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2013

# Indonesia Construction Equipment Industry Outlook to 2017

- Hydraulic Excavators and Earthmoving Equipments Gaining Traction

## TABLE OF CONTENTS

1. Indonesia Construction Equipment Market Introduction
  - 1.1. Indonesia Construction Equipment Market Value Chain
  - 1.2. Role of Government in Construction Industry
2. Indonesia Construction Equipment Market Size
  - 2.1. By Revenues, 2006-2012
  - 2.2. By Quantity, 2006-2012
3. Indonesia Construction Equipment Market Segmentation, 2006-2012
  - 3.1. By Production of Different Equipments, 2006-2012
  - 3.2. By Revenues From Different Equipments, 2006-2012
4. Indonesia Earthmoving and Tunneling Equipment Market Introduction and Size, 2006-2012
  - 4.1. Indonesia Earthmoving and Tunneling Equipment Market Segmentation by Equipments, 2006-2012
    - 4.1.1. Indonesia Earthmoving Equipment Market Segmentation by Equipments, 2006-2012
    - 4.1.2. Indonesia Tunneling Equipment Market Segmentation by Equipments, 2006-2012
  - 4.2. Indonesia Earthmoving and Tunneling Equipment Market Imports, 2008-2012
  - 4.3. Indonesia Earthmoving and Tunneling Equipment Market Exports, 2008-2012
  - 4.4. Earthmoving and Tunneling Equipment Market Trends and Developments
    - Ingress of High Performance Excavators
    - Increasing Exports of Boring and Sinking Machines
    - Declining Demand of Dump Trucks
    - Growing Number of Rental Solutions Providers in Indonesia
5. Indonesia Mining Equipment Market Introduction and Size, 2006-2012
  - 5.1. Indonesia Mining Equipment Market Segmentation by Equipments, 2006-2012
  - 5.2. Indonesia Mining Equipment Market Imports, 2008-2012
  - 5.3. Indonesia Mining Equipment Market Exports, 2008-2012

- 5.4. Indonesia Mining Equipments Market Trends and Developments
  - Government Regulations Hampering Mining Activities
  - Increasing Number of Manufacturers Foraying in Mining Equipments Market
  - Strong Impacts on Tourism Industry
  - Augmented Demand for Coal and Other Primary Commodities
  - Increasing Utility of Hydraulic Excavators in Mining Activities
6. Indonesia Building Construction Equipment Market and Size, 2006-2012
  - 6.1. Indonesia Building Construction Equipment Market Segmentation by Equipments, 2006-2012
    - 6.1.1. Indonesia Cranes and Lifting Equipment Market Segmentation by Equipments, 2006-2012
    - 6.1.2. Indonesia Mobile and Site Based Equipment Market Segmentation, 2006-2012
  - 6.2. Indonesia Building Construction Equipment Market Imports, 2008-2012
  - 6.3. Indonesia Building Construction Equipment Market Exports
  - 6.4. Indonesia Building Construction Equipment Market Trends and Developments
    - Increasing Non-Residential Construction Driving Demand
    - Rising Focus on Energy Efficiency of Equipments
    - Increasing Use of Technology in Building Construction Equipments
7. Indonesia Building Material Equipment Introduction and Size, 2006-2012
  - 7.1. Indonesia Building Material Equipment Market Segmentation by Equipments, 2006-2012
    - 7.1.1. Indonesia Concrete and Cement Material Equipment Market Segmentation by Equipments, 2006-2012
    - 7.1.2. Indonesia Aggregate Equipment Market Segmentation by Equipments, 2006-2012
  - 7.2. Indonesia Building Material Equipment Market Imports, 2008-2012
  - 7.3. Indonesia Building Material Equipment Market Exports, 2008-2012
  - 7.4. Indonesia Building Material Equipment Market Trends and Developments
    - Increasing Usage of Prefabricated Concrete Equipments in Construction Activities
    - Increasing Domestic Production of Cement Batching Plants

8. Indonesia Road Construction Equipment Introduction and Size, 2006-2012
  - 8.1. Indonesia Road Construction Equipment Market Segmentation by Equipments, 2006-2012
    - 8.1.1. Indonesia Rolling and Paving Equipment Market Segmentation by Equipments, 2006-2012
    - 8.1.2. Indonesia Compaction Equipment Market Segmentation by Equipments, 2006-2012
  - 8.2. Indonesia Road Construction Equipment Market Imports, 2008-2012
  - 8.3. Indonesia Road Construction Equipment Market Exports, 2008-2012
  - 8.4. Indonesia Road Construction Equipment Market Trends and Developments
    - Increasing Prices of Asphalt Promoting Rental Solutions
    - Rising Urbanization in Indonesia
    - Increasing Demand of Paving Equipments Driving Growth
9. Market Share of Major Players in Indonesia Construction Equipments Market
  - 9.1. By Overall Construction Equipment Industry, 2012
  - 9.2. By Mining Equipment Industry, 2012
  - 9.3. By Excavators, 2012
  - 9.4. By Loaders, 2012
  - 9.5. By Bulldozers, 2012
  - 9.6. By Trucks, 2012
10. Indonesia Construction Equipment Market Company Profiles
  - 10.1. PT Komastu Indonesia (PT United Tractors)
    - 10.1.1. Company Overview
    - 10.1.2. Company Financials, 2006-2012
    - 10.1.3. Business Strategies
      - Increasing Focus on remanufacturing and Reconditioning of Construction Machinery
      - Increasing Mining Contracting Business Operations
      - Focussing on Increasing Production of Hydraulic Excavators

- 10.2. PT Hexindo Adiperkasa Tbk (Hitachi Limited)
  - 10.2.1. Company Overview
  - 10.2.2. Business Strategies
    - Increased Focus on Developing Efficient Supply Chain
    - Ingress of Next Generation Ultra-Large Excavators
    - Key Focus on Mining Equipments
- 10.3. PT Trakindo Utama (Caterpillar Inc.)
  - 10.3.1. Company Overview
  - 10.3.2. Business Strategies
    - Expanding Manufacturing Capacity in Domestic Market
    - Ingress of Rental Stores
    - Increasing Production Capacity For Trucks and Dozers, Focussing Plantation Business
- 10.4. PT Daya Kobelco Construction Machinery Indonesia (Kobelco Inc.)
  - 10.4.1. Company Overview
  - 10.4.2. Business Strategies
    - Focussing on Manufacturing Hydraulic Excavators
    - Increasing Establishments for Used Equipments

