



China Heavy Truck Industry Report, 2014-2017

Jul. 2014

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

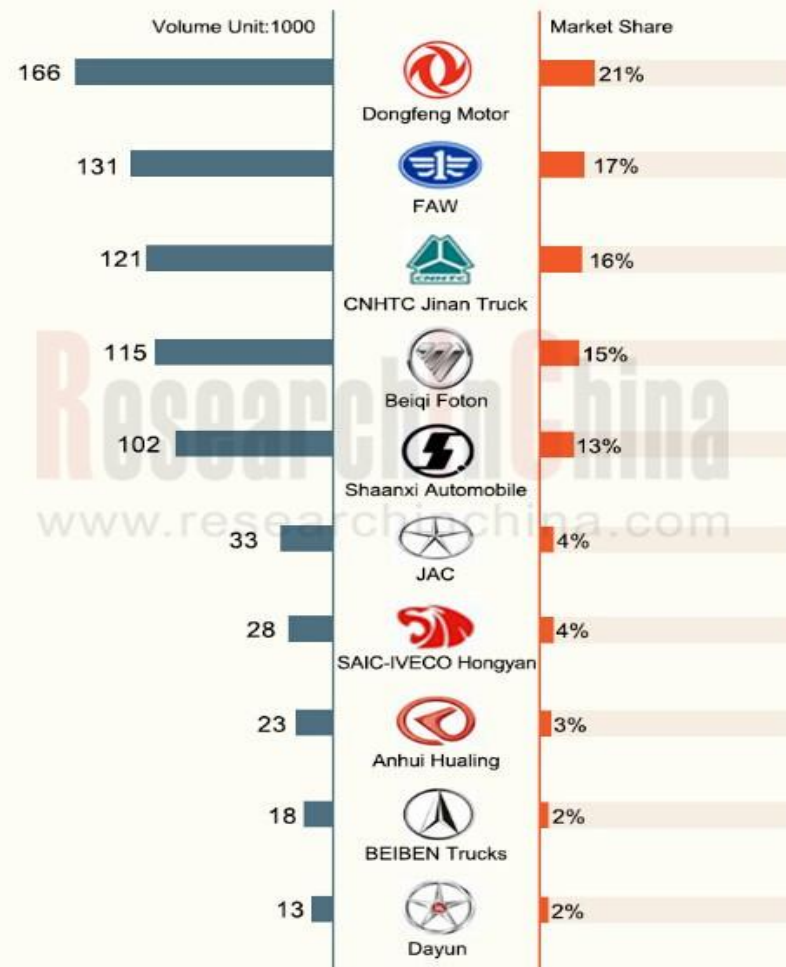
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In the heavy truck industry, the demand mainly comes from infrastructure construction and transportation, and sales volume is to a large extent influenced by macroeconomy and industrial policies. After the downturn in 2011-2012, China heavy truck industry resumed growth in 2013 thanks to logistics demand and national IV emission standards, with the sales volume increasing by 138,100 or 21.71% year on year to 774,100. From January to May of 2014, the cumulative sales volume of heavy trucks hit 365,200, up 11.48% year on year.

This report mainly involves complete heavy truck, incomplete heavy truck and semi-trailer towing vehicle, which enjoyed the market share of 28.41%, 37.56% and 34.02% respectively in 2013. In 2013, the fastest growing semi-trailer towing vehicle grew up by 38.15% and its market share increased by 4 percentage points. The development of semi-trailer towing vehicle depends on highway freight, cargo turnover, container port throughput and other factors. It is expected that semi-trailer towing vehicle will witness stable growth in the future and become the model holding the largest market share.

Sales Volume and Market Share of TOP10 Heavy Truck Manufacturers in China, 2013



Source: China Heavy Truck Industry Report, 2014-2017 ; ResearchInChina

Chinese heavy truck market is featured with high concentration, steady competition pattern and apparent long-term competitive advantages of leading enterprises. From January to May of 2014, China's top 10 heavy truck companies seized 96.89% market shares jointly, up 0.1 percentage point from 2013. In the next few years, the concentration of the heavy truck industry will continue to rise.

As the largest Chinese heavy truck enterprise, Dongfeng Motor Corporation designates its subsidiary Dongfeng Commercial Vehicle to produce and operate heavy trucks, with the production bases in Shiyan (Hubei), Suizhou(Hubei), Liuzhou (Guangxi) and Xinjiang. In 2013, its market share reached 21.41%, nearly one percentage point higher than 2012.

