



David Hill

Chairman – Construction Equipment Committee



Machine types
Market history
Changes within the last year
2010 and beyond



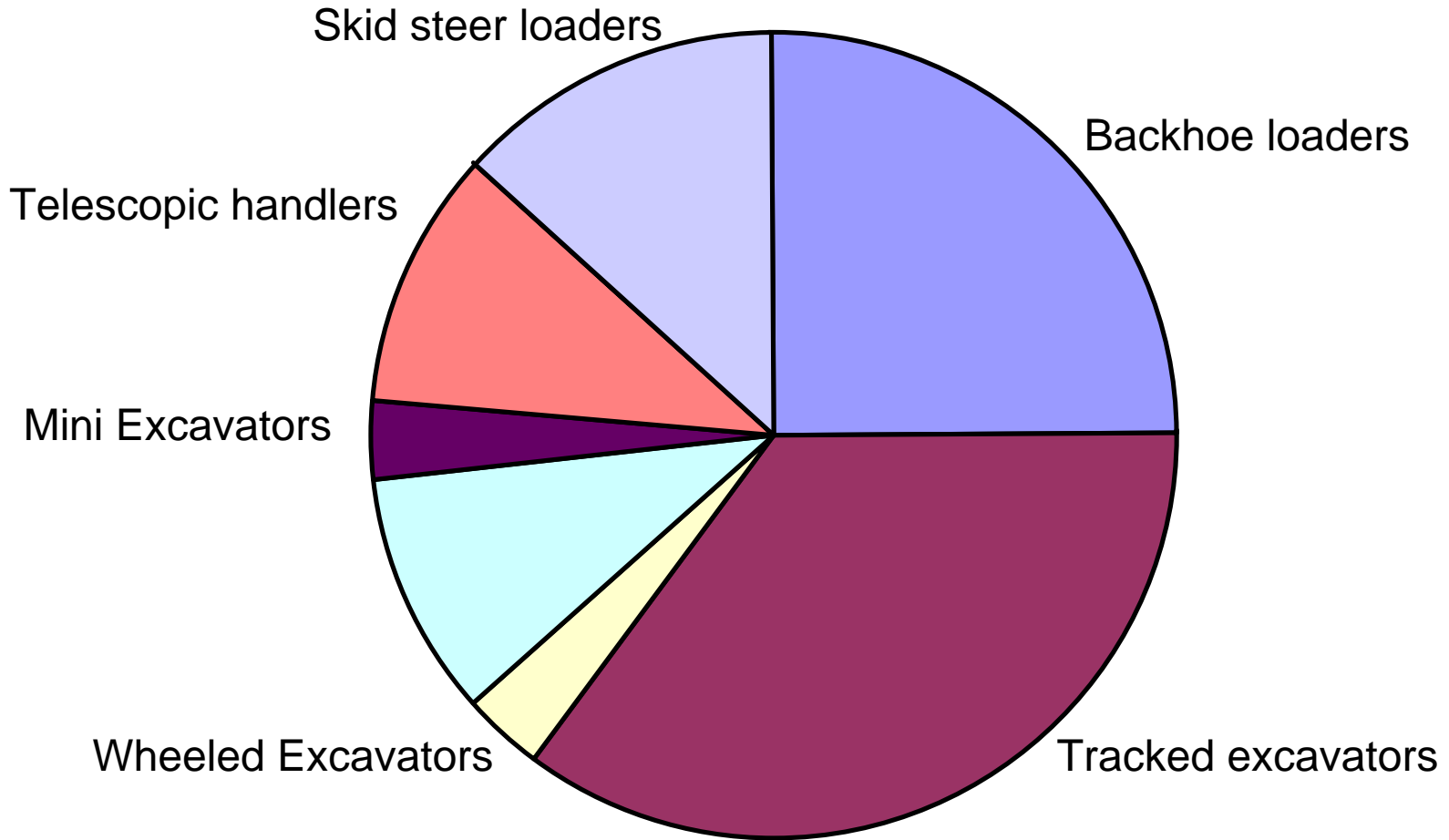
Russian manufacture or Imported manufacture