11. Indonesia Construction Equipment Market Future Outlook and Projections, 2013-2017
12. Macroeconomic Factors Affecting Indonesia Construction Equipment Market
  - 12.1. Population of Indonesia, 2006-2017
  - 12.2. Personal Disposable Incomes in Indonesia, 2006-2017
  - 12.3. Market Size of Indonesia Construction Industry, 2006-2017
  - 12.4. Government Investments In Infrastructure, 2006-2017
  - 12.5. Consumption of Steel in Indonesia, 2006-2017
  - 12.6. Production of Coal in Indonesia, 2006-2017
13. Appendix
  - 13.1. Market Definitions
  - 13.2. Abbreviations

13.3. Research Methodology

    Data Collection Methods

    Approach

    Variables (Dependent and Independent)

    Final Conclusion

13.4. Disclaimer

SAMPLE



## LIST OF FIGURES

Figure 1: Indonesia Construction Equipment Market Value Chain

Figure 2: Indonesia Construction Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 3: Indonesia Construction Equipment Market Size on the Basis of Quantity Produced in Units, 2006-2012

Figure 4: Indonesia Construction Equipment Market Segmentation on the Basis of Quantity of Different Types of Construction Equipments Produced in Percentage, 2006-2012

Figure 5: Indonesia Construction Equipment Market Segmentation on the Basis of Revenues from Different Types of Construction Equipments in Percentage, 2006-2012

Figure 6: Indonesia Earthmoving and Tunneling Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 7: Indonesia Earthmoving and Tunneling Equipment Market Size on the Basis of Production in USD Million, 2008-2012

Figure 8: Indonesia Earthmoving and Tunneling Equipment Market Segmentation on the Basis of Revenues from Different Types of Equipments in Percentage, 2006-2012

Figure 9: Indonesia Earthmoving Equipment Market Segmentation on the Basis of Revenues by Types of Equipments (Excavators, Bulldozers, Dumper Trucks, Loaders and Others) in Percentage, 2006-2012

Figure 10: Indonesia Earthmoving Equipment Market Segmentation on the Basis of Production by Types of Equipments in Percentage, 2008-2012

Figure 11: Indonesia Tunneling Equipment Market Segmentation on the Basis of Revenues by Types of Equipments (Boring and Sinking and Rock Cutting Machines) in Percentage, 2006-2012

Figure 12: Indonesia Tunneling Equipment Market Segmentation on the Basis of Production by Types of Equipments (Boring and Sinking and Rock Cutting Machines) in Percentage, 2008-2012

Figure 13: Indonesia Mining Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 14: Indonesia Mining Equipment Market Size on the Basis of Production in USD Million, 2008-2012



Figure 15: Indonesia Mining Equipment Market Segmentation on the Basis of Revenues by Types of Equipments in Percentage, 2006-2012

Figure 16: Indonesia Mining Equipment Market Segmentation on the Basis of Production by Types of Equipments in Percentage, 2008-2012

Figure 17: Indonesia Building Construction Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 18: Indonesia Building Construction Equipment Market Size on the Basis of Production in USD Million, 2008-2012

Figure 19: Indonesia Building Construction Equipment Market Segmentation on the Basis of Revenues by Types of Equipments (Cranes and Lifting Equipment and Mobile/Site Based Equipment) in Percentage, 2006-2012

Figure 20: Indonesia Building Construction Equipment Market Segmentation on the Basis of Production by Types of Equipments (Cranes and Lifting Equipment and Mobile/Site Based Equipment) in USD Million, 2008-2012

Figure 21: Indonesia Cranes and Lifting Equipment Market Segmentation on the Basis of Revenues by Types of Equipments (Mobile Cranes, Lift and Skip Hoists and Tower Cranes) in Percentage, 2006-2012

Figure 22: Indonesia Cranes and Lifting Equipment Market Segmentation on the Basis of Production by Types of Equipments (Mobile Cranes, Lift and Skip Hoists and Tower Cranes) in Percentage, 2008-2012

Figure 23: Indonesia Mobile and Site Based Equipment Market Segmentation on the Basis of Revenues by Types of Equipments (Mixers, Crushers/ Breakers, Concrete Mixer Lorries and Concrete Pumps) in Percentage, 2006-2012

Figure 24: Indonesia Mobile and Site Based Equipment Market Segmentation on the Basis of Production by Types of Equipment in USD Million in Percentage, 2008-2012

Figure 25: Indonesia Building Material Equipment Market Size on the Basis of Revenues in USD Million and Growth Rate in Percentage, 2006-2012

Figure 26: Indonesia Building Material Equipment Market Size on the Basis of Production in USD Million, 2008-2012

Figure 27: Indonesia Building Material Equipment Market Segmentation on the Basis of Revenues by Types of Equipments in Percentage, 2006-2012

Figure 28: Indonesia Building Material Equipment Market Segmentation on the Basis of Production by Types of Equipments (Concrete and Cement Equipment, Aggregate Equipment, Mixing & Kneading Equipment) in Percentage, 2008-2012

Figure 29: Indonesia Concrete and Cement Material Equipment Market Segmentation on the Basis of Revenues by Types of Equipments (Concrete Batching Plants, Cement Plants and Prefabricated Concrete Production Plants) in Percentage, 2006-2012

Figure 30: Indonesia Concrete and Cement Material Equipment Market Segmentation on the Basis of Production by Types of Equipments in Percentage, 2008-2012

Figure 31: Indonesia Aggregate Equipment Market Segmentation on the Basis of Revenues by Types of Equipments in Percentage, 2006-2012

Figure 32: Indonesia Aggregate Equipment Market Segmentation on the Basis of Production by Types of Equipments (Crushing and Pulverizing Equipments, Screening, Scrubbing & Separating Equipments) in Percentage, 2008-2012

Figure 33: Indonesia Road Construction Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 34: Indonesia Road Construction Equipment Market Size on the Basis of Production in USD Million, 2006-2012

Figure 35: Indonesia Road Construction Equipment Market Segmentation on the Basis of Revenues by Types of Equipment in Percentage, 2006-2012

