



China Refrigerated and Insulated Vehicle Market Report, 2010-2011

May 2011

This report

- ◆ **Analyzes the development environment of refrigerated & insulated van industry in China.**
- ◆ **Focuses on the supply & demand and competition pattern of refrigerated & insulated van market.**
- ◆ **Highlights the operation of 15 key enterprises in this industry.**

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Abstract

Refrigerated & insulated vans are closed special transport vehicles, and they are primarily used to transport frozen or fresh goods, such as meat, fruit, vegetable, aquatic products, flowers and so on.

Refrigerated vans are equipped with carriages (which have thermal insulation structure) and refrigeration devices for transporting refrigerated goods. Insulated vans are also equipped with carriages (which have thermal insulation structure) for heat preservation transport.

As people's living standards have been improved, the demand for refrigerated products keeps increasing; coupled with the strengthened cold chain logistics industry and the rapid development of road transport industry, refrigerated & insulated vans in China have seen quick development. The number of refrigerated & insulated vans in China rose from over 30,000 in 2000 to more than 50,000 in 2010 ; the output increased from less than 3,000 in 2000 to nearly 6,000 in 2010.

However, compared with other countries, China has fewer refrigerated & insulated vans with a low refrigerated transport rate and considerable demand for refrigeration and thermal insulation. For example, Europe, America and Japan each has a refrigerated transport rate of 83-90%, Eastern Europe has 50%, but China only has about 20%. In China, about 80% of fruit, vegetable, poultry and aquatic products are transported by ordinary trucks.

In June 2010, China issued the first Cold Chain Logistics Development Plan for Agricultural Products to point out that China should vigorously develop refrigerated vans, and raise the refrigerated transport rates of fruit & vegetable, meat and aquatic products from 15%, 30% and 40% in 2010 to 30%, 50% and 65% in 2015 respectively. The plan encourages large-scale cold chain logistics enterprises to purchase refrigerated transport vehicles

By 2015, the number of new refrigerated vans will reach 40,000. This means that China's annual demand growth rate for refrigerated and insulated vans will exceed 20% from 2011 to 2015.

Starting from the angle of the environment for the development of China refrigerated & insulated van industry, this report analyzes supply and demand in refrigerated & insulated van market, and then analyzes the competition pattern and 15 key enterprises in this industry.

In 2010, Chinese refrigerated van market was dominated by Beiqi Foton Motor Co., Ltd, Zhenjiang Speed Automobile Group Co., Ltd and Zhengzhou Hongyu Special Vehicle Co., Ltd. In this market, top 3 enterprises contributed 43.63% to the total output, and top 10 ones 82.42%.

The refrigerated vans of Beiqi Foton are made of high-quality polyurethane insulation materials with overall foam process and sandwich process, and enjoy good reputation. In 2010, Beiqi Foton produced 1,058 refrigerated vans, surpassing Zhenjiang Speed to become the champion in the industry.

Zhengzhou Hongyu belongs to China North Industries Group. In recent years, it has focused on the development of special vehicles based on military technology. It mainly produces light-duty and mini refrigerated vans with the chassis made by Chang'an and Jiefang. Zhengzhou Hongyu plans to raise its share in refrigerated & insulated van market to over 20% in 2011.

In China, there are only a few insulated van enterprises putting into real production and with product certificates, including the most competitive Henan Bingxiong and CIMC Vehicles Group.

In addition, the report also analyzes the development, downstream demand, key areas and key enterprises of China cold chain industry.

