

US outlook for

World Diesel Engines & Parts

with forecasts to 2005 and 2010

New study finds:

- *World diesel engine and parts consumption is forecast to reach \$95 billion in 2005*
- *Latin America will exhibit the strongest percentage gain, with the other developing regions of Eastern Europe and Africa/Mideast also exhibiting above-average gains*
- *Within the overall diesel engine and parts market, strongest gains will occur in the stationary segment that includes industrial and power generation type diesel engines*

Freedonia Industry Study #1476

World Diesel Engines & Parts

Study Publication Date: October 2001

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Pages: 297

World Diesel Engines & Parts a new study from The Freedonia Group, provides you with an in-depth analysis of the major trends in 26 countries and six regions for diesel engines and parts and the outlook for major markets -- critical information to help you with strategic planning.

This brochure gives you an indication of the scope, depth and value of Freedonia's new study, ***World Diesel Engines & Parts***. Ordering information is included on the back page of the brochure.

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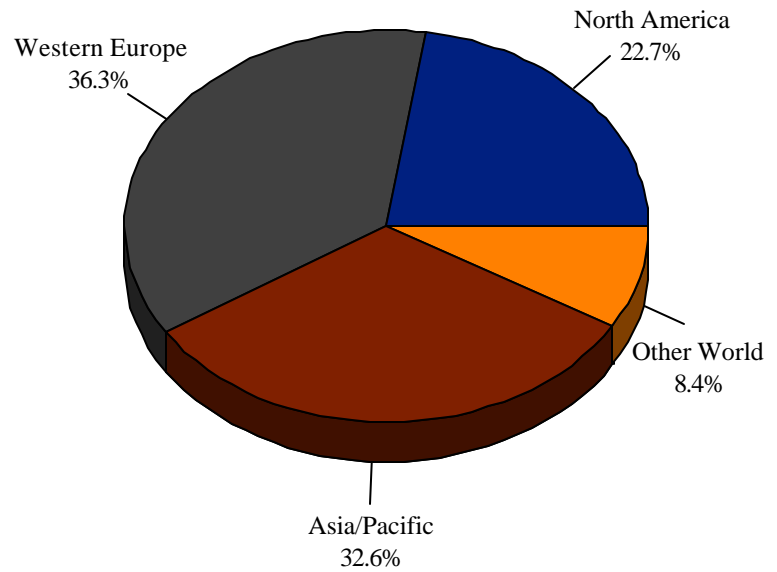
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Study Highlights

- World diesel engine and parts consumption is forecast to rise 5.5 percent per year (including price increases) through 2005 to \$95 billion.
- The West European diesel engine and parts market is expected to perform strongly, as countries in that region continue to see an increasing share of diesels in new passenger cars. Lower prices of diesel fuel relative to gasoline engines and significant technological advancements in diesel technology have made diesel engines an attractive alternative to gasoline engines.
- Latin America will exhibit the strongest percentage gain, with the other developing regions of Eastern Europe and Africa/Mideast also exhibiting above-average gains.
- Within the overall diesel engine and parts market, strongest gains will occur in the stationary segment that includes industrial and power generation type diesel engines.
- In unit terms, the global diesel engine and parts industry is dominated by companies that are in the automotive sector, with Isuzu (Japan), Peugeot (France), Renault (France) and Volkswagen AG (Germany) being the largest producers. Other important automotive and nonautomotive companies include Caterpillar (US), Cummins (US), DaimlerChrysler (Germany), Ford (US), General Motors (US), Navistar International (US), Robert Bosch (Germany), Siemens (Germany) and Volvo (Sweden).