Figure 36: Indonesia Road Construction Equipment Market Segmentation on the Basis of Production by Types of Equipment (Rolling and Paving Equipment, Compaction Equipment) in Percentage, 2008-2012

Figure 37: Indonesia Rolling and Paving Equipment Market Segmentation on the Basis of Revenues by Types of Equipments (Rollers and Pavers) in Percentage, 2006-2012

Figure 38: Indonesia Rolling and Paving Equipment Market Segmentation on the Basis of Production by Types of Equipments (Rollers and Pavers) in Percentage, 2008-2012

Figure 39: Indonesia Compaction Equipment Market Segmentation on the Basis of Revenues by Types of Equipments (Pile Drivers and Pile Extractors, Tampers and Compactors) in Percentage, 2006-2012

Figure 40: Indonesia Compaction Equipment Market Segmentation on the Basis of Production by Types of Equipments (Pile Drivers and Pile Extractors, Tampers and Compactors) in Percentage, 2008-2012

Figure 41: Market Share of Major Players in Indonesia Construction Equipment Market on the Basis of Revenues in Percentage, 2012

Figure 42: Market Share of Major Players in Indonesia Mining Equipment Market on the Basis of Revenues in Percentage, 2012

Figure 43: Market Share of Major Players in Indonesia Excavators Market on the Basis of Revenues in Percentage, 2012

Figure 44: Market Share of Major Players in Indonesia Loaders Market on the Basis of Revenues in Percentage, 2012

Figure 45: Market Share of Major Players in Indonesia Bulldozers Market on the Basis of Revenues in Percentage, 2012

Figure 46: Market Share of Major Players in Indonesia Trucks Market on the Basis of Revenues in Percentage, 2012

Figure 47: PT United Tractors Heavy Equipments Share on the Basis of Revenues in Percentage, 2012

Figure 48: Indonesia Construction Equipment Market Future Outlook on the Basis of Revenues in USD Million, 2013-2017

Figure 49: Indonesia Population in Million, 2006-2017

Figure 50: Indonesia Personal Disposable Income in USD Million, 2006-2017

Figure 51: Indonesia Construction Market Size on the Basis of Revenues in USD Million, 2006-2017

Figure 52: Indonesia Government Investment in Infrastructure in USD Million, 2006-2017

Figure 53: Indonesia Steel Consumption in Million Tons, 2006-2017

Figure 54: Indonesia Coal Consumption in Million Tons, 2006-2017

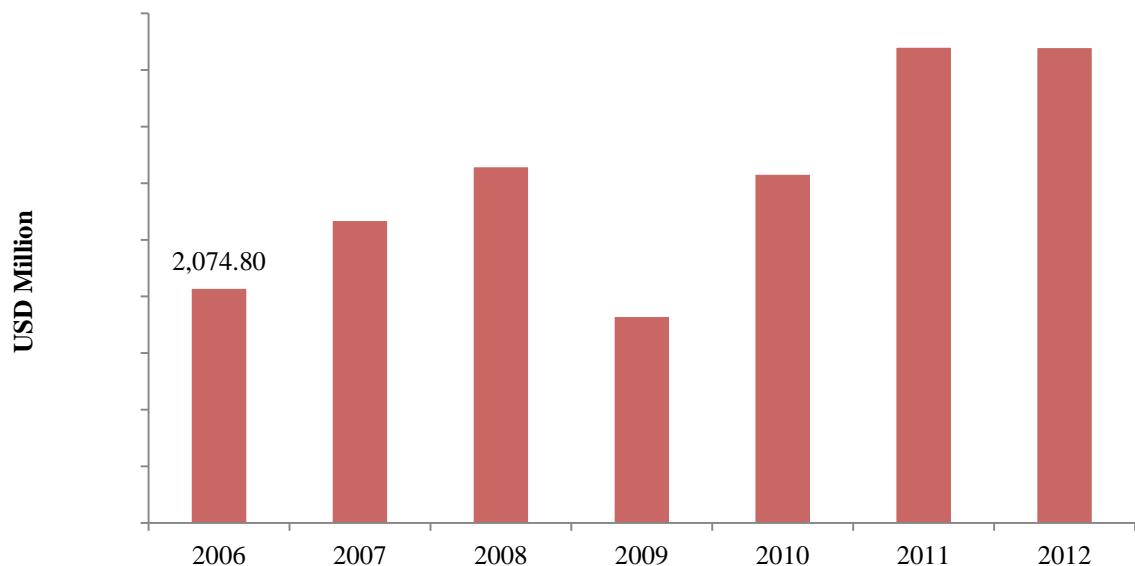
## INDONESIA CONSTRUCTION EQUIPMENT MARKET SIZE

