



China Truck Industry Report, 2017-2021

Apr.2017

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

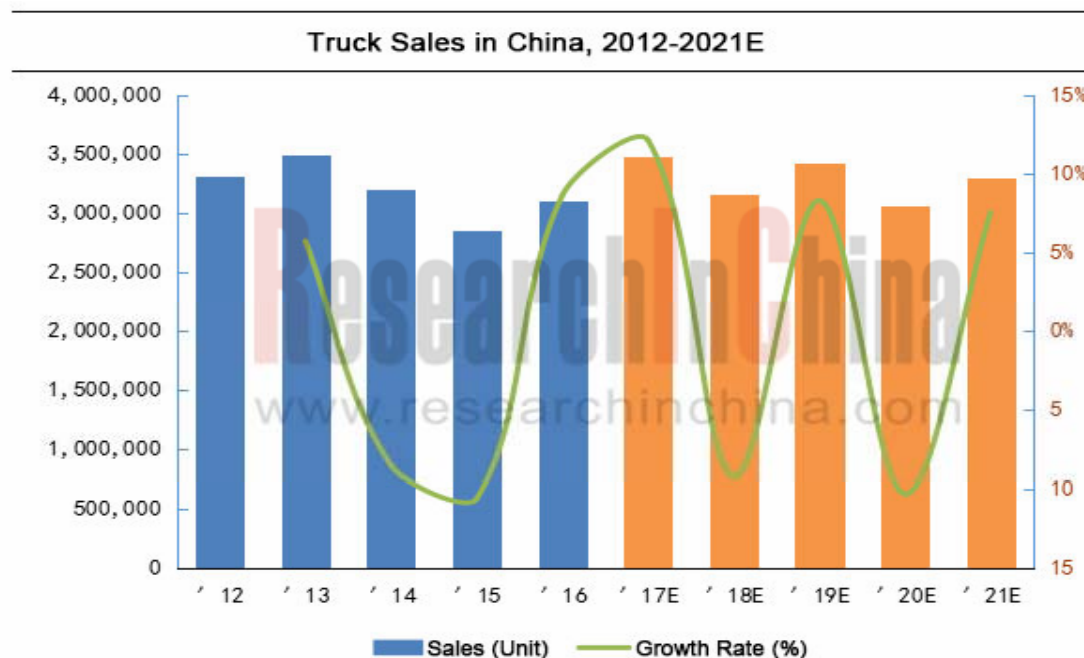
Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional 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

Propelled by infrastructure investment, quicker upgrading of environmental protection, elimination of "yellow label" vehicles, and intelligent and normal supervision of special vehicle market, the truck industry in China picked up in 2016 with production and sales rising to 3.14 million units and 3.10 million units respectively. Generally steady economic progress and sustained investment growth in logistics sector will spur larger demand for trucks in 2017. Moreover, continuous special action on vehicle over-size and overloading, upgrading to National V emission standard, the end of elimination of 'yellow label' vehicle (that doesn't meet exhaust emission standards), and the ban on low-speed trucks will quicken the updating of vehicles. However, as the Chinese economy grows amid great uncertainties and the truck market has been nearly saturated, the market is not likely to maintain the momentum of sustained development in the medium and long run.



Source: China Truck Industry Report, 2017-2021

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Truck can be divided into heavy truck, medium truck, light truck, and mini truck by load capacity. Ever-growing logistics industry has created bigger demand for light trucks in recent years with the products always ranking first by output among product segments. In 2016, the sales of light truck amounted to 1,549,379 units, 49.27% of total truck sales, followed by heavy truck (23.41%) and mini truck (19.98%).

The truck industry in China has found a stable competitive landscape with corporate champions enjoying clear long-term competitive edges. Top5 manufacturers sold 46.01% of total trucks in domestic market and top10 ones 67.56% in 2016. As the light truck holds the lion's share of truck production and sales, light truck manufacturers have overwhelming advantages over others among top 10 truck producers.

China Truck Industry Report, 2017-2021 focuses on the following:

- ◆ Overview of truck industry in China (definition, classification, sources of technology, latest policies, orientation of development, etc.);
- ◆ Status Quo of truck industry in China (ownership, output & sales, market structure, import & export, competitive landscape, etc.);
- ◆ Overview of the Chinese truck market segments (output & sales, competitive landscape, etc. of heavy truck, medium truck, light truck, and mini truck, etc.);
- ◆ Truck industry chain in China (raw material markets, application markets, etc.);
- ◆ 17 truck manufacturers including FAW Group, Dongfeng Motor, Sinotruk, Beiqi Foton Motor, and Jiangling Motors Co., Group (profile, financial position, production & sales, main products, distribution of production bases, latest developments, etc.).

Truck Sales and Market Share of Top10 Enterprises in China, 2016

	Enterprise	Sales in 2016 (unit)	Market Share	Main Product
1	Beiqi Foton Motor	435,341	13.23%	Mini trucks, light trucks, medium trucks, heavy trucks
2	Dongfeng Motor	397,688	12.09%	Heavy trucks, light trucks, medium trucks, mini trucks
3	SAIC-GM-Wuling	251,981	7.66%	Mini trucks
4	FAW Group	227,993	6.93%	Heavy trucks
5	Sinotruk	200,702	6.10%	Heavy trucks, medium trucks
6	Lifan Automobile	171,502	5.21%	Light trucks
7	Jiangling Holdings	166,194	5.05%	Light trucks
8	Changan Automobile	150,161	4.56%	Light trucks
9	Shaanxi Automobile Group	115,881	3.52%	Heavy trucks
10	Great Wall Motors	105,621	3.21%	Light trucks
Subtotal	-	2,223,064	67.56%	-

Source: CAAM, ResearchInChina

1 Overview of Truck Industry

- 1.1 Definition and Classification
- 1.2 Introduction of Technologies
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