Study Highlights

World Diesel Engine & Parts Demand by Region, 2000



World Diesel Engine & Parts Demand (million US dollars)

Item	1995	2000	2005	2010	% Annual Growth	
					00/95	05/00
Gross Domestic Prdt (bil 1998 US\$)	30996	36990				3.6
% fixed invest	21.4					
Gross Fixed Invest (bil 1998 US\$)	6642					
\$ diesel/000\$ fixed invest	7.44					
Demand by Region:	49395	72600				
North America:	10246	16470				4.9
United States	8711	13900				8.0
Canada & Mexico	1535					
Western Europe	15332					
Asia/Pacific:	19211					
Japan	7644					
China	4870					
Other Asia/Pacific	6697					
Other World	4606	6085				6.5

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Tables and Charts are featured for each region and country. Historical data and forecasts are presented for 1995, 2000, 2005 and 2010.

For each country/region, the following are given:

Gross Domestic Product
% fixed investment

Gross Fixed Investment

Motor Vehicle Production

000\$ MV diesel/motor vehicle
\$ diesel/000\$ fixed investment

Diesel Engines & Parts Demand

Motor Vehicles:
Light Vehicles
Heavy Trucks & Buses
Off-Highway
Stationary

net exports

Diesel Engines & Parts Shipments

Engines
Parts

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Market Environment

The Market Environment Section discusses key indicators that drive demand for diesel engines and parts, including technological and pricing trends, and Freedonia's uniquely developed macroeconomic indicators.

This information provides you with an understanding and an analysis of the climate in which the global diesel engines and parts industry operates and helps you build your market strategy to sustain long-term growth.

MARKET ENVIRONMENT

Emission Control

The ability to develop emission control technologies without creating burdensome initial purchase or ownership costs is a key challenge for the diesel engine industry. Historically, diesel engine manufacturers have addressed emissions problems by developing technologies that focus on the combustion process, in other words, to reduce emissions via changes in the combustion process within the cylinder rather than through outside technology. However, as emissions regulations have become more stringent, manufacturers have begun more extensive use of technological developments in other areas affecting engine operation.

The high combustion temperatures required to operate diesel engines result in the generation of high concentrations of oxides of nitrogen (NOX), which are formed during hot, fuel-rich combustion. NOX levels may be reduced by lowering the combustion temperature and the amount of time at which high temperatures exist in the cylinder, thereby reducing average combustion temperature. However, decreasing the average combustion temperature increases the concentration of unburned hydrocarbons and the generation of particulate matter (PM), which is formed during cooler fuel-lean combustion, and decreases fuel economy. Additionally, certain external cylinder solutions aimed at reducing particulate matter emissions compromise engine performance. As a result, the design of low-emission diesel engines often involves trade-offs among conflicting engine requirements or utilizes multiple technologies to balance out the undesirable effects.

The difficulty in lowering emissions levels without sacrificing the fuel efficiency and engine power and durability which make diesel engines popular for many applications has led to conflicting regulations worldwide. For example, regulatory agencies in Europe encourage the use of diesel engines because they have greater

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Global Supply & Demand

The Supply & Demand Section highlights the key issues that have affected the global diesel engines and parts market over the past ten years and summarizes contributing growth factors.

This information helps you:

- **Focus your sales and marketing efforts on high growth areas.**
- **Propose new areas for development**

