



China Heavy Truck Industry Report, 2012

Aug. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources Ministry of Health of the People's Republic of China, National Bureau of Statistics of China and WIND Database etc.

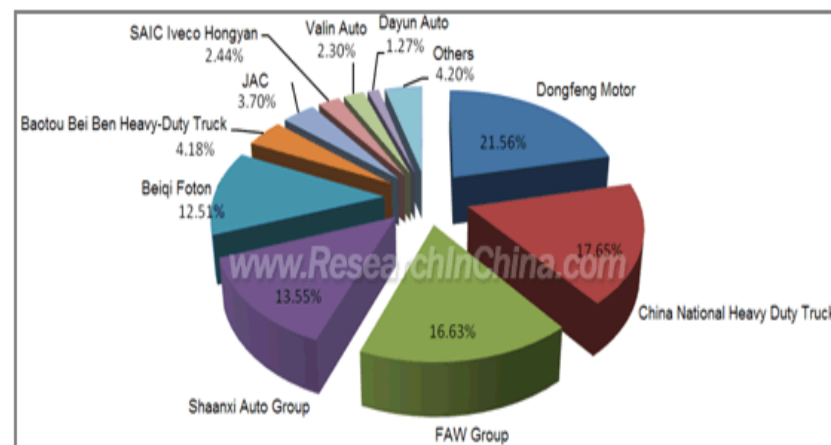
Abstract

In recent two years, as China's economic growth rate slowed down, real estate development, infrastructure construction and the freight market have been in the downturn, the demand for heavy trucks has become weakened. From 2011 to H1 2012, Chinese heavy truck market saw a serious decline. In 2011, China's heavy truck output and sales volume reached 822,700 and 880,600 separately, down 22.29% and 13.44% year on year respectively. In H1 2012, the heavy truck output and sales volume reached 343,600 and 371,600 respectively, down 31.95% and 31.62% year on year separately, showing higher decline rates.

The sales volume of Chinese heavy trucks dropped down by over 30% in H1 2012, but we believe that the market situation will be improved in H2 2012.

In China's heavy truck industry, the market concentration degree is high. Top 5 manufacturers have about 80% market share together. In 2011 and H1 2012, the heavy truck sales volume of Dongfeng Motor exceeded that of China National Heavy Duty Truck and FAW Group, ranking first. From 2011 to H1 2012, the sales volume of top 5 manufacturers witnessed varying decline. In 2011, FAW Group saw the highest decline rate of 31.42%. In H1 2012, the sales volume of top 5 heavy truck enterprises fell by 20%-31%.

Chinese Heavy Truck Market Share, H1 2012



Source: CAAM; ResearchInChina<China Heavy Truck Industry Report, 2012>

As the market demand weakens, the product sales volume continues to decline and the oil price keeps rising, natural gas heavy trucks have drawn the attention of the industry with its advantages in energy saving, safety, cleanliness and operating costs. In China, top five heavy truck enterprises have launched natural gas heavy trucks.

China National Heavy Duty Truck has conducted R & D and production of natural gas heavy trucks since 2008. In 2009, it produced and sold 100 natural gas heavy trucks; the number grew to 1,119 quickly in 2010 and more than 2,600 in 2011. In July 2012, China National Heavy Duty Truck promoted natural gas heavy trucks, especially HOWO natural gas trucks, in Shanxi and Hebei, and the sales volume was satisfying. China National Heavy Duty Truck plans to produce and sell 3,000 to 4,000 natural gas heavy trucks in 2012.

Shaanxi Automobile Group successfully developed CNG, LNG high-powered heavy trucks in 2011, particularly the orders and shipment of LNG heavy trucks grew by 200% in H1 2012. In the domestic market, Shaanxi Automobile Group has launched LNG heavy trucks successfully in Hebei. By June 2012, more than 400 trucks had been ordered, exceeding the annual sales volume of 37 in 2011. In foreign markets, the LNG heavy trucks of Shaanxi Automobile Group sell well in Southeast Asia.

The report includes the following aspects:

- Technology introduction, emission standards and development trends of Chinese heavy trucks;
- Output, sales volume, market structure and price trend in Chinese heavy truck market, as well as the development of LNG heavy trucks;
- Output, sales volume, market share, import and export in three market segments (complete heavy trucks, incomplete heavy trucks and semitrailer tractors);
- China heavy truck industry chain, including upstream raw material price trend, downstream demand, and heavy truck cost structure; Major heavy trucks, operation, output, sales volume, new product R & D and corporate strategies of top 15 Chinese heavy truck enterprises.

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