

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.

Contents

1 INTRODUCTION

1.1 OBJECTIVES

1.2 PRODUCT DEFINITION

1.2.1 INCLUSIONS & EXCLUSIONS

TABLE 1 INCLUSIONS & EXCLUSIONS: SEMI-TRAILER MARKET

1.3 MARKET SCOPE

FIGURE 1 SEMI-TRAILER MARKET: MARKET SEGMENTATION

1.3.1 YEARS CONSIDERED FOR THE STUDY

1.4 LIMITATIONS

1.5 STAKEHOLDERS

1.6 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 SEMI-TRAILER MARKET: RESEARCH DESIGN

FIGURE 3 RESEARCH DESIGN MODEL

2.1.1 SECONDARY DATA

2.1.1.1 List of key secondary sources

2.1.1.2 Key data from secondary sources

2.1.2 PRIMARY DATA

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS

2.1.3 SAMPLING TECHNIQUES & DATA COLLECTION METHODS

2.1.3.1 List of primary participants

2.2 FACTOR ANALYSIS FOR MARKET SIZING: DEMAND AND SUPPLY SIDE

2.2.1 DEMAND-SIDE ANALYSIS

2.2.1.1 Growing logistics industry

2.2.1.2 Infrastructure: Road Network

2.2.2 SUPPLY-SIDE ANALYSIS

2.2.2.1 Technological advancements

2.3 MARKET ESTIMATION METHODOLOGY

FIGURE 5 RESEARCH METHODOLOGY: HYPOTHESIS BUILDING

2.3.1 BOTTOM-UP APPROACH

FIGURE 6 MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH

2.3.2 TOP-DOWN APPROACH

FIGURE 7 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH

2.4 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 8 DATA TRIANGULATION

2.5 FACTOR ANALYSIS

2.6 MARKET SCOPE & ASSUMPTIONS

2.7 RESEARCH LIMITATIONS

3 EXECUTIVE SUMMARY

3.1 INTRODUCTION

FIGURE 9 SEMI-TRAILER MARKET: MARKET DYNAMICS

FIGURE 10 SEMI-TRAILER MARKET, BY REGION, 2020–2025

FIGURE 11 SEMI-TRAILER MARKET, BY END-USE, 2020 VS. 2025

3.1.1 COVID-19 IMPACT ON SEMI-TRAILER MARKET, 2018–2025

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES IN THE SEMI-TRAILER MARKET

FIGURE 12 GROWING SUPPLY CHAIN AND LOGISTICS NETWORK TO DRIVE THE MARKET

4.2 SEMI-TRAILER MARKET, BY REGION

FIGURE 13 NORTH AMERICA PROJECTED TO BE THE LARGEST MARKET, BY VALUE

4.3 SEMI-TRAILER MARKET, BY END-USE

FIGURE 14 LOGISTICS SEGMENT TO BE THE LARGEST, 2020 VS. 2025 (USD MILLION)

4.4 SEMI-TRAILER MARKET, BY TYPE

FIGURE 15 DRY VAN SEGMENT EXPECTED TO BE THE LARGEST, 2020 VS. 2025 (USD MILLION)

4.5 SEMI-TRAILER MARKET, BY LENGTH

FIGURE 16 ABOVE 45 FEET SEGMENT PROJECTED TO BE THE LARGEST, 2020 VS. 2025 (USD MILLION)

4.6 SEMI-TRAILER MARKET, BY NUMBER OF AXLES

FIGURE 17 LESS THAN 3 AXLES SEGMENT PROJECTED TO BE THE LARGEST, 2020 VS. 2025 (USD MILLION)

4.7 SEMI-TRAILER MARKET, BY TONNAGE

FIGURE 18 BELOW 25 T SEGMENT PROJECTED TO BE THE LARGEST, 2020 VS. 2025 (USD MILLION)

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 19 SEMI-TRAILER: MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Expanding cold chain industry