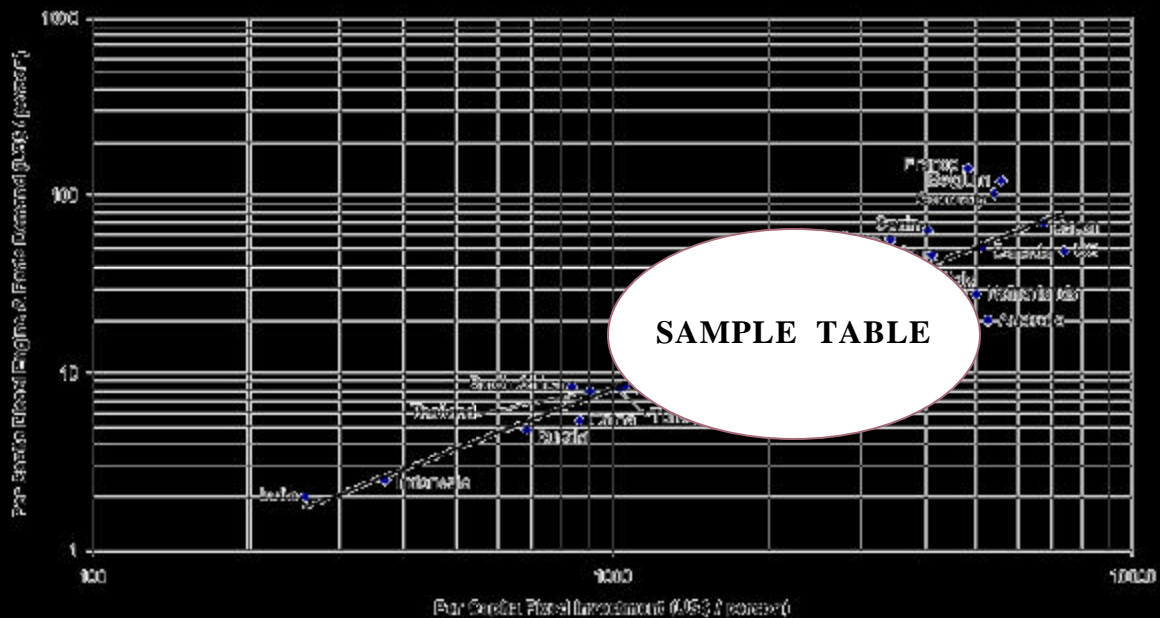
SUPPLY & DEMAND

Applications Markets - Motor Vehicles

Global demand for diesel engines related to motor vehicles is projected to rise 5.5 percent per year, in line with the forecast average pace for the world as a whole over the span. Nevertheless, gains will be concentrated in the space of the 1990-2000 period, when the motor vehicle market was the largest and fastest growing part of the market. Slowing growth in global motor vehicle production combined with limited and comprehensive bans on the use of diesel-powered vehicles in numerous countries -- predominantly in Asia -- will adversely impact motor vehicle type diesel engine demand. Some regions, however, such as Western Europe, will continue to see strong gains due to growing receptivity to diesel-powered vehicles. Diesel-powered cars provide better mileage and lower carbon dioxide emissions, while diesel fuel is generally cheaper than gasoline throughout the world. Nevertheless, public perception and acceptance of diesel engines will continue to suffer from their higher cost compared to gasoline engines, continuing emission of noise and smoke particulates -- especially in regions with older technology -- and government regulations that try to limit nitrogen oxide and sulfur emissions from diesel-powered vehicles. It should be noted that the light vehicle sector of the

SAMPLE PAGE

DIESEL ENGINE & PARTS DEMAND PER CAPITA/FIXED INVESTMENT PER CAPITA RELATIONSHIP, 2000
[logarithmic scale, both axes]



Supply & Demand by Country & Region

These Sections analyze demand trends and consider the threats and opportunities in 26 countries and six regions.

EASTERN EUROPE

Poland

Demand for diesel engines and parts in Poland grew by 10.5 million in 2000, having grown almost 90 percent since 1995. This growth was led by the motor vehicle sector, with domestic production increasing at a similar pace to diesel engine and parts demand. Attracted by Poland's less costly and relatively skilled workforce, a large number of the world's leading automakers have undertaken production in the country. Many of these motor vehicles are geared towards exports to Western Europe, where diesel-powered cars are becoming extremely popular.

Since 1995, shipments of diesel engines and parts from Poland have increased in

Brazil - Diesel Engine & Parts Supply & Demand
(million U.S. dollars)

Item	1990	1995	2000	2005	2010
Gross Domestic Prdt (bil 1998 US\$)	754	870	1050	1250	1560
% fixed invest	19.6				
Gross Fixed Invest (bil 1998 US\$)	148				
Motor Vehicle Production (000 units)	915				
000\$ MV diesel/motor vehicle	0.45	0.52			0.77
\$ diesel/000\$ fixed invest	4.28				
Diesel Engine & Parts Demand	633				
Motor Vehicles:	412				
Light Vehicles	320				
Heavy Trucks & Buses	92				
Off-Highway	153	173			360
Stationary	68				
net exports	147				
Diesel Engines & Parts Shipments	780				
Engines	330				
Parts	450	810			500

