

CECE Economic Forum

17 October 2014, 9.30 am to 1pm
Crowne Plaza, Antwerp



CECE Congress 2014 - 15, 16, 17 October - Antwerp, Belgium



The Changing Structure of The Global Construction Equipment Industry Speaker David Phillips, MD Off-Highway Research



CECE CONGRESS 2014
Antwerp, Belgium



The Changing Structure of The Global Construction Equipment Industry



The Construction Equipment
Industry in an AGILE world

Economic Forum
Antwerp

17th October 2014

CECE
COMMITTEE FOR EUROPEAN
CONSTRUCTION EQUIPMENT



Products Included in This Presentation

- Articulated Dump Trucks
- Asphalt Finishers
- Backhoe Loaders
- Crawler Dozers
- Crawler Excavators
- Crawler Loaders
- Mini Excavators
- Motor Graders
- Motor Scrapers
- Rigid Dump Trucks
- RTLTs – Masted
- RTLTs – Telescopic
- Skid-Steer Loaders
- Wheeled Excavators
- Wheeled Loaders



Global Overview

- Global Equipment Sales:

➡ 2007: \$98 billion

➡ 2009: \$55 billion

➡ 2010: \$77 billion

➡ 2011: \$106 billion

➡ 2012: \$101 billion

➡ 2013: \$94 billion

➡ 2014*: \$92 billion

➡ 2015*: \$97 billion

➡ 2018*: \$104 billion

SALES (\$ BILLION)

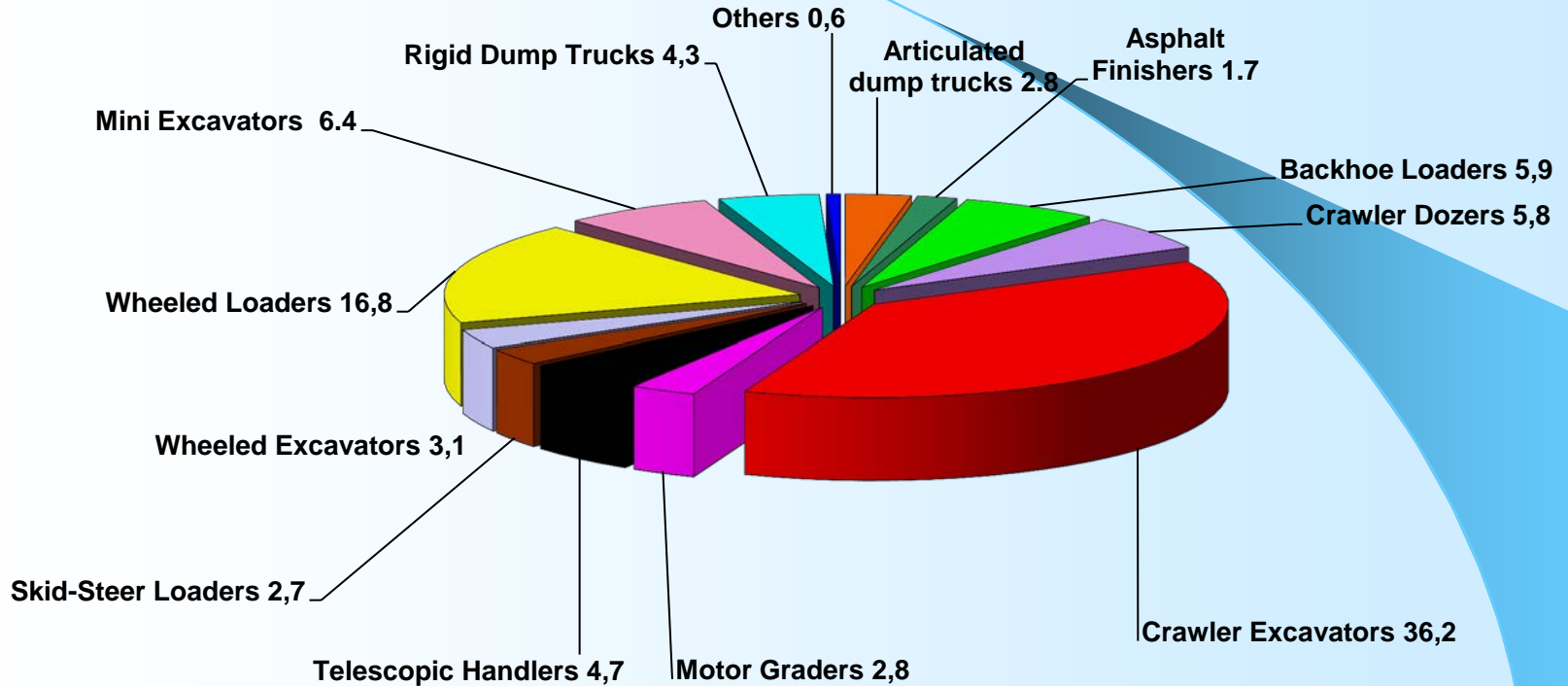
	<u>2007</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014*</u>	<u>2015*</u>	<u>2018*</u>
China	\$11	\$35	\$24	\$22	\$19	\$20	\$22
North America	\$28	\$21	\$25	\$26	\$29	\$31	\$32
Europe	\$20	\$12	\$12	\$12	\$13	\$14	\$14
India	\$2	\$3	\$2	\$2	\$2	\$2	\$4
Japan	\$5	\$3	\$4	\$6	\$5	\$5	\$4
Rest of World	\$32	\$32	\$29	\$30	\$24	\$25	\$28
TOTAL WORLD	\$98	\$106	\$101	\$94	\$92	\$97	\$104

