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# Indonesia Construction Equipment Industry Outlook to 2017

- Hydraulic Excavators and  
Earthmoving Equipments Gaining  
Traction

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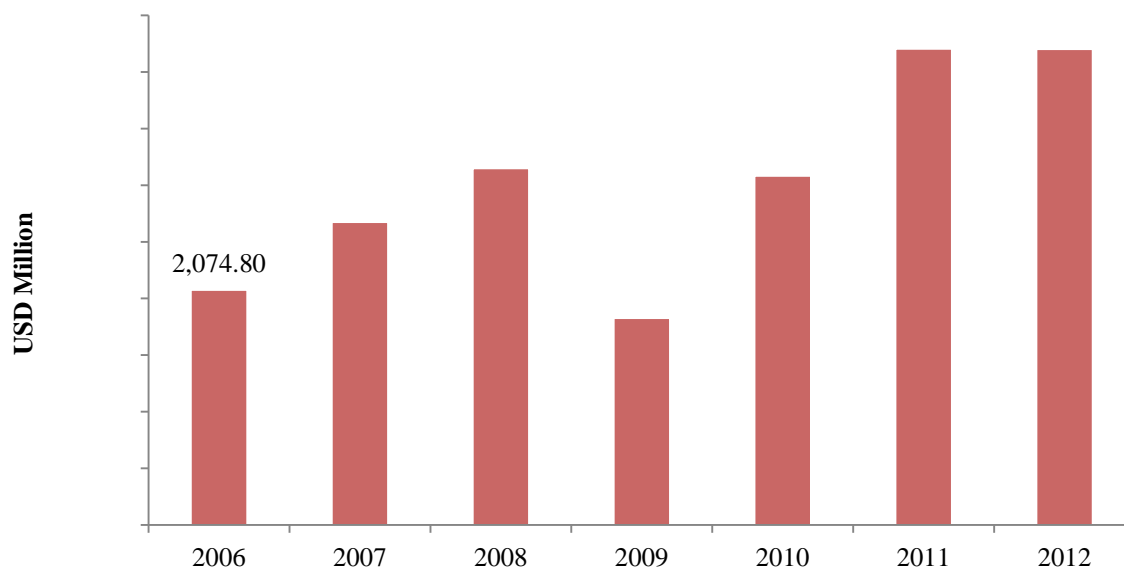
# INDONESIA CONSTRUCTION EQUIPMENT MARKET SIZE

## BY REVENUES, 2006-2012

The construction equipment industry in Indonesia registered revenues of USD ~ million in 2012, declining from USD ~ in 2011. The revenues of 2012 were largely impacted by slumping demand for mining equipments in the country. However, except for the mining equipment segment, all the other segments including earthmoving and tunneling equipments, road construction equipments, building construction equipments and others witnessed a healthy growth during 2012...

...During the period of 2006-2012, the Indonesia construction equipment market grew at the CAGR of ~%.

**Figure: Indonesia Construction Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012**



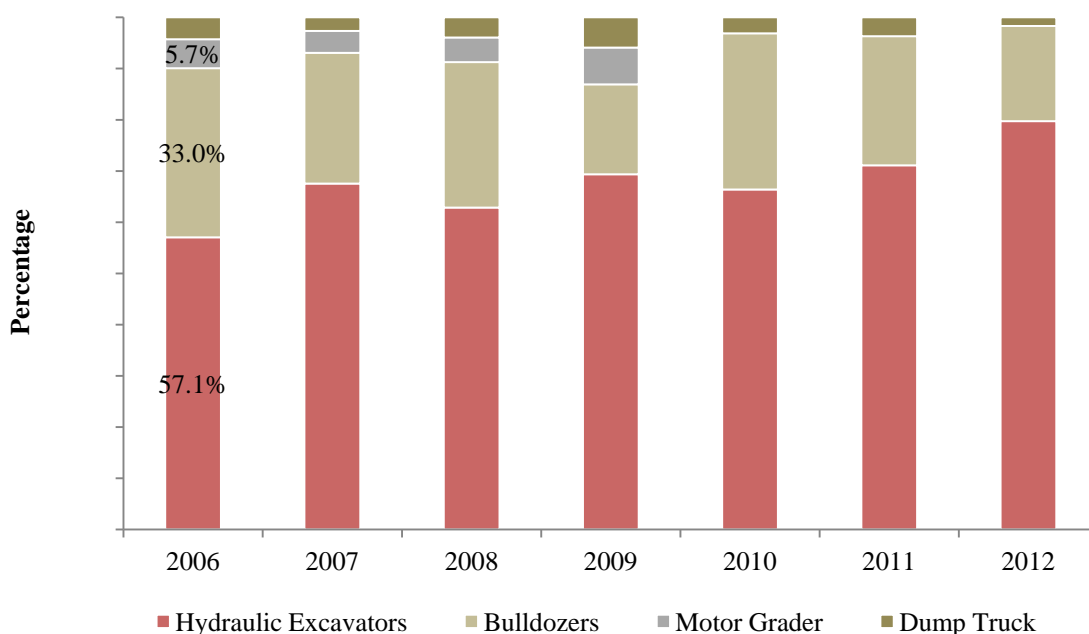
## INDONESIA CONSTRUCTION EQUIPMENT MARKET SEGMENTATION, 2006-2012

### BY PRODUCTION OF DIFFERENT EQUIPMENTS, 2006-2012

The Indonesia construction equipment has been broadly bifurcated into four broad categories on the basis of types of heavy equipments produced in the country. Hydraulic excavators have been the dominant segment of the Indonesia construction equipment market during 2006-2012. Hydraulic excavators are equipped with a bucket shaped box which is used for collecting the clustered material such as sand, gravels and others...