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Industry Structure

Gain a better global understanding of your competition and analyze your company's position in the industry with information about:

- **industry composition & market share**
- **product development & manufacturing**
- **mergers & acquisitions**
- **industry restructuring**
- **marketing & distribution**

INDUSTRY STRUCTURE

Marketing & Distribution

Diesel engine and parts producers sell their products through a couple of basic channels of distribution. The simplest type is intersegment sales to the equipment manufacturing division of the company. For example, an integrated diesel engine producer, such as Caterpillar or Deere Company, utilizes diesel engines produced by its engine division in its own construction and agricultural equipment.

Most engine manufacturers also utilize independent distributors for engines and parts. The need to establish and maintain extensive distribution services for engines, parts and service also provides a barrier to entry. For instance, larger manufacturers have been able to develop such an extensive reach over time that it is difficult for newer firms to compete. Cummins markets its products through over 5,000 worldwide licensed, independent distributors, and DaimlerChrysler (through Detroit Diesel) has an international network of over 2,700 distributors.

As with any industry, effective marketing is a key factor for success in the diesel engine and parts business. The principal factors highlighted to promote corporate and product differentiation include price, quality and performance (including emissions levels and durability), delivery time and reputation. The relative importance of each factor varies according to the type of engine involved and its application. For instance, the more important factors for the parts sector include fast delivery and product quality as operators seek to minimize unit down time.

Marketing tools commonly used in the diesel engine industry include several conventional tactics. For instance, manufacturers targeting the US market purchase advertising in engine trade publications such as Diesel Progress and Engines & Drives, as well as other publications, such as Automotive News, Commercial Carrier Journal, Construction Equipment, Engineering News-Record

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SAMPLE PAGE

Company Profiles

The Profiles Section analyzes 28 companies active in the world diesel engines and parts industry. These profiles represent a sampling or cross-section of the types of companies involved in the industry.

Divisions, subsidiaries, joint ventures, etc., are discussed under appropriate parent companies.

Sources for profiles included:

- **Information provided by key staff members in the respective companies**
- **Annual reports**
- **10-K reports**
- **Security analysts reports**
- **Corporate product literature**

COMPANY PROFILES

Siemens AG

Wittelsbacherplatz 2
80333 Munich
Germany
49-89-2340
<http://www.siemens.com>

Siemens Automotive Corporation
2400 Executive Hills Drive
Auburn Hills, MI 48326
248-253-1000
<http://www.siemensauto.com>

Siemens produces electronic and electrical products, systems and equipment. The Company operates through six segments: Information and Communications, Automation and Control, Power and Energy, Transportation, Medical and Lighting. In FY 2000, Siemens had total sales of \$24 billion to Germany, \$24 billion to other parts of Europe, \$10.3 billion to the Asia/Pacific region and \$10.3 billion to the Americas (world). Siemens employed 447,000 in FY 2000.

SAMPLE PAGE

The Company is active in the world diesel engine industry through its Transportation segment. The segment's Siemens Automotive AG group (Regensburg, Germany) is a leading supplier of technologically advanced emissions, electronics, safety and control systems to the automotive industry. Siemens Automotive makes electronically controlled, high-pressure direct-injection fuel injectors and control systems. These products offer original equipment manufacturers (OEMs) efficient fuel consumption, increased power generation and consistent starting. Additionally, the group manufactures common-rail fuel-distribution systems,

