

China Refrigerated and Insulated Vehicle Market Report, 2010-2011

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Abstracts

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Refrigerated & insulated vans are closed special transport vehicles, and they are primarily used to transport frozen or fresh goods, such as meat, fruit, vegetable, aquatic products, flowers and so on. Refrigerated vans are equipped with carriages (which have thermal insulation structure) and refrigeration devices for transporting refrigerated goods. Insulated vans are also equipped with carriages (which have thermal insulation structure) for heat preservation transport.

As people's living standards have been improved, the demand for refrigerated products keeps increasing; coupled with the strengthened cold chain logistics industry and the rapid development of road transport industry, refrigerated & insulated vans in China have seen quick development. The number of refrigerated & insulated vans in China rose from over 30,000 in 2000 to more than 50,000; the output increased from less than 3,000 to nearly 6,000 in 2010.

However, compared with other countries, China has fewer refrigerated & insulated vans with a low refrigerated transport rate and considerable demand for refrigeration and thermal insulation. For example, Europe, America and Japan each has a refrigerated transport rate of 83-90% respectively, Eastern Europe has 50%, but China only has about 20%. In China, about 80% of fruit, vegetable, poultry and aquatic products are transported by ordinary trucks.

In June 2010, China issued the first Cold Chain Logistics Development Plan for

Agricultural Products to point out that China should vigorously develop refrigerated vans, and raise the refrigerated transport rates of fruit & vegetable, meat and aquatic products from 15%, 30% and 40% in 2010 to 30%, 50% and 65% in 2015 respectively. The plan encourages large-scale cold chain logistics enterprises to purchase refrigerated transport vehicles. By 2015, the number of new refrigerated vans will reach 40,000. This means that China's annual demand for refrigerated and insulated vans will exceed 20% from 2011 to 2015.

Starting from the angle of the environment for the development of China refrigerated & insulated van industry, this report analyzes supply and demand in refrigerated & insulated van market, and then analyzes the competition pattern and 15 key enterprises in this industry.

In 2010, Chinese refrigerated van market was dominated by Beiqi Foton Motor Co., Ltd, Zhenjiang Speed Automobile Group Co., Ltd and Zhengzhou Hongyu Special Vehicle Co., Ltd. In this market, top 3 enterprises contributed 43.63% to the total output, and top 10 ones 82.42%.

The refrigerated vans of Beiqi Foton are made of high-quality polyurethane insulation materials with overall foam process and sandwich process, and enjoy good reputation. In 2010, Beiqi Foton produced 1,058 refrigerated vans, surpassing Zhenjiang Speed to become the champion in the industry.

Zhengzhou Hongyu belongs to China North Industries Group. In recent years, it has focused on the development of special vehicles based on military technology. It mainly produces light-duty and mini refrigerated vans with the chassis made by Chang'an and Jiefang. Zhengzhou Hongyu plans to raise its share in refrigerated & insulated van market to over 20% in 2011.

In China, only a few insulated van enterprises conduct actual production and have product certificates, including the most competitive Henan Bingxiong and CIMC Vehicles Group.

In addition, the report also analyzes the development, downstream demand, key areas and key enterprises of China cold chain industry.

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