...In 2012, these trucks accounted for ~% of the overall construction equipment production in Indonesia. The increasing usage of hydraulic excavators in the place of dump trucks has resulted in reducing the market share of dump trucks in Indonesia.

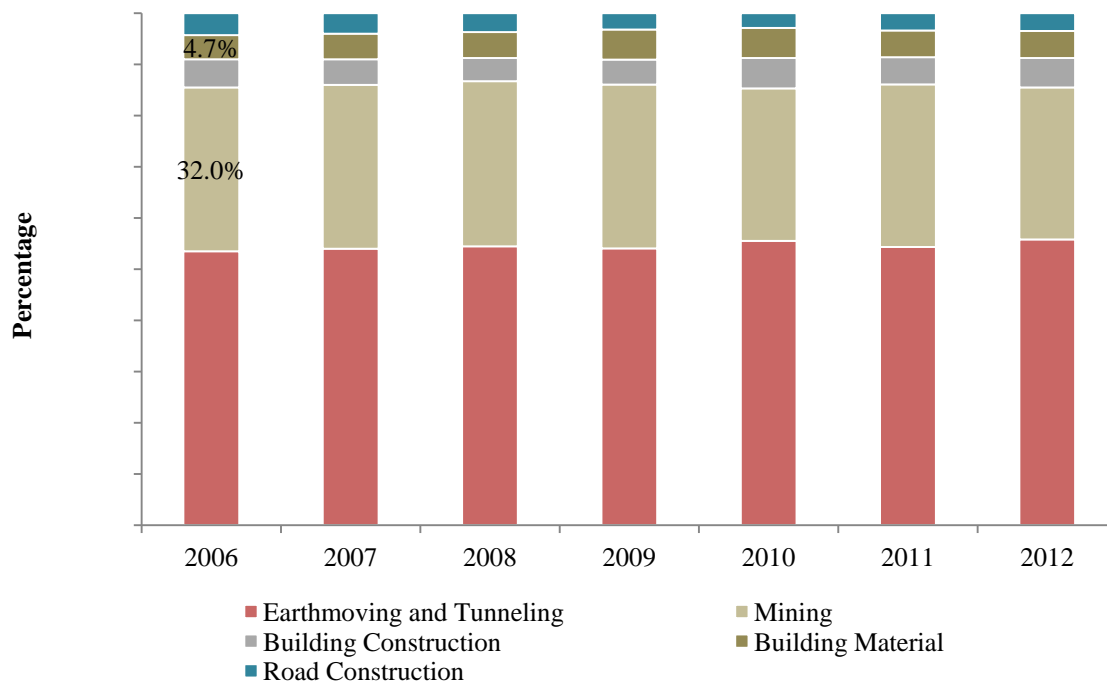
**Figure: Indonesia Construction Equipment Market Segmentation on the Basis of Volume of Different Types of Construction Equipments Produced in Percentage, 2006-2012**



## BY REVENUES FROM DIFFERENT EQUIPMENTS, 2006-2012

The construction equipment market clocked revenues worth USD ~ million in 2012. The construction equipment market earns its proceeds from five broad segments, including earthmoving and tunneling equipments, mining equipments, building construction equipments, road construction equipments and building material equipments. During the period of 2006-2012, the earthmoving and tunneling equipments have been remained as the predominant segment of construction equipment industry...

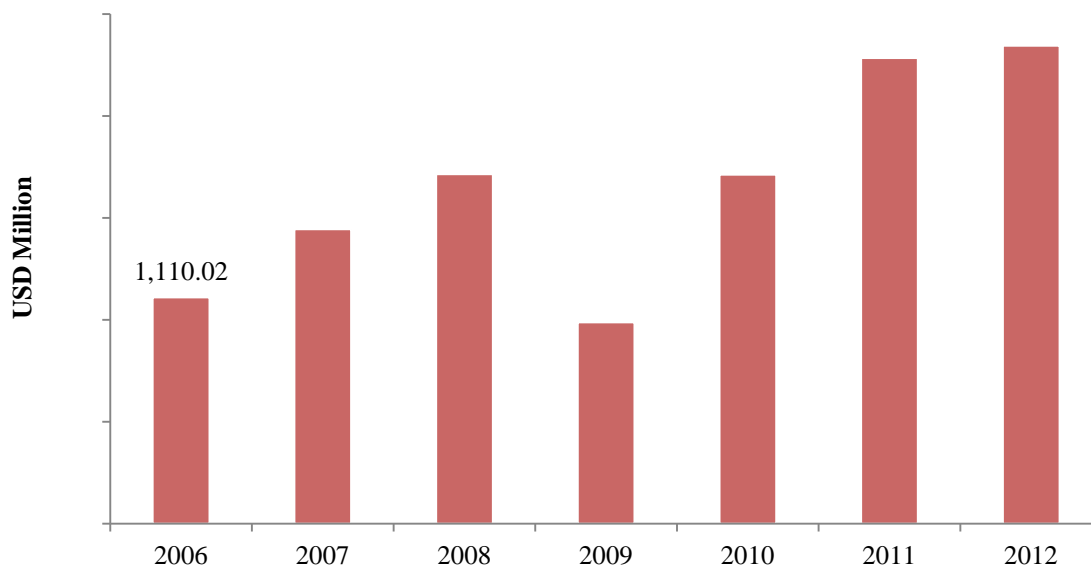
**Figure: Indonesia Construction Equipment Market Segmentation on the Basis of Revenues from Different Types of Construction Equipments in Percentage, 2006-2012**



## INDONESIA EARTHMOVING AND TUNNELING EQUIPMENT MARKET INTRODUCTION AND SIZE, 2006-2012

Earthmoving equipments are primarily used for moving and handling construction materials above and below the ground. These types of equipments have long been used for the extraction of minerals and natural resources apart from the improvement of infrastructure for building and logistics maintenance. Equipments such as excavators, dumper trucks, bulldozers, loaders, construction trucks are amongst the chief equipments in earthmoving category...

