

Top Stories

Little Growth Seen for NA Economy

DataPoint: US Wheel Loaders/Dozers

Boot 2020 Report

Brazil: Foton To Build Trucks

Brazil: CASE IH Has Record Sales

Japan: PO Buys Honda EV Cycles

Thailand: Auto Sales Slump

India: Budget Disappoints

India: Auto Expo 2020 Limited

Russia: Opel Returns

Russia: Bobcat Production Begins

Russia: KAMAZ Patents EV Cables Truck

About Us

Power Systems Research (PSR) is a world leader in providing power equipment information, whether it's pure data, analysis, forecasting or specific business intelligence. This product information ranges from IC engines to battery-electric and hybrid powertrain technologies. PSR has been providing world class business and market intelligence to industry leaders for more than 40 years. How can we help you? For details, call **+1 651.905.8400** or email info@powersys.com. www.powersys.com

Power Systems Research: Data...Forecasting...Solutions

PowerTALKTM News Available in Japanese

To better meet the needs of our readers who prefer to read PowerTALKTM News in Chinese or Japanese, we now offer articles from Asia in Chinese and Japanese, as well as English. Click here to read directly in **Japanese**.

PowerTALKを中国語と日本語でお読みいただけるようになりました

中国語や日本語で読みたいという読者のニーズに応えるために、アジアから中国語と日本語の記事を提供しています。日本語をご希望の方は[こちら](#)をクリックしてください。

 [Click Here To Go To Page 1](#)

CONEXPO-CON/AGG

We'll Be Looking for You in Las Vegas

CONEXPO-CON/AGG is North America's largest construction trade show representing the construction and concrete industries. Even though we'll have a full team at the show with nearly a dozen PSR representatives, it will be difficult to hit all of the 2,800 exhibitor areas so let us know how we can meet up with you.

We always welcome the opportunity to engage and meet with the industry. An in-person meeting provides that chance to place a face with a name, discuss industry trends as well as explore any challenges that we might be able to help you tackle!

If there's a time that works best for us to visit with you at the show, please let us know. Just call or drop us an email.

Email info@powersys.com or call us at **+1 651.905.8400**, and we'll plan to get together. **PSR**

EnginLink™

If you need engine data and forecasts, you need **EnginLink™**

EnginLink™ is the definitive source of global production, forecast and specification data for IC engines. And now it includes information on electric and hybrid-drive systems.

It contains model level detail for power sources used in off-road equipment and on-highway vehicles.

Call today. **+1 651.905.8400**, or email us at info@powersys.com.

Call Today.
Why wait for success?



**Power
Systems
Research**

Data · Forecasting · Solutions™

1365 Corporate Center Curve
St. Paul, MN 55121

+1 651.905.8400
www.powersys.com

North America Report

By *Yosyf Sheremeta*, Director of Product Management & Customer Experience at Power Systems Research

We Expect 2020 OEM Production To Be Nearly Flat

SUMMARY. The North American economy remained stable in 2019 and pure economic conditions as well as fundamentals in the region were favorable. Most industries performed very well, and the short-term outlook remains stable to flat for most market segments. However, we see many new developments that could suggest a shift in the trend.



*Yosyf
Sheremeta*

Consumer confidence declined slightly in December, following a moderate increase in November. The Conference Board's Consumer Confidence Index stood at 126.5 in December, 1.4 points higher than in September 2019.

Per Lynn Franco, Senior Director of Economic Indicators at The Conference Board: "While consumers' assessment of current conditions improved, their expectations declined, driven primarily by a softening in their short-term outlook regarding jobs and financial prospects. While the economy hasn't shown signs of further weakening, there is little to suggest that growth, and in particular consumer spending, will gain momentum in early 2020."

The U.S. economy is still healthy and growing; however, job growth has been flat to steady. The reported number for December 2019 was 130,000. Government

 [Click Here To Go To Page 1](#)

North America Report

Continued from page 2



reports from January 10, 2020, showed a healthy unemployment rate at 3.7%. Employment continued to show steady numbers in several industries, including mining, manufacturing and transportation. Job growth in these industries moderated in 2019 compared with 2018.

Across all market segments, we expect overall total OEM equipment production numbers to be almost flat for 2020, which is slightly better than our estimates from Q3 2019 at 1.02%. The Medium and Heavy Vehicle segment is the only one that is significantly different among all 13 market segments that we track. We project that production for that segment will be down 15% in 2020 compared to 2019. We'll discuss more about this later in this report.

