



**China Heavy Truck Industry Report,
2015-2018**

Jul. 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.

In 2014, China's heavy truck sales volume totaled 748,000 units, falling 3.32% year on year; the accumulative sales volume for Jan.-Apr. 2015 reached 193,300 units, a sharp reduction of 33.52% from the same period in 2014. That was mainly because growing economic downward pressure led to a slowdown in fixed assets investment so that the real estate market experienced volatile adjustment, thus resulting in a fall in demand for heavy trucks. Meanwhile, China began to implement national IV emission standards in January 2015, which brought cost pressure to carmakers and increased the users' procurement costs. On the other hand, the national IV standard-related facilities were still not well-equipped, such as insufficient denitration, a lack of urea supply centers, and less technical reserves of enterprises, which made some users take a wait-and-see attitude for new products, thereby, to some extent, restraining the demand for heavy trucks. As of June 2015, there were three major positive factors in China's heavy truck market that would boost demand:

New projects – In 2015, China will expand the effective investment and set up the promotion mechanism of major infrastructure projects, including more than 420 projects from 7 major project packages with a proposed investment of over RMB10 trillion. And shantytown renovation, railway, road, and infrastructure projects will drive the demand for civil engineering heavy trucks;

Energy conservation and emission reduction – In Sep. 2014, China introduced energy conservation and emissions reduction program, according to which around 600 yellow-label cars and old vehicles would be phased out, which would expand to a certain degree the new demand for heavy trucks.

Logistics transportation – In 2014-2015, as China witnessed a rapid development in e-commerce, the express delivery demand grew at an astonishing pace, which brought huge demand for road transportation and logistics heavy trucks. Moreover, the development of free-trade zone will further promote the growth of port trailer towing vehicles, slag transport vehicles, and other market segments.

In the new normal, China is adjusting its economic growth pattern, and heavy trucks are undertaking the changes in profit model and product demand. In future, high-tech, high added-value heavy trucks will become the mainstream of development trend. Sinotruk, FAW Jiefang, Dongfeng Trucks, etc. have released high-end heavy truck products. As one of the major three heavy truck enterprises in China, Sinotruk developed and manufactured the country's first heavy-duty truck, and has successfully brought in Steyr heavy-duty truck production project. Its independently developed HOWO product takes a crucial position in the Chinese heavy truck market. In 2014 and Jan.-Apr. 2015, the company ranked separately first and second with the sales volume of 120,000 units and 35,000 units. In January 2013, Sinotruk cooperated with MAN to launch SITRAK brand, and with the support from MAN, Sinotruk has entered the field of high-end heavy truck with HOWO T7H and SITRAK C7H.

A middle and heavy-duty truck maker under FAW Group, FAW Jiefang ranked first in heavy truck market with the sales volume of 37,000 units in Jan.-Apr. 2015, with a market share of 19.13%, 0.78 percentage points more than Sinotruk. In November 2014, JH6, a high-end heavy truck developed by FAW Jiefang, was released in FAW Jiefang Qingdao Automobile and delivered to the first batch of users. The model adopts the mainstream Aowei 11L 6DM2 National IV engine of FAW Jiefang Automotive Co., Ltd. Wuxi Diesel Engine Works, representing the company's top level, and will promote the overall sales in the future.

China Heavy Truck Industry Report, 2015-2018 by ResearchInChina mainly covers the following:

Overview of China heavy truck industry, including definition, classification, technology introduction, etc.;

Study of China's overall heavy truck market, including ownership, output, sales volume, competition pattern and the latest market characteristics;

Analysis on China's heavy truck market segments (complete heavy trucks, incomplete heavy trucks and semi-trailer towing vehicles), consisting of output and sales volume, competition pattern, import and export;

Study of China's heavy truck industry chain, including key parts market, raw material market and downstream market;

Study of major heavy truck companies in China, covering their operation, output, sales volume, customers, new products, etc.

China's High-end Heavy Truck Products by Enterprise

<i>Company name</i>	<i>High-end Heavy Trucks</i>	<i>Year</i>	<i>Technology Source /Cooperative Enterprise</i>
Sinotruk	HOWO T7H, SITRAK C7H	2013	MAN
FAW Jiefang	JH6	2014	In-house
Dongfeng Trucks	Dongfeng Tianlong Flagship	2014	Commins
	UD Quester	2014	Volvo
Foton	Auman GTL	2014	Daimler
Shaanxi Automobile	Delong X3000	2014	Commins
SAIC-IVECO Hongyan	Genlyon Wonderful on road	2014	Fiat
CAMC	Hummer H6	2015	Mitsubishi

1. Overview of Heavy Truck Industry

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- 5.9 Chengdu Dayun Automotive Group Company Limited
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- 5.12 Hubei Tri-Ring Special Vehicle Co., Ltd.
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- 5.14 GAC Hino Motors Co., Ltd.
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