

TOP
30
TRAILER BUILDERS

THE WORLD'S TOP 30

TO CELEBRATE HALF A DECADE OF SERVING THE INTERNATIONAL TRAILER BUILDING COMMUNITY, GLOBAL TRAILER HAS SCOUTED THE GLOBE TO CREATE WHAT COULD BE THE FIRST GLOBAL OEM RANKING IN HISTORY. [Story by Sebastian Grote]

As opposed to the powered commercial vehicle segment, which quickly embraced the concept of globalisation in the wake of World War II, trailer manufacturing has remained a highly regionalised business for the most part of the 20th century. Even though the industry was, and still is, closely tied to the success of the truck market, the cost of shipping a 'box on wheels' was long considered uneconomical – especially given the trailer's standing as a commodity item with a low cost margin and little added value.

Since the turn of the century, however, that perspective has slowly changed, with a handful of trailer manufacturing businesses now actively pursuing a globalisation

strategy – some by sending a knocked down (CKD) kit abroad and assembling it locally, and some by investing into a local partnership and/ or production facility.

Leading the pack is Chinese corporation CIMC Vehicles, which is now producing locally in China, Australia, North America, Belgium, Poland as well as the UK (see page 18). The only OEM currently able to compete

with that vast footprint is Germany's Schmitz Cargobull, which is present in Germany, Lithuania, Russia, Spain and China.

Inspired by the industry's dynamic duo, however, Turkey's Tirsan Group is quickly playing catch up. After acquiring German brand Kässbohrer and Dutch OEM Talson, the company is spreading rapidly in the EMEA region (Europe, Middle East and Africa) and has high hopes for the Russian market, where it opened a local factory in 2011.

More specialised OEMs are becoming increasingly globally minded, too: Tennessee-based tanker specialist, Heil Trailer, for example, is now also manufacturing in Thailand, for instance, while San Diego's Hyundai Translead is building equipment out of Tijuana, Mexico (unfortunately Heil Trailer did not want to be part of the actual ranking, ed.).

Even though almost half of the 30 businesses in our ranking are based in the US, North American brands generally still seem unsure about the viability of going global, though. US powerhouse, Wabash National, for example, may be present in South America and Australia, but is not producing equipment outside the US just yet. Great Dane, meanwhile, has shown interest in competing on the global stage when it entered into partnership with Chinese company Icebear in 2012, but has since not commented on the project – most likely because of the almost incomprehensible amount of small and medium-sized businesses fighting for market share in greater China.

Regionally, the size and scope of trailer manufacturing businesses can thus still vary largely: Producing some 4,000 units annually, Dubai-based Gorica, for example, is considered the largest OEM in the Middle East and North Africa (MENA) region, but would hardly make the top 10 in North America in 2015, which MAC Trailer Manufacturing concluded with a total volume of around 4,900.



In comparison, Bhachu Industries, the largest OEM in the booming nation of Kenya, has produced some 1,200 units in 2015; and Pakistani powerhouse Autocom secured a national number-one spot with a volume of just 500. In Europe, meanwhile, Belgian company LAG has produced 1,750 units between July 2015 and June 2016 by solely focusing on tankers, which are traditionally more complex and time-consuming to build.

As a result, the industry is still highly fragmented and almost impossible to map exhaustively. *Global Trailer's* first global OEM ranking can therefore only serve as a guideline and a first step toward a more transparent trailer manufacturing industry. **GT**
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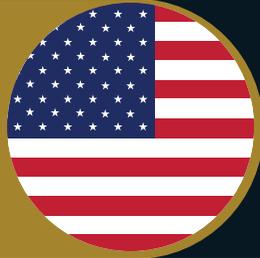
While *Global Trailer's* Top 30 OEM ranking has been compiled with the utmost commitment to accuracy and professionalism, it is still supplied without liability. All up, we reached out to more than 100 OEMs globally since June 2016, with a response rate of just under 50 per cent. If we were not able to obtain an official production number directly from the OEM, our source of choice, we consulted a range of industry sources to obtain an estimate. If the estimate (and/ or number that was already in the public sphere) was backed by at least two matching sources, it also made the list. Build numbers cover the timeframe between 1 July 2015 and 30 June 2016 unless stated otherwise.