China's second-largest light truck manufacturer JAC has made quick progress in the field of heavy trucks over recent years. In 2010, the company stepped into the heavy truck market through the cooperation with Navistar and Caterpillar, as well as launched Gallop series products. After several years of development, JAC's heavy truck sales volume grew by 34.98% year on year during the period from January to May of 2014, far higher than the average growth rate of the industry; the market share hit 5.31%, up 1.07 percentage points from 2013. With the deepened cooperation with Navistar, JAC is expected to embrace further development in Chinese heavy truck market.

China Heavy Truck Industry Report, 2014-2017 by ResearchInChina mainly covers the following:

- Overview of the heavy truck industry, including definition, classification, technology transfer and so on;
- Research on Chinese heavy truck market, including ownership, output, sales volume, market competition pattern, etc.;
- Analysis on Chinese heavy truck market segments, embracing complete heavy trucks, incomplete heavy trucks and semi-trailer towing vehicles;
- Research on the heavy truck industry chain, consisting of key parts market, raw material market and downstream market;
- Analysis on major Chinese heavy truck enterprises, such as operation, output, sales volume, main customers, new products, etc..

1. Overview of China Heavy Truck Industry

- 1.1 Definition and Classification
- 1.2 Technology Introduction
- 1.3 Emission Standards
- 1.4 Development Tendency of Products

2. Heavy Truck Market

- 2.1 Output and Sales Volume
 - 2.1.1 Ownership
 - 2.1.2 Output
 - 2.1.3 Sales Volume
- 2.2 Competition Pattern
 - 2.2.1 Market Share
 - 2.2.2 Sales Goal
- 2.3 LNG Heavy Truck

3. Market Segments

- 3.1 Complete Heavy Truck
 - 3.1.1 Output and Sales Volume
 - 3.1.2 Market Share
 - 3.1.3 Import and Export
- 3.2 Incomplete Heavy Truck
 - 3.2.1 Output and Sales Volume
 - 3.2.2 Market Share
- 3.3 Semi-trailer Towing Vehicle
 - 3.3.1 Output and Sales Volume
 - 3.3.2 Market Structure

3.3.3 Market Share

4. Heavy Truck Industry Chain

- 4.1 Overview
- 4.2 Key Components
 - 4.2.1 Cost Structure
 - 4.2.2 Supporting
- 4.3 Raw Materials Market
 - 4.3.1 Iron and Steel Market
 - 4.3.2 Rubber Market
- 4.4 Downstream Market
 - 4.4.1 Infrastructure Construction
 - 4.4.2 Real Estate Development and Construction
 - 4.4.3 Highway Freight Market

5. Key Companies

- 5.1 Dongfeng Motor
 - 5.1.1 Profile
 - 5.1.2 Revenue and Gross Margin
 - 5.1.3 Output and Sales Volume of Heavy Trucks
 - 5.1.4 Forecast for Heavy Truck Sales Volume
- 5.2 CNHTC Jinan Truck Co., Ltd.
 - 5.2.1 Profile
 - 5.2.2 Revenue and Gross Margin
 - 5.2.3 Output and Sales Volume of Heavy Trucks
 - 5.2.4 Industrial Cooperation in Africa
- 5.3 FAW Group

