



China Heavy Truck Industry Report, 2016-2020

Jul. 2016

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.

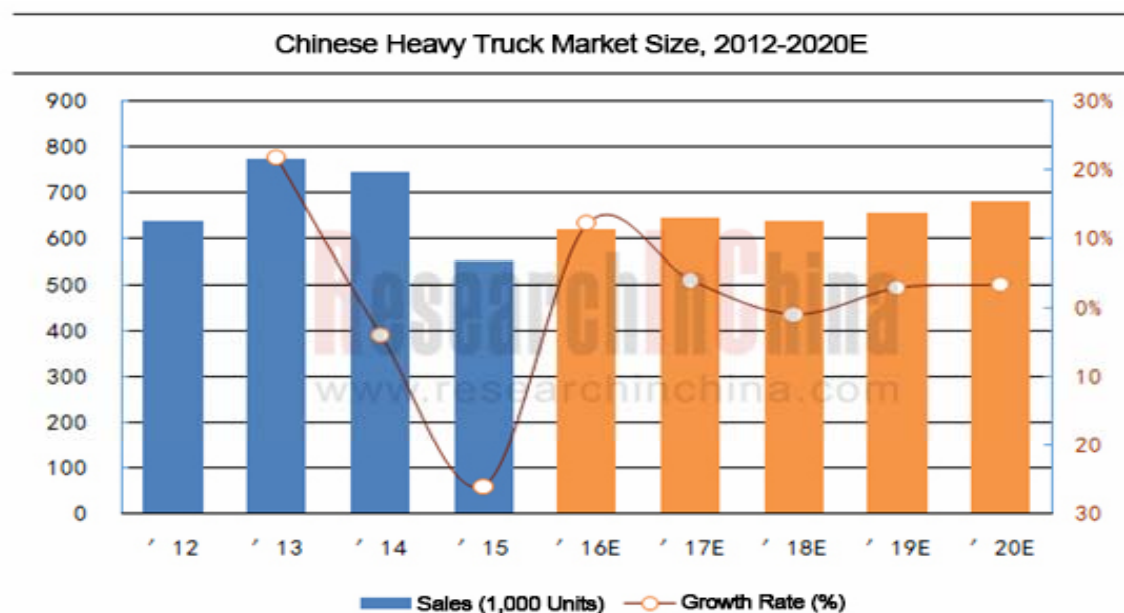
INFORMATION SOURCES

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

Abstract

As China's economic development now has entered the new normal, downward pressure on economy builds up and growth in fixed-asset investment slows, leading to a decline in the demand for construction heavy trucks whose sales came to 536,100 units in 2015, down 25.9% from a year earlier. A recovery of property sector in China from the beginning of 2016 drove up the demand for heavy trucks. 338,000 heavy trucks were sold in the first half of 2016, up 14% from a year ago. Full-year sales are expected to reach 618,000, a year-on-year rise of 12.2%.

Due to mixed factors of infrastructure investment increase, energy conservation & emission reduction, logistics transportation business growth and rising downside risks to the economy, China's heavy truck industry will expand slightly during 2017-2020.



Data Source: China Heavy Truck Industry Report, 2016-2020

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APPS Launched by Chinese Heavy Truck Companies

APP	Company	Launched	Main Functions
Tian Xing Jian	Shaanxi Automobile Group	2011	10 categories and 168 kinds of mobile value-added services and interactive services covering intelligent distribution, heavy truck navigation, user connectivity, fleet fine management, and driving record
ChelunGungun	Shaanxi Automobile Group	Dec 2014	Three systems: intelligent distribution system, dynamic vehicle management system, and intelligent driving service system
Smart Truck	Heavy Sinotruk	Mar 2016	Provide truck users with functional services including sales, parts, repair reservation, and experience
"Kajia"App JAC GALLOP App	JAC	May 2016	Truck users can see all parameter information about vehicle, reserve parts or services, go to nearby service station via one-click navigation, and see and scramble for distribution orders of logistics companies on "Kajia"
JiefangGuanjia	FAW Jiefang	Predicted Aug 2016	Truck use, maintenance & repair, roadside assistance, communication between dealers and vehicle makers

Source: China Heavy Truck Industry Report, 2016-2020 by ResearchInChina

Chinese heavy truck market is highly concentrated with the top3 companies holding a combined market share of over 50%, top5 enterprises more than 80%, and top10 players around 97%. FAW Jiefang, China National Heavy Duty Truck Group (Sinotruk), and Dongfeng Motor are three leading companies in the Chinese heavy truck market with each having a more than 15% market share. FAW Jiefang has long been a champion in the semi-trailer tractor market, while Sinotruk and Dongfeng Motor hold the lion's share of complete and incomplete heavy truck markets.

Heavy trucks will become larger and more intelligent in China: 13L large displacement and 500HP-above high-end tractors became available on the market in 2015 and will be the leading products over the next five years, such as X3000 golden version of Shaanxi Automobile, J6 series of FAW Jiefang, and flagship Tianlong of Dongfeng Motor. On the other hand, mainstream heavy truck manufacturers have come up with the concepts of "Internet+" and intelligent driving, put them into practice, delivering good social and economic benefits, like Sinotruk's "Smart Heavy Truck" APP, FAW Jiefang's "JiefangGuanjia" APP, and Mercedes-Benz' first application of self driving in heavy truck. As market competition intensifies, heavy truck manufacturers will increase their input to differentiated products.