5.2.1.2 Growth of end-use industries

5.2.2 RESTRAINTS

5.2.2.1 Local players in unorganized sector

5.2.3 OPPORTUNITIES

5.2.3.1 Semi-trailer platooning

5.2.3.2 Increasing use of advanced technologies

5.2.3.3 Electric semi-trailers

5.2.4 CHALLENGES

5.2.4.1 Lowering TCO and maintenance cost

5.2.4.2 Lightweight semi-trailers

5.2.5 IMPACT OF MARKET DYNAMICS

FIGURE 20 SEMI-TRAILER MARKET: IMPACT OF MARKET DYNAMICS

5.3 MACRO INDICATOR ANALYSIS

5.3.1 INTRODUCTION

5.4 PORTER'S FIVE FORCES ANALYSIS

5.4.1 SEMI-TRAILER MARKET

FIGURE 21 PORTER'S FIVE FORCES ANALYSIS: SEMI-TRAILER MARKET

FIGURE 22 INTENSITY OF COMPETITIVE RIVALRY IN THE SEMI-TRAILER MARKET IS CONSIDERED MEDIUM

TABLE 2 PORTER'S FIVE FORCES ANALYSIS

5.4.1.1 Competitive rivalry

FIGURE 23 LARGE NUMBER OF PLAYERS IN THE MARKET LEADS TO A MEDIUM DEGREE OF COMPETITION IN THE SEMI-TRAILER MARKET

5.4.1.2 Threat of new entrants

FIGURE 24 DESIGN-SPECIFIC REQUIREMENT ALONG WITH REGULATORY NORMS MAKES NEW ENTRY FAIRLY DIFFICULT

5.4.1.3 Threat of substitutes

FIGURE 25 LACK OF SUBSTITUTES FOR SEMI-TRAILER MAKES THREAT OF SUBSTITUTES LOW

5.4.1.4 Bargaining power of suppliers

FIGURE 26 LARGE NUMBER OF SUPPLIERS MAKES THE BARGAINING POWER OF SUPPLIERS MEDIUM

5.4.1.5 Bargaining power of buyers

FIGURE 27 SPECIFIC BUYER REQUIREMENT AND LARGE NUMBER OF SUPPLIERS MAKES THE BARGAINING POWER OF BUYERS MEDIUM

5.5 SEMI-TRAILER MARKET ECOSYSTEM

FIGURE 28 SEMI-TRAILER MARKET: ECOSYSTEM ANALYSIS

5.6 SUPPLY CHAIN ANALYSIS

FIGURE 29 SUPPLY CHAIN ANALYSIS: SEMI-TRAILER MARKET

5.6.1 RAW MATERIAL SUPPLIER

5.6.2 COMPONENT SUPPLIERS

5.6.3 SEMI-TRAILER SUPPLIERS

5.6.4 END USERS

5.7 TRENDS IMPACTING CUSTOMER'S BUSINESS

FIGURE 30 TRENDS IMPACTING CUSTOMER'S BUSINESS IN SEMI-TRAILER MARKET

5.8 REGULATORY LANDSCAPE

FIGURE 31 SEMI-TRAILER FUEL SAVING TECHNOLOGIES

TABLE 3 POLICIES PROMOTING SEMI-TRAILER FUEL SAVING TECHNOLOGIES

5.8.1 STANDARD TRAILER LENGTHS IN NORTH AMERICA AND EUROPE

FIGURE 32 GLOBAL EMISSION LEGISLATION

5.9 PATENT ANALYSIS

TABLE 4 PATENT ANALYSIS: SEMI-TRAILER MARKET

5.10 CASE STUDY ANALYSIS

TABLE 5 CASE STUDY ANALYSIS: AUTOMOTIVE SEMI-TRAILER MARKET

5.11 TECHNOLOGY ANALYSIS

TABLE 6 TECHNOLOGY ANALYSIS: SEMI-TRAILER MARKET

5.12 AVERAGE SELLING PRICE TREND

TABLE 7 NORTH AMERICA: SEMI-TRAILER, PRICE RANGE ANALYSIS, 2019 (USD)

TABLE 8 ASIA PACIFIC: SEMI-TRAILER, PRICE RANGE ANALYSIS, 2019 (USD)

TABLE 9 EUROPE: SEMI-TRAILER, PRICE RANGE ANALYSIS, 2019 (USD)

TABLE 10 ROW: SEMI-TRAILER, PRICE RANGE ANALYSIS, 2019 (USD)

5.13 SEMI-TRAILER MARKET, SCENARIOS (2020–2025)

FIGURE 33 FUTURE TRENDS & SCENARIO: SEMI-TRAILER MARKET, 2020–2025 (THOUSAND UNITS)