01

**CIMC VEHICLES* // CHINA // OUTPUT: 100,300 ^**

The world's largest trailer manufacturer based on output, CIMC Vehicles' global network of affiliated brands includes US-based brand, Vanguard, as well as Northern Ireland's SDC Trailers.

02

**WABASH NATIONAL // USA // OUTPUT: 63,450**

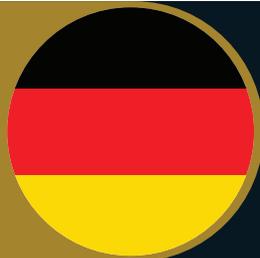
Wabash National is North America's largest trailer manufacturer. Specialising in dry freight, refrigerated and flatbed trailers, the company is led by President and CEO, Dick Giromini.

03

**GREAT DANE // USA // OUTPUT: 52,600**

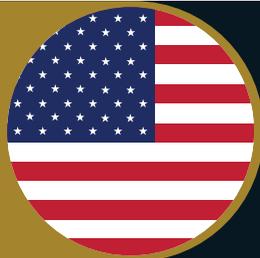
After more than 115 years in business, privately owned company Great Dane has cemented its position in the US trailer market with a focus on dry freight, refrigerated and flatbed trailers.

04

**SCHMITZ CARGOBULL // GERMANY // OUTPUT: 50,000**

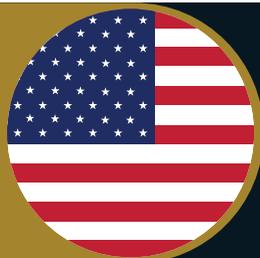
Schmitz Cargobull has long led the European trailer building scene, with curtain-siders, reefers, tippers and swap bodies dominating its product line-up. Andreas Schmitz took over as Chairman of the Management Board in April 2016.

05

**HYUNDAI TRANSLEAD // USA // OUTPUT: 49,713 ^**

Formed in 1989 as a container manufacturer, Hyundai Translead entered the US transport equipment market in 1994. A subsidiary of Korea's Hyundai Motor Company, it is now focussing on the production of reefers, skels, dollies and vans.

06

**UTILITY TRAILER MANUFACTURING // USA // OUTPUT: 49,187 ^**

Founded in 1914, Utility is best known for its expertise in refrigerated transport equipment. The company's five manufacturing sites across North America produce nearly 50,000 trailers yearly.



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07

**KRONE // GERMANY // OUTPUT: 49,000**

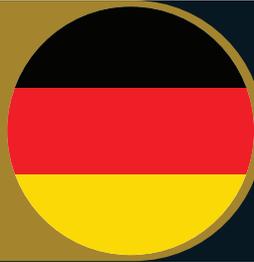
Krone holds the number two position in Europe thanks to a wide product portfolio ranging from tippers, curtain-siders and dry vans through to refrigerated trailers, as well as a strong focus on in-house manufacturing and value added services.

08

**STOUGHTON TRAILERS // USA // OUTPUT: 16,000 ^**

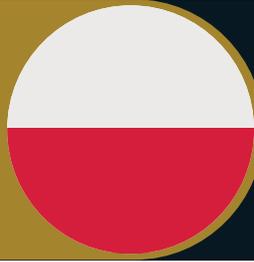
Led by President and CEO, Bob Wahlin, US OEM Stoughton Trailers specialises in the manufacture of chassis, dry freight, grain, livestock and custom equipment. The company acquired Oklahoma-based company Barrett Trailers in 2014.

09

**KÖGEL // GERMANY // OUTPUT: 13,000 ^**

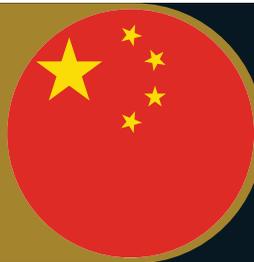
Having celebrated its 80th anniversary in 2014, Kögel covers much of the European market with a range spanning dry and refrigerated vans, curtain-siders, container chassis and tippers. It is owned by fellow German company, Humbaur.

