

Semi-Trailer Market by Type (Flatbed, Lowboy, Dry Van, Refrigerated, Tankers and Others), Number of Axles (4 Axles), Tonnage (Below 25T, 25T-50T, 51T-100T, and Above 100T), Length, End-Use and Region - Global Forecast to 2025

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Abstracts

The global semi-trailer market is estimated to be USD 29.5 billion in 2020 and is projected to grow to USD 41.2 billion by 2025, at a CAGR of 5.6% during the forecast period. Expanding cold chain industry, growing FMCG sector and increasing use of advanced technologies such as telematics and stability control are expected to boost the demand for semi-trailer market. However, local players in unorganized sector in developing countries are a restraining factor for global semi-trailer market players. Modern technologies such as semi-trailer platooning and electric semi-trailer truck offer numerous development opportunities in the near future. On the other hand, lightweight semi-trailers and lowering the total cost of ownership (TCO) will be the challenging factors for semi-trailer market in the future.

COVID-19 has had a significant impact on the semi-trailer market. Both the production and sales of new semi-trailers came to a halt across the globe as the whole ecosystem got disrupted. OEMs had to wait until lockdowns were lifted to resume production, which affected their business. Post the pandemic, the demand for new semi-trailers is expected to show an increase as economies are recovering steadily. Nevertheless, another wave of COVID-19 due to newer strains may hamper the recovery in some countries. Subsequently, semi-trailer manufacturers would need to adjust the production volume based on the COVID-19 scenario across different countries. In addition, component manufacturing too was suspended, and small Tier II and Tier III manufacturers are facing face liquidity issues. Thus, production suspension during the outbreak and lower demand post the pandemic might have an unprecedented impact on

semi-trailer providers.

“Growing FMCG industry is likely to drive the semi-trailer market”

Currently, companies are focusing on investments in automation of supply chains, expansion of existing manufacturing facilities, and development of warehouse hubs. Further, distribution centers and locations play a vital role in FMCG logistics. Hence, growing transport of goods from manufacturing facilities to warehouses, warehouses to distribution centers, and distribution centers to retail stores will drive the demand for semi-trailers in the FMCG sector. Also, growing acceptance of ecommerce in FMCG will provide opportunities for the growth of the semi-trailer market.

Semi-trailers are among the key modes of road transport used by the FMCG industry to transport its products. Numerous leading companies rely on their own transport and logistics system to transport their goods. For instance, FMCG giants such as Coca-Cola, PepsiCo, Walmart, and Nestle have their own private fleet of vehicles, including semi-trailers for transport of goods. The transport of goods in the FMCG sector must follow specific standards and laws. As the characteristics of the products can be impacted during the packaging and transport of the products, the demand for specialized semi-trailers such as refrigerated semi-trailers is growing in the FMCG industry. Key players of the semi-trailer market have understood the shift in demand for refrigerated semi-trailers and are either investing in new product development or collaborations. For instance, in February 2020, Wabash and C&S Wholesale Grocers developed a zero-emissions 48' refrigerated trailer. This is one-of-its-kind product which is up to 30% more thermally efficient than conventional refrigerated trailers.

“Growing logistics industry to drive the Asia Oceania semi-trailer market”

This semi-trailer market in Asia Pacific has experienced significant growth in the past couple of years. The region comprises some of the fastest growing economies, including India, China, and South Korea. With developments taking place at a fast pace, the logistics sector in this region is growing. High growth of industrialization in these countries offers new opportunities in the semi-trailer market. The increase in the overall industrial production has led to increased freight transportation, fueling the demand for semi-trailers in this region. The region offers better cost advantages related to labor and materials than developed regions. Moreover, government policies in India and China encourage the production of semi-trailers in local markets to satisfy domestic demands. For instance, in 2015 China started “Made in China 2025” initiative, aimed towards encouraging the companies in this region to compete with global players. All these

factors have led to the increased production volumes over the years, where OEMs not only satisfy domestic demands but also serve developed markets and remain globally competitive.

“Technological advancements are a key driver for the European market”

The European semi-trailer market is estimated to show steady growth, with Germany and the UK being major performers. Most of the major economies of Europe are expected to have higher business investments in the coming years. This would positively impact the semi-trailer market.

Europe is home to many industries such as electronics equipment, chemicals, automotive, biotechnology, and food & beverage. The continuous growth in these sectors would fuel the market for semi-trailers in the European region. With the development of the latest semi-trailer technologies, such as semi-trailer telematics and temperature monitoring system, the European semi-trailer market is expected to get traction during the coming years. The three German giants—Schmitz Cargobull AG, Fahrzeugwerk Bernard KRONE GmbH, and K?gel Trailer GmbH & Co. KG—not only dominate the European market but are also expanding operations in emerging economies. The semi-trailer market in Germany is expected to see growth in the form of exports and increased production levels in the coming years.

The study contains insights from various industry experts, ranging from component suppliers to tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 - 70%, Tier 2 – 18%, Others - 12%

By Designation: C level - 34%, D level - 27%, Others - 39%

By Region: North America - 36%, Europe - 23%, Asia Pacific - 41%

Major players profiled in the report are: China International Marine Containers (China), Wabash National (US), Schmitz Cargobull AG (Germany), Utility Trailer Manufacturing Company (US), and Fahrzeugwerk Bernard Krone (Germany).

Research Coverage

The report segments the semi-trailer market and forecasts its size, by volume and

Semi-Trailer Market by Type (Flatbed, Lowboy, Dry Van, Refrigerated, Tankers and Others), Number of Axles (<3...

value, on the basis of region (North America, Asia Pacific, Europe, and RoW), type (flatbed, lowboy, dry van, refrigerated, tankers, and others), length (Up to 45 Feet and Above 45 Feet), tonnage (below 25 T, 25 T-50 T, 51 T-100 T, and above 100 T), number of axles (4 axles) and end-use (heavy industry, FMCG, chemical, automotive, oil & gas, healthcare, logistics, and others). It also covers the competitive landscape and company profiles of the major players in the semi-trailer market ecosystem.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants in this market with information on the closest approximations of revenue and volume numbers for the overall semi-trailer market and its sub segments.

This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies.

The report will also help the market players understand the impact of COVID-19 on semi-trailer market.

The report also helps stakeholders understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.

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