

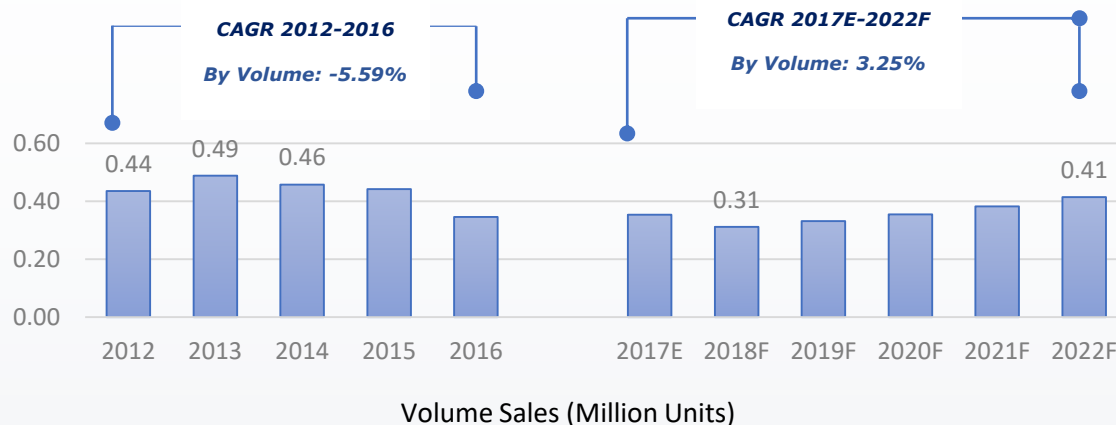


# GCC AND AFRICA COMMERCIAL VEHICLE AND TIRE MARKET STUDY

Market Intelligence . Consulting



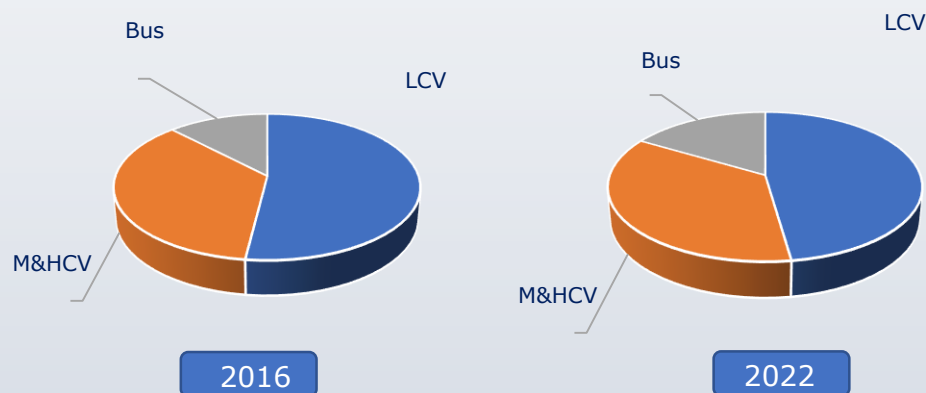
**GCC Commercial Vehicle Market anticipated to accelerate with a slower pace in the forecast period**



## Prominent Automobile Brands in GCC Countries



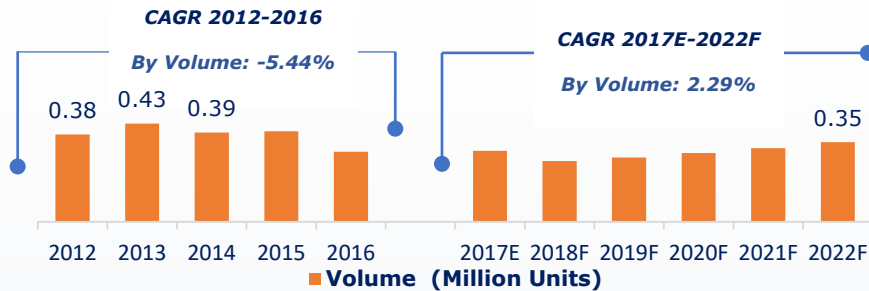
## GCC Commercial Vehicle Sales Share, By Vehicle Type, 2016 & 2022