5.13.1 MOST LIKELY SCENARIO

TABLE 11 SEMI-TRAILER MARKET (MOST LIKELY), BY REGION, 2018-2025 ('000 UNITS)

5.13.2 OPTIMISTIC SCENARIO

TABLE 12 SEMI-TRAILER MARKET (OPTIMISTIC), BY REGION, 2018–2025 ('000 UNITS)

5.13.3 PESSIMISTIC SCENARIO

TABLE 13 SEMI-TRAILER MARKET (PESSIMISTIC), BY REGION, 2018–2025 ('000 UNITS)

6 SEMI-TRAILER MARKET, BY TYPE

6.1 INTRODUCTION

6.1.1 ASSUMPTIONS FOR MARKET FORECASTING

6.1.2 RESEARCH METHODOLOGY FOR SEMI-TRAILER TYPE

6.1.3 OPINIONS FROM INDUSTRY EXPERTS

6.1.4 OPERATIONAL DATA

TABLE 14 TELEMATICS DATA AND POTENTIAL USE CASES

FIGURE 34 SEMI-TRAILER MARKET, BY TYPE, 2020 VS. 2025

TABLE 15 SEMI-TRAILER MARKET SIZE, BY TYPE, 2016–2019 ('000 UNITS)

TABLE 16 SEMI-TRAILER MARKET SIZE, BY TYPE, 2020–2025 ('000 UNITS)

TABLE 17 SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 18 SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

6.2 FLATBED

TABLE 19 FLATBED: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 20 FLATBED: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 21 FLATBED: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 22 FLATBED: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

6.3 LOWBOY

TABLE 23 LOWBOY: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 24 LOWBOY: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 25 LOWBOY: SEMI-TRAILER MARKET SIZE, BY REGION, 2016–2019 (USD MILLION)

TABLE 26 LOWBOY: SEMI-TRAILER MARKET SIZE, BY REGION, 2020–2025 (USD MILLION)

6.4 DRY VAN

TABLE 27 DRY VAN: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 28 DRY VAN: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 29 DRY VAN: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 30 DRY VAN: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

6.5 REFRIGERATED

TABLE 31 REFRIGERATED: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 32 REFRIGERATED: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 33 REFRIGERATED: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 34 REFRIGERATED: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

6.6 TANKER

TABLE 35 TANKER: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 36 TANKER: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 37 TANKER: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 38 TANKER: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

6.7 OTHERS

TABLE 39 OTHERS: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 40 OTHERS: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 41 OTHERS: SEMI-TRAILER MARKET SIZE, BY REGION, 2016–2019 (USD MILLION)

TABLE 42 OTHERS: SEMI-TRAILER MARKET SIZE, BY REGION, 2020–2025 (USD MILLION)

7 SEMI-TRAILER MARKET, BY LENGTH

7.1 INTRODUCTION

7.1.1 ASSUMPTIONS FOR MARKET FORECASTING

7.1.2 RESEARCH METHODOLOGY FOR LENGTH SEGMENT

7.1.3 OPINIONS FROM INDUSTRY EXPERTS

FIGURE 35 SEMI-TRAILER MARKET, BY LENGTH, 2020 VS. 2025 (USD MILLION)

TABLE 43 SEMI-TRAILER MARKET, BY LENGTH, 2016–2019 ('000 UNITS)

TABLE 44 SEMI-TRAILER MARKET, BY LENGTH, 2020–2025 ('000 UNITS)

TABLE 45 SEMI-TRAILER MARKET SIZE, BY LENGTH, 2016–2019 (USD MILLION)

TABLE 46 SEMI-TRAILER MARKET SIZE, BY LENGTH, 2020–2025 (USD MILLION)

7.2 UP TO 45 FEET

TABLE 47 UP TO 45 FEET: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 48 UP TO 45 FEET: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 49 UP TO 45 FEET: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 50 UP TO 45 FEET: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

7.3 ABOVE 45 FEET

TABLE 51 ABOVE 45 FEET: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 52 ABOVE 45 FEET: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 53 ABOVE 45 FEET: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 54 ABOVE 45 FEET: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