### 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**



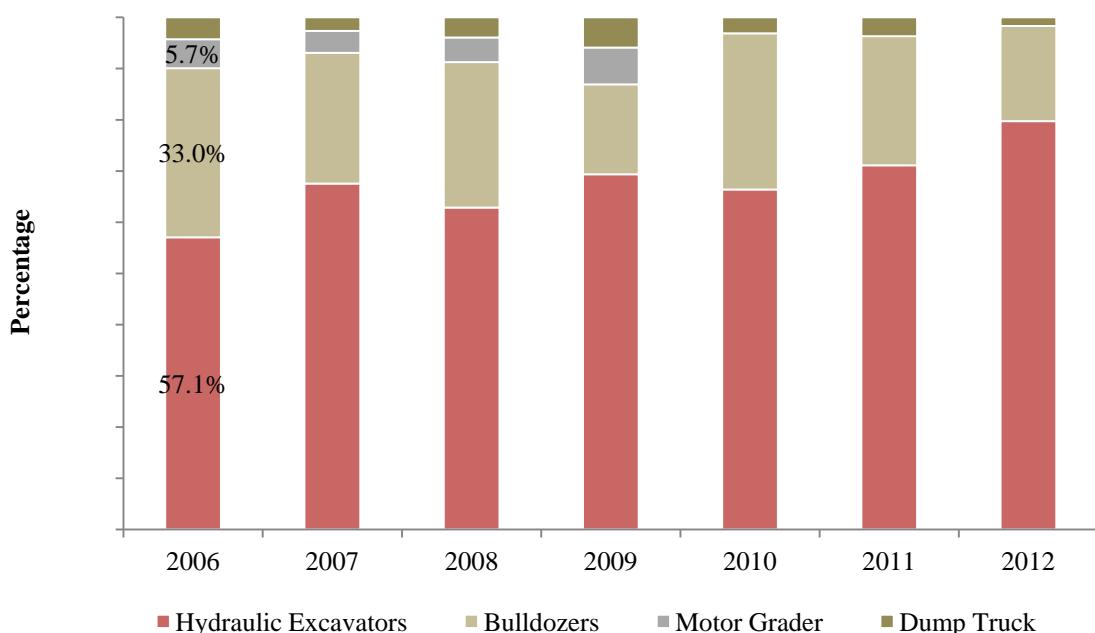
## INDONESIA CONSTRUCTION EQUIPMENT MARKET SEGMENTATION, 2006-2012

### 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.

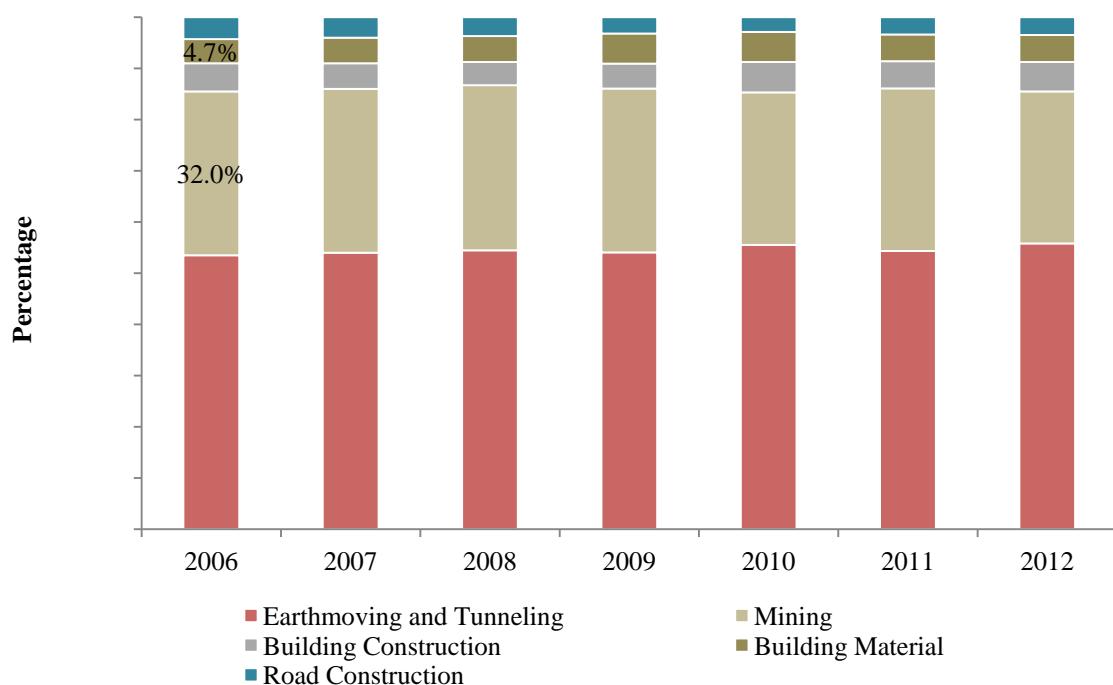
**Figure: Indonesia Construction Equipment Market Segmentation on the Basis of Volume of Different Types of Construction Equipments Produced in Percentage, 2006-2012**



## 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...

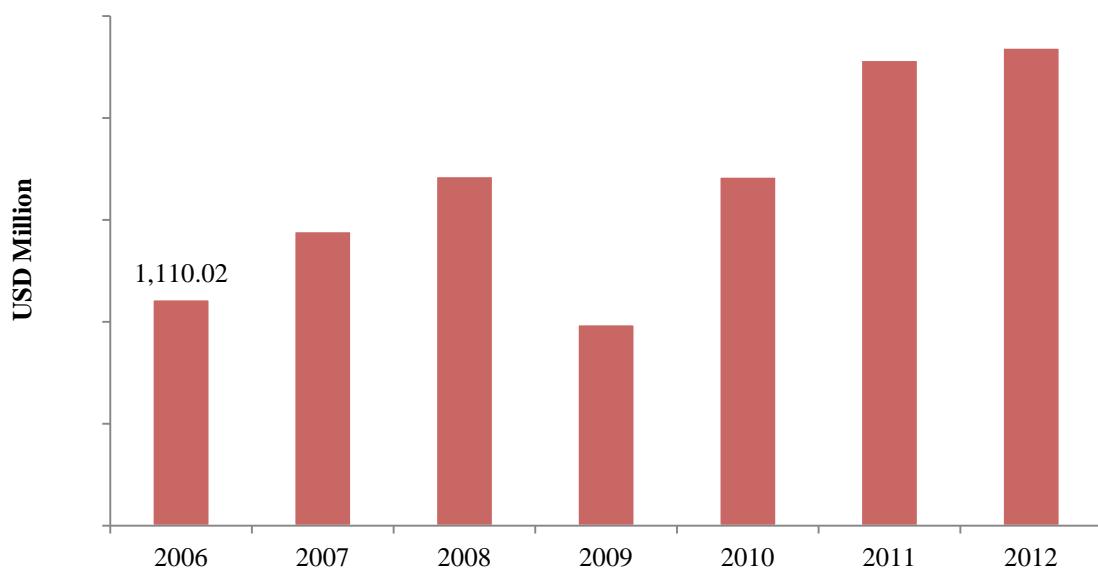
**Figure: Indonesia Construction Equipment Market Segmentation on the Basis of Revenues from Different Types of Construction Equipments in Percentage, 2006-2012**



