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World Diesel Engines

Industry Study with Forecasts for **2012 & 2017**

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Industry Study with Forecasts for *2012 & 2017*

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ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

Despite a slower growth rate, substantial increases in demand will occur in every segment of the world diesel engine market, with most new demand in the motor vehicle segment.

Global demand to expand 3.5% yearly through 2012

World diesel engine demand is forecast to expand 3.5 percent per year through 2012 to $153 billion. This represents a considerable deceleration from the growth posted during the 2002-2007 period, reflecting an expected slowdown in motor vehicle and off-highway equipment production and a moderation in metal prices. Despite the slower growth rate, substantial increases in demand will occur in every segment of the world diesel engine market, with most new demand in the motor vehicle segment.

Motor vehicle, stationary power types to lead gains

Demand for diesel engines in the stationary power segment is expected to expand at the fastest annual rate, as industrialized nations transition to alternative energy sources (stationary engines used as backup generators) and developing countries continue to invest in their infrastructure (micropower generation). Nonetheless, the stationary segment will continue to play only a small role in the global diesel engine market. Demand in the motor vehicle segment is forecast to grow 3.7 percent per year, accounting for a majority of new growth from 2007 to 2012. The off-highway segment is expected to perform slightly below the market average as commodity and agricultural prices retreat from their elevated 2007 levels, which will undermine demand for several key types of machinery and equipment.

World Diesel Engine Demand
($153.3 billion, 2012)

Asia/Pacific region to remain largest market

Between 2002 and 2007, growth in the Asia/Pacific regional market was driven by rising demand for diesel engines in China, India, Indonesia and Thailand where increased domestic production of motor vehicles, machinery and equipment encouraged demand. The Asia/Pacific market for diesel engines is forecast to grow 4.0 percent annually through 2012, with China alone responsible for over 18 percent of total new global demand generated between 2007 and 2012. The largest absolute gains in the regional market will occur in the heavy truck and bus segment, which will total $26.7 billion in 2012.

The diesel engine market in Western Europe is projected to decelerate through 2012, due to weakness in the production of motor vehicles and machinery. Some of the region's largest diesel engine markets, such as Germany, France and Spain, are expected to experience restrained growth. In North America, growth will be driven by the motor vehicle segment, which is set to benefit from higher levels of heavy vehicle output and the increased use of diesel engines in light vehicle production. From 2007 to 2012, demand for diesel engines in Eastern Europe and Latin America is expected to expand faster than the global average, yet each region will still only account for about five to six percent of aggregate demand.

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Sample Text, Table & Chart

TABLE III-2

WORLD DIESEL ENGINE DEMAND BY APPLICATION (million dollars)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil 2006$)	44280				
% fixed invest	21.2				
Gross Fixed Investment (bil 2006$)	9400				
Motor Vehicle Production (000 units)	55970				
$ MV diesel/motor vehicle	785				
$ diesel/000$ fixed investment	7.2				
Diesel Engine & Parts Demand	67500				
Motor Vehicles:	44000				
Light Vehicles	18800				
Heavy Trucks & Buses	25200				
Off-Highway	20370				
Stationary	3130				

SAMPLE TABLE

ASIA/PACIFIC

India: Supply & Demand

Diesel engine demand in India totaled $4.9 billion in 20 ing 12.5 percent per year since 2002. Factors directly related diesel engine market combined with broader economic trend double-digit growth. From 2002 to 2007, India continued to experiencing rising living standards and large inflows of fore Rising production levels of motor vehicles and off-highway combined with increasing domestic consumption of these fin drove demand for diesel engines. The most noteworthy gain in the light vehicle and heavy truck and bus segments, both expanded over 18 percent per year. Increasing demand for d in these two segments coincided with a 20 percent per year i motor vehicle output. Although light vehicle diesel engine d than doubled from 2002 to 2007, the segment represented on percent of total demand in 2007. Production of agricultural, construction equipment also surged during this period, pushing demand for related diesel engines to $2.7 billion.

Diesel engine demand percent annually through 2012 to $ wth in the large off-highway segr ate of expansion for the entire die overall market will easily outpace s for the 2007-2012 period. Sagging n India are expected to constrain pro way segment will expand 3.0 percent per year through 2012. With its extensive potential for growth, the motor vehicle segment of the diesel engine market is predicted to expand 11.9 percent per year through 2012 to $3.4 billion. Rising demand for heavy trucks and buses in the transport industry will coincide with increasing sales of light vehicles; together, the two segments will represent nearly half of total demand in 2012, up ten percent from 2007. Stationary diesel engines will continue to play a