8 SEMI-TRAILER MARKET, BY TONNAGE

8.1 INTRODUCTION

8.1.1 ASSUMPTIONS FOR MARKET FORECASTING

8.1.2 RESEARCH METHODOLOGY FOR TONNAGE TYPE SEGMENT

8.1.3 OPINIONS FROM INDUSTRY EXPERTS

FIGURE 36 SEMI-TRAILER MARKET, BY TONNAGE, 2020 VS. 2025 (USD MILLION)

TABLE 55 SEMI-TRAILER MARKET, BY TONNAGE, 2016–2019 ('000 UNITS)

TABLE 56 SEMI-TRAILER MARKET, BY TONNAGE, 2020–2025 ('000 UNITS)

TABLE 57 SEMI-TRAILER MARKET, BY TONNAGE, 2016–2019 (USD MILLION)

TABLE 58 SEMI-TRAILER MARKET, BY TONNAGE, 2020–2025 (USD MILLION)

8.2 BELOW 25 TON

TABLE 59 BELOW 25 TON: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 60 BELOW 25 TON: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 61 BELOW 25 TON: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 62 BELOW 25 TON: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

8.3 25–50 TON

TABLE 63 25–50 TON: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 64 25–50 TON: SEMI-TRAILER MARKET SIZE, BY REGION, 2020–2025 ('000 UNITS)

TABLE 65 25–50 TON: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 66 25–50 TON: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

8.4 51–100 TON

TABLE 67 51–100 TON: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 68 51–100 TON: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 69 51–100 TON: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 70 51–100 TON: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

8.5 ABOVE 100 TON

TABLE 71 ABOVE 100 TON: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 72 ABOVE 100 TON: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 73 ABOVE 100 TON: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 74 ABOVE 100 TON: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

9 SEMI-TRAILER MARKET, BY NUMBER OF AXLES

9.1 INTRODUCTION

9.1.1 ASSUMPTIONS FOR MARKET FORECASTING

9.1.2 RESEARCH METHODOLOGY FOR NUMBER OF AXLES SEGMENT

9.1.3 OPINIONS FROM INDUSTRY EXPERTS

FIGURE 37 SEMI-TRAILER MARKET, BY NUMBER OF AXLES, 2020 VS. 2025 (USD MILLION)

TABLE 75 SEMI-TRAILER MARKET, BY NUMBER OF AXLES, 2016–2019 ('000

UNITS)

TABLE 76 SEMI-TRAILER MARKET, BY NUMBER OF AXLES, 2020–2025 ('000 UNITS)

TABLE 77 SEMI-TRAILER MARKET, BY NUMBER OF AXLES, 2016–2019 (USD MILLION)

TABLE 78 SEMI-TRAILER MARKET, BY NUMBER OF AXLES, 2020–2025 (USD MILLION)

9.2 4 AXLES

TABLE 87 MORE THAN 4 AXLES: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 88 MORE THAN 4 AXLES: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 89 MORE THAN 4 AXLES: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 90 MORE THAN 4 AXLES: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

10 SEMI-TRAILER MARKET, BY END-USE

10.1 INTRODUCTION

10.1.1 ASSUMPTIONS FOR MARKET FORECASTING

10.1.2 RESEARCH METHODOLOGY FOR END-USE SEGMENT

10.1.3 OPINIONS FROM INDUSTRY EXPERTS

TABLE 91 WEIGHT AND VALUE OF FREIGHT SHIPMENTS BY DOMESTIC MODE IN

2017 IN THE US

FIGURE 38 USE CASES AND NEW LOGISTICS BUSINESS MODELS

FIGURE 39 SEMI-TRAILER MARKET, BY END-USE, 2020 VS. 2025 (USD MILLION)

TABLE 92 SEMI-TRAILER MARKET, BY END-USE, 2016–2019 ('000 UNITS)

TABLE 93 SEMI-TRAILER MARKET, BY END-USE, 2020–2025 ('000 UNITS)

TABLE 94 SEMI-TRAILER MARKET, BY END-USE, 2016–2019 (USD MILLION)

TABLE 95 SEMI-TRAILER MARKET, BY END-USE, 2020–2025 (USD MILLION)

10.2 AUTOMOTIVE

TABLE 96 AUTOMOTIVE: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 97 AUTOMOTIVE: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 98 AUTOMOTIVE: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD

MILLION)