10

**WIELTON // POLAND // OUTPUT: 11,500 ^**

Wielton has only been on the scene for around 20 years, with a product range including dry and refrigerated vans, curtain-siders, container chassis and tippers. Wielton has its eyes set on the hotly contested number three spot in Europe.

11

**HUAJUN // CHINA // OUTPUT: 10,780**

Since 1952, China's Huajun has been manufacturing semi-trailers, tippers, curtain-siders and van trailers, as well as skels, tankers, concrete agitators and flat tops. The company officially became part of the CIMC Vehicles group in 2004.

12

**RANDON // BRAZIL // OUTPUT: 10,066 ^**

Randon has been manufacturing a wide spectrum of commercial road equipment for more than 60 years, covering both semi-trailers and truck bodies. The company is currently planning a global expansion campaign.

13

**SDC TRAILERS // NORTHERN IRELAND // OUTPUT: 9,500**

As the best-selling OEM in the United Kingdom, SDC Trailers specialises in the design and manufacture of curtain-siders, dry vans, tippers and skels. In June 2016, CIMC Vehicles acquired the company for an undisclosed sum.

14

**TIRSAN TREYLER* // TURKEY // OUTPUT: 9,300 ^**

Founded in 1977, Turkey's Tirsan Treyler is considered one of Europe's largest and fastest growing trailer manufacturers. German brand Kässbohrer and Dutch OEM Talson are both part of the Tirsan family.

15

**MANAC // CANADA // OUTPUT: 8,225**

Canadian family business, Manac, is listed as the seventh largest trailer builder in North America, just ahead of Fontaine and with a comfortable 2000-unit gap to ninth-ranked Wilson.

16

**SCHWARZMÜLLER // AUSTRIA // OUTPUT: 7,800**

Drawing on more than 140 years of industry experience, Schwarzmüller hopes to produce some 10,000 trailers annually by 2020. In February, CEO Jan Willem Jongert was replaced by ex-Linde executive, Roland Hartwig.

17

**FONTAINE // USA // OUTPUT: 7,655 ^**

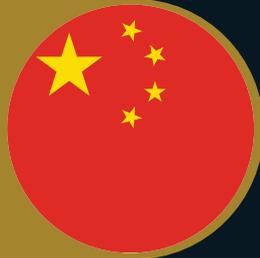
Specialising in flat top trailers, US company Fontaine has expanded considerably over the past 60 years. Its portfolio now also encompasses flat tops and drop decks, as well as low loaders, extendable trailers and intermodal equipment.

18

**LECITRAILER // SPAIN // OUTPUT: 6,490**

Founded in 1990, Spanish trailer manufacturing company, Lecitrailer, is one of the youngest and fastest growing trailer building businesses in Europe, boasting a broad portfolio across various industries.

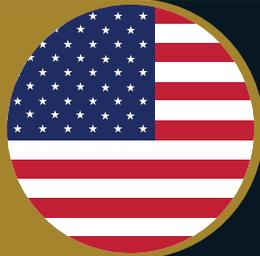
19



HONGTAI // CHINA // OUTPUT: 6,315

Established in 2004, Hongtai is considered one of the biggest trailer manufacturers in China. Experts estimate Hongtai's current production to be around the 6,000-unit mark, with potential to ramp up volume to around 15,000.

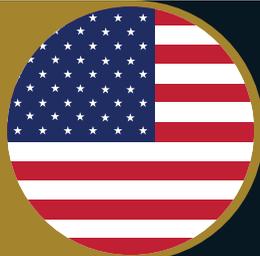
20



WILSON // USA // OUTPUT: 5,300 ^

Headquartered in Sioux City, Iowa, US company Wilson Trailer focuses on the production of over-the-road equipment, with a portfolio ranging from livestock and grain equipment through to flatbeds and self-unloading trailers.

