

Flatbed Semi Trailer Manufacturing in North America

*Size, segmentation, competition, growth and trends underlying
the manufacture of flatbed semi trailers in North America*

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

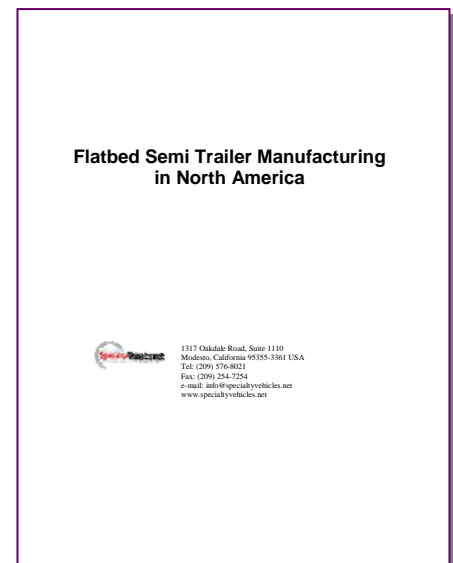
ANALYSIS

- 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

**The only report of its
kind on the \$760m+
flatbed semi trailer
manufacturing
industry**



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ABOUT THIS REPORT

The manufacture of flatbed or platform semi trailers in North America is a unique product segment in the semi trailer industry. These units are very simple, with all steel, all aluminum, or composite (steel and aluminum) frames. A few manufacturers make all frame types, but the majority produce steel-framed units. Some manufacturers focus on a single frame type, such as Reitnouer Inc. and East Mfg. with aluminum frames, and Talbert Mfg. with steel frames. Flatbeds are the predominant product line for only a handful of trailer manufacturers; most produce other types of trailers as well. We have identified 36 players manufacturing flatbed semi trailers. Based on the approximate number of final units, this application represents an activity of around \$760 million.

Going forward, the key factor for success increasingly will be lighter-weight units. Composite and all-aluminum products have become more popular as diesel prices have increased. Their lighter tare weights allow users to haul more payload with the same maximum capacity. All-steel units are easy to produce, but have the lowest sale price and are therefore less profitable for manufacturers and dealers. Regional players that produce other types of semi trailers in addition to flatbeds focus on the all-steel market.

Flatbed semi trailer manufacturing is still a very regional market, with Transcraft, Fontaine and MANAC as the only manufacturers with multiple manufacturing facilities. SVN believes there may be opportunities for consolidation in this product area, but with relatively few barriers to entry, there will always be unseen competitors entering this segment.

This report has broken out estimated unit production and sales for each manufacturer within the flatbed semi-trailer market, as well as displaying regional production. SVN believes this information will be invaluable to semi trailer manufacturers and suppliers in this segment.

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

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

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

Please visit www.specialtyvehicles.net for detailed credentials and testimonials on our work. **References gladly provided.**

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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H. COMPANY PROFILES

A J R/Rhodes Trailers	Pratt Industries Inc.
Alutrec Inc.	Profab Mfg. Ltd.
Benson International	Rayfab Inc.
BWS Mfg., Ltd.	Reinke Mfg. Co. Inc.
Chaparral Mfg., Inc.	Reitnouer Inc.
Deloupe Inc.	Schnure Mfg. Co. Inc.
Doepker Industries Ltd.	Stoughton Trailers
Doonan Specialized Trlr	Talbert Mfg.
EHS Industries/Nu Van	Thru-way Trailer Centre
East Mfg. Corp.	Titan Trailers
FalCan Industries Ltd.	Towmaster Trailers Inc.
Fontaine Trailer Co.	Transcraft
Great Dane	Utility Trailer Mfg.
Lode-King Industries	Western Trailer
MAC Trailers Mfg.	Wilson Trailer Co.
MANAC	X-L Specialized Trailer

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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 flatbed trailers, with details such as **pricing**, **materials** used in construction, and **weight** and **size** parameters.

C. MARKET ANALYSIS provides estimated **production** and **competitive shares** in units and dollars for the entire North American flatbed semi trailer market. In addition to covering **estimated production by material type in units & dollars**, this section addresses the **regional nature** of this product, with locations, production numbers and values for each region illustrated by tables, charts and maps.

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 growth** of the industry through 2011, as well as **production history** of major manufacturers through 2007.

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 flatbed 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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