**Figure: Indonesia Earthmoving and Tunneling Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012**

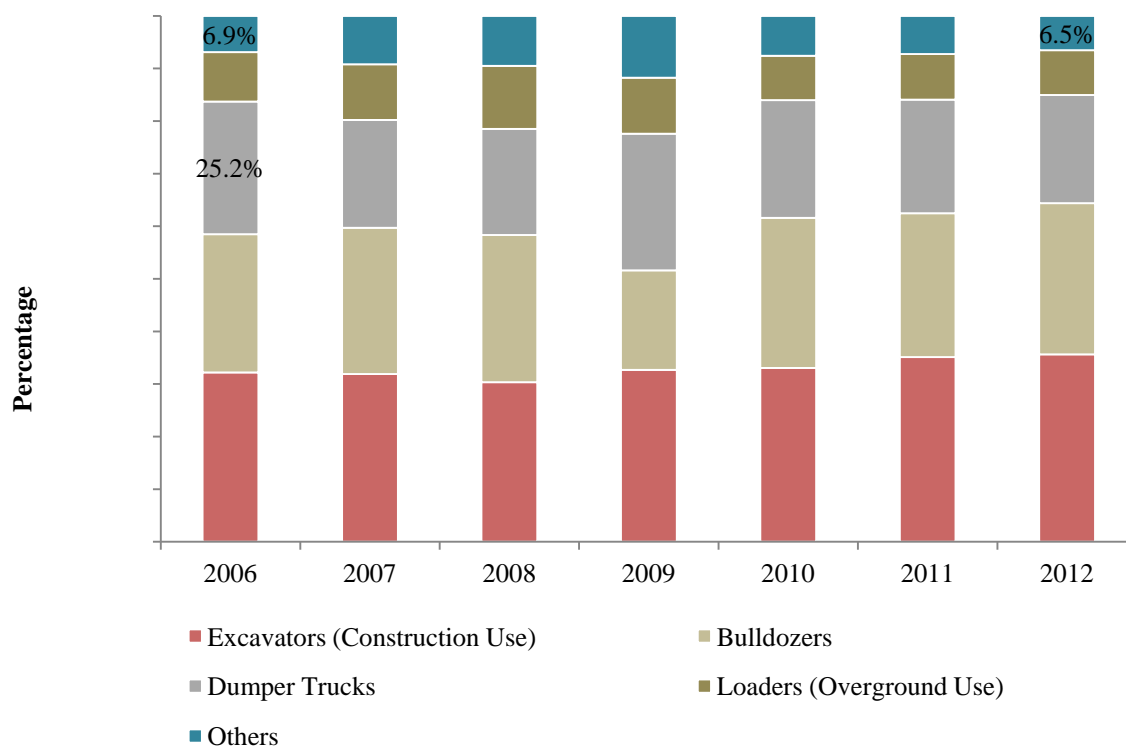


## INDONESIA EARTHMOVING EQUIPMENT MARKET SEGMENTATION, 2006-2012

On the basis of different functionalities exhibited by the equipments, the earthmoving equipments are majorly of five types. The dominating segment in the earthmoving equipments in terms of revenues has been that of excavators...

...Other earthmoving equipment encompasses equipments such as graders and levellers, construction trucks and scrapers. These equipments contributed 6.5% to the overall earthmoving equipment market in 2012, declining from ~% in 2011. The growing rate of technologically advanced equipments such as hydraulic excavators, articulated dumper trucks and track loaders has impacted the revenues of these equipments.

**Figure: Indonesia Earthmoving Equipment Market Segmentation on the Basis of Revenues by Types of Equipments in Percentage, 2006-2012**