We see an almost flat to slightly negative level of overall activity in 2021 at -1.5%, as the overall economy performs at its peak in productivity, and as demand levels decline going into 2020-2021.

The following segment level summaries describe some of the key drivers and factors we are evaluating by segment:

Note: *The full report for the American economy, with details on expected unit and percentage changes, is available to our subscription-based clients in our Q4 2019 Update Bulletin.*

AGRICULTURAL. The Agricultural segment suffered multiple setbacks in 2019, driven by several factors. The weather was not cooperative – with the above average rain fall levels—and many fields in the Midwest remained too wet during planting season to be used; such conditions prevented farmers from replacing their equipment, and they postpone their capital spending and buying decisions.

Ongoing trade uncertainties with China left US farmers with excessive inventories of key commodity items such as soy and pork. Given the current rhetoric on the trade situation, particularly with China, we expect such conditions to be flat in 2020. According to a proposed U.S. China Phase One trade agreement slated to be signed in January 2020, China agreed it will import more U.S. wheat, rice, corn, energy, pharmaceuticals and financial services. Such moves should help the sector regain stability and return to growth.

CONSTRUCTION EQUIPMENT. Recent market performance has been very good, but the first signs of a slowdown appeared in declining sales during the second part of 2019, especially with larger equipment.

Major OEMs in the Construction and Industrial segments reported significant increases in orders and activities in 2018 and 2019, but demand seems to be tapering off, mainly due to overall economic and market performance, as well as uncertainty.

Like what you see? To ensure that you continue to receive your complimentary copy of the PowerTALK™ News report each month, [Sign up now.](#)

[↑ Click Here To Go To Page 1](#)

North America Report

Continued from page 3

The Lawn and Garden market is set to include one of the strongest adoption rates among all other segments in the introduction of new battery-powered models and technologies.

As in the Agricultural sector, we have started to see the introduction of new technologies and electric drive types. We project this trend will rapidly increase over the next few years, and it may start gaining significant market share within 5-10 years.

INDUSTRIAL. We see very similar trends in growth for the Industrial segment as the overall growth dynamics closely mirror the Construction segment. The main drivers for the segment are small construction equipment, material handling and forklift applications, where the demand remains strong.

Consumer sectors, including **LAWN AND GARDEN, PASSENGER CARS, MINIVANS AND SUVs** as well as **RECREATIONAL PRODUCTS**, continue to benefit from the strong economy and low Interest rates. These segments performed very well over the past few years (2016-2019).

LAWN AND GARDEN segment shows steady demand, and the growth trend will remain flat to slightly positive in 2020 and then shifting into a slight downward trend towards 2021. The key drivers for this segment are solid housing starts and a strong economy; however, lower housing starts will slow the growth in this segment.

The Lawn and Garden market is set to include one of the strongest adoption rates among all other segments in the introduction of new battery-powered models and technologies. During the past few quarters we have been gathering intelligence on these electric models, and we will be completing data and releasing them to our client databases over the next few quarters.

Passenger Cars and Minivan/SUVs segments have experienced a continuous slight slowdown in demand since late 2016. New vehicle sales as well as profits continued to decline in 2019.

Overall, for 2020, we expect Passenger Car segment production volumes to drop as many consumers transition into the small SUV sector or drive their current car longer in taking advantage of today's more reliable and durable car.

The smaller size SUV market is rapidly gaining momentum vs. large SUVs with many products coming from major global OEMs. We expect this niche market to continue to develop and be solid in the next few years with many more new product offerings from major OEMs.

Another point worth mentioning is the adoption of electric vehicles, which has been gaining ground very rapidly. Most OEMs will have solid electric product offerings within a couple of years, and we expect to see a more rapid increase in sales of electric vehicles.

At this point, the overall share of electric vehicles is still insignificant, but it is growing very rapidly; we expect this trend will accelerate much faster over the next five years. While we expect electric cars to gain in popularity, they will not gain any significant share of the total market in the near term.

 [Click Here To Go To Page 1](#)

North America Report

Continued from page 4

MEDIUM AND HEAVY VEHICLES. After very strong demand for class 8 trucks during the past few years, the market has started to cool primarily due to an overcapacity of trucks in the market. While freight demand is expected to be relatively strong in 2020, tonnage started to slow toward the end of 2019.

Continued uncertainty surrounding the Chinese tariffs along with an overall slowdown in global economic growth is weighing on the freight segment. While a slowdown in the medium duty truck segment is also expected in 2020, truck demand is not expected to decline as significantly as the class 8 segment.