*Forecast

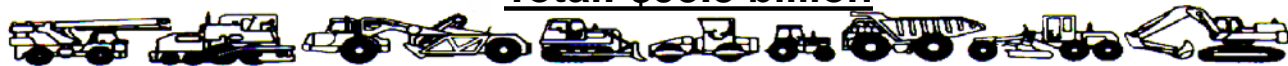


Global Value of Construction Equipment, by Type 2013

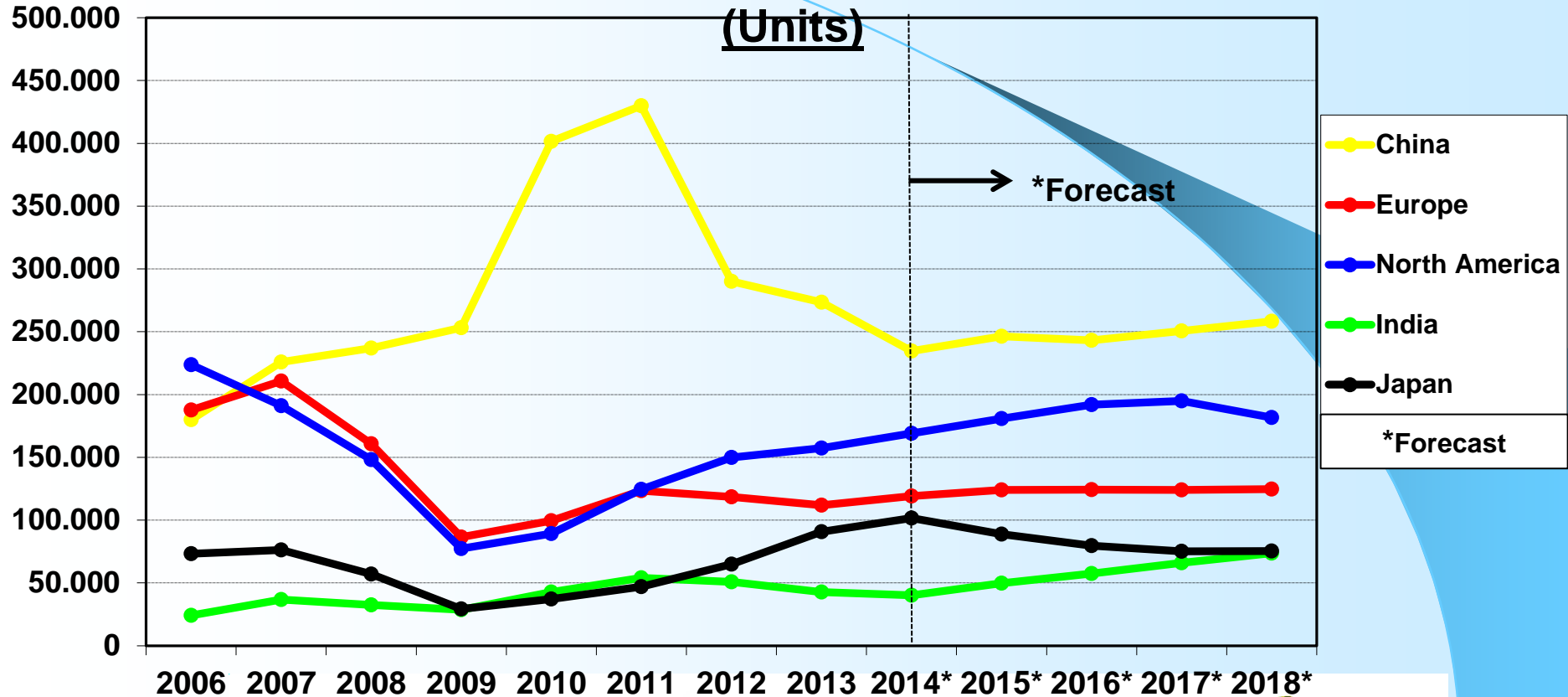
(\$ Billion)



