

"The report reviews, analyzes and projects the global market for Fans & Blowers in Commercial Vehicle Engine Cooling and HVAC for the period 2010-2020."

Published: October 2015

Report Code: AT011

Pages: 533 Charts: 725

Price: \$6030 Single User License, \$9630 Enterprise License

SUMMARY

Fans are integral part of commercial vehicle thermal management systems such as engine radiator cooling and air-conditioner (A/C) condenser cooling. Demand for fans in commercial vehicle segment is closely correlated to the production of commercial vehicles. While mechanical fans dominate the commercial vehicle engine cooling applications, the electric fans are used in A/C condenser cooling such as those used in bus A/C systems. Volume consumption of fans in medium & heavy trucks, estimated at 5.7 million units in 2015, and expected to be 5.9 million units in 2016, is further projected to reach 6.8 million units by 2020 thereby exhibiting a CAGR of 3.1% during 2014-2020. During the same analysis period, the global volume market for fans in buses, on the other hand, is likely to post a CAGR of 4.7% and to reach a projected 1.6 million units by 2020.

Global commercial vehicle production has witnessed a slight decrease, almost in all the regions, in recent past owing to the global financial crisis. On a global basis, the production of medium & heavy trucks and buses has recorded a negative cumulative growth of 0.8% and 1% respectively during 2010-2014, but expected to be back on the track with respective CAGRs of 2.4% and 3.1% for the forthcoming five year period.

Blowers are part of vehicle HVAC systems and the demand for HVAC systems in commercial vehicles has grown significantly over the last decade, specifically in Asia-Pacific, and is on the rise. While trucks use up to couple of blowers in their HVAC systems, bus HVAC systems use multiple blowers up to 12 in a single system. The global volume market for blowers in medium & heavy trucks is expected to register the fastest CAGR of 4.8% during the analysis period and to reach 3.1 million units by 2020 from an estimated 2.4 million units in 2015. Volume consumption of blowers in buses, estimated at 1.3 million units in 2015.

Commercial vehicle fans applications analyzed in this study include engine cooling fans, which comprise radiator cooling fans and airconditioner condenser cooling fans. Fan types analyzed in this study include both electric fans and mechanical fans. Blower applications analyzed in this study include HVAC blowers. Commercial vehicle types explored in this study include medium trucks, heavy trucks and buses. The report focuses on commercial vehicle original equipment manufacturer (OEM) fans and blowers market only and does not include aftermarket.

This global market research report includes 725 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. The statistical tables represent the data for the global commercial vehicle fans & blowers market value in US\$ and volume in units by geographic region and product segment. The report profiles 30 major market players across Asia-Pacific – 18; Europe – 11; and North America – 6. The research also provides the listing of the companies engaged in manufacturing and supply of commercial vehicle engine cooling fan modules, fans, HVAC systems and blowers. The global list of companies covers addresses, contact numbers and the website addresses of 204 companies.

Global Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Trucks in Volume ('000 Units)





SAMPLE COMPANY PROFILE

DENSO CORPORATION (JAPAN)

1-1, Showa-cho, Kariya, Aichi 448-8661, Japan

Phone: +81-566-25-5511

Website: www.denso.co.jp, www.globaldenso.com

Business Profile

Denso Corp, founded in 1949 and based in Aichi, Japan, is a major global provider of automotive technology, systems and components for leading auto manufacturers, with the company's sales in 2014 reaching US\$35.9 billion. The company has employee strength of 146,000 working in 220 group companies. Denso is active in supplying products for the automotive and non-automotive industries, with automotive products comprising air conditioners, heaters, electrical & electronic devices, fuel management systems and ITS devices and non-automotive products including consumer products and factory automation products such as compact robots.

