

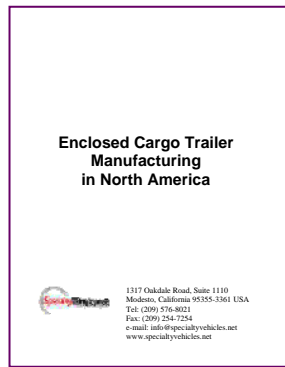
Enclosed Cargo Trailer Manufacturing in North America

Size, segmentation, competition, growth and trends underlying the manufacture of lightweight cargo trailers and toy haulers in North America for recreational and commercial use

Comprehensive information analysis on the manufacture of enclosed cargo trailers

Analysis

- Production estimates in units and dollars
- Competitive review
- Key trends & developments
- Demand drivers
- Key external environmental and regulatory influences
- Export data
- Outlook and forecast



The only independently-researched report of its kind that evaluates a \$1 billion specialty segment of the trailer industry

- Bumper-Pull Trailers
- Gooseneck Trailers
- Toy Hauler Trailers

Strategic Profiles of Manufacturers

- Competitive industry picture on identified manufacturers in the United States and Canada, with:
 - Market shares
 - Key proprietary and technical advantages
 - Description of operations
 - ISO and other qualifications
 - Channels
 - Facilities and employees
 - Company description/niches
 - Strategies/strengths/weaknesses

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Enclosed Cargo Trailer Manufacturing in North America

ABOUT THIS REPORT

Lightweight cargo trailers are a common method for consumer and light commercial transportation of tools, equipment, automobiles and power sport “toys” such as snowmobiles, motorcycles, and ATVs. The units can be simple in nature, ranging from small 4 ft. by 6 ft. bumper-pull trailers, to complex, such as toy-haulers with customized living quarters and slide-outs.

This is a fragmented and regional business in North America, with 126 identifiable players spread across the U.S. and Canada. The majority of manufacturers in this industry have only one manufacturing facility. However the top players have multiple facilities, enabling them to supply their dealers with units from the facility nearest to them. Some RV manufacturers participate, but only in the toy hauler segment because of their experience with customization from their RV work.

The products in this industry fall into three primary categories— bumper-pulls, goosenecks and toy haulers. Based on the approximate number of final units, this activity represents a business of around \$1.14 billion in North America.

Going forward, key factors for success will increasingly be differentiation and more user-friendly specification processes for the final units. Toy hauler trailers had been a growth product, but with the sudden onset of the 2008 recession impacting high-end consumer expenditures, the whole industry will remain highly challenged. Bumper-pull units are simple to produce, but have the lowest sales price and therefore are less profitable for manufacturers and dealers. Additionally, gas prices directly affect the type of frame construction preferred and purchased by customers.

This report displays the estimated unit production and sales for each manufacturer within each of the product segments. Market shares are broken out by region to reflect the local/regional geographic nature of the business.

These and other aspects of the business are analyzed in this report, providing a perspective on the industry structure and dynamics of this specialized trailer segment. SVN feels that this information will be invaluable to trailer manufacturers and suppliers to the industry.

SpecialtyVehicles.net (SVN) is a market research firm that focuses on providing business information on vocational and specialized trucks, trailers and related products. SVN's studies have been put to use throughout the industry for market planning, acquisitions/mergers, bank debt/equity submissions, and for developing strategic and competitive direction.

This is the only report of its kind on this subject, prepared by a publishing/ consulting firm whose principals have 25+ years of industry knowledge and experience.

METHODOLOGY

- Perusal of all relevant trade publications.
- Financial information searches from national and local sources, including several specialized directories.
- Extensive utilization of Internet research tools.
- Analysis of product literature and technical data from individual manufacturers and from general industry sources.
- Interactive contact(s) with industry participants.

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SVN is a consultancy firm dedicated to providing proprietary business analysis and databases to the global OE body, engine, equipment, trailer, component and related manufacturing industries. The company's principals have over 25 years of market research and business consulting experience in these sectors.

SVN has developed unique expertise and skills in developing information on these industries and markets that require a pioneering effort in research and analysis. Our reports are used throughout the vehicular industries for sales and market planning, strategy development, acquisitions, investment presentations, financing submissions and numerous other uses.