Source: TechSci Research

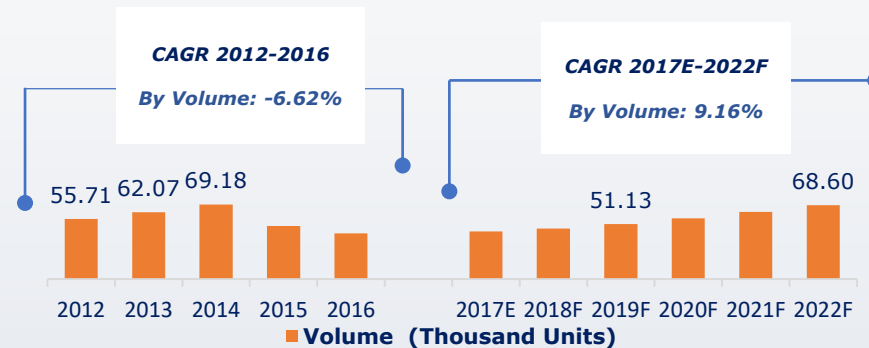
- ❖ GCC truck and Bus market is majorly dominated by light vehicles that comprise of light trucks, light buses and pickups.
- ❖ Implementation of VAT by most of the GCC countries in 2018 will stimulate Pre-VAT sales rush.
- ❖ Lower government spending on new vehicle purchase and focus on rental or leasing options.
- ❖ Toyota, Mitsubishi and Isuzu are the major brands for trucks and buses in GCC

**GCC Truck Market expected to recover from the downfall on account of improving crude oil prices**



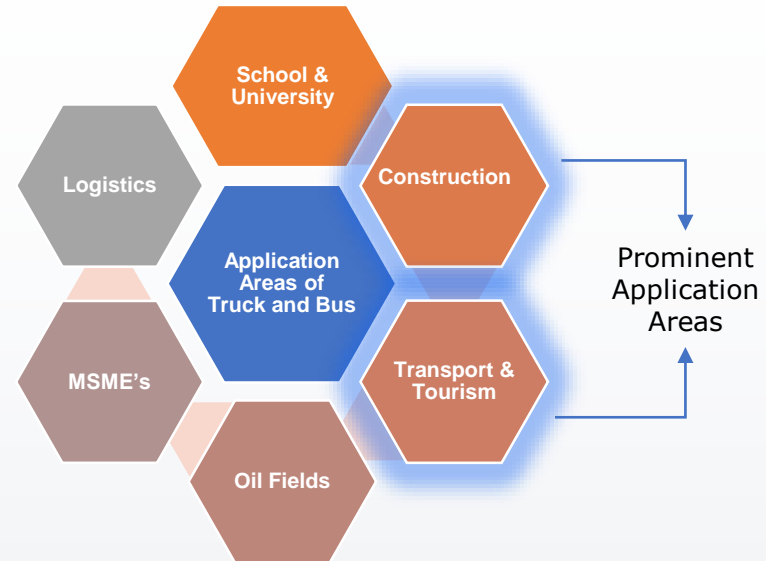
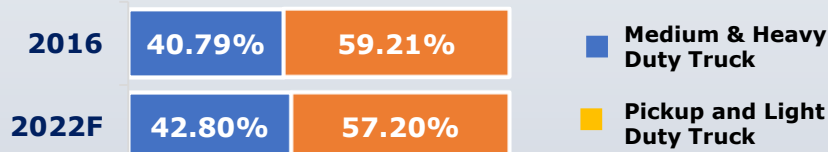
GCC Truck Market in Volumes