POWER GENERATION. Things look good for the segment but underlying weaker global economic conditions will put pressure on the power generation markets. Overall, the segment will follow overall economic conditions in the region.

For more information, please see our detailed analysis on the segment, published in September 2019 edition of Diesel Progress magazine.

RECREATIONAL VEHICLES This sector follows consumer sector trends and posted very good growth in 2019 vs. 2018. Furthermore, the prospects for growth in 2020 looks promising vs. 2019. The key drivers for the segment are a peak in the economic cycle, higher interest rates as well as a change in demographics. **PSR**

MarineLink™

Updated and Expanded

MarineLink™ contains details on nearly 500 pleasure boat and internal combustion engine manufacturers in Europe and North America.

MarineLink™: a great tool for tracking 10-year trends in the marine industry.

Call Today.
Why wait for success?



**Power
Systems
Research**

Data · Forecasting · Solutions™

1365 Corporate Center Curve
St. Paul, MN 55121

+1 651.905.8400
www.powersys.com

Europe Report

By *Natasa Mulahalilovic*, MarineLink™ Product Manager

Boot 2020 Wraps Up Successful Boat Show



*Natasa
Mulahalilovic*


DUESSELDORF, Germany – The general mood at Boot 2020 this year was very positive. Most builders said they had a very successful nautical 2018/2019 year, and most said they are looking forward to a good year in 2020. The show drew 240,000 visitors who had an opportunity to meet 1,900 exhibitors from 71 countries.

The Power Systems Research (PSR) team spent several days exploring the 17 halls at this year's Boot 2020 Show, reviewing products and talking with pleasure boat builders, traders and other industry professionals about the latest achievements, innovations and trends.

The 51st edition of Boot 2020, Europe's largest boat show, wrapped up January 26.

Read our complete report on major boat builders at Boot 2020.

The Sailing boat segment is coming back on track, motorboats of all sizes are doing well, the Super yachts segment remains strong, and inflatable boats and tenders have gained in popularity. The optimistic view for 2020 is based on

 [Click Here To Go To Page 1](#)

Europe Report

Continued from page 5



2019's good year-end results, continuous investments in new technologies, materials, equipment, design and exciting new boat concepts.

Modern designs, completely new looks, use of light and solid material, work on multi-functionality and openness of the boats were visible everywhere and in all segments. Boats are open more than ever, providing more space and light, and bringing riders closer to the water.

Environmental awareness is growing, and a new generation of boaters is looking for cleaner solutions, not just comfort. That's why the sailing segment is gaining ground, electric boats are appealing to the general curiosity, and small and medium motorboats are more attractive than in last 10 years when the trend was toward bigger motor yachts and super yachts.

17 Halls of Boats, Boats and More Boats

Products featured at the show were small boats up to 10 meters, 10-20 meter motorboats, inflatable boats, luxury tenders and performance boats, medium and large motor yachts, super yachts, sail boats and yachts, catamarans, equipment, accessories, other maritime products and services.

The traditional sailing boat segment is changing in both performance and comfort. The same boat with small modifications can be easily transformed for either regattas or cruising experiences. Builders are looking for innovations in materials, structure of boats, interior design and equipment that has multiple functions.

Catamarans continue to be in high demand. Often, they are built exclusively for chartering companies, but they frequently are built for the end user as well. Catamarans built for chartering are functional, spacious, and pretty much basic in design. At the other extreme, the family version is more luxurious and comfortable.

Catamarans for chartering are produced in hundreds of units annually in shipyards in Europe and elsewhere. Luxury equipped catamarans have much lower production numbers but are more profitable. Luxury catamarans are expected to see a slight growth in units and important growth in revenues for 2020, while chartering catamaran manufacturers expect significant growth in produced units of as much as 20%.

Motorboats and yachts of all sizes are doing well. Boats up to 15 meters are attractive to many European and international buyers. The emphasis is on good quality-price ratio and convenience in navigation, maneuverability in marinas and maintenance.

The general takeaway from the show is that the new generation of boaters is looking to enjoy nature and the water, not comfort inside the boat. Combining both produces a winner.

Today, the Super yacht segment is stable. But 2019 was politically and economically unstable because of Brexit, and the USA and China trading conflicts. That is why the segment produced fewer orders than were expected.

LIKE WHAT YOU SEE?

To ensure that you continue to receive your complimentary copy of the PowerTALK™ News report each month, [Sign up now](#).