TABLE 99 AUTOMOTIVE: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

10.3 CHEMICAL

TABLE 100 VARIOUS OF TANK TRAILERS FOR BULK LIQUID & CHEMICAL TRANSPORTATION

FIGURE 40 SALES OF CHEMICALS, BY REGION, 2018 (USD BILLION)

TABLE 101 CHEMICAL: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 102 CHEMICAL: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 103 CHEMICAL: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 104 CHEMICAL: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

10.4 FMCG

FIGURE 41 VALUE CHAIN OF FMCG SECTOR

TABLE 105 FMCG: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 106 FMCG: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 107 FMCG: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 108 FMCG: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

10.5 HEALTHCARE

TABLE 109 HEALTHCARE: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 110 HEALTHCARE: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 111 HEALTHCARE: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 112 HEALTHCARE: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

10.6 HEAVY INDUSTRY

TABLE 113 TOP 10 COMPANIES IN MINING INDUSTRY

FIGURE 42 GOLD PRODUCTION IN 2019, BY COUNTRY (TONNES)

FIGURE 43 MINING PRODUCTION IN 2018, BY COUNTRY (MILLION METRIC TONNES)

FIGURE 44 CONSTRUCTION/MINING EQUIPMENT PRODUCTION ('000 UNITS)

TABLE 114 HEAVY INDUSTRIES: SEMI-TRAILER MARKET, BY REGION, 2016–2019

('000 UNITS)

TABLE 115 HEAVY INDUSTRIES: SEMI-TRAILER MARKET, BY REGION, 2020–2025

('000 UNITS)

TABLE 116 HEAVY INDUSTRIES: SEMI-TRAILER MARKET, BY REGION, 2016–2019

(USD MILLION)

TABLE 117 HEAVY INDUSTRIES: SEMI-TRAILER MARKET, BY REGION, 2020–2025

(USD MILLION)

10.7 LOGISTICS

TABLE 118 LOGISTICS: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 119 LOGISTICS: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 120 LOGISTICS: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 121 LOGISTICS: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

10.8 OIL & GAS

FIGURE 45 OIL CONSUMPTION, BY REGION, 2019 (TWH)

TABLE 122 OIL & GAS: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 123 OIL & GAS: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 124 OIL & GAS: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 125 OIL & GAS: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

10.9 OTHERS

FIGURE 46 PULP PRODUCTION, 2018 VS. 2019 ('000 TONNES)

TABLE 126 OTHERS: SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 127 OTHERS: SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 128 OTHERS: SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 129 OTHERS: SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

11 SEMI-TRAILER MARKET, BY REGION

11.1 INTRODUCTION

11.1.1 ASSUMPTIONS FOR MARKET FORECASTING

11.1.2 RESEARCH METHODOLOGY FOR SEMI-TRAILER, BY REGION

11.1.3 OPINIONS FROM INDUSTRY EXPERTS

FIGURE 47 SEMI-TRAILER MARKET, BY REGION, 2020 VS. 2025 (USD MILLION)

TABLE 130 SEMI-TRAILER MARKET, BY REGION, 2016–2019 ('000 UNITS)

TABLE 131 SEMI-TRAILER MARKET, BY REGION, 2020–2025 ('000 UNITS)

TABLE 132 SEMI-TRAILER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 133 SEMI-TRAILER MARKET, BY REGION, 2020–2025 (USD MILLION)

11.2 ASIA PACIFIC

TABLE 134 ASIA PACIFIC: SEMI-TRAILER MARKET, BY COUNTRY, 2016–2019 (UNITS)

TABLE 135 ASIA PACIFIC: SEMI-TRAILER MARKET, BY COUNTRY, 2020–2025 (UNITS)

TABLE 136 ASIA PACIFIC: SEMI-TRAILER MARKET, BY COUNTRY, 2016–2019 (USD MILLION)

TABLE 137 ASIA PACIFIC: SEMI-TRAILER MARKET, BY COUNTRY, 2020–2025 (USD MILLION)

FIGURE 48 ASIA PACIFIC: SEMI-TRAILER MARKET SNAPSHOT

11.2.1 CHINA

11.2.1.1 Government infrastructure spending and improving real estate to drive the market

TABLE 138 CHINA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 139 CHINA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 140 CHINA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 141 CHINA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.2.2 INDIA