## 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**

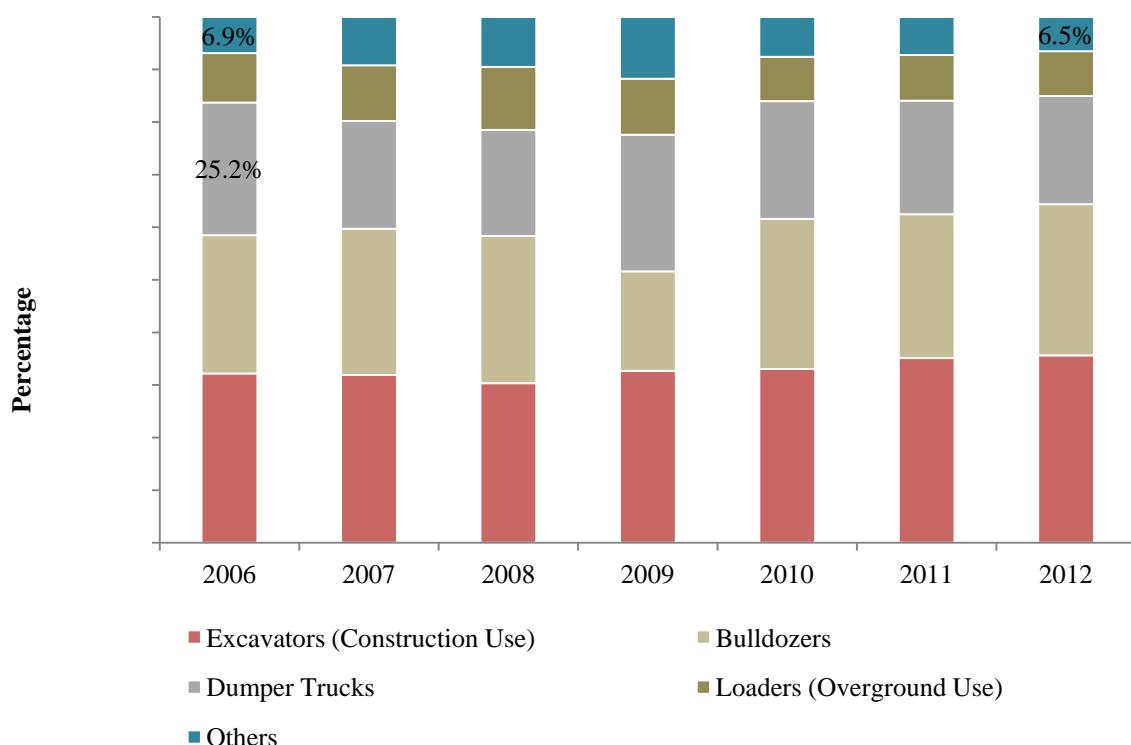


## INDONESIA EARTHMOVING EQUIPMENT MARKET SEGMENTATION, 2006-2012

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**

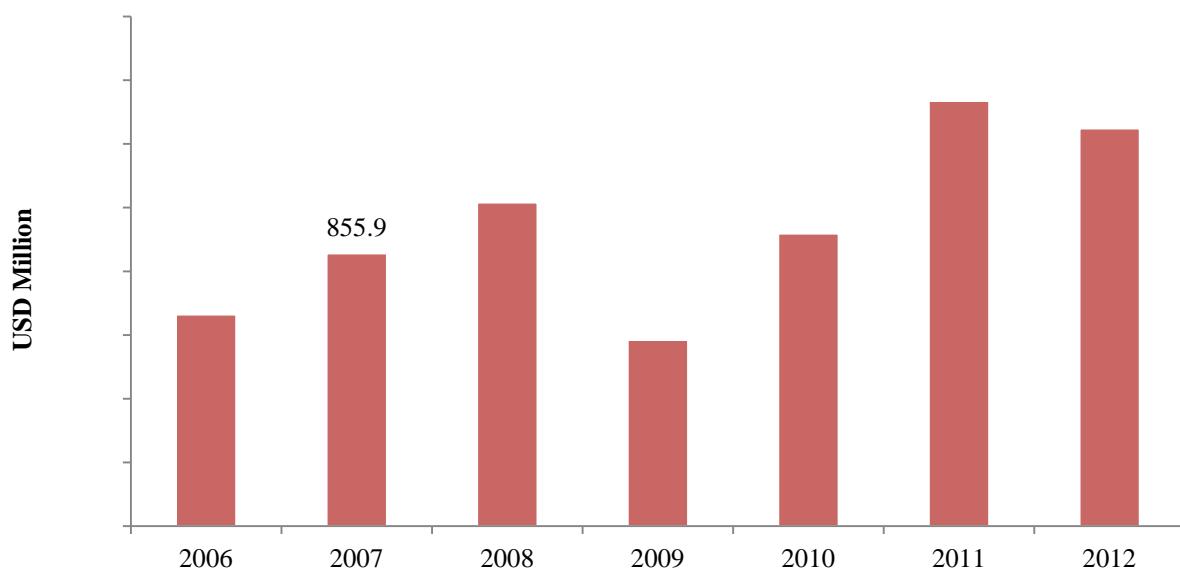


*Note: Others Include Graders, Construction Trucks and Scrapers*

## 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...

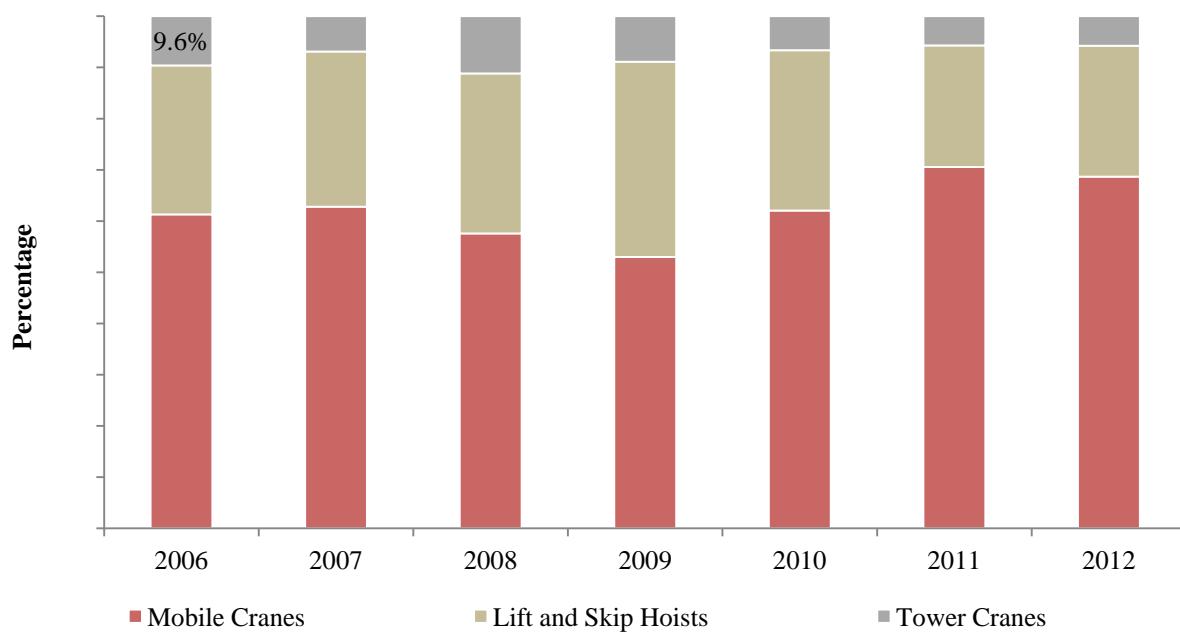
**Figure: Indonesia Mining Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012**