1 Overview of Refrigerated and Insulated Van

- 1.1 Definition
 - 1.1.1 Definition and Classification
 - 1.1.2 Statistical Standards
- 1.2 Structure
- 1.3 Characteristics
- 1.4 Role in Cold Chain

2 Development Environment of Refrigerated and Insulated Van in China

- 2.1 Policy Environment
 - 2.1.1 Special Vehicle Industry Standards
 - 2.1.2 Encouragement Policies
- 2.2 Technology Environment
 - 2.2.1 Envelope Structure
 - 2.2.2 Refrigeration unit technology
 - 2.2.3 Basal Disc Technology and Application
- 2.3 Social Environment

3 Current Development of Refrigerated and Insulated Van in China

- 3.1 History
- 3.2 Supply
- 3.3 Demand
- 3.4 Gap Between Domestic and Foreign

4 Main equipments Market of Refrigerated and Insulated Van in China

- 4.1 Refrigerating Unit
 - 4.1.1 Conception

- 4.1.2 Market Status
- 4.1.3 Key Manufacturers
- 4.2 Basal Disc
 - 4.2.1 Conception
 - 4.2.2 Market Status
 - 4.2.3 Key Manufacturers
- 4.3 Thermal Insulation

5 Competition Pattern of Refrigerated and Insulated Van in China

- 5.1 Competition among Enterprises
- 5.2 Product Competition
 - 5.2.1 Comparison among Refrigerated Transport means
 - 5.2.2 Product Structure
- 5.3 Regional Competition

6 Key Enterprises

- 6.1 Beiqi Foton Motor Co., Ltd.
- 6.2 Zhenjiang Speed Automobile Group Co.,Ltd.
- 6.3 CIMC Vehicles (Group) Co., Ltd.
- 6.4 Zhengzhou Hongyu Special Vehicle Co., Ltd.
- 6.5 Hennan Bingxiong Lengcangche Company.,Ltd.
- 6.6 Henan Xinfei Special Purpose Vehicle Co., Ltd.
- 6.7 Zhenjiang Kangfei Machine-building Co.,Ltd.
- 6.8 JMC Special-purpose Vehicle Plant
- 6.9 Anhui Jianghuai Automobile Co.,Ltd.
- 6.10 Dongfeng Automobile Co., Ltd.
- 6.11 Other
 - 6.11.1 Qingling Motors (Group)co.,Ltd.
 - 6.11.2 CIMC Vehicles (Shandong) Co., Ltd
 - 6.11.3 Shenzhen Kaifeng Special Automobiles Co., Ltd.

- 6.11.4 Anhui Jianghuai Special Purpose Vehicle Co.,Ltd.
- 6.11.5 Beijing Beiling Special Automobile Co.,Ltd.

7 Overview of Cold Chain Market in China

- 7.1 Current Development of Cold chain logistics industry in China
- 7.2 Downstream Demand of Cold Chain
 - 7.2.1 Demand for Meat Cold Chain
 - 7.2.2 Demand for Aquatic Products Cold Chain
 - 7.2.3 Demand for Fruits and Vegetables Cold Chain
 - 7.2.4 Demand for Drug Cold Chain
- 7.3 Development of Cold Chain in China by Region
 - 7.3.1 Beijing
 - 7.3.2 Shanghai
 - 7.3.3 Guangdong
- 7.4 Key Cold Chain Logistics Companies in China
 - 7.4.1 Shanghai HaiBo Co., Ltd.
 - 7.4.2 Jinjiang International Industrial Investment Co., Ltd.
 - 7.4.3 China Railway Tielong Container Logistics Co., Ltd.