5.3.1 Profile

5.3.2 Output and Sales Volume of Heavy Trucks

5.3.3 Third-generation Anjie Heavy Truck is Launched

5.4 Shaanxi Automobile Group Co., Ltd.

5.4.1 Profile

5.4.2 Output and Sales Volume of Heavy Trucks

5.5 Beiqi Foton Motor Co., Ltd.

5.5.1 Profile

5.5.2 Revenue and Gross Margin

5.5.3 Major Clients

5.5.4 Output and Sales Volume of Heavy Trucks

5.5.5 High-end Environment-friendly Heavy Trucks Are Launched

5.6 BEIBEN Trucks Group Co.,Ltd

5.6.1 Profile

5.6.2 Output and Sales Volume of Heavy Trucks

5.7 Jianghuai Automobile Co., Ltd.

5.7.1 Profile

5.7.2 Revenue and Gross Margin

5.7.3 Output and Sales Volume of Heavy Trucks

5.8 SAIC-IVECO Hongyan Commercial Vehicle Co., Ltd

5.8.1 Profile

5.8.2 Output and Sales Volume of Heavy Trucks

5.8.3 The First High-end Heavy Truck Model -- StralisHi-Way is Launched

5.9 Anhui Hualing Automobile Co., Ltd.

5.9.1 Profile

5.9.2 Output and Sales Volume of Heavy Trucks

5.10 Chengdu Dayun Automotive Group Company Limited

5.10.1 Profile

5.10.2 Output and Sales Volume of Heavy Trucks

5.11 Hubei Tri-Ring Special Vehicle Co., Ltd.

5.11.1 Profile

5.11.2 Output and Sales Volume of Heavy Trucks

5.12 GAC Hino Motors Co., Ltd.

5.12.1 Profile

5.12.2 Output and Sales Volume of Heavy Trucks

5.12.3 New 700 Series Products Complying with National IV Emission Standards Are Launched

5.13 Zhejiang Feidie Automobile Manufacturing Co., Ltd.

5.13.1 Profile

5.13.2 Output and Sales Volume of Heavy Trucks

5.14 Nanjing Xugong Automobile Manufacturing Co., Ltd.

5.14.1 Profile

5.14.2 Output and Sales Volume of Heavy Trucks

5.15 Qingling Motors (Group) Co., Ltd.

5.15.1 Profile

5.15.2 Output and Sales Volume of Heavy Trucks

6 Summary and Forecast


6.1 Market Size

6.2 Market Structure

- 
- Classification of Heavy Truck Industry
 - Technology Introduction of Key Heavy Truck Manufacturers in China
 - China Vehicle Emission Standards
 - China's Heavy Truck Ownership, 2002-2013
 - China's Heavy Truck Output, 2007-2013
 - Output and Market Share of Heavy Truck Breakdown Products, 2012-2013
 - Heavy Truck Output and Growth Rate by Model, Jan-May 2014
 - China's Heavy Truck Sales Volume, 2007-2013
 - Sales Volume and Market Share of Heavy Truck Breakdown Products, 2012-2013
 - Heavy Truck Sales Volume and Growth Rate by Model, Jan-May 2014
 - Sales Volume and Market Share of Major Heavy Truck Enterprises in China, 2013
 - Sales Volume and Market Share of Major Heavy Truck Enterprises in China, Jan-May 2014
 - China's Complete Heavy Truck Output and Sales Volume, 2007-2014
 - China's Complete Heavy Truck Sales Volume, Growth Rate and Market Share, 2013
 - China's Complete Heavy Truck Sales Volume, Growth Rate and Market Share, Jan-May 2014
 - China's Complete Heavy Truck Import and Export Volume, 2009-2014
 - China's Complete Heavy Truck Export Structure, 2009-2014
 - China's Heavy Truck (14t <Gross Weight ≤ 20t) Export Volume and Growth Rate,, 2009-2014
 - China's Heavy Truck (Gross Weight> 20t) Export Volume and Growth Rate,, 2009-2014
 - Proportion of Complete Heavy Truck Export Volume in Total Sales Volume in China, 2009-2014
 - China's Incomplete Heavy Truck Output and Sales Volume, 2007-2014
 - China's Incomplete Heavy Truck Sales Volume, Growth Rate and Market Share, 2013
 - China's Incomplete Heavy Truck Market Share, Jan-May 2014
 - China's Semi-trailer Towing Vehicle Output and Sales Volume, 2007-2014
 - China's Semi-trailer Towing Vehicle Sales Volume by Tonnage, 2007-2013