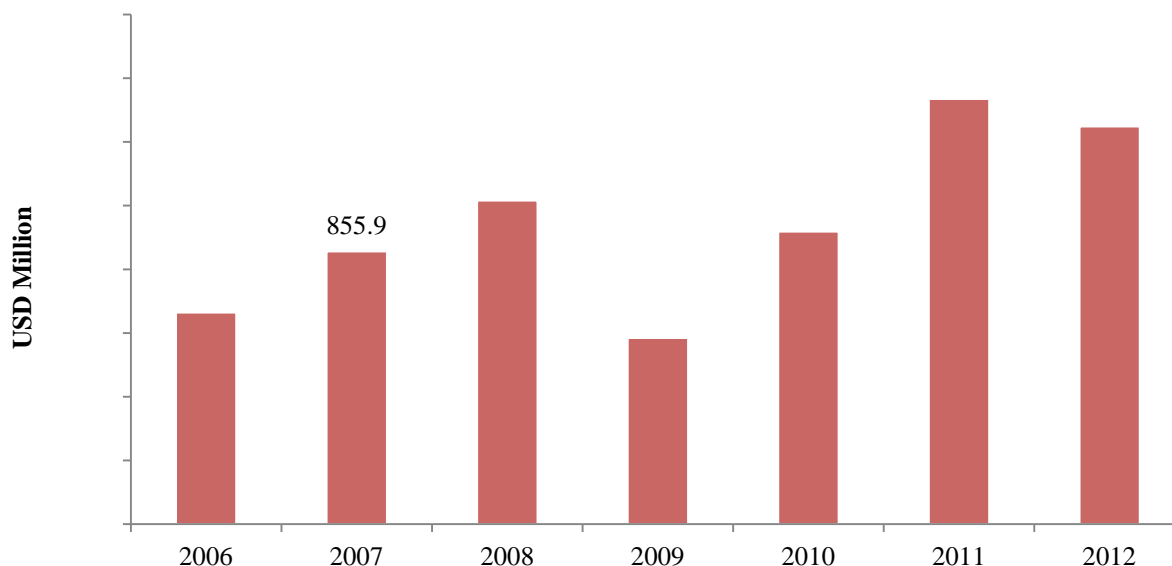


*Note: Others Include Graders, Construction Trucks and Scrapers*

## INDONESIA MINING EQUIPMENT MARKET INTRODUCTION AND SIZE, 2006-2012

The Indonesia mining market has historically been amongst major buyers of heavy construction equipments. The rapid economic growth of the country coupled with increasing demand for minerals and metals from various sectors such as transportation, manufacturing, consumer goods and others have augmented the scope for mining activities in the country. Indonesia is amongst the prime global mining centers, which has contributed a significant proportion to the rising global oil and energy demands over the years. In 2012, the mining sector contributed an approximate ~% share to the total GDP of the Indonesian economy. The country is a leading producer and exporter of a number of essential commodities such as coal, copper, gold, ignite and others. Indonesia was the second largest producer of tin and nickel in the world in 2012. The above mentioned features have made the mining sector of Indonesia, one of the crucial growth drivers for the country's economy...

**Figure: Indonesia Mining Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012**

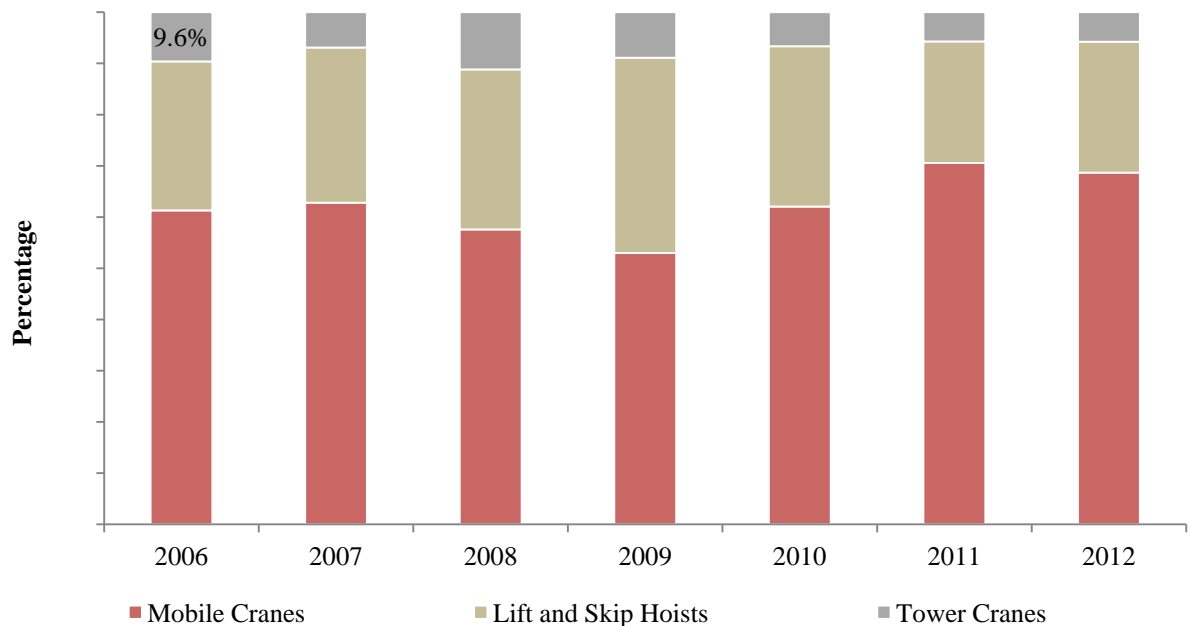




## INDONESIA CRANES AND LIFTING EQUIPMENT MARKET SEGMENTATION, 2006-2012

On the basis of types of equipments, the cranes and lifting equipment market can be divided into three major sub-segments. Mobile cranes have recorded a dominant share in the revenues of the cranes and lifting equipment market throughout the period of 2006-2012. These are primarily used for lifting and transporting raw materials and heavy objects such as rocks, boxes and others. The other types of cranes and lifting equipments include tower cranes and lift and skip hoists...