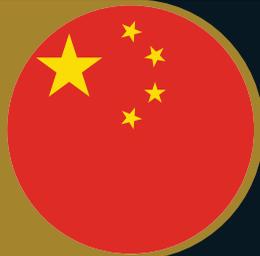
21



MAC TRAILERS // USA // OUTPUT: 4,900 ^

Based in the town of Alliance, Ohio, MAC Trailer's portfolio stretches across steel and aluminium dump trailers, transfer trailers, flatbed trailers, drop deck trailers, pneumatic tankers as well as straight truck bodies, according to the OEM.

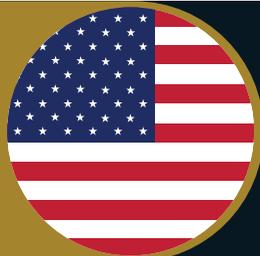
22



HUAYU LIANGSHAN // CHINA // OUTPUT: 4,599

Often referred to as Huayu only, the Liangshan Huayu Group Automobile Manufacture Company is located in the northern Chinese province of Shandong and mainly serves the domestic market as well as Southeast Asia and Africa.

23



STRICK // USA // OUTPUT: 4,300 ^

The roots of Strick Trailers reportedly extend back to the 1930s, when Frank Strick first applied his knowledge of aircraft engineering to the transport industry. Today the company produces a range of customisable dry van trailers.

24



AFRIT // REPUBLIC OF SOUTH AFRICA // OUTPUT: 4,200 ^

Proudly South African, Pretoria-based family company, Afrit, is one of the country's leading trailer manufacturers. It supplies equipment to Zambia, Uganda, Kenya, Mozambique, Botswana, as well as several other African countries.



iTAP



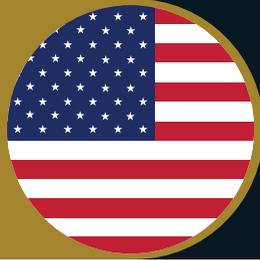
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25

**PITTS // USA // OUTPUT: 4,100 ^**

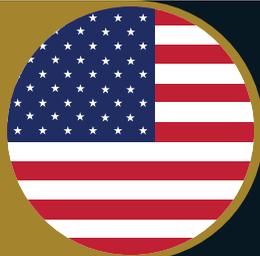
Pitts Trailers is marketing itself as the “world’s largest and only complete line” forestry trailer OEM. Its portfolio covers log trailers, open and closed top chip vans, moving floors vans, steel and platforms as well as drop decks and low loaders.

26

**GORICA // UNITED ARAB EMIRATES // OUTPUT: 4,000**

In 2014, Gorica gained global attention when it purchased a suite of plant equipment and know-how from Krone to expand into the refrigerated transport market. Today, it is considered the leading OEM in the Middle East.

27

**TIMPTE // USA // OUTPUT: 3,900 ^**

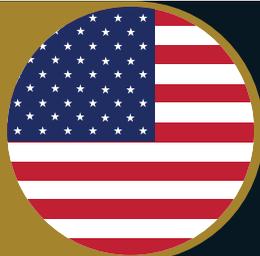
Based in the US state of Nebraska, Timpte has been manufacturing bulk commodity trailers for more than 130 years and is best known for what is said to be North America’s best-selling aluminium grain hopper design.

28

**GUERRA // BRAZIL // OUTPUT: 3,723**

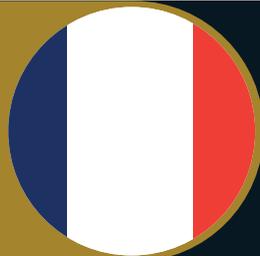
Randon rival, Guerra, has made in-house innovation its key priority to handle the economic slowdown in Brazil, reportedly focusing on rugged forestry equipment and hydraulics cranes.

29

**REITNOUER // USA // OUTPUT: 3,600 ^**

Specialising in aluminum flatbeds and drop deck trailers, Reitnouer was founded in 1982 by then-24-year-old Bud Reitnouer. More than 30 years on, it has now secured a spot in *Global Trailer’s* first ever global OEM ranking.

30

**CHEREAU // FRANCE // OUTPUT: 3,371**

Keeping food cold and fresh over a long distance can be a tricky task. Rising to the challenge, Chereau has made a point of finding the most innovative way to control temperature on the road – even in France’s demanding economic climate.

*Group result. ^2015 calendar year.

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