to climb 8.5 percent annually through 2015 to \$92 billion. Demand will be stimulated by a pickup in mining output growth as global manufacturing activity and construction expenditures accelerate in a generally favorable economic climate. Commodity prices are also expected to remain high by historical standards, contributing to a rise in resource exploration and development activity, and associated mining machinery sales.

Key metals mining segment to lead gains

The market for mining machinery used in metals mining operations, which account for the largest share of world sales, is projected to expand at the strongest pace through 2015, driven by price-driven increases in resource exploration and mine development activity. Coal mining equipment demand is expected to climb nearly as fast, stimulated by an acceleration in primary metals manufacturing growth, bolstering industrial furnace and oven coal use, as well as by a pickup in global economic activity and additional population gains, leading to higher demand for coal utilized in heating and electricity generating applications. The world market for nonmetallic minerals mining machinery will rise at a somewhat slower rate, stimulated by increases in construction expenditures and ongoing population

World Mining Equipment Demand (\$92 billion, 2015)



growth, boosting farming activity and consumption of fertilizer minerals like phosphate rock and potash.

Asia/Pacific region to be fastest growing market

In a continuation of recent trends, the Asia/Pacific region is forecast to register the strongest market advances through 2015, fueled by robust increases in mine production and related machinery sales in China, India and Indonesia. China alone will account for 57 percent of all new mining equipment demand between 2010 and 2015, even though growth is expected to slow significantly. Central and South America will post the second fastest gains, supported by a pickup in

manufacturing and construction activity, leading to higher demand for mined materials. The Africa/Mideast region will record the next strongest market advances, followed by North America, Eastern Europe and Western Europe. Mining output and associated machinery sales in all of these regions will be spurred by high commodity prices and generally healthy economic growth. In addition, equipment suppliers will benefit from the implementation of Tier 4 emissions standards in the US and Canada and the adoption of Stage IIIB and Stage IV emissions standards in the European Union, raising average product prices and contributing to overall dollar demand.

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Sample Text, Table & Chart

CENTRAL & SOUTH AMERICA

Brazil: Mining Equipment Outlook & Suppliers

Mining equipment sales in Brazil are forecast to climb 7.5 percent per year through 2015 to \$3.0 billion, not as strong as 2011 market performance but outpacing product demand in most of Central and South America. Suppliers will benefit from a 2012 increase in metals mining output, spurred by high commodity prices and an acceleration in durables manufacturing activity. In September 2011, for example, AngloGold Ashanti reported that it plans to increase Brazilian output of gold by two-thirds by 2016, and ArcelorMittal announced plans to double production at its Andrade iron ore mine in 2012. However, construction expenditures growth in the nation is expected to moderate, constraining sales of machinery used in mining and gypsum mining operations.

Brazil's shipments of mining equipment are projected to reach \$1.4 billion, trailing 2011's \$1.5 billion, as mining machinery sales are expected to decline as investment in local production is restricted. For instance, the production of an excavator by Hyundai Heavy Industries is building an excavator and loader manufacturing facility in Rio de Janeiro that is scheduled to go on line by the end of 2012. Industry output gains will be restricted to some degree by competition from foreign equipment suppliers, resulting in an expansion of the country's trade deficit in these products.

Representative Brazilian manufacturers of mining machinery include Air Service Indústria e Comércio, MGM Mecânica Máquinas and Simplex Equipamentos. Among the foreign manufacturers with mining equipment factories in the nation are BEML, the CNH Global subsidiary of Fiat Industrial, Joy Global, Komatsu

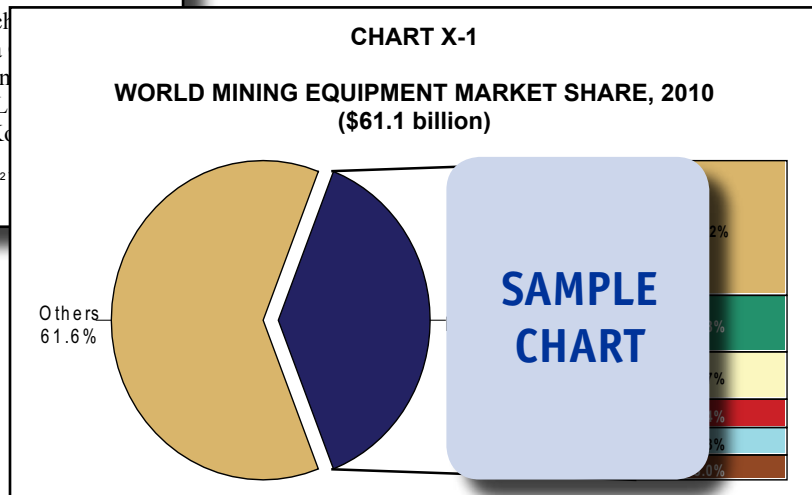
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TABLE VII-3 BRAZIL - MINING EQUIPMENT SUPPLY & DEMAND (million dollars)					
Item	2000	2005	2010	2015	2020
Gross Domestic Product (bil 2009\$)	100	100	100	100	100
% GFI	10	10	10	10	10
Gross Fixed Investment (bil 2009\$)	10	10	10	10	10
Mining Output (mil metric tons)	10	10	10	10	10
\$ equipment/mil \$ GDP	10	10	10	10	10
\$ equipment/000\$ GFI	10	10	10	10	10
\$ equipment/m ton mining output	10	10	10	10	10
Mining Equipment Demand					
Surface Mining Machinery					
Underground Mining Machinery					
Drills & Breakers					
Crushing/Pulverizing/Screening Eq					
Stationary					
Portable					
Mineral Processing Machinery					
Parts & Attachments					
net exports					
Mining Equipment Shipments					
% Brazil					
C&S America Mining Eqp Shipments					