Total: \$93.8 billion



Key Sales Trends, by Region, 2006-2018*

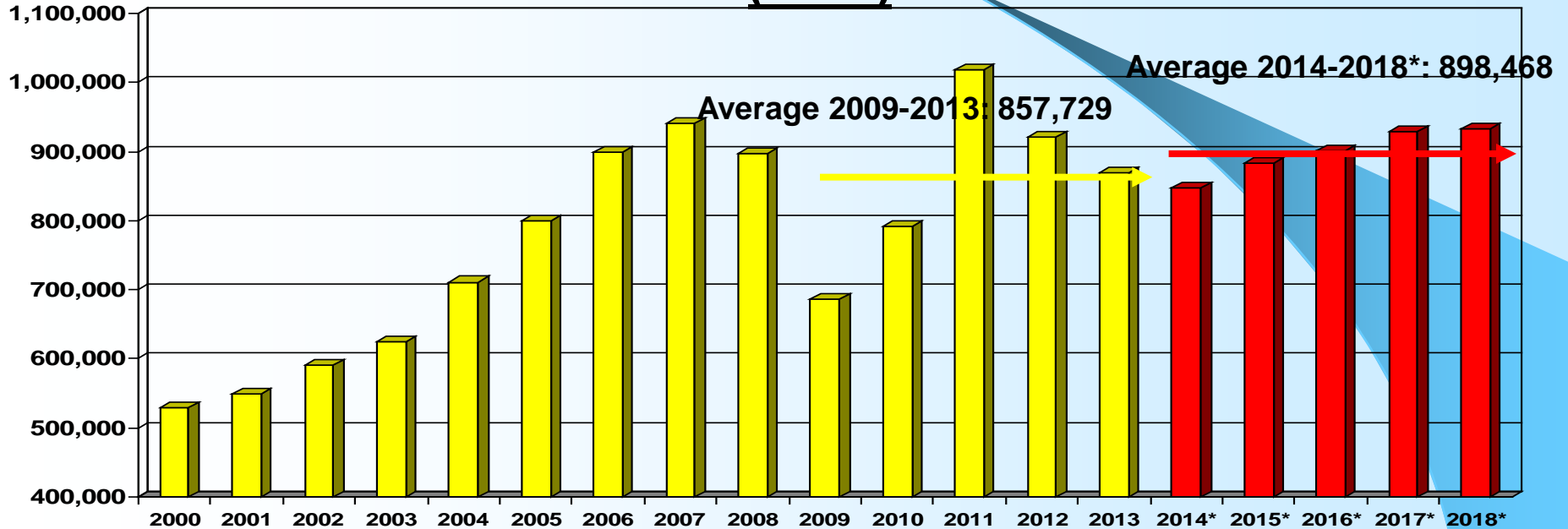




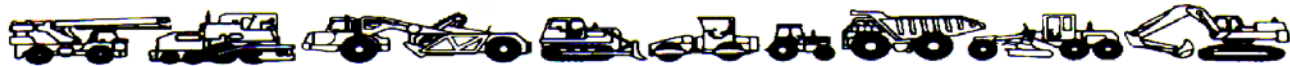
Global Recovery: Slow, and Governments' Help Will be Needed



Global Sales of Construction Equipment 2000 – 2018* (Units)