**GCC Bus Market also expected to recover on account of improving economic conditions and focus of non oil sector**

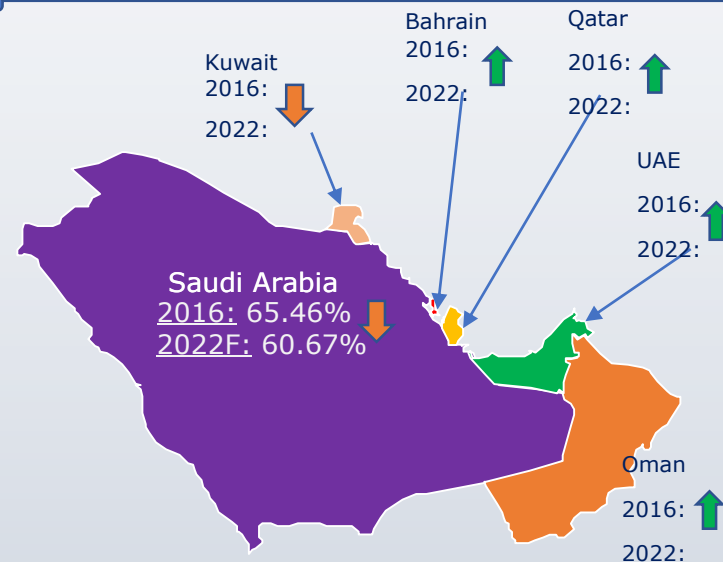


GCC Bus Market in Volumes

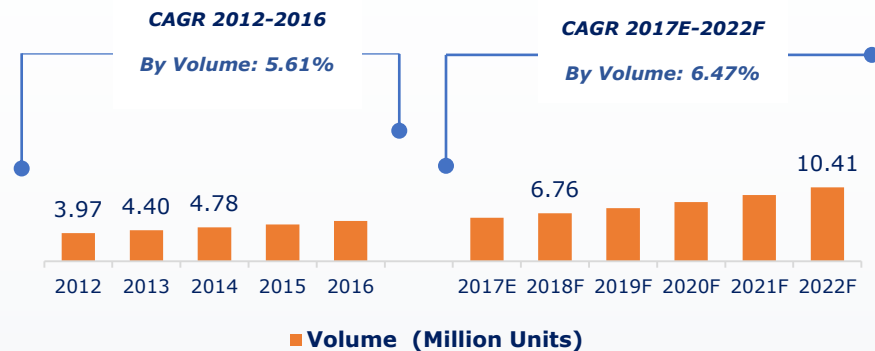
**Light Duty and Pick up truck dominate Truck market in GCC countries**



**Saudi Arabia dominate GCC Truck and Bus Market in Volume Terms due to its large fleet size and automobile sales**



**GCC Tire Market expecting a robust growth in the next 5 years**



Passenger Car segment expected to dominate tire market in GCC countries



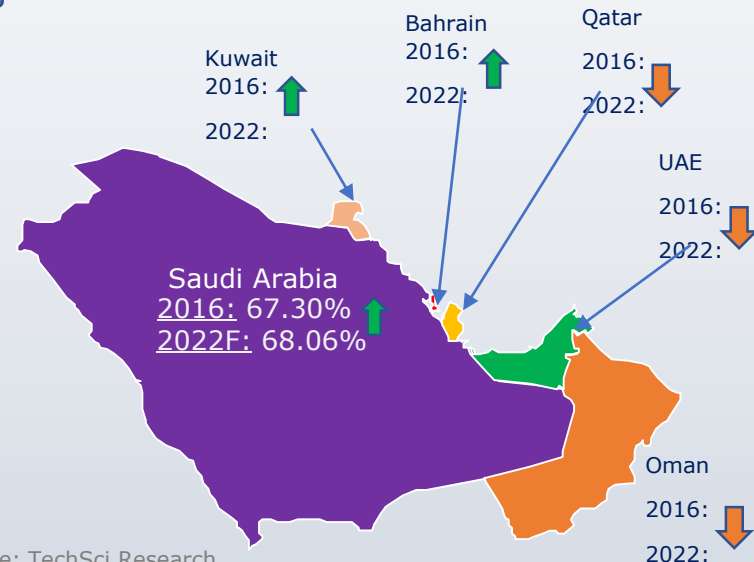
Chinese brands include Tianjan, Jiangsu, King's West Lake and Marshal

European brands include Dunlop, Pirelli, Michelin, and Continental

Asian brands include Bridgestone, Yokohama, Toyo, Kumho and others



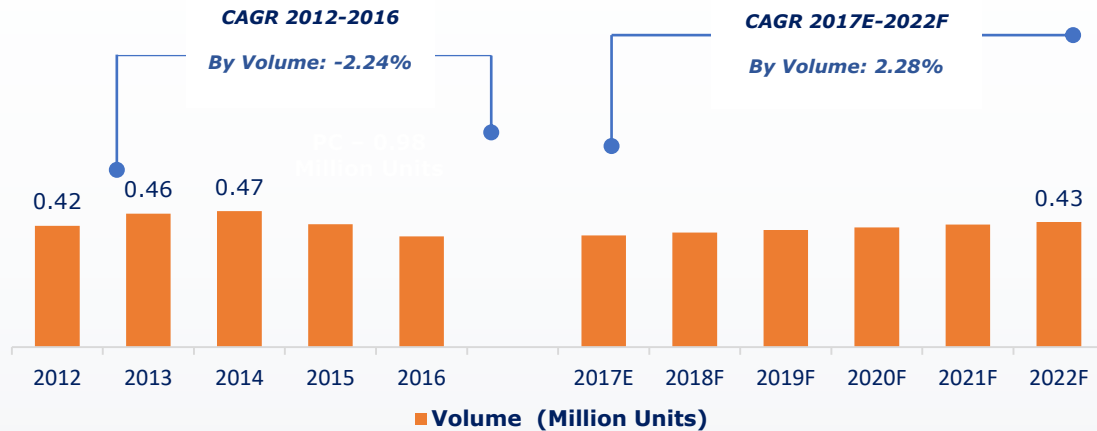
Saudi Arabia dominate GCC Tire Market due to its large fleet size and automobile sales