[↑ Click Here To Go To Page 1](#)

Europe Report

Continued from page 6

Outboard boats are very appealing to the younger generation looking for a dynamic day boating experience on European waters, and outboard boats of all sizes are in high demand.

Electric boats are becoming increasingly popular, especially those used for day boating on lakes and rivers in Central and Northern Europe. We find many electric solutions now, and technology is advancing rapidly. The most sophisticated products in the segment come from builders in Austria and Scandinavia.

Outboard boats are very appealing to the younger generation looking for a dynamic day boating experience on European waters, and outboard boats of all sizes are in high demand. Outboard engines are considered more convenient and technically easier to work on, maintenance is less expensive, and the engine itself does not take up interior space, improving boat storage.

Overall, we would say that the marine pleasure industry is strong. Boat builders are focused on innovations in design, materials, technology and technical features, all making twenty-first century boating easier and more accessible to a larger public. **PSR**

DataPoint: *US Wheel Loaders/Dozers*

20,200

By *Carol Turner, Senior Analyst, Global Operations*

This is the estimate by Power Systems Research of the number of Wheel Loaders to be produced in the United States in 2019. Final numbers still are being compiled.

This information comes from industry interviews and from two proprietary databases maintained by Power Systems Research: **EnginLink™**, which provides information on engines, and **OE Link™**, a database of equipment manufacturers.

Market Share: With combined plant totals of 47%, Caterpillar leads in production of Wheel Loaders/Dozers in the United States. In second position is Deere with 22%. Third, is Case New Holland with 8%.

Exports: Collectively, up to 35% worldwide

Trends: In 2018, production of Wheel Loaders/Dozers in the United States increased 3% over 2017. Production in 2019 is expected to drop 3.5% from 2018. The decline is attributed to Tier 4 engine regulation and new machine designs that significantly increased machine cost. To offset this increase, new products deliver greater production and improved profits and are designed to carry an array of materials for construction, industrial and mining applications.

The increase in 2018 is attributed to record mining related activities that is also the prime reason for the following year decline. Production is expected to fluctuate over the next 3-5 years based on global economic factors and conditions; we could see a gain up to 5%. **PSR**

 [Click Here To Go To Page 1](#)

Brazil/South America Report

By *Fabio Ferraresi*, PSR Director, Business Development, South America

Foton To Produce Trucks in Brazil Again



*Fabio
Ferraresi*

Source: *Automotive Business* [Read The Article](#)

Foton says it will start producing Trucks in Guaiba-RS, in the facility formerly designated for his own factory. However, the production will be handled by GEFCO under a manufacturing contract, with parts imported from China. Previously, Foton assembled its trucks at the Agrale plant, also in Rio Grande do Sul state, to meet commitments made under government incentive programs. The number of models built here is likely to increase during the year, but no details have been disclosed.

PSR Analysis: At the same time Foton works on local production, it is working on adding about 50 dealers from Ford Trucks, which closed its operations in Brazil, to eliminate one of the biggest gaps to increase sales. The other gaps, such as reliability perception and spare parts availability, will take longer to be addressed, but we can see growth in sales and production of the Chinese OEM in Brazil, given more positive market conditions.

CASE IH Sugar Cane Harvester Posts Record Sales

Source: *M&T* [Read The Article](#)

CASE IH celebrates positive results in 2019 with 649 sugar cane harvesters sold in Brazil in 2019 being 50% made by CASE. Case points the share growth to the improvements made at the model A8000 that can make up to 15% on operational cost savings and robustness for those machines that operates over 4,000 hours per year.

PSR Analysis: Agricultural business remains strong. Despite lower sales of small tractors dedicated to small business due to lower credit, heavy production equipment sales remain strong because of record production of grains and other agricultural products.

Colombia 2019 Car Sales Increase

Source: *Andemos* [Read The Article](#)

Despite the poor performance of auto sales in Latin America countries such as Mexico and Argentina, Colombia keep growing sales of cars as Brazil, with 2.7% growth with 263,700 units in 2019. Colombia also leads in EV/HEV sales gains. The forecast for 2020 is that sales will continue growing at the same rate.

PSR Analysis: Pent up demand for vehicles coupled with a strong economy is expected to keep the car market in Colombia growing. The currency devaluation

OE Link™

Your source for OEM
production and forecast data

OE Link™ is the definitive source of global OEM production and forecast data for with engine installation detail for the full range of highway vehicle and off-road segments. And now it includes information on electric and hybrid-drive systems.