Price

Quality

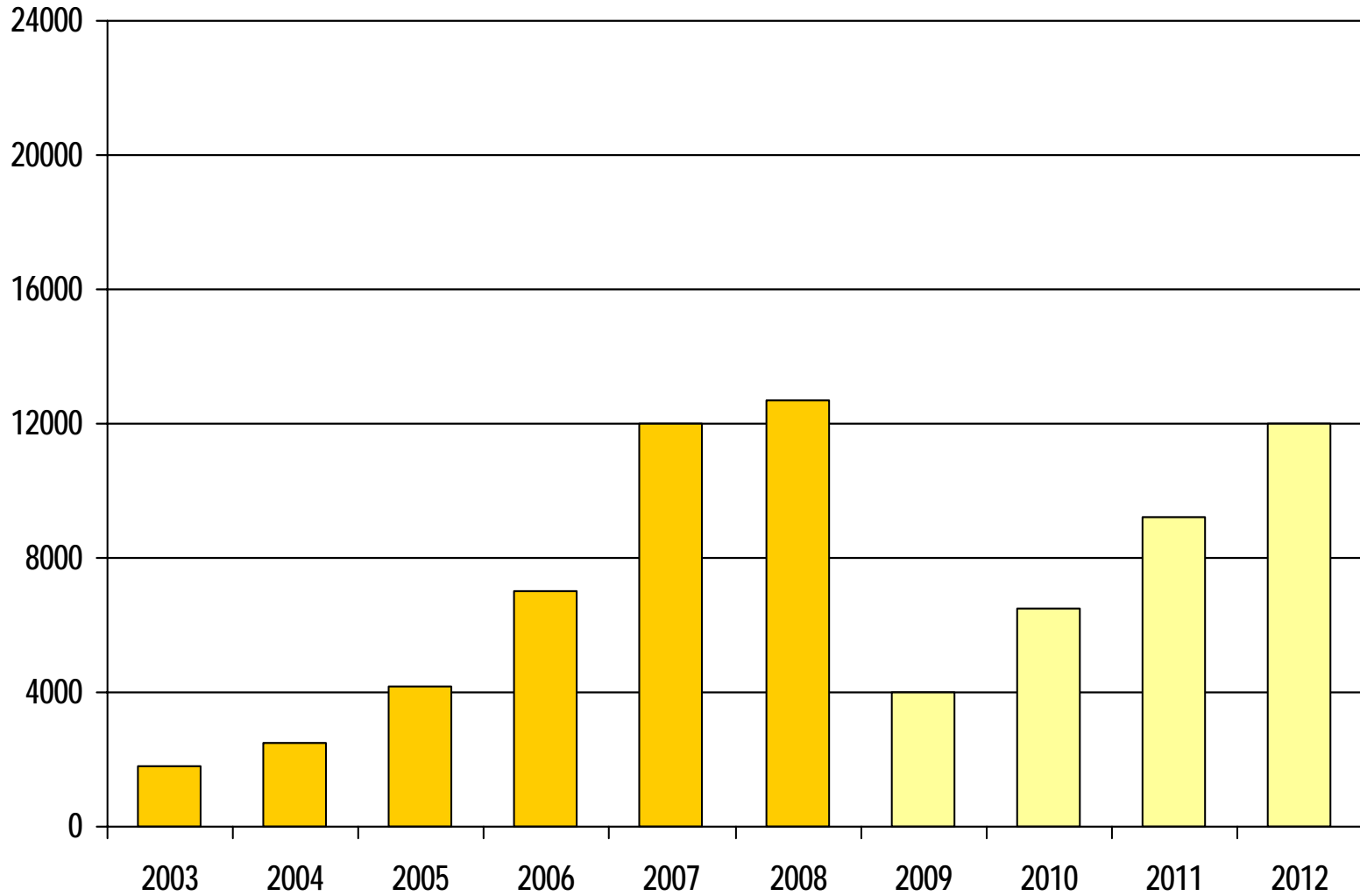
Distribution network





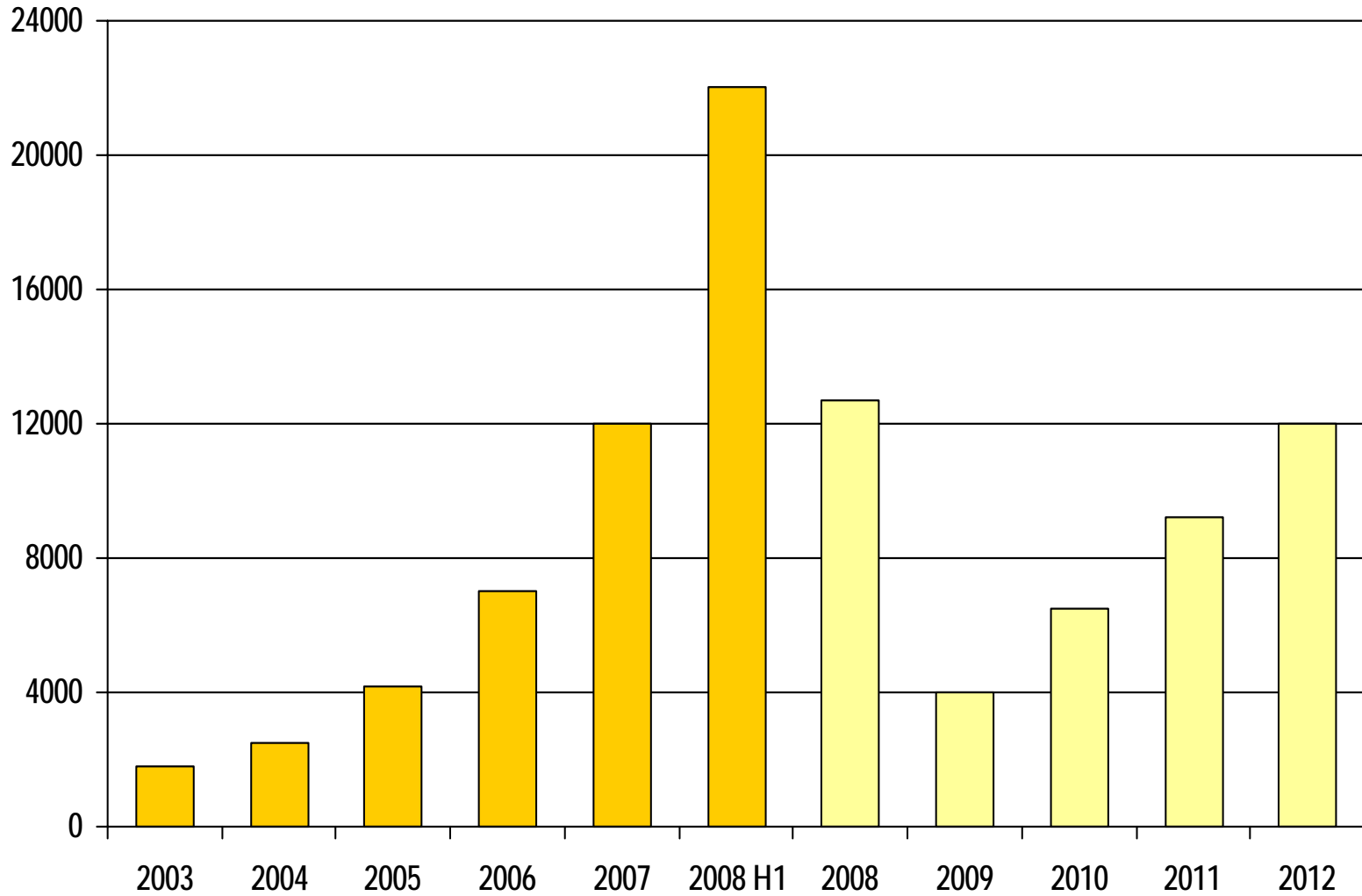


Market Volume



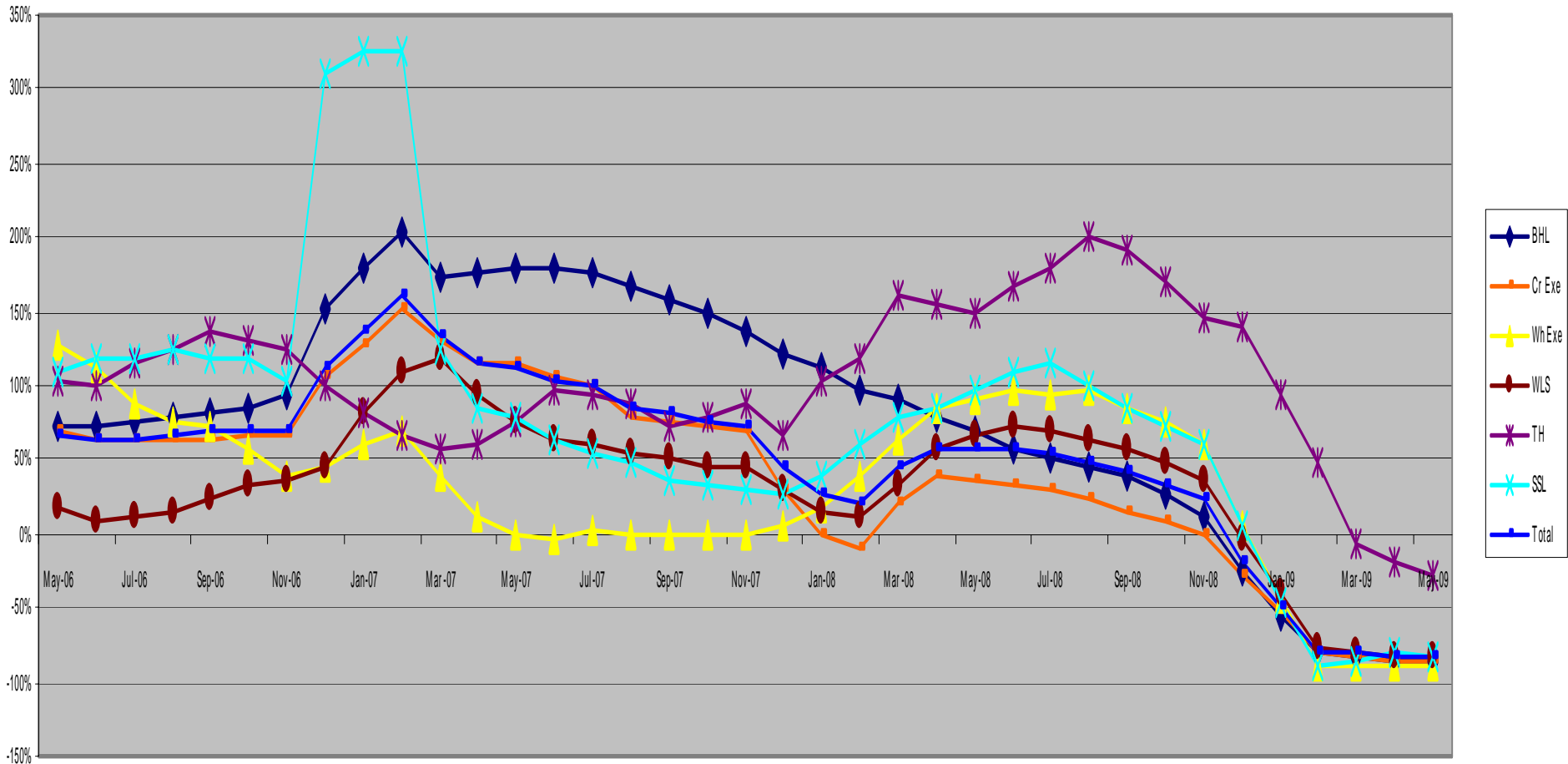


Market Volume





Russia ROC T3





High stocks

Very poor market conditions

Some manufacturers to import machines this year

Component Supplier Base

Logistics

Staff Skills



- **Caterpillar**
 - Tracked excavators (Tosno)
- **Komatsu**
 - Tracked excavators (Kaluga)
- **John Deere**
 - Recently announced investment
- **Volvo**
 - CE equipment, (Kaluga)



- **Hitachi**
 - Plans on hold pending market conditions
- **Manitou**
 - Plans announced, but not proceeding