11.2.2.1 Expanding cold chain industry to drive the market

TABLE 142 INDIA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 143 INDIA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 144 INDIA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 145 INDIA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.2.3 JAPAN

11.2.3.1 Emphasis on adopting technologically advanced semi-trailers to drive the market

TABLE 146 JAPAN: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 147 JAPAN: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 148 JAPAN: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 149 JAPAN: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.2.4 SOUTH KOREA

11.2.4.1 Growth of export-based consumer electronics to drive the market

TABLE 150 SOUTH KOREA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 151 SOUTH KOREA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 152 SOUTH KOREA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 153 SOUTH KOREA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.2.5 REST OF ASIA PACIFIC

TABLE 154 REST OF ASIA PACIFIC: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 155 REST OF ASIA PACIFIC: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 156 REST OF ASIA PACIFIC: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 157 REST OF ASIA PACIFIC: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.3 NORTH AMERICA

TABLE 158 NORTH AMERICA: SEMI-TRAILER MARKET, BY COUNTRY, 2016–2019 (UNITS)

TABLE 159 NORTH AMERICA: SEMI-TRAILER MARKET, BY COUNTRY, 2020–2025 (UNITS)

TABLE 160 NORTH AMERICA: SEMI-TRAILER MARKET, BY COUNTRY, 2016–2019 (USD MILLION)

TABLE 161 NORTH AMERICA: SEMI-TRAILER MARKET, BY COUNTRY, 2020–2025 (USD MILLION)

FIGURE 49 NORTH AMERICA: SEMI-TRAILER MARKET SNAPSHOT

11.3.1 US

11.3.1.1 Presence of strong healthcare industry to drive the market

TABLE 162 US: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 163 US: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 164 US: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 165 US: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.3.2 CANADA

11.3.2.1 Growing exports from US to drive the market

TABLE 166 CANADA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 167 CANADA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 168 CANADA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 169 CANADA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.3.3 MEXICO

11.3.3.1 Increasing number of US-based trailer manufacturers to drive the market

TABLE 170 MEXICO: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 171 MEXICO: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 172 MEXICO: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 173 MEXICO: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.4 EUROPE

FIGURE 50 EUROPE: SEMI-TRAILER MARKET, 2020 VS. 2025 (USD MILLION)

TABLE 174 EUROPE: SEMI-TRAILER MARKET, BY COUNTRY, 2016–2019 (UNITS)

TABLE 175 EUROPE: SEMI-TRAILER MARKET, BY COUNTRY, 2020–2025 (UNITS)

TABLE 176 EUROPE: SEMI-TRAILER MARKET, BY COUNTRY, 2016–2019 (USD MILLION)

TABLE 177 EUROPE: SEMI-TRAILER MARKET, BY COUNTRY, 2020–2025 (USD MILLION)

11.4.1 GERMANY

11.4.1.1 Presence of largest semi-trailer manufacturers to drive the market

TABLE 178 GERMANY: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 179 GERMANY: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 180 GERMANY: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 181 GERMANY: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.4.2 UK

11.4.2.1 Demand for customized semi-trailers to drive the market

TABLE 182 UK: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 183 UK: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 184 UK: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 185 UK: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.4.3 FRANCE

11.4.3.1 Established food & beverage industry to drive the market

TABLE 186 FRANCE: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 187 FRANCE: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 188 FRANCE: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 189 FRANCE: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.4.4 SPAIN

11.4.4.1 Matured food processing and equipment industry to drive the market

TABLE 190 SPAIN: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 191 SPAIN: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 192 SPAIN: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 193 SPAIN: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.4.5 POLAND

11.4.5.1 Growing manufacturing industry to drive the market

TABLE 194 POLAND: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 195 POLAND: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 196 POLAND: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 197 POLAND: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.4.6 ITALY

11.4.6.1 Established transportation and logistics industries to drive the market

TABLE 198 ITALY: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 199 ITALY: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 200 ITALY: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 201 ITALY: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.4.7 REST OF EUROPE

TABLE 202 REST OF EUROPE: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 203 REST OF EUROPE: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 204 REST OF EUROPE: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 205 REST OF EUROPE: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.5 REST OF THE WORLD (ROW)