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CONTENTS

PREFACE

A. SCOPE & METHODOLOGY

B. PRODUCT OVERVIEW

C. MARKET OVERVIEW

C.1 Estimated Unit Production & Dollar Sales for All Products

C.2 Unit Production by Trailer Weight

C.3 Unit Production by Frame Type

C.4 By Geographic Region(s) for All Products

D. ESTIMATED PRODUCTION & COMPETITIVE SHARES BY PRODUCT TYPE

D.1 Bumper-pull Enclosed Cargo Trailers

D.2 Gooseneck/Fifth-wheel Enclosed Cargo Trailers

D.3 Toy Hauler Enclosed Cargo Trailers

E. COMPETITIVE REVIEW

F. MARKET SCENARIO

G. OUTLOOK & FORCAST

H. MANUFACTURER DATA/INDUSTRY STRUCTURE MATRIX

H.1 Employment, Plant Size & Sales Correlations

H.2 Web/URL Addresses of Manufacturers

I. COMPANY PROFILES

4-Star Trailers Inc.	Hillsboro Industries Inc.
Adventure Mfg.	Homesteader, Inc.
Alfa Leisure	Horton Vans, Inc.
Alum-Line Inc.	Interstate Group LLC
Aluminum Trailer Co., The (ATC)	J & L's Cargo Express, Inc.
American Hauler Industries LLC	Jayco, Inc.
Az-Tex Trailers/Trailer Nation USA	Keifer Built
C & C Trailers	Keystone RV, Inc.
Car Mate Trailers Inc.	K-Z RV LP
Cargo Craft Inc.	LA Cargo Trailers
Cargo South Inc.	Loadmaster Trailer Mfg./H & S Mfg.
Carriage Inc.	Logan Coach Inc./Carriage Industries LLC.
Carry-On Trailer Inc.	Magnum Trailers
Carson Trailers	Monaco Coach Corp.
Chariot Inc./Covenant Cargo Inc.	MVP RV Inc./Thor California
Charmac Trailers	Newmar Corp.
Cherokee Trailers/Welchel Enterprises, LLC	North American Cargo/Load Trail Inc.
Cimarron Trailers	Northwood Mfg.
Classic Mfg. Inc.	Pace American Inc.
CM Trailers Inc.	Ponderosa Trailers
Coachmen Industries/Coachmen RV Inc.	Rage'n Inc.
CrossRoads RV, Inc.	Roadmaster LLC
Delta Mfg. Inc.	Roseburg Trailer Works/Thuro-Bilt Trailers
Doolittle Trailer Mfg.	S & H Trailer Mfg. Co./Jbw Ventures LLC
Dutchmen Mfg. Inc.	Skyline Corp.
Elite Trailer Mfg.	SnoPro Inc.
Exiss Aluminum Trailers Inc.	Southland Trailer Corp.
Featherlite Inc.	Triton Corp.
Fleetwood RV	United Trailers
Forest River, Inc.	Vintage Trailers Ltd.
Gulf Stream Coach Inc.	Weekend Warrior Trailers Inc.
H & H Trailer Co.	Wells Cargo
Hart Mfg. Inc.	Western World, Inc./Circle J Trailers
Haulmark Industries, Inc.	W-W Trailer Mfg. Inc.
Heartland Recreational Vehicles, LLC)	

HOW THIS REPORT IS ORGANIZED

Enclosed Cargo Trailer Manufacturing in North America

Size, segmentation, competition, growth and trends underlying the manufacture of lightweight cargo trailers and toy haulers in North America for recreational and commercial use

A. SCOPE & METHODOLOGY defines the coverage of the report and outlines the **methodology**, **assumptions** and **sources** used in compiling the research.

B. PRODUCT OVERVIEW describes the various types of enclosed cargo trailers, including **pricing**, **size** and **material** considerations.

C. MARKET OVERVIEW provides estimated **production** and **competitive shares** in units and dollars for the entire North American cargo trailer market. This section addresses the **regional nature** of these products, with locations, production numbers and values for each region, illustrated by tables and charts.

D. ESTIMATED PRODUCTION & COMPETITIVE SHARES BY PRODUCT TYPE IN UNITS & DOLLARS provides individual analysis of each of the three product categories, in terms of **unit volumes**, **estimated sales values**, **identification of top producers**, **pricing** and **unit sizes**.

E. COMPETITIVE REVIEW briefly describes the **challenges** facing **major manufacturers** in this market segment.

F. MARKET SCENARIO describes relevant aspects of the marketplace for each type of unit, including **recent developments and trends**, **key demand drivers**, **applications**, **customers**, and **distribution channels**.

G. OUTLOOK & FORECAST offers **SVN's predictions** for the immediate future of the cargo trailer industry.

H. INDUSTRY STRUCTURE & MANUFACTURER DATA is a **tabulation** that correlates **employment**, **plant size** and **sales** at each company, to arrive at a bird's eye view of the underlying industry structure. **Web addresses of manufacturers** are provided as a convenience to users wishing to access additional information on each company.

I. COMPANY PROFILES, based on a mix of interviews and/or other information, seek to describe company operations in a way that adds immeasurably to the overall understanding of this industry. All identified players in the United States and Canada are featured as a profile, with the larger, more important companies carrying a higher degree of detail.

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