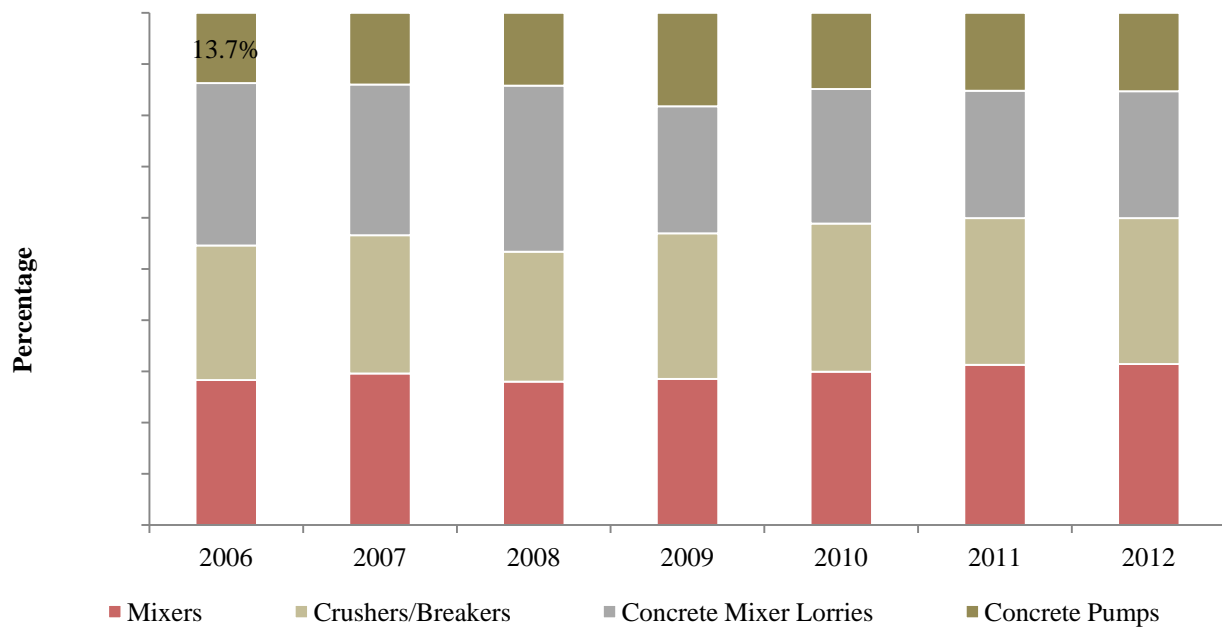
**Figure: Indonesia Cranes and Lifting Equipment Market Segmentation on the Basis of Revenues by Types of Equipments in Percentage, 2006-2012**



## INDONESIA MOBILE AND SITE BASED EQUIPMENT MARKET SEGMENTATION, 2006-2012

Site-based equipments comprise of four different types of equipments which includes mixers, concrete pumps, concrete mixer lorries and crushers. Mixing equipments have been the largest revenue contributor of the mobile and site based equipment market, owing to their extensive usage during building construction activities. These equipments are largely used for mixing and processing the construction materials such as cement, asphalt, rocks and others...

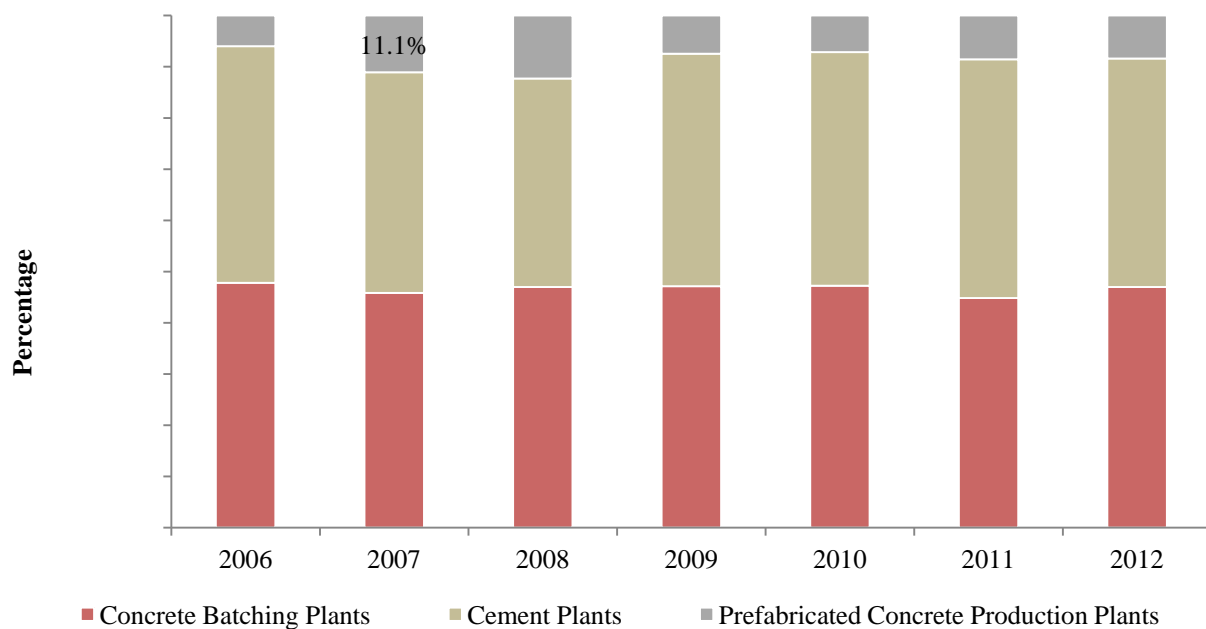
**Figure: Indonesia Mobile and Site Based Equipment Market Segmentation on the Basis of Revenues by Types of Equipment in Percentage, 2006-2012**



## INDONESIA CONCRETE AND CEMENT MATERIAL EQUIPMENT MARKET SEGMENTATION, 2006-2012

The concrete and cement equipment category registered revenues worth USD ~ million in 2012, growing from USD ~ million in 2011. These equipments can be further divided into three categories such as concrete plants, cement plants and pre-fabricated concrete production plants. Concrete plants has been the predominant category of concrete and cement material equipments throughout the period of 2006-2012. Concrete plant is often referred to as batch plants, which is primarily used for manufacturing the final concrete material to be used for construction purposes...