FIGURE 51 REST OF THE WORLD (ROW): SEMI-TRAILER MARKET, 2020 VS. 2025 (USD MILLION)

TABLE 206 REST OF THE WORLD (ROW): SEMI-TRAILER MARKET, BY COUNTRY, 2016–2019 (UNITS)

TABLE 207 REST OF THE WORLD (ROW): SEMI-TRAILER MARKET, BY COUNTRY, 2020–2025 (UNITS)

TABLE 208 REST OF THE WORLD (ROW): SEMI-TRAILER MARKET, BY COUNTRY, 2016–2019 (USD MILLION)

TABLE 209 REST OF THE WORLD (ROW): SEMI-TRAILER MARKET, BY COUNTRY, 2020–2025 (USD MILLION)

11.5.1 BRAZIL

11.5.1.1 Promising logistics environment to drive the market

TABLE 210 BRAZIL: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 211 BRAZIL: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 212 BRAZIL: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 213 BRAZIL: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.5.2 RUSSIA

11.5.2.1 Growing domestic freight transportation to drive the market

TABLE 214 RUSSIA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 215 RUSSIA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 216 RUSSIA: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 217 RUSSIA: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

11.5.3 REST OF ROW

TABLE 218 REST OF ROW: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (UNITS)

TABLE 219 REST OF ROW: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (UNITS)

TABLE 220 REST OF ROW REST OF ROW: SEMI-TRAILER MARKET, BY TYPE, 2016–2019 (USD MILLION)

TABLE 221 REST OF ROW: SEMI-TRAILER MARKET, BY TYPE, 2020–2025 (USD MILLION)

12 COMPETITIVE LANDSCAPE

12.1 MARKET EVALUATION FRAMEWORK

FIGURE 52 MARKET EVALUATION FRAMEWORK

12.2 OVERVIEW

FIGURE 53 KEY DEVELOPMENTS BY LEADING PLAYERS IN THE SEMI-TRAILER MARKET

12.3 MARKET SHARE ANALYSIS FOR SEMI-TRAILER MARKET

FIGURE 54 MARKET SHARE ANALYSIS, 2019

12.4 MARKET RANKING ANALYSIS FOR SEMI-TRAILER MARKET

FIGURE 55 MARKET RANKING ANALYSIS, 2019

12.5 COVID-19 IMPACT ON SEMI-TRAILER COMPANIES

12.6 COMPETITIVE SCENARIO

12.6.1 COLLABORATIONS/JOINT VENTURES/SUPPLY CONTRACTS/
PARTNERSHIPS/AGREEMENTS

TABLE 222 COLLABORATIONS/JOINT VENTURES/SUPPLY CONTRACTS/
PARTNERSHIPS/ AGREEMENTS, 2018–2020

12.6.2 NEW PRODUCT DEVELOPMENTS

TABLE 223 NEW PRODUCT DEVELOPMENTS, 2018–2020

- 12.6.3 MERGERS & ACQUISITIONS, 2017–2020
- TABLE 224 MERGERS & ACQUISITIONS, 2017–2020
- 12.6.4 EXPANSIONS, 2017–2020
- TABLE 225 EXPANSIONS, 2017–2020
- 12.7 COMPETITIVE LEADERSHIP MAPPING FOR SEMI-TRAILER MARKET
 - 12.7.1 STARS
 - 12.7.2 EMERGING LEADERS
 - 12.7.3 PERVASIVE
 - 12.7.4 EMERGING COMPANIES
- FIGURE 56 SEMI-TRAILER MARKET: COMPETITIVE LEADERSHIP MAPPING, 2019
- 12.8 STRENGTH OF PRODUCT PORTFOLIO
- FIGURE 57 PRODUCT PORTFOLIO ANALYSIS OF TOP PLAYERS IN SEMI-TRAILER MARKET
- 12.9 BUSINESS STRATEGY EXCELLENCE
- FIGURE 58 BUSINESS STRATEGY EXCELLENCE OF TOP PLAYERS IN SEMI-TRAILER MARKET
- 12.10 SEMI-TRAILER TELEMATICS PROVIDER: COMPETITIVE LEADERSHIP MAPPING, 2019
- FIGURE 59 SEMI-TRAILER TELEMATICS PROVIDER, 2019

13 COMPANY PROFILES

(Business Overview, Products & Services, Key Insights, Recent Developments, MnM View)*

