



China Heavy Truck Industry Report, 2013

Aug. 2013

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

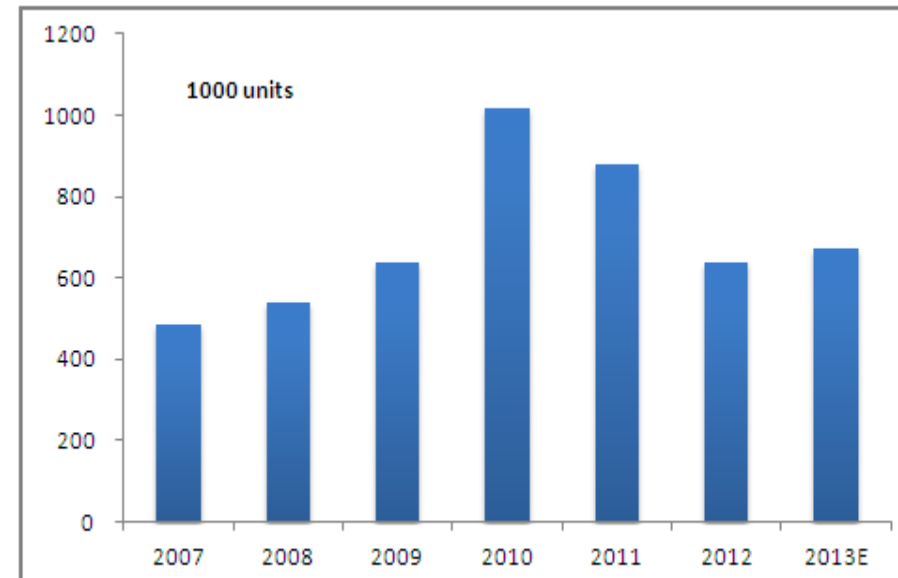
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

With the fading effect of a 4 trillion yuan stimulus package as well as the slowdown of Chinese economic growth rate, the demand in China heavy truck market has kept declining since 2011. In 2012, the sales volume of heavy trucks in China was no more than 636,000 units, down 27.78% over 2011.

In H12013, the heavy truck industry of China saw pickup in terms of both output and sales volume, with the sales volume, in particular, increasing by 8.36% year-on-year. The contributing reasons are as follows: a) China's investment in infrastructure construction saw a steady growth rate; b) the requirements for updating heavy trucks which are on their last legs since 2008-2010 when witnessed a spike in sales; c) the release of National IV emission standard brought with orders for consumption in advance. However, from the perspective of the overall situation all the year round, China's sales of heavy truck is not so optimistic, with the expected growth in sales volume by around 6%, against the backdrop of a series of adverse factors such as slackened macro-economic situation as a whole, declining demand for coal power and the growth dive of highway freight volume.

Sales Volume of Heavy Trucks in China, 2007-2013



Source: CAAM; RIC China Heavy Truck Industry Report, 2013

In 2011-2012, the output of China's top five heavy truck producers fell to varying degrees. In H1 2013, with the sole exception of SINOTRUK whose output declined slightly by 3%, the rest four ones saw pickup in output to various degrees.

Dongfeng Automobile Co., Ltd. -- in 2012, the company saw steep drop in both output and sales volume of heavy trucks, with the figure of 119,649 and 130,830, respectively, down 30.52% year-on-year and 29.65% year-on-year. In 2013H1, the company's output and sales volume of heavy trucks turned around for the better, up 12% year-on-year and 9% year-on-year, respectively. In Sep.2013, the 80,000 units/a capacity of its Shiyan Heavy Truck Base is expected to fully put into production.

FAW Group --it boasts the widest range of product line in China heavy truck industry. In 2012, the company's output and sales volume of heavy trucks dropped by 31.33% year-on-year and 33.28% year-on-year, respectively. Given the weakening domestic heavy truck market, the company is gearing its focus on Russia, South Africa and other overseas markets.

Beiqi Foton Motor Co., Ltd. --in 2011-2013, the company, in terms of output and sales volume, came first among the top five industrial players in China. In H12013, its output and sales volume presented a year-on-year rise of 42% and 25%, respectively, well above the rest four.

The report analyzes external factors exerting impacts on the demand in China heavy truck market, and predicts the output and sales volume of China heavy trucks market, on the basis of the output and sales volume of heavy trucks by model as well as the operation of major heavy truck enterprises.

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