Data includes model level detail on vehicle, mobile and stationary equipment applications in 13 key industry segments.

Call today. +1 651.905.8400, or email us at info@powersys.com.

Call Today.
Why wait for success?



**Power
Systems
Research**
Data · Forecasting · Solutions™

1365 Corporate Center Curve
St. Paul, MN 55121

+1 651.905.8400
www.powersys.com

[↑ Click Here To Go To Page 1](#)

Brazil/South America Report

Continued from page 8



in 2019 affected the market, since a significant portion of vehicles are imported or assembled in Colombia under the CKD model. It is an important time for exports from Brazil, that went through currency devaluation as well and for local producers such as GM Colmotores and Hino. **PSR**

Far East: Japan Report

By Akihiro Komuro, Research Analyst, Far East and Southeast Asia

小室 明大 極東及び東南アジア - リサーチアナリスト



*Akihiro
Komuro*

EV Postal Delivery Motorcycle Is Honda's New Opportunity

Honda plans to introduce 200 electric motorcycles for postal delivery services by March 2020, and around 2,000 units are expected to be introduced in FY2020. Approximately 85,000 postal delivery motorcycles are running in Japan today, and all are made by Honda. There are also three-wheel models, but most are Super Cubs, which has a reputation for reliability. At

first, these EV bikes will be deployed in Tokyo, where the driving range is small, and in other local ordinance-designated cities.

The base unit is the electric motorcycle for business use, the Benly e-series. Honda will start selling it to corporations in April 2020. This is a 96V system in which two lithium-ion batteries with a voltage of 48V are connected in series. Charging is performed by removing the battery from the vehicle and using a special charger; it takes about four hours to reach full charge from zero.

Honda says the bike has a maximum output of 3.8PS and achieves a 12-degree slope uphill performance with maximum load capacity. The cruising range is 87km for Benly e: I and 43km for Benly e: II. According to Honda officials, the bike can be operated for one day considering the delivery range, but in most cases it will return to the post office during lunch break, and a battery can be replaced at that time.

Source: Response

PSR Analysis: If 2,000 vehicles are added during fiscal 2020, approximately 1/40 of all postal delivery motorcycles operating in Japan will be electric motorcycles.

Although running costs have not been disclosed, oil changes are unnecessary and electricity costs are about half of gasoline costs, so it seems the cost side also is effective.

Like what you see? To ensure that you continue to receive your complimentary copy of the PowerTALK™ News report each month, [Sign up now.](#)

[↑ Click Here To Go To Page 1](#)

Far East Report

Continued from page 9

If EV bikes can be introduced to post offices throughout Japan after this trial, it means that spots where batteries can be exchanged will be set up all over Japan at the same time.

If EV bikes can be introduced to post offices throughout Japan after this trial, it means that spots where batteries can be exchanged will be set up all over Japan at the same time.

And if the battery exchange at the post office can be opened to the general public, there is a possibility that about 23,800 post offices can form a major battery exchange infrastructure for EV bikes.

Honda, Yamaha, Suzuki, and Kawasaki have established a battery replacement consortium for electric motorcycles. Discussions are being held to determine the best specifications for the EV motorcycle battery. It is still not clear if they will release the Honda model common to all four companies, but if batteries can be used commonly by these four companies and their charging infrastructure is the same, it will be a major advancement. **PSR**

極東 > 日本:

郵便配達バイクを電動化、ホンダの新たなる挑戦

郵便配達業務用として、ホンダの電動バイクが2020年3月までに200台、2020年度中に2000台程度導入される。郵便配達用のバイクは全国で約8万5000台が走っているが、すべてがホンダ製である。3輪のモデルもあるが、そのほとんどがスーパーカブだ。雪の降る地域でも故障せず毎日頼もしく走る頑丈さに定評がある。そんな偉大なモデルが務めてきた郵便配達業務を、これからは電動バイクが担っていく。まずは走行範囲の少ない都内や首都圏、地方の政令指定都市などに配備する計画とのこと。郵便配達用電動バイク、ベースとなるのはビジネス用電動二輪車ベンリィeシリーズで、ホンダは法人向けに2020年4月に販売開始する。電圧48Vのリチウムイオンバッテリー2個を直列に接続させた96V系システムで、充電はバッテリーを車体から外して専用充電器でおこない、約4時間でゼロの状態から満充電になる。