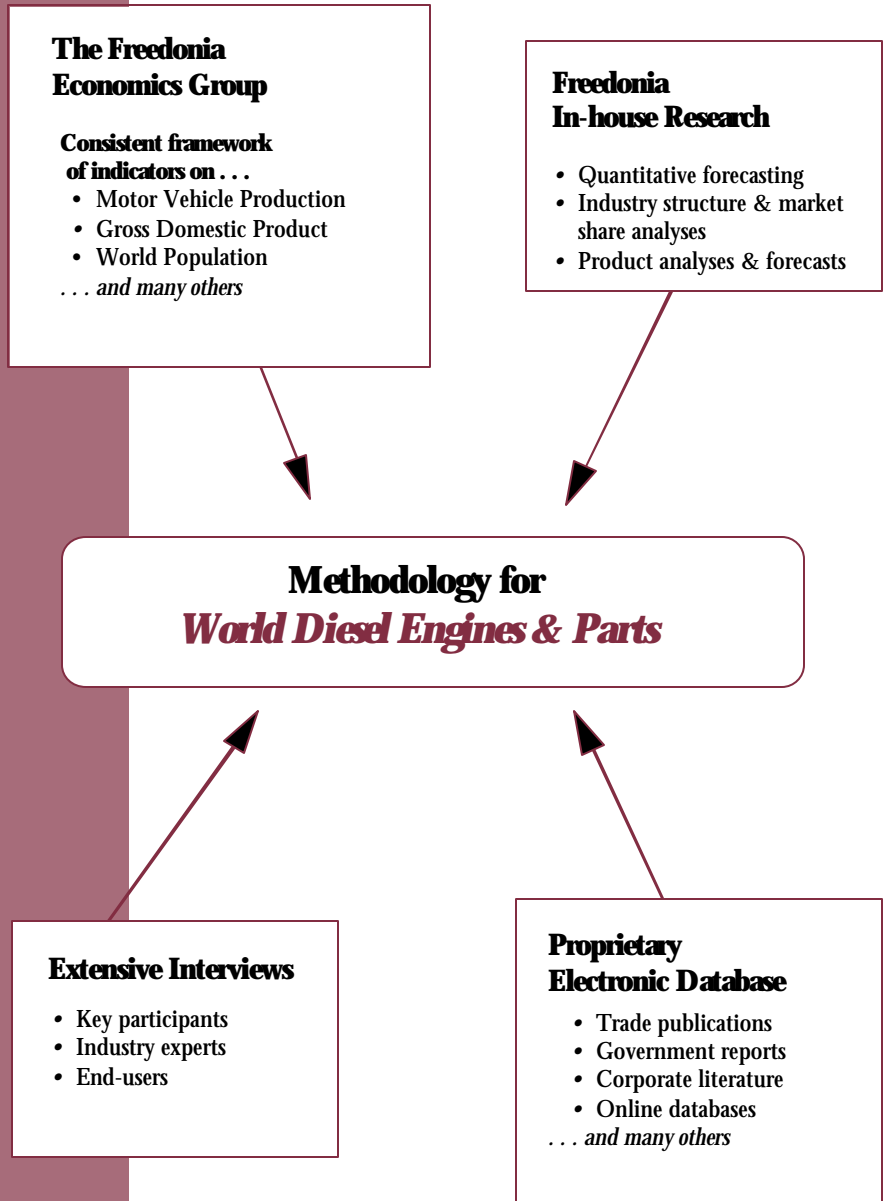
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Companies Profiled

