



**China Off-road Engine Industry  
Report, 2015-2018**

**Feb. 2015**

## 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

As an important part of Chinese machinery industry, off-road mobile machinery witnessed the first booming decade of the 21st century with the continuous progress of infrastructure construction in China. Within the second decade of the century, especially the period after 2011, China off-road mobile machinery industry and the engine market which is the core of the industry decline in the wake of the global economic ups and downs and the slowdown of Chinese economic growth.

According to statistics of China Internal Combustion Engine Industry Association (CICEIA), China sold 60.3834 million engines (down 1.67% year on year) in 2014, including 46.1062 million road engines (down 0.32% year on year marginally); the sales volume of off-road engines fell 5.79% year on year to 14.2772 million.

In 2014, the entire off-road engine market showed a downward trend. The sales volume of garden machinery-use internal combustion engines totaled 4.2464 million in China, down 0.52% year on year. The sales volume of generator-use internal combustion engines dropped 6.92% year on year to 3.0024 million. The sales volume of agricultural machinery-use internal combustion engines descended 8.18% year on year to 5.7834 million. In comparison, construction machinery-use and marine internal combustion engines saw more severe reduction, with the respective sales volume of 568,900 (a fall of 13.16% year on year) and 57,600 (dropping 16.04% year on year).

### Size of Off-road Engine Market Segments, 2013-2014

2013: 15.1545 million sets

2014: 14.2772 million sets



- Agricultural Machinery
- Garden Machinery
- Engineering Machinery
- Generators
- Ships
- Others

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Single-cylinder diesel engines are mainly used in small-sized agricultural machinery, garden machinery and generators. At present, an increasing number of single-cylinder diesel engines are applied to generators, while the quantity of such engines used in other fields decreases. The sales volume of single-cylinder diesel engines slumped 14.20% year on year to 3.4466 million in 2014. The top five companies include: Changchai, Changfa, Jiangsu Jianghuai Engine, Changlin Agricultural Equipment and Cixi Sanhuan whose combined single-cylinder diesel engine sales volume accounted for 68.42% of the industrial total.

Multi-cylinder diesel engines are suitable for commercial vehicle, agricultural machinery and construction machinery. The sales volume herein dipped 9.91% year on year to 4.1914 million in 2014. The top-ranked Weichai, Yuchai, Quanchai Engine, FAWDE, JMC, Kunming Yunnei, Xinchai, Dongfeng Cummins, Foton Cummins and Changchai contributed 66.75% to the total sales volume together.

The report mainly covers the following:

- Overview of China off-road engine industry, including definition, classification, policies, regulations and future trends;
- Overview of China internal combustion engine industry, road and off-road engine market size, sales volume of gasoline and diesel engines;
- Overview of construction machinery, agricultural machinery, generators, marine and universal small gasoline engines and other downstream segments of the industry, output and sales volume of main products, demand for off-road engines, etc.
- Profile, financial performance, output, sales volume, main customers, hit products, R & D, production base distribution and other technical characteristics of five multinational companies (including Cummins, Perkins, Deutz, Isuzu, Mitsubishi Heavy Industries) as well as 12 domestic Chinese off-road engine manufacturers (embracing Yuchai International, Weichai Power, Yunnei Power, FAWDE, Quanchai Engine, Jiangsu Jianghuai Engine, Changchai, Shanghai Diesel Engine, Dongfeng Chaoyang Diesel, Zongshen Power Machinery, etc.).

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