最高出力3.8PSを発揮し、最大積載量を積んだ状態で、傾斜12度の登坂性能を実現した。航続距離は、ベンリィe:Iが87km、ベンリィe:IIが43kmだ。ホンダ関係者によれば、配達範囲を考慮すると1日稼働可能だが、昼休みに一旦郵便局に戻ってくる場合がほとんどなので、電池残量がもし減っていたならそのときバッテリー交換すれば心配ないとのこと。バッテリー残量は、メーターパネルで絶えず目視で確認できる。

出典: レスポンス

PSR 分析: 全国で稼働する郵便配達用バイクはおよそ85,000台で、2020年度中に2,000台が追加されれば、およそ40分の1が電動バイクという構成となる。ランニングコストは非公開ながら、オイル交換不要なことや電気代はガソリン代のおよそ半分とのことで、コスト面でも導入の効果はありそうだ。

電動バイクのみならず、電動四輪車を含むEV全般の普及に対し障壁となっているのは、「充電をどうするのか」という問題だ。もしこのトライアルを経てEV

 [Click Here To Go To Page 1](#)

Far East Report

Continued from page 10

バイクが郵便局に全国的に導入できれば、それは同時にバッテリーを交換できるスポットが全国に配備されることを意味する。郵便局でのバッテリー交換を一般に開放できれば、現状で約23,800か所ある郵便局がEVバイクにとってバッテリー交換のインフラになり得る可能性を秘めている。すでにホンダ、ヤマハ、スズキ、カワサキの4社による電動二輪車用交換バッテリーコンソーシアムが設立されている。そこでEVバイクのバッテリーの仕様を含めた在り方について議論されているということだ。今回ホンダが発表したモデルが4社共通になるかは定かではないが、これらの4社で共通使用が可能なバッテリーと、その充電インフラがセットで普及するのなら、それは大きな進歩といえるだろう。 **PSR**

Southeast Asia: Thailand Report

Thailand Auto Industry Brakes Sharply

Vehicles produced in Thailand are exported to the world, including Asia, Oceania, the Middle East and Europe. However, the automobile industry is in trouble because of the double punch of the global economy slowing down due to the US-China trade friction and the spread of the new coronavirus.

Exports, which account for half of Thailand's automobile production, where Japanese and other automakers such as Toyota and Honda have production bases, have fallen, and vehicle production turned negative for the first time in five years in 2019. In addition, the spread of the new coronavirus is catching up. It is expected that the impact on Thailand's automobile industry will be even greater if the shutdown of factories in China and production cutoffs are prolonged and parts procurement is delayed.

Source: NHK

PSR Analysis: From about September 2019, it has been reported that many Southeast Asian automobile industries, including Thailand, have begun to slow down, but this has been attributed to a slowdown in trade due to US-China trade friction.

Today, of course, there is the same problem, but the rapid spread of COVID-19 is a new problem. Many automotive industries around the world are supported by the supply of parts from China, and a slowdown in supply could severely impact car production. Especially in Southeast Asia such as Thailand and Indonesia. **PSR**

東南アジア > タイ:

タイの自動車産業が急ブレーキ

タイで生産された車は、アジアやオセアニア、中東や欧州など、世界へ輸出されている。しかし、米中貿易摩擦による世界経済の減速、そして新型コロナウイルスの感染拡大というダブルパンチで、その自動車産業が苦境にある。トヨタやホンダなど日本の自動車メーカー各社が生産拠点を置くタイの自動車生

CV Link™

We know trucks and buses.

CV Link™ is the leading source of global production, forecast and specification data for on-highway commercial vehicles.

CV Link™ contains OEM names, brands, and models, engine model detail, and qualitative analysis of OEMs and product platforms.

Call today. +1 651. 905.8400, or email us at info@powersys.com.

Call Today.

Why wait for success?



**Power
Systems
Research**

Data · Forecasting · Solutions™

1365 Corporate Center Curve
St. Paul, MN 55121

+1 651.905.8400
www.powersys.com

 [Click Here To Go To Page 1](#)

Southeast Asia Report

Continued from page 11



産の半分を占める輸出向けが減少したため、車の生産台数は2019年に5年ぶりにマイナスに転じた。こうした中さらに、新型コロナウイルスの感染拡大が追い打ちをかけている。今後、中国の工場の稼働停止や減産が長期化し、部品調達が滞るような事態になれば、タイの自動車産業への打撃はさらに大きくなると見られている。

出典: NHK

PSR 分析: 2019年9月頃からタイをはじめ多くの東南アジア自動車産業が鈍化しはじめたと報じられてきたが、これは米中貿易摩擦による貿易鈍化が原因とされてきた。今日もちろんその問題はあるが、新たにCOVID-19の急速な広がりがリスクとなっている。世界中の多くの自動車産業は中国からの部品供給に支えられており、その供給が滞れば自動車生産に著しく悪影響を及ぼす。特にタイやインドネシアなどの東南アジアにおいてはそうした外的影響が迅速かつ顕著に現れる。 **PSR**

India Report

By *Ritvik Kulkarni*, Research Analyst - India.