China Heavy Truck Industry Report, 2016-2020 by ResearchInChina focuses on the followings:

- Overview of heavy truck industry in China (definition & classification, development trends, technology, industrial standards, etc.);
- Chinese heavy truck market size (ownership, output & sales, import & export, competitive landscape, etc.);
- Market segments including complete/incomplete heavy truck and semi-trailer tractor (market size, competitive landscape, development trends, etc.);
- Related industrial chains (industrial chains, upstream raw materials, downstream investment & property development, etc.);
- FAW Jiefang, Dongfeng Motor, Sinotruk, Foton Motor, Shaanxi Automobile, JAC, Hualing Automobile, Qingling Motors, Dayun Automobile, BEIBEN Trucks, SAIC-IVECO Hongyan, Tri-Ring Special Vehicle, Xugong Automobile, GAC Hino Motors, Feidie Automobile (profile, business performance, revenue structure, heavy truck business, development strategy, etc.)

1 Overview of Heavy Truck Industry

- 1.1 Definition and Classification
- 1.2 Technology Introduction
- 1.3 Emission Standards
- 1.4 Product Trends
- 1.5 Self-driving and Telematics
 - 1.5.1 Self-driving Truck
 - 1.5.2 Truck Telematics

2 Overall Heavy Truck Market

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- 2.2 Output and Sales
 - 2.2.1 Output
 - 2.2.2 Sales
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- 2.4 Competitive Landscape
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 - 3.1.1 Output and Sales
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 - 3.1.3 Competitive Landscape
- 3.2 Incomplete Heavy Truck
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- 3.3 Semi-trailer Tractor
 - 3.3.1 Output and Sales
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4 Heavy Truck Industry Chain

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- 5.3 Dongfeng Motor Corporation
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 - 5.3.5 Release of New Vehicles
- 5.4 BeiqiFoton Motor Co., Ltd.
 - 5.4.1 Profile
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- 5.6 Anhui Jianghuai Automobile Co., Ltd.
 - 5.6.4 Launch of Intelligent APP for Heavy Truck
- 5.7 Anhui Hualing Automobile Co., Ltd.
- 5.8 Qingling Motors (Group) Co., Ltd.
- 5.9 Shanxi Dayun Automobile Manufacturing Co., Ltd.
- 5.10 BEIBEN Trucks Group Co., Ltd.
 - 5.10.1 Profile
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- 5.11 SAIC-IVECO Hongyan Commercial Vehicle Co., Ltd.
 - 5.11.1 Profile
- 5.12 Hubei Tri-ring Special Vehicle Co., Ltd.
- 5.13 Nanjing Xugong Automobile Manufacturing Co., Ltd.
- 5.14 GAC Hino Motors Co., Ltd.
- 5.15 Zhejiang Feidie Automobile Manufacturing Co., Ltd.

6 Summary and Forecast

- 6.1 Market Size
- 6.2 Market Structure
- 6.3 Competitive Landscape
- 6.4 Trends

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 - Schedule for Implementation of China's Motor Vehicle National V Emission Standards
 - Comparison of China's National IV and V Emission Standards
 - Policies and Regulations on Commercial Vehicle Telematics
 - Survey on Truck Telematics at Home and Abroad
 - China's Heavy Truck Ownership, 2005-2020E
 - China's Heavy Truck Output, 2005-2020E
 - China's Heavy Truck Sales Volume, 2005-2020E
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 - China's Heavy Truck Sales Volume and Growth Rate by Product, 2014-2016
 - Sales Volume and Market Share of Top 10 Heavy Truck Enterprises in China, 2015-2016
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 - Major Natural Gas Heavy Truck Manufacturers in China
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 - China's Incomplete Heavy Truck Output and Sales Volume, 2005-2020E
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 - China's Semi-trailer Towing Vehicle Output and Sales Volume, 2005-2020E
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Selected Charts

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- Sales Volume and Market Share of Semi-trailer Towing Vehicles (> 40 Tonnage) in China by Enterprise, 2015-2016
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- China's (Shanghai) Cold-rolled Coil Price, 2013-2016
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- Foton's Revenue and Net Income, 2010-2016
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- Hualing Automobile's Assets and Net Income, 2012-2015
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- Qingling Motors' Heavy Truck Output and Sales Volume, 2009-2016
- Dayun Automobile's Heavy Truck Output and Sales Volume, 2009-2016
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- SAIC-IVECO Hongyan's Heavy Truck Output and Sales Volume, 2009-2016

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 - Growth Rate of Heavy Truck Sales in China, 2006-2020E
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 - China's Heavy Truck Market Concentration, 2009-2016
 - Market Share of Major Heavy Truck Manufacturers in China, 2009-2016
 - Intelligent Application System of Some Chinese Heavy Truck Manufacturers

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