

# Lowboy & Heavy Hauler Semi Trailer Manufacturing in North America

*Size, segmentation, competition, growth and trends underlying the manufacture of heavy-duty hauling or lowboy semi trailers for construction, oil field, windmill and agricultural equipment in North America*

**Comprehensive information on the manufacture of lowboy and heavy hauler semi trailers in North America**

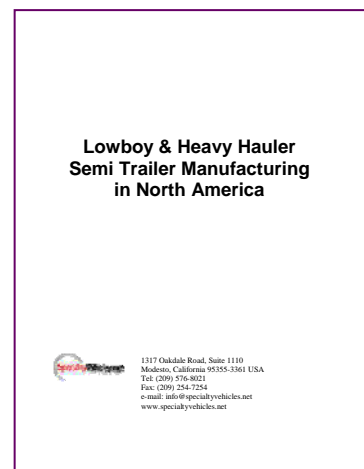
**The only report of its kind on the \$700 million heavy hauler semi trailer manufacturing industry**

## 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 heavy hauler, or lowboy, semi trailers in North America is a unique product segment in the semi trailer industry. These units can be very simple—from fixed gooseneck double-drop decks for hauling agricultural and construction equipment—to very complicated, with multiple axles to haul components for large windmills. We have identified 56 players manufacturing these types of trailers. Among these companies, heavy hauler trailers are the predominant product line for nearly half of the players. Based on the approximate number of final units, this application represents an activity of around \$700 million for trailer fabricators in this segment.

Going forward, the key factors for success increasingly will be production of either standardized or more customized units. Few companies manufacture standardized units, although a couple of manufacturers, such as Trail King and Fontaine, focus on standardized manufacturing. Standardization allows builders to achieve economies of scale, but most manufacturers focus on customized designs. Customization is a more involved process from a design standpoint, and customers are willing to pay extra for a specific design. This allows the manufacturer to charge a higher price and achieve higher profit margins. Additionally, the complexity of customized trailers means that manufacturers commonly export these products.

Heavy hauler semi trailer manufacturing is still a very regional market, with Trail King, Pitts Trailers, Dakota Mfg., Holden Industries Inc. and Peerless Ltd. 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 unforeseen competitors entering this segment.

This report has broken out production by region. It also displays estimated unit production and sales for each manufacturer within the heavy hauler markets. SVN feels that this information will be invaluable to suppliers and semi trailer manufacturers involved in this segment.

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

SpecialtyVehicles.net (SVN) is a market research company that focuses on fabrication of vocational and specialized trucks and trailers. 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

### 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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Arne's Trailer Sales	Ledwell & Son Enterprises
Aspen Custom Trailers	Inc. Liddell Trailers
Atoka Trailer & Mfg. LLC	Loadstar Trailers
BWS Mfg., Inc.	Magnolia Trailers Inc.
C-ALL Mfg. Inc./Nuttall Trailers	MANAC
Carolina Trailers	McLendon Trailers.
Chaparral Mfg., Inc.	Mega Corp.
Clegg Industries	Overbilt Trailer Co.
Cozad Trailers	Palomino Mfg. Corp.
Dakota Mfg. Co., Inc.	Peerless Ltd.
Doepker Industries Ltd.	Pitts Trailers
Doonan Specialized Trailer LLC	Pratt Industries Inc.
E.D. Etnyre & Co.	Rayfab Inc.
Evans Trailers/John Evans Mfg.	Rogers Mfg. Co. Inc.
Everett Equipment Inc.	Schnure Mfg. Co. Inc.
Felling Trailers	Scona Trailer Mfg.
Ferree Trailers	Talbert Mfg.
Fontaine Trailer Co.	Temisko 1983 Inc.
Gem State Mfg.	Terex Load King Trailers/ CMI Terex Corp.
General Engines Co., Inc.	Thru-way Trailer Centre Ltd.
Globe Trailers	Towmaster Trailers Inc.
Harley Murray Inc.	Trail King Industries
Heil Trailer International.	TrailBoss Trailers
Holden Industries Inc.	Viking Trailers
Interstate Trailers Inc.	Waltron Ltd.
J & J Trailers Mfrs & Sales	Witzco Trailers Inc.
K-Line Trailers Ltd.	X-L Specialized Trailers Inc.
Lakeside Trailer Mfg. Inc.	
Landoll Corp.	

### **Lowboy & Heavy Hauler Semi Trailer Manufacturing in North America**

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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 heavy hauler 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 heavy hauler 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 heavy hauler 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 heavy hauler 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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