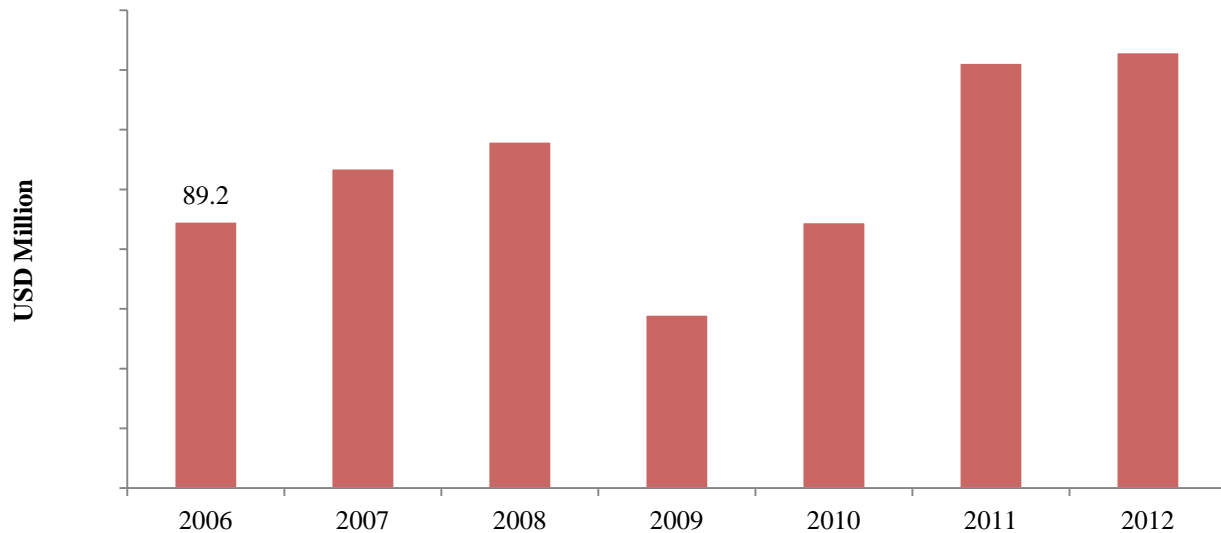
**Figure: Indonesia Concrete and Cement Material Equipment Market Segmentation on the Basis of Revenues by Types of Equipments in Percentage, 2006-2012**



## INDONESIA ROAD CONSTRUCTION EQUIPMENT INTRODUCTION AND SIZE, 2006-2012

Transportation and mobility have become an integral part of today's society. Better transportation facilities coupled with the efficient logistics operations hugely support the country's economic growth of a country. The road construction sector has been the predominant category of transportation market in Indonesia in recent years. The government of Indonesia has undertaken a gamut of road construction projects in past few years...

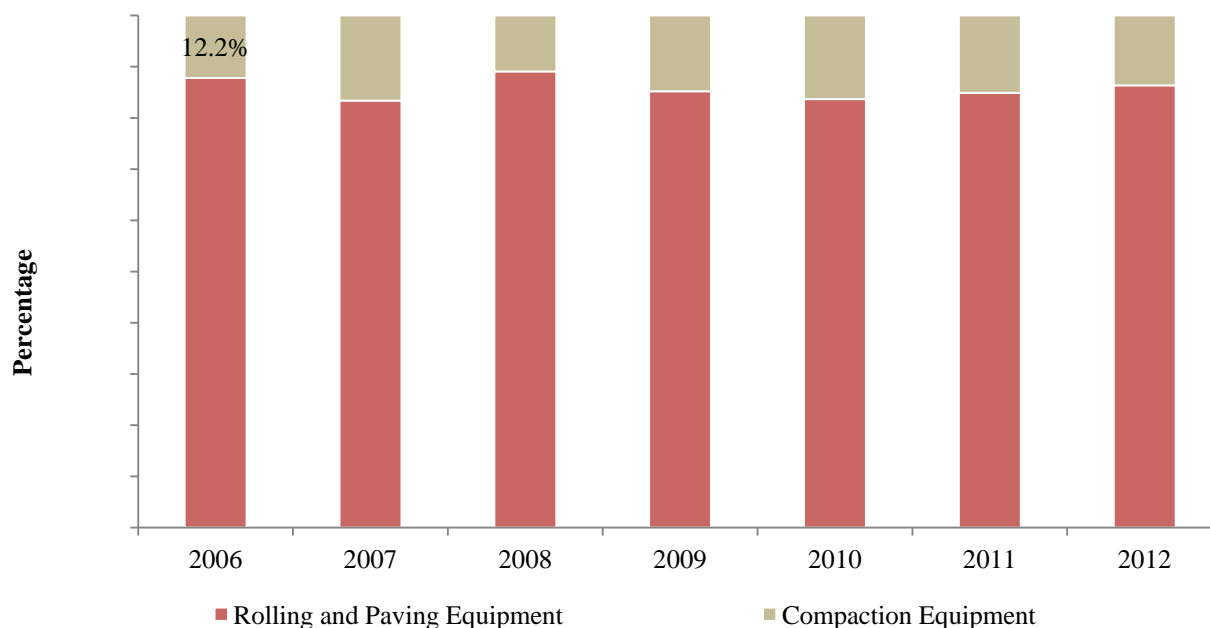
**Figure: Indonesia Road Construction Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012**



## INDONESIA ROAD CONSTRUCTION EQUIPMENT MARKET SEGMENTATION, 2006-2012

Over the period of 2006-2012, the contribution from road and asphalt paving machines has been leading the revenues of the road construction equipment market in Indonesia. Asphalt pavers are the most commonly used machines in road and bridge construction activities. Pavers are primarily used for processing and pouring down the asphalt on the targeted construction sites such as road, bridges and other places. The asphalt patch is further operated upon by rollers which provide uniformity to the patched material on the surface. The increasing number of road construction projects, on account of rising urban development in the country has resulted in increasing the demand for road and paver equipments in past few years. In 2012, road and paving equipments contributed ~% to the overall revenues of road construction equipments, rising from ~% in 2011. Consequently, the demand for rolling and paving equipments augmented in 2012, registering revenues of USD ~ million...

