



**China Diesel Engine Industry Report,
2014-2017**

Nov. 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

With growth of commercial vehicle output in 2013, vehicle diesel engine market has warmed up with the annual output reaching 3.563 million sets, increasing 7.3% YoY but still below 3.936 million sets in 2010 and 3.59 million sets in 2011. In January-February, 2014, China vehicle diesel engine output was 648,467 sets, representing an increase of 8.2% over the same period in 2013.

In 2013, there were 21 vehicle diesel engine manufacturers in China, and the TOP five were Guangxi Yuchai, Weichai Power, Anhui Quanchai Engine, FAW Group and Jiangling Motors. Among them, Weichai Power sold 516,000 sets of vehicle diesel engines in 2013, surging 98.7% YoY, standing at 14.5% of sales volume of the whole industry. It enjoyed the highest growth rate of sales volume among all vehicle diesel engine manufacturers. Weichai Power's rapid rise in sales volume benefited from the substantial increase of truck sales of its major client --Foton Daimler.

In 2013, Weichai Power achieved revenue of RMB 58.31 billion, a year-on-year increase of 21% YoY and net income of RMB 3.82 billion, up 18% YoY.

In 2014, the National IV Diesel Engine Emission Standards are being widely implemented, the installation rate of China's high-pressure common rail engine will increase from 30% in 2013 to 60%-70%. As it enjoys greater superiority in high pressure common rail engine technology, in 2014 Weichai's sales volume of diesel engine are expected to be further improved.

China's economy is in a transition phase and economic growth is slowing down. These factors will result in fluctuations in market demand for diesel engine. Furthermore, China's passenger vehicle diesel engine market penetration is still very low, thus in the future, the growth stimulus for Chinese vehicle diesel engine market will still come to commercial vehicles.

Sales Volume and Market Share of Diesel Engine Manufacturers in China, 2013 (Unit)

Enterprise	Output	Sales Volume	Market Share (measured by sales volume)
Guangxi Yuchai Machinery Group Co., Ltd.	531,842	549,572	15.34%
Weichai Power Holdings Co., Ltd.	530,136	516,000	14.41%
Anhui QuanChai Group Limited Company	478,157	476,224	13.30%
China FAW Group Corporation	438,520	440,352	12.29%
JMC Holdings Co., Ltd.	239,379	239,529	6.69%
Yunnei Power Co., Ltd.	220,495	232,429	6.49%
Dongfeng Automobile Co., Ltd.	181,146	181,137	5.06%
Shandong Huayuan Laidong Engine Co., Ltd.	162,833	163,687	4.57%
Beiqi Foton Motor Co., Ltd.	151,158	151,467	4.23%
Dongfeng Chaoyang Diesel Engine Company	128,876	132,033	3.69%
GreatWall Motor Holdings Co., Ltd.	94,249	94,441	2.64%
China National Heavy Duty Truck Group Co., Ltd.	94,799	92,572	2.58%
Qingling Motors (Group) Co., Ltd.	74,962	74,962	2.09%
Anhui JAC Motors Co., Ltd.	74,220	74,494	2.08%
Dongfeng Motor Commercial Vehicle Co., Ltd.	44,942	45,091	1.26%
Nanjing Automobile Corporation	42,470	42,889	1.20%
Shanghai Diesel Engine Co., Ltd.	25,014	25,012	0.70%
Mianyang Xinchun Engine Co., Ltd.	19,139	19,663	0.55%
Shanghai HINO Engine Co., Ltd.	15,293	14,664	0.41%
Chengdu Chengfa Automobile Engine Co., Ltd.	14,731	14,559	0.41%
GAC GONOW Auto Co., Ltd.	691	841	0.02%
FAW-VW Automobile Co., Ltd.	0	0	0.00%
BMW-brilliance Auto Co., Ltd.	0	0	0.00%
Total	3,563,052	3,581,618	100.00%

Source: CAAM; RIC

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