- 13.1 CHINA INTERNATIONAL MARINE CONTAINERS
 - FIGURE 60 CHINA INTERNATIONAL MARINE CONTAINERS: COMPANY SNAPSHOT
 - TABLE 226 CIMC: SUPPLY CONTRACTS
 - TABLE 227 CIMC: AGREEMENTS
 - TABLE 228 CIMC: JOINT VENTURES/PARTNERSHIPS/COLLABORATIONS
- 13.2 WABASH NATIONAL
 - FIGURE 61 WABASH NATIONAL: COMPANY SNAPSHOT
 - TABLE 229 WABASH NATIONAL: NEW PRODUCT LAUNCHES
 - TABLE 230 WABASH NATIONAL: JOINT VENTURES/PARTNERSHIPS/COLLABORATIONS/ACQUISITIONS
- 13.3 SCHMITZ CARGOBULL
 - FIGURE 62 SCHMITZ CARGOBULL: COMPANY SNAPSHOT
 - TABLE 231 SCHMITZ CARGOBULL: NEW PRODUCT LAUNCHES
 - TABLE 232 SCHMITZ CARGOBULL: EXPANSIONS

TABLE 233 SCHMITZ CARGOBULL: SUPPLY CONTRACTS
TABLE 234 SCHMITZ CARGOBULL: JOINT
VENTURE/PARTNERSHIP/COLLABORATION
TABLE 235 SCHMITZ CARGOBULL: MERGER & ACQUISITION
13.4 GREAT DANE
TABLE 236 GREAT DANE: NEW PRODUCT LAUNCHES
TABLE 237 GREAT DANE: EXPANSIONS
TABLE 238 GREAT DANE: JOINT VENTURE/PARTNERSHIP/COLLABORATION
13.5 UTILITY TRAILER MANUFACTURING COMPANY
TABLE 239 UTILITY TRAILER MANUFACTURING: NEW PRODUCT LAUNCHES
TABLE 240 UTILITY TRAILER MANUFACTURING: EXPANSIONS
13.6 FAHRZEUGWERK BERNARD KRONE
FIGURE 63 FAHRZEUGWERK BERNARD: COMPANY SNAPSHOT
TABLE 241 FAHRZEUGWERK BERNARD KRONE: EXPANSIONS
TABLE 242 FAHRZEUGWERK BERNARD KRONE: SUPPLY CONTRACTS
TABLE 243 FAHRZEUGWERK BERNARD KRONE: JOINT
VENTURES/PARTNERSHIPS/COLLABORATIONS
13.7 KOGEL TRAILER
TABLE 244 KOGEL TRAILER: NEW PRODUCT LAUNCHES
TABLE 245 KOGEL TRAILER: EXPANSIONS
13.8 HYUNDAI TRANSLEAD
TABLE 246 HYUNDAI TRANSLEAD: EXPANSIONS
13.9 LAMBERET
TABLE 247 LAMBERET: EXPANSIONS
13.10 WILHELM SCHWARZMÜLLER
FIGURE 64 WILHELM SCHWARZMÜLLER: COMPANY SNAPSHOT
TABLE 248 WILHELM SCHWARZMÜLLER: NEW PRODUCT LAUNCHES
TABLE 249 WILHELM SCHWARZMÜLLER: MERGERS & ACQUISITIONS
13.11 STOUGHTON TRAILERS, LLC
13.12 FELLING TRAILERS
13.13 KENTUCKY TRAILERS
13.14 PITTS TRAILERS
13.15 PREMIER TRAILERS
13.16 WIELTON SA
13.17 SDC TRAILERS LTD.
13.18 DENNISON TRAILERS LTD
13.19 KASSBOHRER
13.20 VAN HOOL
13.21 MONTRACON

13.22 RAC GERMANY

13.23 SATRAC

13.24 VAZRON

*Details on Business Overview, Products & Services, Key Insights, Recent Developments, MnM View might not be captured in case of unlisted companies.

14 APPENDIX

14.1 KEY INSIGHTS OF INDUSTRY EXPERTS

14.2 DISCUSSION GUIDE

14.3 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

14.4 AVAILABLE CUSTOMIZATIONS

14.5 RELATED REPORTS

14.6 AUTHOR DETAILS

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