New Budget Disappoints Auto Industry

Source: *Business Today* [Read The Article](#)



*Ritvik
Kulkarni*

PSR Analysis: The Indian Automotive Industry was largely left disappointed with the budget after no direct steps were taken to arrest the decline in automotive sales. Although keeping long term benefits in mind, the budget did introduce measures to boost the rural economy, which in turn will directly benefit the commercial vehicle industry which is an important driver for the economy.

Announcing a huge budget for the construction and infrastructure projects throughout the country for the next five years is sure to boost demand for tippers in the medium and heavy commercial vehicle segment. Long distance haulage trucks as well as last mile delivery light commercial vehicles also stand to benefit from the soon to be announced logistics policy.

Promoting the Make in India campaign, the budget also hiked import duties on completely built, semi knocked down and completely knocked down units of trucks and busses from 25% to 40%, 15% to 25% and 10% to 15%, respectively. These measures will boost the local manufacturing scene, but in the short term the budget failed to bring relief to the ailing sector. Growth still remains at least two quarters away for the automotive sector in India

Like what you see? To ensure that you continue to receive your complimentary copy of the PowerTALK™ News report each month, [Sign up now.](#)

[↑ Click Here To Go To Page 1](#)

India Report

Continued from page 12

With the entire country gearing up for the imminent transition to cleaner emission norms in BS6, and the uncertainty over the recovery of a bad 2019, it was impressive that the Auto Expo 2020 registered a record attendance.

Auto Expo 2020 Misses Majors But Shows Many New Products

The 15th edition of the biennial **Auto Expo 2020** in New Delhi posted a record turnout of visitors. Despite missing out on mega launches and lukewarm participation by many OEMs, and absentees like Honda, Toyota, Fiat-Chrysler, Ford, Nissan, Audi, Hero Moto Corp, TVS Motors, Bajaj Auto and Royal Enfield the auto show presented many futuristic concepts and cleaner vehicles.

Source: *ET Auto.com* [Read The Article](#)

PSR Analysis : With the entire country gearing up for the imminent transition to cleaner emission norms in BS6, and the uncertainty over the recovery of a bad 2019, it was impressive that the Auto Expo 2020 registered a record attendance.

The show saw a slew of launches from the participating OEMs, and almost all the vehicles present were displayed with BS6 capabilities. Although major players such as Hero, Ashok Leyland and others did not attend, they were replaced by several important Chinese newcomers such as Great Wall Motors.

Tata Motors launched upgraded BS6 compliant versions of their commercial vehicles, ranging from the Ace mini truck to the 49T Prima series. Force motors along with SML also displayed their upgraded lineups.

With the auto expo providing the perfect stage for OEMs to display their BS6 readiness, the attention now shifts to the March 31 deadline for the transition. OEMs will start producing only BS6 variants from mid-February to smoothly transition. Although with the fiscal quarter ending March 31, we will see a push from the OEMs to close the fiscal strongly, Q1 of FY21 will see a drop in sales due to price hikes in the transition. **PSR**

Russia Report

By Maxim Sakov, Market Consultant, Russia

Dieselzipservice Starts Producing M401D Engines



Maxim Sakov

Dieselzipservice has started mass production of the M400D and M401D marine diesel engines it has developed. These propulsion engines are installed on hydrofoil ships and speedboats for river and sea use.

The tech features provide increased power with reduced fuel consumption and improved ecological performance.

[Read The Article](#)

PSR Analysis: The group of companies identified as Dieselzipservice is an engine marinizer and marine engine repair company. Marine propulsion engine

 [Click Here To Go To Page 1](#)

production is a new business for the company. Still, it has a good chance for success because this market niche in Russian has a lot of room for newcomers. Top world players, like Volvo, Mercury, MTU and others have limited their presence in the market with Western sanctions, the local product is still undeveloped, and engines from China often are reliable.

Opel Bets on Russia

Opel is back in Russia, and the company appears to be betting the Russian market can provide a significant opportunity for business diversification.