Automotive Operations

Operating Unit	Particulars
Powertrain Control Systems	Engaged in developing and manufacturing products for hybrid and electric vehicles, gasoline and diesel engine management systems and components, powertrain control systems, starters and powergeneration systems such as alternators
Electronic Systems	Engaged in developing and manufacturing semiconductor sensors, microelectronic devices such as ICs, and electronics products such as engine electronic control units (ECUs)
Thermal Systems	Engaged in developing and manufacturing car and bus air conditioning systems, cooling systems and components such as radiators and cooling fans
Information & Safety Systems	Engaged in developing and manufacturing ITS (Intelligent Transport System) products such as car navigation and ETC (Electronic Toll Collection) systems, telematics products, driving control and safety products (airbags sensors and ECUs), body electronics and meters
Small Motors	Engaged in developing and manufacturing motors for windshield wiper systems, power windows, power seats, power sliding doors, power steering, engine control systems and other automotive systems

Product Portfolio

The Thermal Systems business operation of Denso develops and manufactures car and bus air conditioning systems, cooling systems and components such as radiators and cooling fans. Major products and solutions offered by this division include air-conditioning systems for cars, radiators, cooling fans, inter coolers, oil coolers, engine cooling modules, reserve tanks, engine cooling module, air-conditioning systems for buses and construction equipment, truck refrigeration units and air purifiers.

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SAMPLE TABLE/CHART

Glance at 2015 Global Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World



Asia-Pacific Production Analysis (2020) for Medium & Heavy Trucks by Vehicle Type in Units



KEY PLAYERS PROFILED

Aisin Chemical Co Ltd **Bergstrom Climate Systems** Borgwarner Inc. **Denso Corporation** Donghwan Industrial Corp. Doowon Climate Control Co Ltd **EBM-PAPST Group** Horton Holding, Inc. Internacional Hispacold, S.A. Kendrion (Markdorf) GmbH Konvekta AG MAHLE Behr GmbH & Co. KG Robert Bosch GmbH Spheros GmbH Subros Limited Thermo King Xinxiang Aviation Industry (Group) Co Ltd Zhengzhou Guchen Industry Co., Ltd.

.....more



TABLE OF CONTENTS

PART A: GLOBAL WARKET PERSPECTIVE	
1. INTRODUCTION	
1.1 Product Outline	
1.1.1 Automotive/Transportation Applications for Fans & Blow 1.1.2 Fans	
1.1.2.1 Electric Fans	٠١
1.1.2.2 Mechanical Fans	
1.1.2.2.1 Viscous Fan Clutch	
1.1.2.2.2 Electromagnetic Fan Clutch	
1.1.3 Blowers	
1.1.4 Fans & Blowers in Medium & Heavy Trucks 1.1.4.1 Engine Cooling Fans	
1.1.4.2 HVAC Blowers	
1.1.5 Fans & Blowers in Buses and Coaches	
1.1.5.1 Engine Cooling Fans	9
1.1.5.2 HVAC Fans & Blowers	
2. MAJOR MARKET PLAYERS	
Aisin Chemical Co Ltd (Japan)	1
Bergstrom Climate Systems (United States)	1
Borgwarner Inc. (United States) Denso Corporation (Japan)	دا 11
Donghwan Industrial Corp. (South Korea)	17
Doowon Climate Control Co Ltd (South Korea)	1
Eberspächer Sütrak GmbH & Co. KG (Germany)	18
EBM-PAPST Group (Germany)	2
Engineered Machined Products, Inc. (United States)	
Guangzhou Jingyi Automobile Air Conditioning Co., L (China)	เน. วา
Horton Holding, Inc. (United States)	2
Internacional Hispacold, S.A. (Spain)	2
Kendrion (Markdorf) GmbH (Germany)	2
Konvekta AG (Germany)	
MAHLE Behr GmbH & Co. KG (Germany) Dongfeng Behr Thermal Systems Co Ltd (China)	
Mobile Climate Control Group Holding AB (Sweden).	
Modine Manufacturing Company (United States)	3!
Robert Bosch GmbH (Germany)	3
Samvardhana Motherson Group (India)	38
Motherson Bergstrom HVAC Solutions Pvt. Ltd. (India Spheros Motherson Thermal System Ltd (India)	
Songz Automobile Air Conditioning Co Ltd (China)	40
SPAL Automotive Srl (Italy)	4
Spheros GmbH (Germany)	4
Subros Limited (India)	4
Thermo King (United States)USUI Kokusai Sangyo Kaisha Ltd (Japan)	48
Webasto SE (Germany)	5
Xiezhong International Holdings Limited (China)	
Xinxiang Aviation Industry (Group) Co Ltd (China)	58
Zhonghang Yuxin Commercial Vehicle Air Conditioner	r Co
Ltd (China)	5
Yuxin Vehicle Heat Exchanging Equipment Co Ltd (China) Xuelong Group Co Ltd (China)	
Zhengzhou Guchen Industry Co., Ltd. (China)	
3. KEY BUSINESS AND PRODUCT TRENDS	
Launch of EBM-PAPST Fan Solutions for Bus Air-	02
Conditioning Systems at the Busworld Trade Show	62
New Live Center LCV40 and LCV80 Viscous Fan Drives	s fron
Horton	62
Launch of First and Only Structural Thermoset Compo	
based Fan on Market by Horton BorgWarner Visctronic® Fan Drives Equipped on	6.
Freightliner Cascadia® Trucks Deliver Efficient and Re	liable
Cooing	
New DuroSpeed™ 2-Speed Fan Drive from BorgWarn	
Vocational and Off-Highway Trucks	
Spheros Acquired Indiana-based ACC Climate Contro DENSO Takeover Half of the Assets of DJ Cool Corporatio	
Significant Cooling Module Award in China Received	
Modine	
EMP and Walmart Jointly Developed an Innovative	
Remote Mount AC Condenser	
Horton WindShift™ WSE Offer Enhanced Airflow and Operating Noise	
Operating Noise	0