SAMPLE
TABLE

SAMPLE
TEXT



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VII-4
BRAZIL - MINING EQUIPMENT DEMAND BY MARKET
 (million dollars)

Item	2000	2005	2010	2015	2020
Mining Output (mil metric tons)					
\$ equipment/m ton mining output					
Mining Equipment Demand					
Metals Mining:					
Iron Ore					
Copper					
Bauxite					
Other					
Minerals Mining:					
Aggregates					
Phosphate Rock & Potash					
Other					
Coal Mining:					
Bituminous & Sub-Bituminous					
Anthracite & Other					
% Brazil					
C&S America Mining Equip Demand	2210	3030	4700	6330	8890

**SAMPLE
PROFILE**

**SAMPLE
TABLE**

COMPANY PROFILES

Belarusian Autoworks OJSC

40 let Oktyabrya Street 4
 Zhodino 222160
 Belarus
 375-177
<http://www.belarusianautoworks.com>

Annual Sales
 Employees

Key Products: underground trucks and wheel dozers

Belarusian Autoworks, or BELAZ, is a manufacturer of dump trucks and other heavy vehicles for use in mining and construction applications. The Company is privately held.

The Company participates in the world mining equipment industry through the manufacture of dump trucks, wheel loaders, underground trucks and wheel dozers. These products are sold mainly under the BELAZ and MOAZ brand names.

BELAZ's dump trucks are designed for the transportation of loosened rocks on technological haul roads at open-pit mining sites under different climatic conditions. These dump trucks feature payload capacities of up to 360 metric tons. Among the Company's wheel loaders is the MOAZ 4048 model, which has a hydromechanical transmission and a 60-metric-ton payload capacity. BELAZ's underground trucks include the MOAZ 7529 variety that is used for the transportation of rocks and minerals in underground openings, tunnels and other applications. A representative wheel dozer available from the Company is the BELAZ 7823 type that has a 4-meter-wide blade and an operating weight of 50,000 kilograms.

"Brazil is also an important manufacturer of mining equipment. In 2010, machinery shipments were \$1.8 billion, accounting for 78 percent of the Central and South American industry total. Among the better-represented products in the country's output mix are crushing and grinding equipment, excavators, loaders, and parts and attachments. Nevertheless, Brazil is a net import of mining machinery, running a trade deficit equivalent to 16 percent of 2010 domestic demand."
 --Section VII, pg. 215-6

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OTHER STUDIES

World Tractors

World demand for tractors will rise 6.8 percent annually through 2016 to \$122 billion. Gains in the Asia/Pacific region will be more than twice that of any other region, with China alone claiming nearly one-third of the global total. Agricultural tractors will remain the largest segment, followed by tractors for construction and mining applications. This study analyzes the \$88 billion world tractor industry, with forecasts for 2016 and 2021 by market, product, world region and for 23 countries. The study also evaluates company market share and profiles industry participants.

#2984 February 2013 \$6300

World Material Handling Products

Global demand for material handling products is forecast to climb 4.0 percent annually through 2016 to \$123.6 billion. Opportunities will be best for sales of advanced equipment such as automated conveyors and automated guided vehicles. Among national markets, India and China will see the fastest gains. This study analyzes the \$101.4 billion global material handling product industry, with forecasts for 2016 and 2021 by product, market, world region and for 24 major countries. This study also evaluates company market share and profiles industry participants.

#2919 August 2012 \$6300

Construction Machinery in China

Demand for construction machinery in China is expected to rise 6.2 percent annually to 387 billion yuan in 2015. Cranes and excavators -- the dominant segment -- will be the fastest growing type, along with mixers and related equipment. The Central-East region will remain the largest market, while the North-west region will grow the fastest. This study analyzes the 287 billion yuan construction machinery industry in China, with forecasts for 2015 and 2020 by product and region. The study also evaluates company market share and profiles industry participants.

#2855 May 2012 \$5400

World Abrasives

Global abrasives demand will rise 6.3 percent annually to \$44.8 billion in 2015. The fastest gains will be seen in China and India, while gains in North America and Western Europe will be much improved over the 2005-2010 period. Loose grains and powders will be the fastest growing products in the key nonmetallic abrasives segment. This study analyzes the \$33 billion world abrasives industry, with forecasts for 2015 and 2020 by product, market, raw material, world region and for 23 countries. The study also evaluates company market share and profiles industry players.

#2837 February 2012 \$6100

World Elevators

Global elevator and escalator equipment and services demand is forecast to rise 6.4 percent yearly through 2015 to \$90 billion. China will solidify its spot as the largest elevator market and remain the top escalator market. The best prospects exist for energy-efficient elevators, in-home elevators and machine room-less (MRL) elevators. This study analyzes the \$66 billion world elevator industry, with forecasts for 2015 and 2020 by product, service, market, world region and for 16 countries. The study also evaluates company market share and profiles industry players.

#2832 January 2012 \$5900

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