GCC AND AFRICA  
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AND TIRE MARKET STUDY



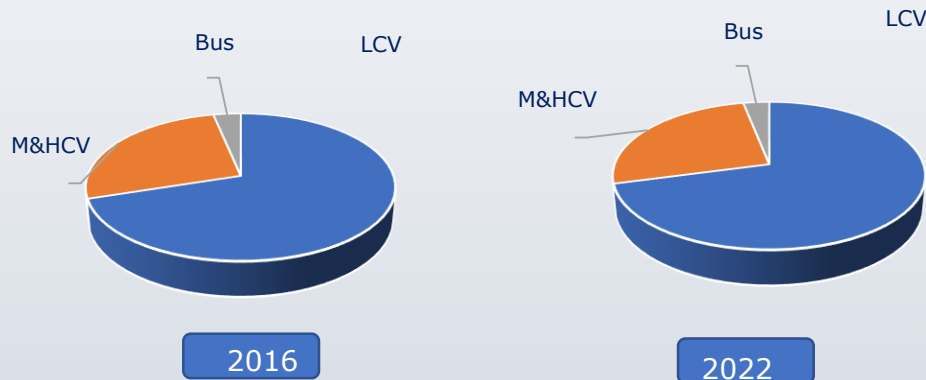
## Africa Commercial Vehicle Market expected to recover in the forecast period



### Prominent Automobile Brands in African Countries

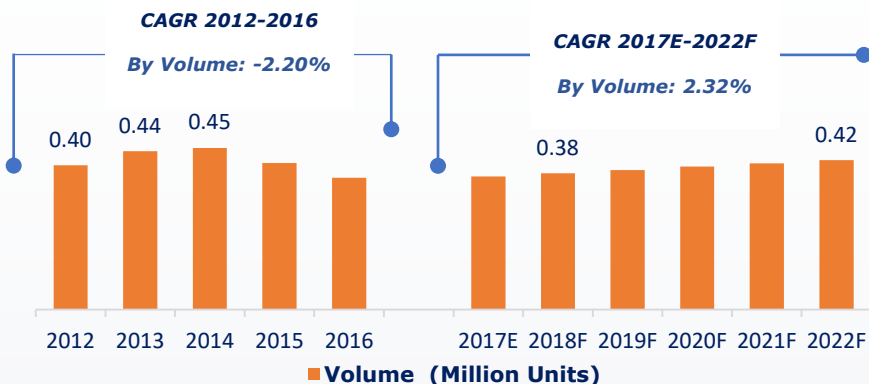


### Africa Commercial Vehicle Sales Share, By Vehicle Type, 2016 & 2022



- ❖ Toyota, Isuzu and Nissan are the major brands in Africa truck and bus market
- ❖ Africa truck and bus market is expected to recover in the next 5 years due to improving political scenario and governments focus on developing infrastructure in their respective countries.

## Africa Truck Market expected to recover in the forecast period



❖ Africa truck market is heavily dependent on imports as only very few countries have production units.

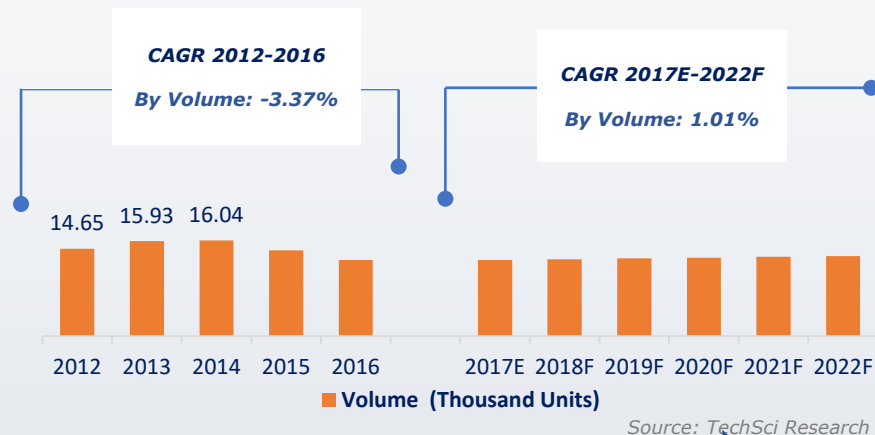
❖ South Africa, Egypt, Algeria, Morocco and Tunisia dominate truck and bus sales in the region.

❖ Africa truck market is characterized by sale of used trucks.