Athenia™ E-Series Air-Conditioning Modules from Thermo
King Offer Sustainable Transport and Passenger Mobility 65
Inauguration of Spheros' New Noida Production Facility 65
Opening of Ingersoll Rand's Novel Production Facility in
Ovčáry-Kolín, Czech Republic
Manufacture of Visctronic® Fan Drives Started at
BorgWarner's New Facility in Itatiba City, Brazil
Borgwarner's New Facility in Italiba City, Brazil
Horton Modulator® LCV40 Fan Drive and WindMaster®
Plastic LS11 Fan Enhance Fuel Economy66
Spheros China Inaugurated Novel Production Facility in Suzhou67
Innovative Product Development Corporation Acquired by
Bergstrom67
Subros Established New Facility at Oragadam to Produce
Commercial Vehicle Air-Conditioners
Development of New Lightweight, Energy Efficient HVAC
Platform from Thermo King
Launch of New WindShift WSC and WSD Fan Blades from
Horton
Establishment of Spheros Australia (Pty) Ltd68
Formation of Eberspaecher Mikuni Climate Control
Systems Corporation69
Modine's Advanced Cooling System Helps Transit Buses
Enhance Fuel Economy
CJSC Eberspaecher Climate Control Systems is the New
Name of OTEM ZAO70
Name of Otelvi ZAO
Dirna S.A. Acquired by Bergstrom70
Bergstrom Inked Collaboration with SEA SRL70
4. GLOBAL MARKET OVERVIEW71
4.1 Global Commercial Vehicle Production Overview71
4.1.1 Global Medium & Heavy Truck Production Overview by
Vehicle Type73
4.2 Global Medium & Heavy Truck Fans & Blowers Market
Overview
4.2.1 Global Medium & Heavy Truck Fans & Blowers Market
Overview by Vehicle Type
4.2.2 Global Medium & Heavy Truck Fans & Blowers Market
Overview by Type
4.2.2.1 Global Medium & Heavy Truck Engine Cooling Fans
Market Overview
4.2.2.1.1 Global Medium & Heavy Truck Engine Cooling Fans
Market Overview by Geographic Region85
4.2.2.1.2 Global Medium & Heavy Truck Engine Cooling Fans
Market Overview by Vehicle Type89
4.2.2.1.3 Global Medium & Heavy Truck Engine Cooling Fans
4.2.2.1.3 Global Medium & Heavy Truck Engine Cooling Fans Market Overview by Fan Type
Market Overview by Fan Type93
Market Overview by Fan Type