- Cold Chain Logistics
- Mileage and Density of Highway in China, 2006-2010
- Enterprise Quantity of Available Refrigerated & Insulated Van in China, 2006-2010
- Output of Refrigerated & Insulated Van in China, 2008-2010
- Output and Cold Chain Transport Volume of Fresh Agricultural Products in China, 2010
- Proportion of Refrigerated & Insulated Van in Freight Vehicles
- Performance Comparison of Insulation Material Used in Refrigerated & Insulated Van
- Top 10 Refrigerated Van Production Enterprises in China, 2010
- Top 4 Insulated Van Production Enterprises in China, 2010
- Characteristics of Main Refrigerated Transport Means
- Product Structure of Refrigerated Van in China, 2009
- Product Structure of Insulated Van in China, 2009
- Output of China Refrigerated Van by Region, 2009
- Output of China Insulated Van by Region, 2009
- Refrigerated & Insulated Van Product Series of Foton
- Revenue and Net Income of Foton, 2007-2010
- Output of Foton Refrigerated & Insulated Van, 2009-2010
- Monthly Output of Foton Refrigerated Van, 2010
- Refrigerated & Insulated Van Product Series of Zhenjiang Speed
- Monthly Output of Zhenjiang Speed Refrigerated Vehicle, 2010
- Output of CIMC Vehicles Refrigerated & Insulated Van, 2009-2010
- Refrigerated Van Monthly Output of CIMC Vehicles 2010
- Product Structure of CIMC Vehicles Refrigerated & Insulated Van by Ga, 2009
- Chassis Brand of CIMC Vehicles Refrigerated & Insulated Van, 2009
- Refrigerated & Insulated Van Product Series of Zhengzhou Hongyu

- Refrigerated & Insulated Van Monthly Output of Zhengzhou Hongyu, 2009-2010
- Refrigerated & Insulated Van Product Series of Henan Bingxiong
- Refrigerated & Insulated Van Output of Henan Bingxiong, 2009-2010
- Refrigerated & Insulated Van Product Series of Henan Xinfei
- Refrigerated Van Monthly Output of Henan Xinfei, 2010
- Refrigerated Van Monthly Output of Zhenjiang Kangfei, 2010
- Refrigerated & Insulated Van Product Series of JMC Special-purpose Vehicle Plant
- Refrigerated & Insulated Van Monthly Output of JMC Special-purpose Vehicle Plant, 2009-2010
- Refrigerated Van Monthly Output of JMC Special-purpose Vehicle Plant, 2010
- Revenue & Net Income of JAC, 2008-2011
- Monthly Output of JAC Refrigerated Van, 2010
- Revenue & Net Income of DFAC, 2008-2011
- Refrigerated Van Monthly Output of DFAC, 2010
- Refrigerated Van Product Series of CIMC Vehicles (Shandong) Co., Ltd
- Refrigerated Van Output of CIMC Vehicles (Shandong), 2009-2010
- Refrigerated Van Product Series of Shenzhen Kaifeng
- Refrigerated Van Output of Shenzhen Kaifeng, 2009-2010
- Refrigerated Van Output of Anhui Jianghuai Special Purpose Vehicle Co.,Ltd., 2009-2010
- Refrigerated Van Product Series of Beijing Beiling Special Automobile Co., Ltd.
- Refrigerated Van Output of Beijing Beiling Special Automobile Co.,Ltd., 2009-2010
- Cold Chain Circulating Rate & transport rate of Fresh Agricultural Products in China
- Cold Chain Circulation and Transport Volume of Meat Products in China, 2011E-2015E
- Cold Chain Logistics Process of Frozen Aquatic Products
- Cold Chain Transport Volume of Aquatic Products in China, 2011E-2015E Cold Chain Logistics Process of Fruits and Vegetables

- Cold Chain Transport Volume of Fruits and Vegetables in China, 2011E-2015E
- Scale of Human Vaccines and Animal Vaccine Markets in China, 2007-2009
- Constitution of In-vitro Diagnostic Reagents in China, 2009
- Per Capita Frozen and Refrigerated Food Consumption in Shanghai, Japan and USA, 2008
- Distribution of Refrigeratory in Guangdong, Mar 2010
- Refrigeratory Capacity of Cold Storage Company in Guangzhou, 2009
- Refrigeratory Capacity of Cold Storage Company in Shenzhen, 2009
- Revenue & Net Income of Shanghai HaiBo Co., Ltd, 2007-2011
- Revenue & Net Income of Jinjiang International Industrial Investment, 2007-2011
- Revenue and Profit of Jinjiang International Industrial Investment by Sector, 2009-2010
- Revenue and Profit of China Railway Tielong Container Logistics Co., Ltd. by Sector, 2009-2010
- Special Container Business Types of China Railway Tielong Container Logistics Co., Ltd.

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