❖ Libya, Nigeria, Ghana, Kenya and Zimbabwe are the major importers of used trucks in Africa.

❖ Toyota's Hilux and Isuzu's KB series in light duty trucks, UD Trucks' Quester, Scania's P-Series and Iveco's Eurocargo in medium and heavy duty trucks are the most popular truck models in Africa.

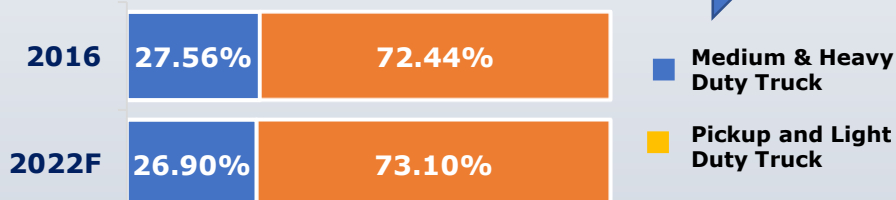
## Africa Bus Market also expected to recover in the forecast period



## List of Prominent Truck and Bus Players in Africa, By Vehicle Segment

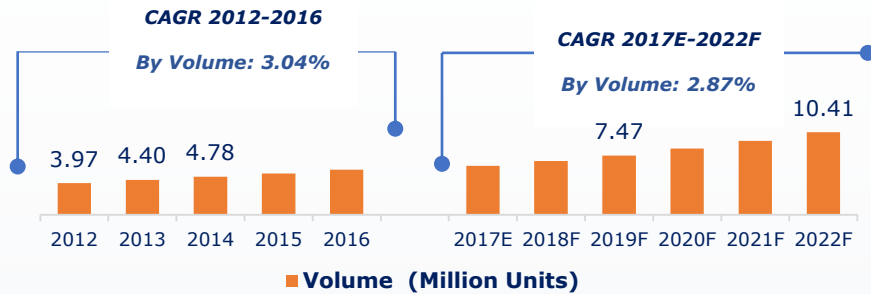
| Truck Type                | Top Players                          | Others   |
|---------------------------|--------------------------------------|--|
| Light Duty Trucks and Bus | Toyota, Isuzu and Nissan             | Ford, Mazda, Mahindra, Renault, Mitsubishi, TATA, Chevrolet, Fiat, Mercedes Benz and others                |
| Medium Duty Truck and Bus | UD Trucks, Iveco and Isuzu           | Nissan, Toyota, TATA, Hino, General Motors, Renault, Fiat, Fuso, Powerstar, Peugeot, Volkswagen and others |
| Heavy Duty Truck and Bus  | Scania, Man, Volvo and Mercedes Benz | Iveco, Renault, Volkswagen, Powerstar, Navistar and others   |

## Pickup and Light duty trucks dominate Africa Truck Market





**Africa Tire Market expecting a moderate growth in the next 5 years**



Source: TechSci Research

Chinese and Asian brands dominate Africa Tire Market

Chinese

Asian Brands

European Brands

Chinese brands include Tianjan, Jiangsu, King's West Lake and Marshal

Asian brands include Bridgestone, Yokohama, Toyo, Hankook, Kumho and others

European brands include Pirelli, Michelin, and Continental



South Africa, Egypt and Algeria dominate Africa Tire Market

## GCC Truck and Bus Market

- ❖ GCC truck and Bus market is majorly dominated by light vehicles that comprise of light trucks, light buses and pickups.
- ❖ Owing to low crude oil prices in the last 5 years, GCC truck and Bus market has exhibited a negative growth
- ❖ Toyota, Mitsubishi and Isuzu are the major brands for truck and bus in GCC

## GCC Tire Market

### Truck and Bus Tire Market

- ❖ Saudi Arabia Dominate GCC tire market
- ❖ Chinese brands owing to economical price and easy availability dominate GCC tire markets
- ❖ Passenger car segment has the highest penetration of tires in GCC among all vehicle segments

## GCC and Africa Tire and Truck/Bus Market Key Insights

## Africa Truck and Bus Market

- ❖ Toyota, Isuzu and Nissan are the major brands in Africa truck and bus market
- ❖ Africa truck and bus market is expected to recover in the next 5 years due to improving political scenario and governments focus on developing infrastructure in their respective countries.

## Africa Tire Market

- ❖ South Africa Dominate African tire market
- ❖ Chinese and Indian brands owing to economical price and easy availability have good presence in Africa tire market
- ❖ Many Flagship companies are reworking their strategy to tap African markets especially in countries like Sudan, Eritrea, Ethiopia an others



# Thank You

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