4.2.2.2.2 (Slobal Medium Truck HVAC Blowers Market Overview by Geographic Region		
4.2.2.2.2 Global Heavy Truck HVAC Blowers Market Overview by Geographic Region		
Overview by Geographic Region 144 4.3 Global Bus Fans & Blowers Market Overview by Type 149 4.3.1.1 Global Bus Fanjine Cooling Fans Market Overview by Geographic Region 154 4.3.1.1.1 Global Bus Engine Cooling Fans Market Overview by Geographic Region 154 4.3.1.1.2 Global Bus Engine Cooling Fans Market Overview by Fan Type 158 4.3.1.1.1.1 Global Bus Engine Cooling Mechanical Fans Market Overview by Geographic Region 164 4.3.1.1.1.1 Global Bus Engine Cooling Mechanical Fans Market Overview by Geographic Region 164 4.3.1.1.1.1 Global Bus Engine Cooling Mechanical Fans Market Overview by Geographic Region 164 4.3.1.1.1.2 Global Bus Engine Cooling Electric Fans Market Overview by Geographic Region 164 4.3.1.1.1.3 Global Bus Engine Cooling Electric Fans Market Overview by Geographic Region 164 4.3.1.1.3.1 Global Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview by Geographic Region 173 4.3.1.2 Global Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview by Geographic Region 173 4.3.1.2 Global Bus HVAC Blowers Market Overview by Geographic Region 173 4.3.1.2 Global Bus HVAC Blowers Market Overview by Geographic Region 173 4.3.1.2 Global Bus HVAC Blowers Market Overview by Geographic Region 173 6.1.1 Aug Global Medium Truck Production Overview by Geographic Region 174 6.1 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Geographic Region 184 6.1 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Geographic Region 184 6.1 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Geographic Region 192 REGIONAL MARKET OVERVIEW 196 6.1 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country 192 6.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country 194 6.3.3.1.3.1 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Vehicle Type 204 6.3.3.1.3.1 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Vehicle Type 204 6.3.3.1.3.1.3.1 Asia-Pacific Medium &	4.2.2.2.2 Global Heavy Truck HVAC Blowers Market	
4.3.1 Global Bus Engine Cooling Fans Market Overview. 153 4.3.1.1.1 Global Bus Engine Cooling Fans Market Overview by Geographic Region	Overview by Geographic Region	
4.3.1.1 Global Bus Engine Cooling Fans Market Overview by Geographic Region 154 4.3.1.1.2 Global Bus Engine Cooling Fans Market Overview by Fan Type 158 4.3.1.1.1 Global Bus Engine Cooling Mechanical Fans Market Overview by Fan Type 158 4.3.1.1.1 Global Bus Engine Cooling Mechanical Fans Market Overview by Geographic Region 162 4.3.1.1.1.1 Global Bus Engine Cooling Mechanical Fans Market Overview by Geographic Region 163 4.3.1.1.1.2 Global Bus Engine Cooling Electric Fans Market Overview by Geographic Region 168 4.3.1.1.1.2 Global Bus Engine Cooling Electric Fans Market Overview by Geographic Region 168 4.3.1.1.1.3 Global Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview by Geographic Region 173 4.3.1.1.3 Global Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview by Geographic Region 173 4.3.1.2 Global Bus HVAC Blowers Market Overview by Geographic Region 173 4.3.1.2 Global Bus HVAC Blowers Market Overview by Geographic Region 173 4.3.1.2 Global Bus HVAC Blowers Market Overview by Geographic Region 186 Global Heavy Truck Production Overview by Geographic Region 180 Global Heavy Truck Production Overview by Geographic Region 180 Global Bus Production Overview by Geographic Region 180 Global Bus Production Overview by Geographic Region 180 Global Bus Production Overview by Geographic Region 192 REGIONAL MARKET OVERVIEW 196 1.1 Asia-Pacific Medium & Heavy Truck Production Overview by Country 192 2.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country 192 2.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country 192 2.3.1 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country 192 2.3.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country 192 2.3.3.1 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Country 192 2.3.3.3.1 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Country 192 2.3.3.3.3.1 Asia-Pacific Medium & Heavy Truck Engine Coo		