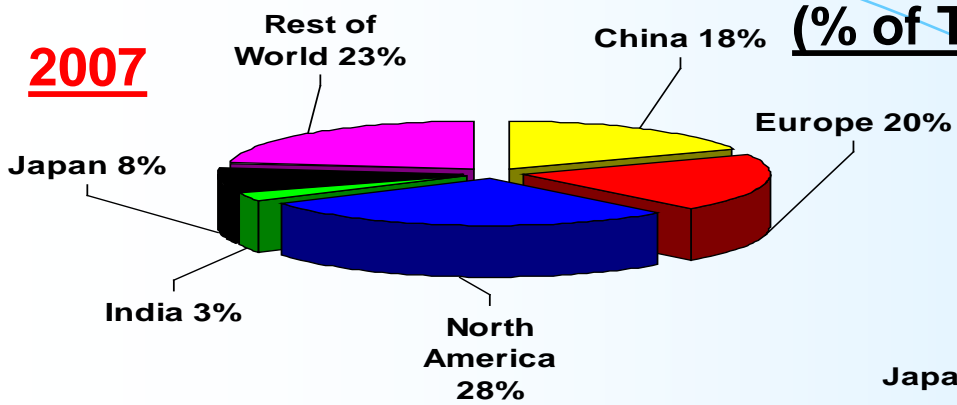


*Forecast

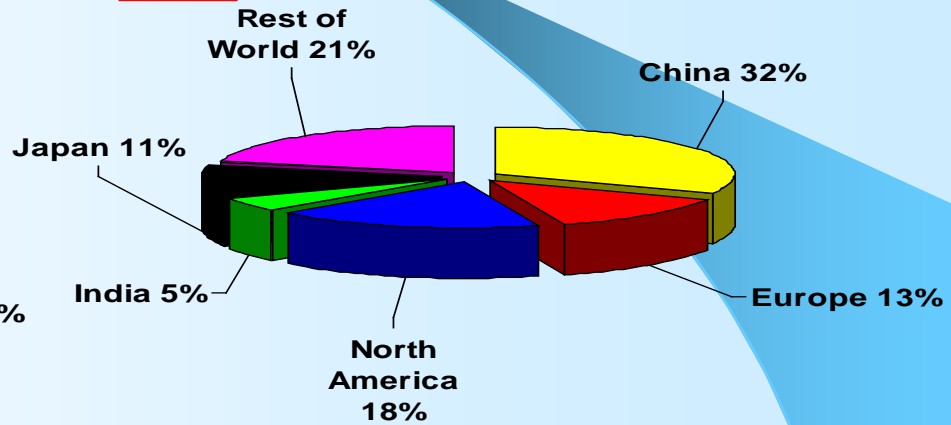


Changing Structure of Demand, 2007-2018*

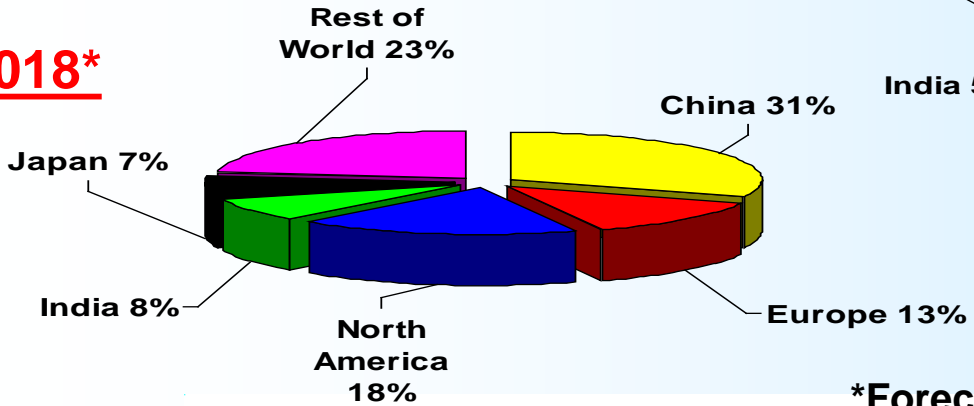
2007



2013



2018*



*Forecast



Global Summary



Still A Most Uncertain Future



Off-Highway Research

THANK YOU!



Please do not hesitate to contact the team for help at:

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A handwritten signature in black ink on a white background, appearing to read 'David Phillips'.

DAVID C A PHILLIPS

Managing Director