AVL LIST GmbH
Bosch (Robert) GmbH
Wuxi Europe Asia Diesel Fuel Injection Co. Ltd.
Zexel Corp.
Caterpillar Inc.
Guangzhou MaK Diesel Engine Co. Ltd.
Hindustan Power Plus
MaK Motoren GmbH & Co. KG
Perkins Engine Co. Ltd.
Sabre Engines Ltd.
Shanxi International Casting Co. Ltd.
Wilson (FG)
Cummins Engine Co. Inc.
Consolidated Diesel Co.
Cummins Komatsu Engine Co.
Diesel Recon Co.
Holset Engineering Co. Ltd.
Industrial Power Alliance Ltd.
Onan Corp.
Daihatsu Motor Co. Ltd.
Briggs & Stratton Daihatsu
DaimlerChrysler AG
Detroit Diesel Corp.
L'Orange
MTU Motoren-und Turbine Union
Friedrichshafen GmbH
Deere & Co.
ReGen Technologies
Delphi Automotive Systems Corp.
Lucas Diesel Systems
Deutz AG
Fiat SpA
Consolidated Diesel Co.
Hua Dong Teskid Automotive Foundry
Iveco SpA
Magneti Marelli SpA
Teskid SpA
Ford Motor Co.
Blue Diamond Truck Co. LLC
Land Rover
Mazda Motor Corp.
Volvo Car Corp. LLC
General Motors Corp.
Allison Transmission
DMAX Ltd.
Holden
Opel Powertrain GmbH
Shanghai GM
Hino Motors Ltd.
Isuzu Motors Ltd.
American Isuzu Motors Inc.
DMAX Ltd.
Komatsu Ltd.
Cummins Komatsu Engine Co.
Industrial Power Alliance Ltd.
Kubota Corp.
Mitsubishi Heavy Industries Ltd.
Mitsubishi Motors Corp.
Navistar International Corp.
Blue Diamond Truck Co. LLC
International Engine Corp.
Magnum Power Products
Maxion International Motores SA
Siemens Diesel Systems Technology LLC
Nissan Motor Co. Ltd.
Peugeot SA
Dong Feng Citroen Automobile Co.
Francaise de Mechanique
Renault SA
Francaise de Mechanique
Siemens AG
Rexroth Automotive
Siemens Diesel Systems Technology LLC
STX Corp.
Ssangyong Heavy Industries
Toyota Motor Corp.
Tianjin Toyota Motor Engine Co. Ltd.
Volkswagen AG
Volvo AB
Mack Trucks Inc.
Renault VI/Mack
Yanmar Diesel Engines Co. Ltd.
Kanzaki Kokyukoki Mfg. Co. Ltd.
Matsue Diesel Engine Co. Ltd.

Forecasting Methodology

Freedonia does not just collect and reprint data; Freedonia develops data. Our analysts thoroughly investigate an industry by extensively interviewing key industry participants and analyzing information from sources such as associations, government and trade literature. Once this research is complete, Freedonia establishes one set of forecasts. All writing, editing and forecasting is done in-house to assure quality and consistency. In cases where data does not exist, Freedonia develops the data based on input/output ratios, bills of materials and flow charts. The following chart summarizes Freedonia's methodology.



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Advantages of Freedonia Reports

The Freedonia Group, Inc. is a leading international industry study/database company.

Since 1985, Freedonia has published over 1,600 titles covering areas such as plastics, chemicals, coatings and adhesives, building materials, industrial components and equipment, health care, packaging, household goods, security, and many other industries.

Freedonia has produced a wide variety of titles, including:

- **World Turbines**
- **Recreational Boating**
- **Automotive Aftermarket in North America**
- **World Fuel Cells**

Because Freedonia is a reliable information source, our forecasts are cited in numerous publications such as *The Wall Street Journal*, *The Financial Times* and *Lubricants World*.

In-house operations

Because all of our staff work at the same location, interaction between analysts and departments provides a strong system of checks and balances.

Consistency

Our Economics Group develops indicators that are used by all analysts. Therefore, every Freedonia study is based on a consistent set of economic assumptions (GDP, motor vehicle production, global population, etc.).

Reliable forecasts

Because all of our forecasts consider the environment in which a product or industry is operating, as well as threats and opportunities to the market, Freedonia forecasts are reliable indicators of future performance.

One-on-one interviews

All studies are produced by conducting interviews with key industry participants and end-users.

Proprietary electronic database

Freedonia's analysts can tap into an extensive in-house electronic database containing corporate literature (including private company information), trade publications, government reports and many other sources of information.

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- **Key Executives**
- **Corporate Planners**
- **Market Researchers**
- **Financial Analysts**
- **Information Centers**
- **New Product Developers**
- **Merger & Acquisition Specialists**

Since 1985 we have provided research to customers ranging in size from global conglomerates to one person consulting firms. More than 90% of the industrial companies in the Fortune 500 use Freedonia research to help with their strategic planning.

