

China Heavy Truck Industry Report, 2019-2025

Aug. 2019

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

Global heavy truck market showed an upward mobility in the past decade, with its sales rising 6.2% year on year to 2.39 million units in 2018 and presenting a CAGR of 3.5% between 2008 and 2018.

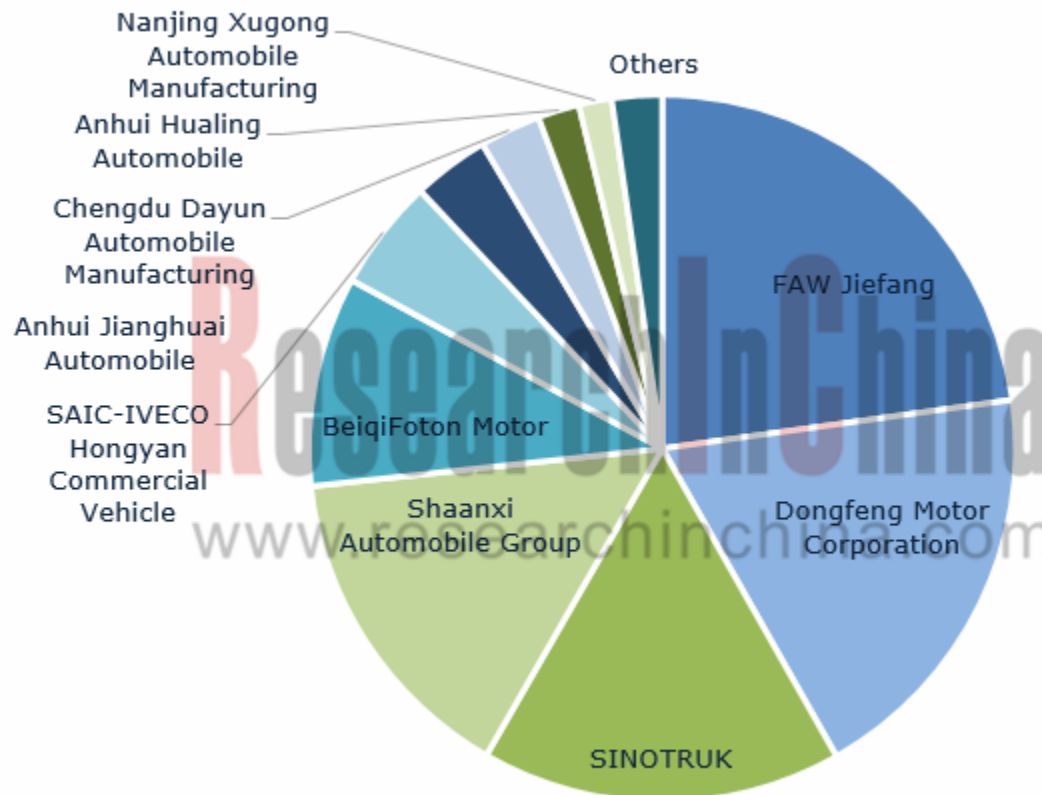
In 2018, China, the largest heavy truck market around the globe, sold approximately 1.15 million heavy trucks (a 48.1% share of global total), up 2.8% on an annualized basis, with a CAGR of 7.9% from 2008 to 2018 and higher than the growth rate of global market. The heavy truck sales in the Chinese market will decline in the forthcoming years due to adjustments in the market, and it is expected to stand at roughly 900,000 units in 2025.

Product segments: About 35% sales of heavy trucks in China are semi-trailer tractors whose sales in 2018 reached 422,000 units at home. Favored by evolution of logistics, tighter control on emissions as well as the declining price of natural gas, natural gas semi-trailer tractor will see tremendous growth and the whole semi-trailer tractor market will be thus boosted.

Export market: The cargo truck exported from China has an ever heavier tonnage, and the exported heavy trucks from China were approximately 50,000 tons altogether in 2018 with a year-on-year increase of over 10%, which is largely attributed to the factors as follows: 1) the heavy truck is in short supply in Europe, Africa, Americas, etc.; 2) The constructors of the 'One Belt, One Road' projects give an impetus to heavy truck exports; 3) infrastructure investments worldwide grow rapidly; 4) China-made heavy trucks are more competitive.

Competition: the world-renowned heavy truck producers are Daimler, Volvo, VW, FAW Jiefang, Dongfeng Motor, Sinotruk, among others, with the CR10 being above 85% in the world and CR10 over 95% in China in 2018. In China, FAW Jiefang commands a more than 20% market share and has been in the first place for four consecutive years, closely followed by Dongfeng Motor with 19% shares or so.

Competitive Pattern of Chinese Heavy Truck Market, 2018



Source: ResearchInChina

China-made heavy trucks are heading towards:

New energy: New energy heavy trucks had a share of a mere 2% in China in 2018, a figure projected to be more than 10% in 2025;

High-end: High-end heavy trucks seized only 2.6% market shares in China in 2018, a figure projected to at least 30% in 2025;

Intelligent driving: About 10% of heavy trucks were provided with intelligent driving technologies in China in 2018, a figure project to rise to roughly 25% in 2025.

China Heavy Truck Industry Report, 2019-2025 highlights the following:

- Heavy truck (definition, classification, product trend, etc.);
- Heavy truck ownership, production & sales, market structure, competitive landscape as well as the sales volume of natural gas heavy trucks and the development tendencies of heavy truck industry in China;
- Production & sales, import & export and competitive pattern of segmented heavy trucks (complete heavy truck, chassis, semi-trailer tractor) in China;
- Heavy truck upstream (steel, rubber) market size and prices and downstream (infrastructure construction, real estate development, freight transport) market size, etc.;
- 15 Chinese heavy truck manufacturers (operation, revenue structure, heavy truck business, etc.).

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