In 2019, company sales declined as the business was reorganized, and Opel cut its model portfolio.

According to reports, 96% of Opel sales are concentrated in Europe. This fact has determined a focus point for sales increase. In 2022, Opel expects to be in 20 new export markets. After 20 years of financial losses, the very first year within the Peugeot SA structure was quite profitable for Opel (plus 859 million Euro for 2018).

Meanwhile, the Russian PSA plant in Kaluga has begun final preparations for production of Zafira Life and Vivaro minivans. [Read The Article](#)

PSR Analysis: It appears that Opel has decided to start with minivans in the Russian market, and it is targeting the LCV niche where the chances for success are better than in passenger cars. While individual consumer demand is declining for LCVs, the companies making the vehicles locally can receive State and municipal orders for vehicles.

Last year, the State placed big orders for ambulances and school buses, sharing the orders between the GAZ Group and other local OEMs. At the same time, new models of passenger cars produced abroad, like Opel Crossland X, did not post good sales in the Russian market.

Elabuga Plant Begins Production of Bobcat B780.

In January Bobcat announced local production of its B780 wheel loaders. The model will be assembled in Elabuga, Tatarstan.

“Russia is an important market for Bobcat wheel loaders, and for the company in general,” said Yaroslav Fisher, director of Bobcat’s wheel loader production, Doosan Bobcat EMEA. “(Local production and the certification of the right of mark “Made in Russia” will be done. Bobcat engineers will control all the production processes in the plant to ensure the product quality conforms with company standards.” [Read The Article](#)

PSR Analysis: One more localized product. At the moment it’s SKD assembly with the prospect of components being produced locally.

Like what you see? To ensure that you continue to receive your complimentary copy of the PowerTALK™ News report each month, [Sign up now.](#)

COMPONENTS

Looking for component data?

We can help.

Many components are already included in our databases. If the ones you require are not, we may be able to identify them for you.

The **Components & Consumables Module Directory** provides a quick overview of components data available in our EnginLink™, OE Link™, CV Link™ and PartsLink™ proprietary databases.

The modules are not stand-alone products; they can be purchased only as part of a subscription/extract to one of the databases, EnginLink™, OE Link™, CV Link™ or PartsLink™.

Call today. +1 651. 905.8400, or email us at info@powersys.com.



**Power
Systems
Research**

Data · Forecasting · Solutions™

1365 Corporate Center Curve
St. Paul, MN 55121

+1 651.905.8400
www.powersys.com

 [Click Here To Go To Page 1](#)

Russia Report

Continued from page 14

Last year, KAMAZ started testing a driverless truck developed for coal transportation in one of Kuzbass mines.

KAMAZ Patents Electric Truck Without Cab

This truck has a very unusual design. The database of Rospatent has shown drawings of a cabless truck with an electric motor. The patent owner is KAMAZ. The truck has a very unusual appearance because it doesn't have a cabin – it's a box on wheels with low clearance, and it features round head and rear lights, and a vent grid. No details are available about the motor, except that it's electric.

The truck looks somewhat like the Volvo Vera truck.

Last year, KAMAZ started testing a driverless truck developed for coal transportation in one of Kuzbass mines. It is equipped with cruise-control and a system for bypassing obstacles and making lane changes. **Read the Article**

PSR Analysis: The future is next door. Of course, it's a long way from the patent to the working vehicle, but the trend is clear. KAMAZ has concentrated technologies for creation of a driverless electric truck and has patented them. **PSR**

Meeting Your Information Needs

Power Systems Research has been providing world class business and market intelligence on power equipment to industry leaders for more than 40 years. A comprehensive range of database products and strategic analysis services is available to meet your planning needs. For more information, visit us at www.powersys.com.

- **EnginLink™** – Engine Production-Forecast Data
- **CV Link™** – Commercial Vehicle Production-Forecast Data
- **OE Link™** – Original Equipment Production-Forecast Data
- **OE Link-Sales™** – Original Equipment Sales-Forecast Data
- **PartsLink™** – Engine and Original Equipment Population Data
- **MarineLink™** – Boat Production and Engine Installation Data
- **MarketTRACKER™** – Several individual quarterly syndicated surveys
- **PowerTRACKER™NA** – North American gen-set syndicated survey
- **Call Center** - In-house calling capability for custom surveys
- **Market Studies** – Conducted more than 3,100 proprietary studies
- **Component Modules** – Special component packages with databases