## 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...

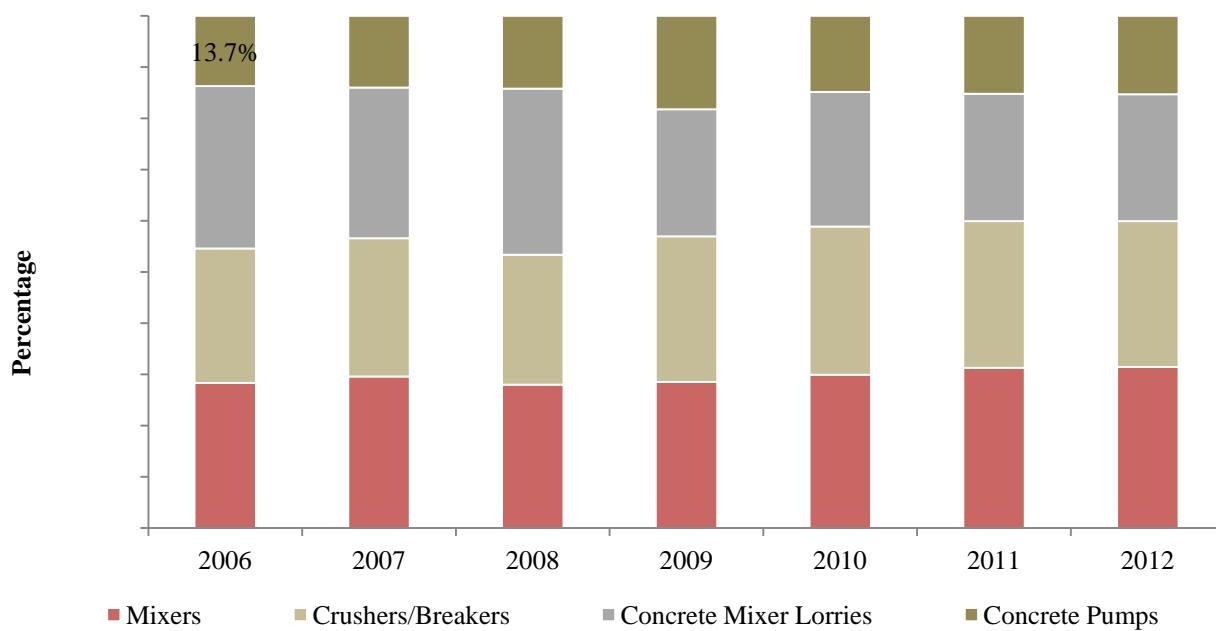
**Figure: Indonesia Cranes and Lifting Equipment Market Segmentation on the Basis of Revenues by Types of Equipments in Percentage, 2006-2012**



## 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...

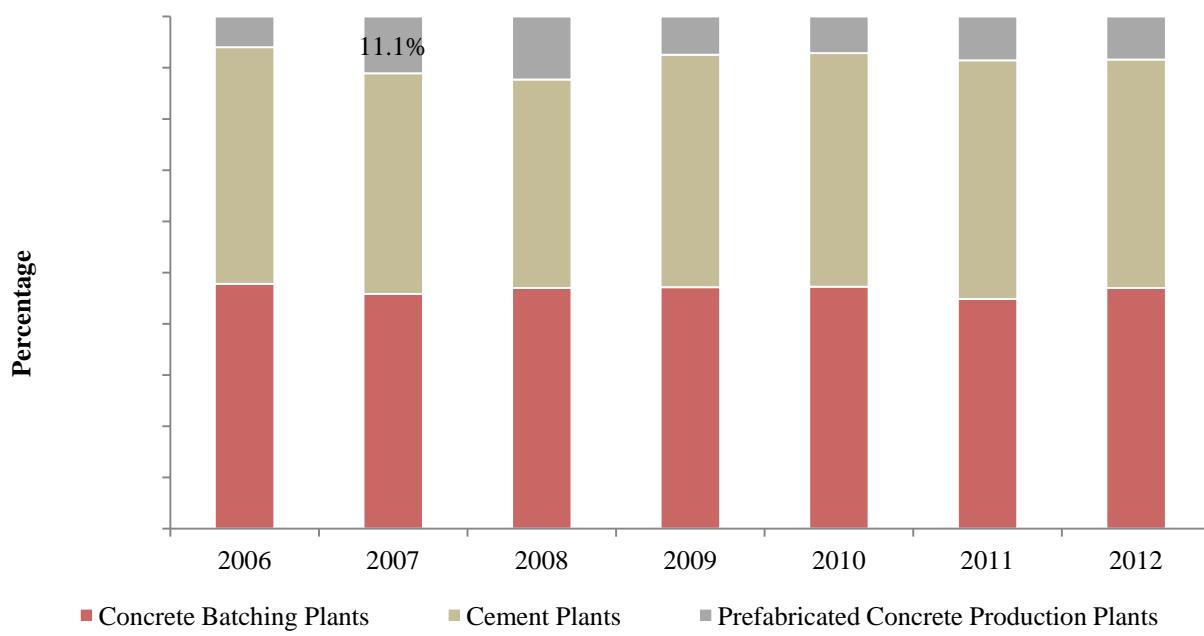
**Figure: Indonesia Mobile and Site Based Equipment Market Segmentation on the Basis of Revenues by Types of Equipment in Percentage, 2006-2012**



