

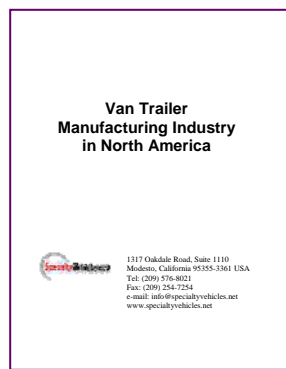
Van Trailer Manufacturing Industry in North America

Size, segmentation, competition, growth and trends underlying the manufacture of van trailers for the transport of goods and refrigerated cargo in North America

Comprehensive information developed through rigorous analysis on a complex industry involving dry freight, refrigerated and moving van 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 the business of van trailer manufacturing in North America by reference to each type of van:

- **Dry Freight Van Trailers**
- **Refrigerated Van Trailers**
- **Moving Van 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
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 - Channels
 - Facilities and employees
 - Company description/niches
 - Strategies/strengths/weaknesses

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Van Trailer Manufacturing Industry in North America

ABOUT THIS REPORT

Dry freight and refrigerated van trailers are the leading segments in the semi trailer industry. The majority of goods in North America are moved by these two products. Dry freight van trailers are used for the transport of boxed goods, such as televisions and refrigerators, over long distances. Refrigerated van trailers are used with perishable goods that need to be kept cool until reaching a storage facility or grocery store. Leading semi trailer manufacturers focus on these two markets because it allows them to reap the benefits of scale. SVN has identified 16 players producing dry freight, refrigerated or moving van semi trailers. Based on the approximate number of final units, this application represents an activity of around \$3.92 billion for manufacturers of these products.

Going forward, the key factor for success increasingly will be the ability to produce lighter units that can haul more cargo, due to high prices for diesel fuel. This directly affects the customers of the van semi trailer market—fleets and owner-operators. If a manufacturer can make a van trailer lighter, without changing the safety or performance of the tractor and trailer, the customer can make a profit on the unit faster. Some manufacturers are working with leading fleets, like the partnership between Great Dane and Wal-Mart, to develop trailers with improved aerodynamics, to reduce diesel consumption and therefore reduce operating costs. Aftermarket manufacturers have been developing products to improve aerodynamics as well. However, due to the longevity of these dry freight and refrigerated units, if manufacturers are able to provide a complete unit with better aerodynamics to the customer at the time of purchase, the cost benefit of the new unit should spur new demand.

Van semi trailer manufacturing is essentially a national market, but Great Dane and Utility are the only manufacturers with multiple manufacturing facilities. This segment has significant foreign participation, with South Korea's Hyundai owning Hyundai Translead, China's CIMC ownership of Vanguard National, and Singapore Technologies' ownership of Kidron. SVN believes that there are few opportunities for consolidation in the product segment because it is a very competitive marketplace.

This report has broken out regional production and also displays estimated unit production and sales for each manufacturer within the van 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 segment.

SpecialtyVehicles.net (SVN) is a market research company that focuses on the 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

- 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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Van Trailer Manufacturing Industry in North America

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I. COMPANY PROFILES

Di-Mond Trailers Inc.

Durabody and Trailer Ltd.

Great Dane

Hercules Manufacturing Company

Hyundai Translead

Johnson Truck Bodies

Kentucky Trailer / Kentucky Manufacturing

Kidron Inc.

MANAC

Pratt Industries Inc.

Stoughton Trailers

Strick Corporation & Cheetah Chassis Corporation

Trailmobile

Utility Trailer Manufacturing

Vanguard National Trailer Corporation

Wabash National Corporation

HOW THIS REPORT IS ORGANIZED

COMPLETE REPORT

Van Trailer Manufacturing Industry in North America *Size, segmentation, competition, growth and trends underlying the manufacture of van trailers for the transport of goods and refrigerated cargo 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 van 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 van 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. ESTIMATED PRODUCTION & COMPETITIVE SHARES BY PRODUCT TYPE 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 van 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. **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 van 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.

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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