**Figure: Indonesia Road Construction Equipment Market Segmentation on the Basis of Revenues by Types of Equipment in Percentage, 2006-2012**

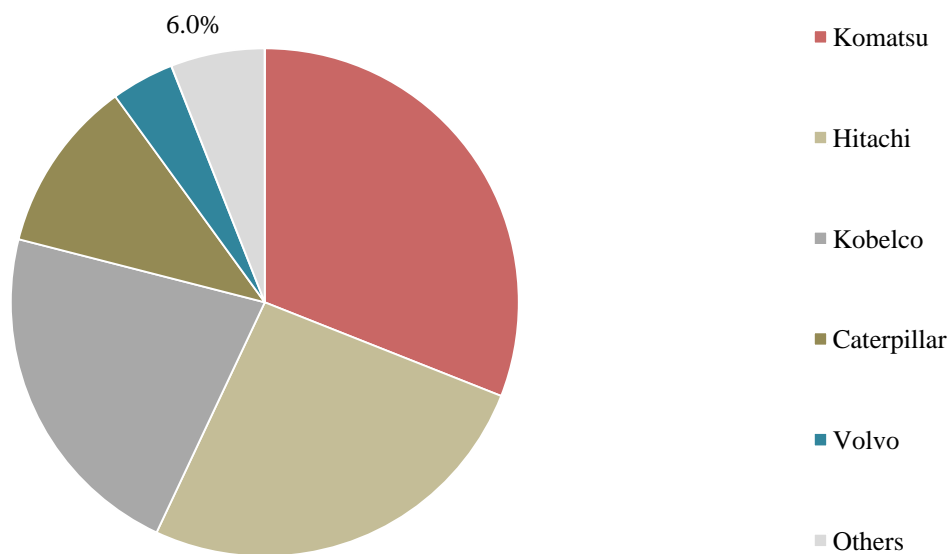


## MARKET SHARE OF MAJOR PLAYERS IN INDONESIA CONSTRUCTION EQUIPMENTS MARKET

BY OVERALL CONSTRUCTION EQUIPMENT INDUSTRY, 2012

Indonesia construction equipments market features a highly concentrated landscape, with market shares being majorly distributed amongst five leading players that held a ~% share of the total construction equipment market revenues in 2012. The market is marked by the presence of the several international players which have substantially expanded their business arms in Indonesian geography, accounting for a large proportion of the market share in construction equipment market...

**Figure: Indonesia Construction Equipment Market Share on the Basis of Revenues in Percentage, 2012**

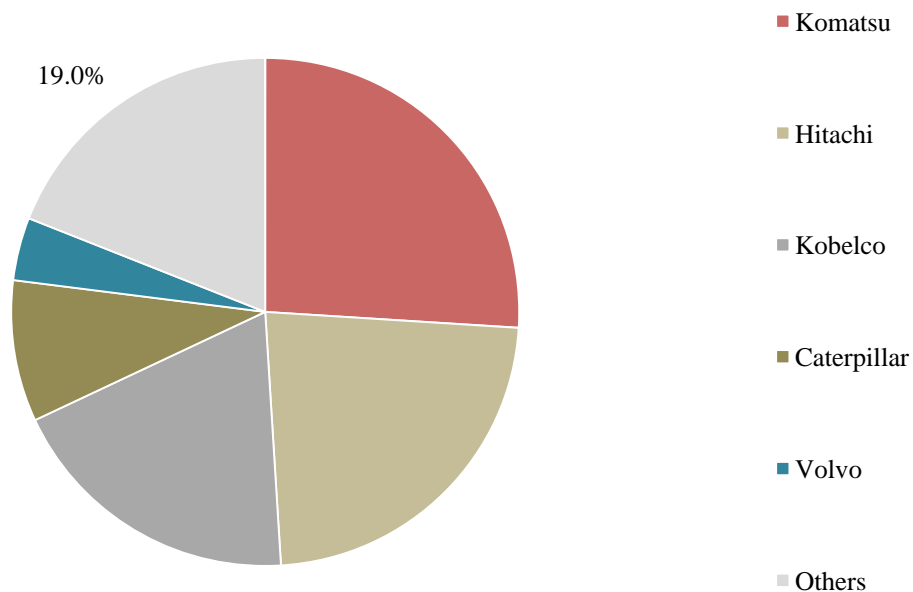


## BY INDIVIDUAL EQUIPMENTS MARKETS

### BY EXCAVATORS, 2012

Excavator equipments have been deployed in a number of construction activities including mining, earthmoving, tunneling, building construction and other infra and non infrastructure construction projects. Owing to its surging demand in construction activities, the leading construction equipment manufacturing companies have been majorly focusing on raising their manufacturing capacity for excavators segment, particularly for hydraulic excavators over the past few years. PT Komatsu Indonesia noted the highest share in the excavators segment revenues, amounting to ~% in 2012...