## 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...

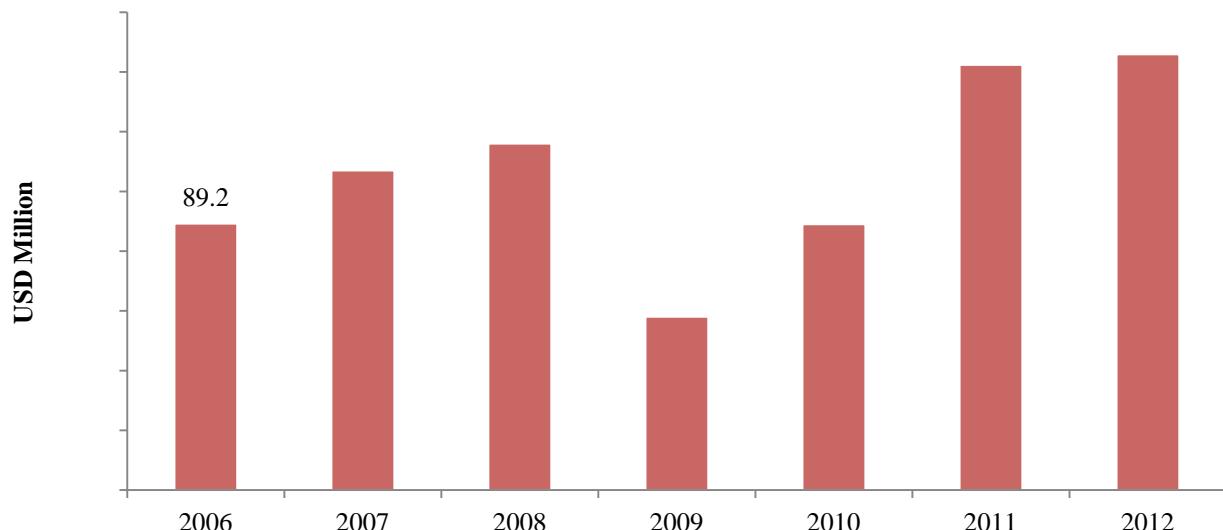
**Figure: Indonesia Concrete and Cement Material Equipment Market Segmentation on the Basis of Revenues by Types of Equipments in Percentage, 2006-2012**



## 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...

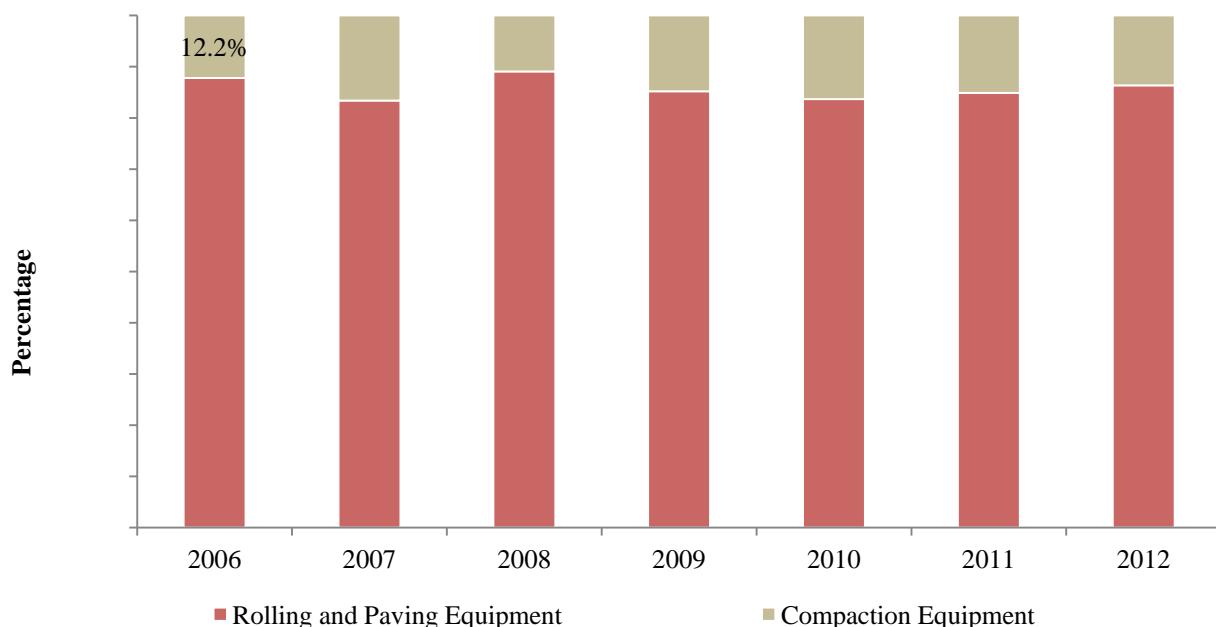
**Figure: Indonesia Road Construction Equipment Market Size on the Basis of Revenues in USD Million, 2006-2012**



