

Dump Semi Trailer Manufacturing in North America

*Size, segmentation, competition, growth and trends underlying
the manufacture of dump semi trailers for commercial use in North America*

**Comprehensive information on
the manufacture of dump semi
trailers in North America**

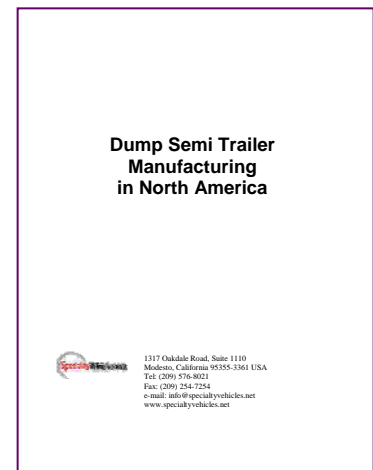
**The only report of its
kind on the
\$560+ million dump
semi trailer
manufacturing industry**

ANALYSIS

- Unit & value production estimates
- Competitive shares and industry structure
- Leading demand drivers
- Industry developments, changes and trends
- Key external / environmental influences
- Regional / geographic breakouts of market size estimates

STRATEGIC PROFILES

- Competitive industry picture on virtually all manufacturers in the United States and Canada, with:
 - Unit and dollar production estimates
 - By type / segments / size
 - Description of operations
 - Key proprietary and technical advantages
 - Channels and geographic coverage
 - Facilities and employees
 - Company description / niches
 - Strategies / strengths / weaknesses



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ABOUT THIS REPORT

The manufacture of dump semi trailers in North America is a unique segment of the semi trailer industry. These units can be very simple, such as end dump semi trailers made of steel or aluminum, to very complicated side dump or bottom dump semi trailers. A few manufacturers, such as Smithco and Side Dump Industries, focus on manufacturing side dump semi trailers, while most manufacturers focus on producing end dump semi trailers. We have identified 58 companies manufacturing dump semi trailers. Among these companies, dump semi trailers are the predominant product line for half of the players. Based on the approximate number of final units, this application represents an activity of around \$567 million for dump semi trailer fabrication companies in this product segment.

Going forward, the key factors for success increasingly will be the ability to produce lighter units that can haul more. This is due to high prices for diesel fuel, which directly affects the customers of the dump semi trailer market, primarily fleets and owner-operators. If a manufacturer can make a trailer unit lighter without changing the safety of the tractor and trailer, it allows the customer to make a profit on the unit faster. Some manufacturers use aluminum in the dump body, but this cannot be used for hauling large rocks. Other manufacturers use high-end steel to make the units last longer. Both aluminum and high-end steel units cost more, but are attractive to users because of the weight savings and longevity. East and MAC have also introduced frameless dump semi trailers, which improve fuel mileage and lessen the weight of the unit.

Dump semi trailer manufacturing is still a very regional market, with MANAC, MAC, Ranco, Trail King and Beall as the only manufacturers with multiple manufacturing facilities. SVN believes that there may be opportunities for consolidation in this product segment, but with relatively few barriers to entry other than design capabilities, there will always be unseen competitors entering the marketplace.

This report has broken out regional production, and also displays estimated unit production and sales for each manufacturer within the dump semi trailer market. SVN feels that this information will be invaluable to suppliers and semi trailer manufacturers in the segment.

These and other issues are analyzed in this report, to provide a perspective on the industry structure and dynamics of this specialized vocational segment.

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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

Primary

- Extensive interviews and interactive contact with senior industry executives in marketing, product management, technical and other functional areas.
- Industry trade associations and government agencies.
- Trade show visits.

Secondary

- 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.

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I. COMPANY PROFILES

A J R Inc. / Rhodes Trailers	Phil Larochelle Equipment Inc.
Alfab, Inc.	Probilt Body and Trailer Products
Arne's Welding/Arne's Trailer Sales	R&S-Godwin Truck Body Co. LLC
Beall Corp.	(Godwin Group)
Benson International	R Way Trailer Mfg. Corp.
Borco Equipment Co. Inc.	Raglan Industries Inc.
Canuck Trailer Mfg. Ltd.	Ranco Trailers / Dragon Products
Clement Industries	Rayfab Inc.
Construction Trailer Specialists Inc.	Reliance Trailer, Co. LLC
Coras Welding Shop Inc.	Rogers Mfg. Co. Inc.
Dakota Trailer Mfg. / Hawkeye Mfg.	Schien Equipment Inc./Bibeau
Doepker Industries Ltd.	Enterprises Inc. Les Usines
EagleRock Trailers Inc.	D'Autray Ltee (Bibeau & Schien)
East Mfg. Corp.	Side Dump Industries
Everlite Inc.	Smithco Mfg. Inc.
Globe Trailers	Steco, Inc.
Hanson Trailers Inc.	Summit Trailers Sales Inc.
HaulTec Trailers Ltd.	Superior Mfg. Inc.
Hilbilt Mfg. Inc.	Terex Load King Trailers/
J & J Truck Bodies & Trailers Div.	CMI Terex Corp.
Somerset Welding & Steel Inc.	Thurston Mfg.
JMH Trailers	Titan Trailers
K-Line Trailers Ltd.	Trail King Industries
Kruz Inc.	TrailStar Trailers
Landoll Corp.	Travis Body and Trailer
LangFab Fabricators Ltd.	Vantage Trailers Inc.
MAC Trailer	Virginian Metal Products Co. Inc.
MANAC	Warren Equipment, Inc.
Mega Corp.	Wes-Tex Mfg. Inc.
Midland Mfg. Ltd.	Western Construction Components
Montone Trailers	White's Welding & Trailer Shop
Palmer Machine Works	

HOW THIS REPORT IS ORGANIZED

Dump Semi Trailer Manufacturing in North America

Size, segmentation, competition, growth and trends underlying the manufacture of dump semi trailers for commercial use in North America

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 dump trailers, with details such as **pricing** and **weight** and **size** parameters.

C. MARKET ANALYSIS provides estimated **production** and **competitive shares** in units and dollars for the entire North American dump semi 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. COMPETITIVE REVIEW briefly describes the **product offerings** and **distinguishing characteristics** of the major players in each market segment.

E. 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**.

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

G. 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. **Units in use**, based on the most recent US Bureau of the Census Vehicle Inventory and Use Survey, summarizes some of the basic characteristics of dump trailers in use in the US. **Web addresses of manufacturers** are provided as a convenience to users wishing to access additional information on each company.

H. 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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