SAMPLE TEXT

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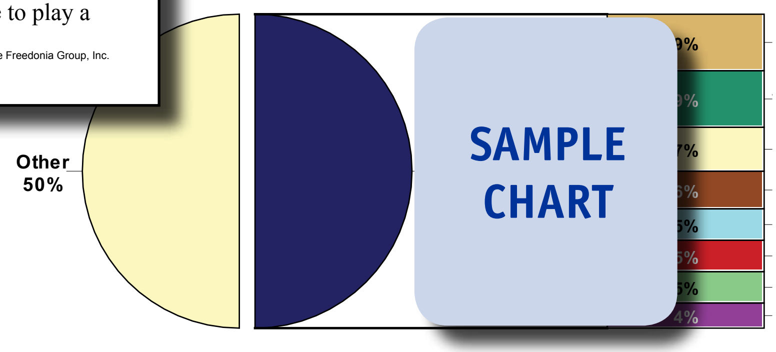
CHART VIII-1

RLD DIESEL ENGINE MARKET SHARE, 2007 ($129.3 billion)



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Sample Profile, Table & Forecast

TABLE VI-10

INDIA - DIESEL ENGINE SUPPLY & DEMAND
(million dollars)

Item	1997	2002	2007	2012	2017
Motor Vehicle Production (000 units)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ MV diesel/motor vehicle	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Diesel Engine Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Motor Vehicles:	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Light Vehicles	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Heavy Trucks & Buses	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Off-Highway	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Stationary	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
+ net exports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Diesel Engine Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Engines	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Parts	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

Renault SA
13-15 quai le Gallo
92513 Boulogne-Billancourt cedex
France
33-176-840404
http://www.re

Revenues: $
Geographic R ... ce 32%,
Euromed 11% ... Asian and
African Coun
Employment:

Key Products

SAMPLE PROFILE

Renault is engaged in the production and distribution of automobiles, light commercial vehicles and trucks, and parts and accessories. The Company operates in two segments: Automobile and Sales Financing. Additionally, Renault holds a 44-percent share of Nissan Motor Company Limited (Japan).

Renault was the fourth largest manufacturer of diesel engines and parts in 2007, accounting for six percent of global sales. The Company is active in the world diesel engine industry through the Automobile segment, which had 2007 revenues of $52.9 billion. The segment produces automobiles, light commercial vehicles and trucks, and parts and accessories, including diesel engines. Through the segment, Renault produces and sells DCI and D series engines for the RENAULT and DACIA vehicle lines. The DCI series includes models with power output ranging from 55 to 185 horsepower (hp) and in 1.5-, 2-, 2.2-, 2.5- and 3-liter (L) configurations. These engines are used in such models as TWINGO, CLIO, MODUS, KANGOO, LOGAN, MEGANE,

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"Shipments of diesel engines and parts from India totaled $4.3 billion in 2007, after growing 9.9 percent per annum since 2002. Nonetheless, the country still posted a net trade deficit of $620 million in 2007. With demand being projected to grow 7.1 percent per year through 2012, the net trade deficit is set to reach $930 million in that year."

--Section VI, pg. 148

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Other Studies

World Fuel Cells

This study analyzes the global fuel cell industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product (e.g., stacks and systems, fuels, electronics), chemistry (e.g., proton-exchange membrane, phosphoric acid, solid oxide), application (e.g., electric power generation, motor vehicles), world region and major country. The study also considers market environment factors, reviews fuel cell technology, details industry structure, evaluates market share and profiles industry players.

#2502 .... 05/2009.................... $5800

Batteries in China

This study analyzes the Chinese battery industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by type (e.g., zinc-carbon/zinc-chloride, alkaline, primary lithium, lead-acid, rechargeable lithium, nickel-cadmium, nickel-metal hydride) and market (e.g., consumer, industrial, government, electric bicycles and motor vehicles, portable devices, motive power, backup power). The study also considers market environment factors, evaluates company market share and profiles industry participants.

#2466 .... 05/2009.................... $5200

Diesel Engines & Related Parts

US diesel engine product demand will rise 6.2% annually through 2013. Motor vehicle uses will outpace the non-motor vehicle segment as consumers choose diesel's better fuel economy and towing/hauling power. New emission control regulations will also drive gains via the upgrading or replacement of older, noncompliant engines. This study analyzes the $14.5 billion US diesel engine and parts industry, with forecasts for 2013 and 2018 by product, material and market. It also details market share and profiles industry players.

#2464 .... 02/2009.................... $4700

Wind Turbine Systems

US wind turbine system demand will grow 6.8% annually through 2012, driven by rising interest in domestic energy and government incentives. Public utilities will increase their market share while independent power producers remain dominant. The New England and Middle Atlantic subregions will grow the fastest. This study analyzes the $7.3 billion US wind turbine system industry, with forecasts for 2012 and 2017 by type, component, application and region. It also evaluates market share and profiles industry players.

#2439 .... 01/2009.................... $4600

World Turbines

Global turbine demand will rise 4.9% yearly through 2012. Gains in the large Chinese market will slow yet remain well above the average rate, with smaller developing markets growing even faster. Developed regions will also offer good opportunities. Aircraft engines will outpace the larger electric power generation market. This study analyzes the $83.6 billion world turbine industry, with forecasts for 2012 and 2017 by product, application, world region and for 22 countries. It also evaluates market share and profiles industry players.

#2315 .... 06/2008.................... $5500

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