## 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**

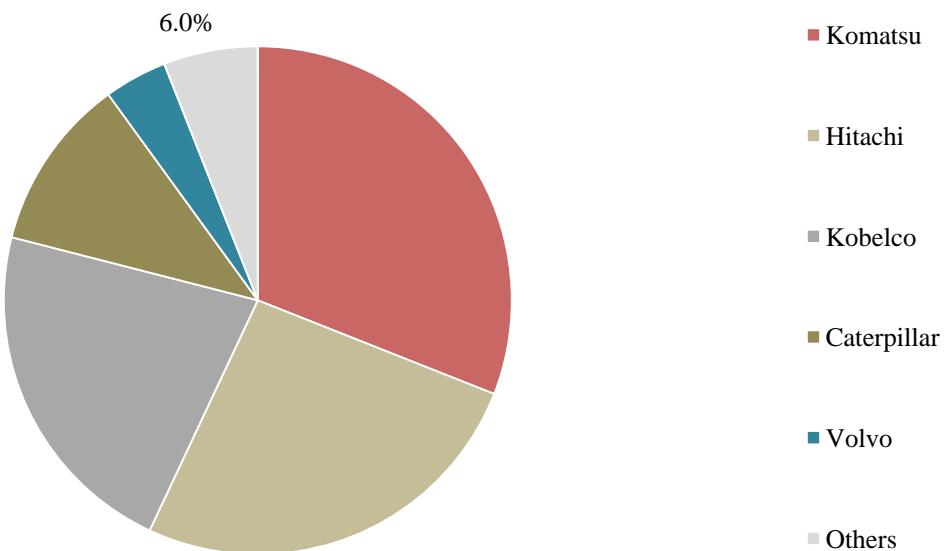


# MARKET SHARE OF MAJOR PLAYERS IN INDONESIA CONSTRUCTION EQUIPMENTS MARKET

## 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**

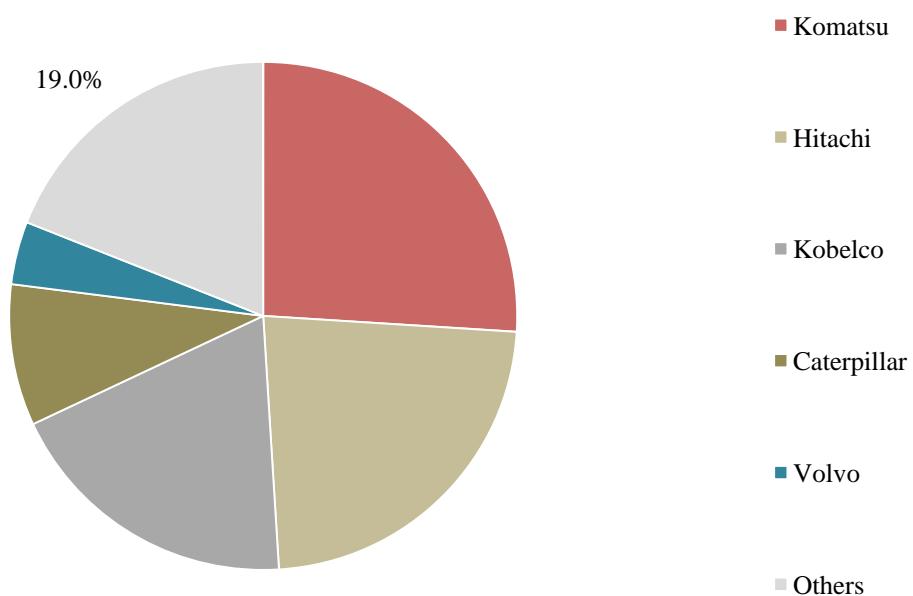


## BY INDIVIDUAL EQUIPMENTS MARKETS

### 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...

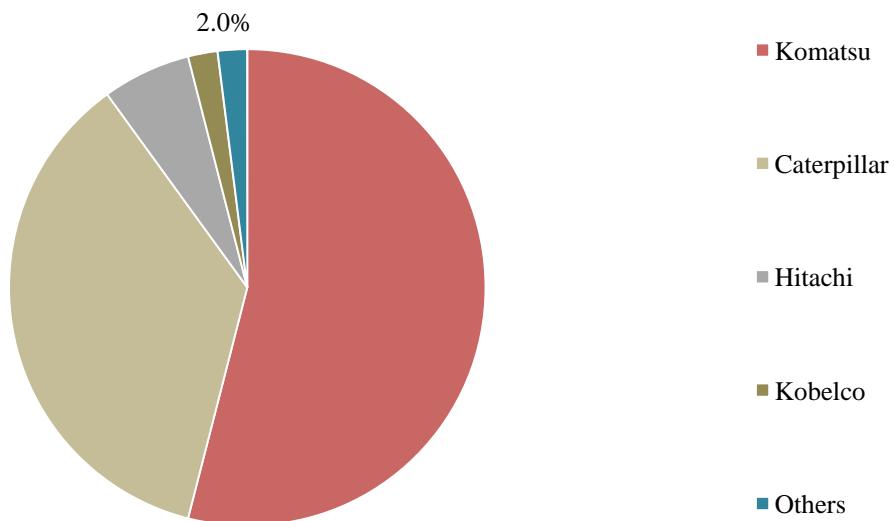
**Figure: Indonesia Excavators Market Shares on the Basis of Revenues in Percentage, 2012**



## 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...

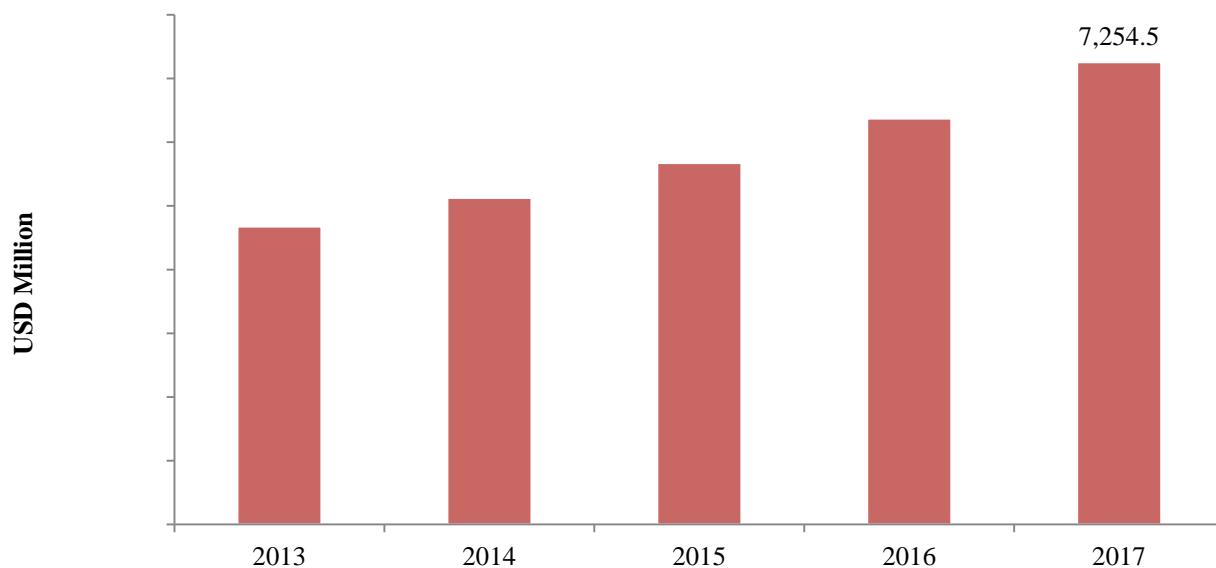
**Figure: Indonesia Trucks Market Share on the Basis of Revenues in Percentage, 2012**



## 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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