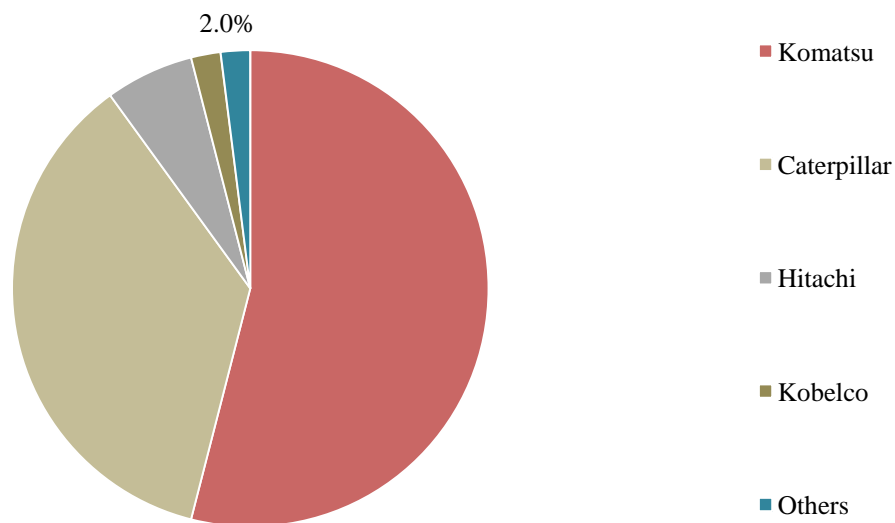
**Figure: Indonesia Excavators Market Shares on the Basis of Revenues in Percentage, 2012**



## BY TRUCKS, 2012

In construction activities, trucks are largely used for carrying the raw materials or for transporting the clustered or excavated materials from the ground such as soil, gravels, rocks and others. PT Komatsu remained the predominant player in the trucks manufacturing, contributing ~% to the overall revenues in trucks market in 2012. Komatsu ~E has been one of the most prevalent haul trucks purchased in building construction, mining, and in construction activities in recent years...

**Figure: Indonesia Trucks Market Share on the Basis of Revenues in Percentage, 2012**

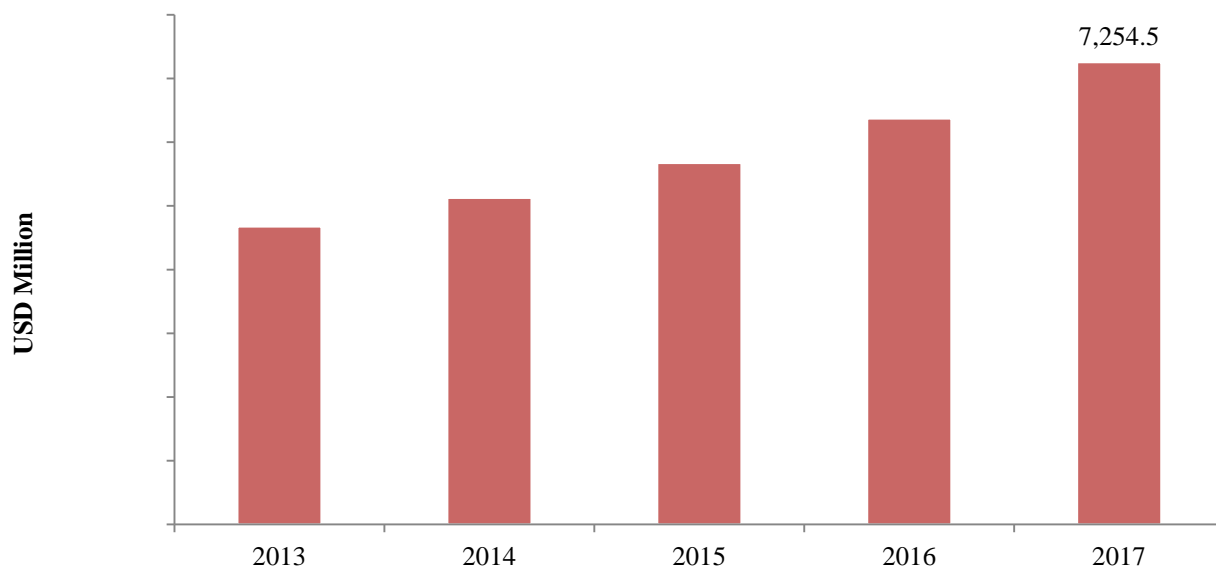




## INDONESIA CONSTRUCTION EQUIPMENT MARKET FUTURE OUTLOOK AND PROJECTIONS, 2013-2017

Indonesia ranks amongst the rapidly growing economies in the world. The country has gained massive traction in the fields of global tourism and manufacturing in the recent years. Increasing urbanization has been witnessed in Indonesia over the years with approximately ~% of the population residing in urban areas in 2012. Increasing demand of low and medium-sized houses from this set of population has historically been encouraging the growth of realty sector in Indonesia. This trend is expected to drive revenues for the future as well, as growing number of people start migrating to urban areas supported by rising disposable incomes and rising standards of living. Indonesia construction equipment market, which has grown at a CAGR of ~% in the period of 2006-2012, is expected to incline at a compounded annual rate of ~%, growing from USD ~ million in 2012 to USD 7,254.5 million in 2017...

**Figure: Indonesia Construction Equipment Market Future Outlook on the Basis of Revenues in USD Million, 2013-2017**



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