Some of Freedonia's customers in the diesel engines and parts industry include: Caterpillar, DaimlerChrysler, Delphi Automotive and Siemens.

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World Turbines

World demand for turbines will grow 7.9% annually through 2005. Gains will be fueled by increasing electric power generation capacity, particularly in rapidly industrializing nations and Western Europe. High-efficiency gas turbines hold the best prospects, while microturbines and wind turbines grow faster from smaller bases. This study analyzes the US\$49 billion world turbine industry to 2005 and 2010 by product, application, region and for 31 countries. It also details market share and profiles key firms.

#1453. 8/01. \$4,500

Diesel Engines & Parts

US demand for diesel engines and parts will grow 4.8% through 2005. Value gains will be propelled by technological innovations resulting from rising emissions standards. Opportunities for growth will also be driven by demand for niche products such as power generation and mining equipment, as well as further development of the light-duty trucks market. This study analyzes the \$14 billion US diesel engine industry to 2005 and 2010 by product and market. It also evaluates market share and profiles key firms.

#1448. 7/01. \$3,600

Uninterruptible Power Supplies (UPS) & Other Power Protection Systems

The US market for UPS and other backup power systems will grow over 7% annually through 2005. Gains will result from the continuing proliferation of energy-intensive information technology, innovations in alternative UPS/backup power modalities (e.g., fuel cells, flywheels, microturbines), and pressures on the utility grid from energy supply/demand imbalances. This study analyzes the \$6.5 billion US UPS industry to 2005 and 2010 by product and end use. It also evaluates market share and profiles key firms.

#1438. 6/01. \$3,700

World Fuel Cells

The world fuel cell market will more than triple to 2005 to US\$8.5 billion, and exceed US\$23 billion by 2010. Fuel cells are receiving extensive investigation due to their inherent nature as a low-polluting, high efficiency energy source. Three major uses are emerging: electric power generation, portable electronic devices and motor vehicles. This study analyzes the world fuel cell industry to 2005 and 2010 by product, market and region, and for 10 countries. It also reviews technology and profiles leading companies.

#1425. 5/01. \$4,700

Recreational Boating

US demand for recreational boating products will grow over 6% annually through 2005. Gains will be driven by a shift in the product mix toward larger, better-equipped boats, as well as by product innovations. Growth will also stem from the baby boomer generation reaching its best earning years. The South and West will see the fastest gains in demand. This study analyzes the \$12.5 billion US recreational boating industry to 2005 and 2010 by type and market. It also evaluates market share and profiles key firms.

#1423. 5/01. \$3,500

World Automotive Aftermarket

The world automotive aftermarket will grow over 6% annually to 2005. Advances will be driven by more light vehicles in use, continued maintenance and repair of older vehicles and greater use of higher value electronics. Brake parts and fuel injectors will lead gains in the large mechanical and electrical products segment. This study analyzes the US\$107 billion world automotive aftermarket by product and geographic region, and for 25 countries. It also details industry structure and profiles key companies.

#1408. 4/01. \$4,500

Automotive Aftermarket in North America

The aftermarket for light vehicle components and parts in North America will grow over 4% annually. Gains will be driven by the growing size and age of the light vehicle park, with the increasing durability of newer models a limiting factor. Mechanical products will remain the largest segment while electronics grow the fastest. This study analyzes the \$45 billion US, Canadian and Mexican automotive aftermarket to 2004 and 2009 by country and product. It also profiles key players and presents market shares.

#1323. 9/00. \$3,700

Fuel Cells

US fuel cell markets will rise over fourfold through 2004, with the market reaching \$7 billion in 2009. Fuel cells combine atmospheric oxygen with hydrogen or hydrocarbon fuels to produce electrical energy, emitting virtually no pollution. Fuel cells may soon be able to compete with internal combustion engines, gas-fired turbines and storage batteries. This study analyzes the US fuel cell industry to 2004 and 2009 by product/chemistry and application. It also details market share and profiles key companies.

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