- 
- Semi-trailer Towing Vehicle Sales Volume, Growth Rate and Market Share by Model, 2013-2014
 - Sales Volume and Market Share of Semi-trailer Towing Vehicle Enterprises in China, 2013
 - China's Semi-trailer Towing Vehicle Sales Volume, Growth Rate and Market Share by Model, 2013
 - China's Semi-trailer Towing Vehicle Sales Volume, Growth Rate and Market Share by Model, Jan-May 2014
 - Automobile Industry Chain
 - Cost Structure of Heavy Truck Industry
 - China's Galvanized Sheet (Strip) Output and Sales Volume, 2005-2014
 - China's Galvanized Coil Price, 2012-2014
 - China's Cold-rolled Thin Sheet Output and Sales Volume, 2005-2014
 - China's Cold-rolled Coil Price, 2012-2014
 - China's Natural Rubber Spot Price, 2012-2014
 - China's Investment in Fixed Assets, 2004-2014
 - Prosperity Index of China Real Estate Industry, 2010-2013
 - China's New Housing Construction Area, 2004-2014
 - China's Commercial Housing Sales Area, 2004-2014
 - China's Highway Freight Volume, 2004-2014
 - China's Highway Freight Turnover, 2004-2014
 - Number of Employees of Dongfeng Motor, 2009-2013
 - Dongfeng Motor's Revenue, Net Income and Gross Margin, 2009-2013
 - Dongfeng Motor's Revenue Breakdown by Region, 2009-2013
 - Dongfeng Motor's Heavy Truck Output and Sales Volume, 2007-2014
 - Dongfeng Motor's Heavy Truck Sales Volume, 2007-2014
 - Dongfeng Motor's Heavy Truck Output and Sales Volume, 2014-2017E
 - Number of Employees of CNHTC, 2009-2013
 - CNHTC's Revenue, Net Income and Gross Margin, 2008-2013

- 
- CNHTC's Main Heavy Truck Products
 - CNHTC's Heavy Truck Output and Sales Volume, 2007-2014
 - CNHTC's Heavy Truck Sales Volume, 2007-2014
 - CNHTC's Heavy Truck Output and Sales Volume, 2014-2017E
 - FAW's Heavy Truck Output and Sales Volume, 2007-2014
 - FAW's Heavy Truck Sales Volume, 2007-2014
 - FAW's Heavy Truck Output and Sales Volume, 2014-2017E
 - Heavy Truck Output and Sales Volume of Shaanxi Automobile Group, 2007-2014
 - Heavy Truck Sales Volume of Shaanxi Automobile Group, 2007-2014
 - Heavy Truck Output and Sales Volume of Shaanxi Automobile Group, 2014-2017E
 - Number of Employees in Beiqi Foton, 2009-2013
 - Beiqi Foton's Revenue, Net Income and Gross Margin, 2009-2013
 - Name List and Revenue Contribution of Top 5 Clients of Beiqi Foton, 2012-2013
 - Beiqi Foton's Heavy Truck Output and Sales Volume, 2007-2014
 - Beiqi Foton's Heavy Truck Sales Volume, 2007-2014
 - Beiqi Foton's Heavy Truck Output and Sales Volume, 2014-2017E
 - BEIBEN's Heavy Truck Output and Sales Volume, 2007-2014
 - BEIBEN's Heavy Truck Sales Volume, 2007-2014
 - Number of Employees of JAC, 2009-2013
 - JAC's Revenue, Net Income and Gross Margin, 2009-2013
 - JAC's Overseas Revenue and % in Total, 2009-2013
 - JAC's Heavy Truck Output and Sales Volume, 2007-2014
 - Heavy Truck Output and Sales Volume of SAIC-IVECO Hongyan, 2007-2014
 - Heavy Truck Sales Volume of SAIC-IVECO Hongyan, 2007-2014
 - Heavy Truck Output and Sales Volume of SAIC-IVECO, 2014-2017E

- 
- Hualing Automobile's Heavy Truck Output and Sales Volume, 2007-2014
 - Hualing Automobile's Heavy Truck Sales Volume, 2007-2014
 - Dayun Automotive's Heavy Truck Output and Sales Volume, 2009-2014
 - Dayun Automotive's Heavy Truck Sales Volume
 - Heavy Truck Output and Sales Volume of Tri-Ring Special Vehicle, 2007-2014
 - Heavy Truck Sales Volume of Tri-Ring Special Vehicle, 2007-2014
 - GAC Hino's Heavy Truck Output and Sales Volume, 2009-2014
 - GAC Hino's Heavy Truck Sales Volume, 2009-2014
 - Zhejiang Feidie's Heavy Truck Output and Sales Volume, 2009-2014
 - Xugong Automobile's Heavy Truck Output and Sales Volume, 2009-2014
 - Xugong Automobile's Heavy Truck Sales Volume, 2009-2014
 - Heavy Truck Output and Sales Volume of Qingling Motors, 2012-2014
 - Heavy Truck Sales Volume of Qingling Motors, 2012-2014
 - Cumulative YoY Growth Rate of China's Heavy Truck Monthly Sales Volume, 2014
 - Forecast for China's Heavy Truck Sales Volume, 2014-2017E
 - China's Heavy Truck Market Structure, 2017E

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