Geographic Region	4.3.1.1 Global Bus Engine Cooling Fans Market Overview.	153
4.3.1.1.2 Global Bus Engine Cooling Fans Market Overview by Fan Type		
4.3.1.1.1.1 Global Bus Engine Cooling Mechanical Fans Market Overview		
Market Overview by Geographic Region 163 4.3.1.1.1.1.1 Global Bus Engine Cooling Mechanical Fans Market Overview by Geographic Region 163 4.3.1.1.1.2 Global Bus Engine Cooling Electric Fans Market Overview by Geographic Region 168 4.3.1.1.1.3 Global Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview 172 4.3.1.1.3.1 Global Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview by Geographic Region 173 4.3.1.2 Global Bus HVAC Blowers Market Overview by Geographic Region 174 4.3.1.2.1 Global Bus HVAC Blowers Market Overview by Geographic Region 178 PART B: REGIONAL MARKET PERSPECTIVE 182 Global Medium Truck Production Overview by Geographic Region 182 Global Medium Truck Production Overview by Geographic Region 184 Global Medium & Heavy Truck Fans & Blowers Market Overview by Geographic Region 186 Global Bus Production Overview by Geographic Region 186 Global Bus Fans & Blowers Market Overview by Geographic Region 196 REGIONAL MARKET OVERVIEW 196 1.1 Asia-Pacific Medium & Heavy Truck Production Overview by 1.2 Asia-Pacific Medium & Heavy Truck Production Overview by 1.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by 1.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Vehicle Type 20 1.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Vehicle Type 20 1.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Vehicle Type 20 1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Country 20 1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Fan Type 20 1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Fan Type 20 1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Fan Type 20 1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Mechanical Fans Market Overview by Country 21 1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Mechanical Fans Market Overview by Country 21 1.2 Asia-Pacific Medium & Heavy Tru		158
Market Overview by Geographic Region		162
4.3.1.1.1.2 Global Bus Engine Cooling Electric Fans Market Overview		
Overview		
Overview by Geographic Region	Overview	167
4.3.1.1.3 Global Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview		
4.3.1.1.1.3.1 Global Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview by Geographic Region. 173 4.3.1.2 Global Bus HVAC Blowers Market Overview by Geographic Region. 178 4.3.1.2.1 Global Bus HVAC Blowers Market Overview by Geographic Region. 178 PART B: REGIONAL MARKET PERSPECTIVE 182 Global Medium Truck Production Overview by Geographic Region. 182 Global Heavy Truck Production Overview by Geographic Region. 184 Global Medium & Heavy Truck Fans & Blowers Market Overview by Geographic Region. 184 Global Medium & Heavy Truck Fans & Blowers Market Overview by Geographic Region. 190 Global Bus Production Overview by Geographic Region. 190 Global Bus Fans & Blowers Market Overview by Geographic Region. 192 REGIONAL MARKET OVERVIEW 196 1. ASIA-PACIFIC. 196 1. ASIA-PACIFIC 197 1.1.1 Asia-Pacific Medium & Heavy Truck Production Overview by Country. 197 1.1.2 Asia-Pacific Medium & Heavy Truck Production Overview by Country. 197 1.1.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Vehicle Type. 200 1.2.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Vehicle Type. 201 1.2.3 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country 202 1.2.3 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country 202 1.2.3 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country 202 1.2.3 1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Country 207 1.2.3.1.3 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Fan Type 211 1.2.3.1.3.1.1 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Fan Type 211 1.2.3.1.3.1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Mechanical Fans Market Overview by Country 214 1.2.3.1.3.1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Mechanical Fans Market Overview by Country 214 1.2.3.1.3.1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Mechanical Fans Market Overview by Country 214 1.2.3.1.3.1.2 Asia-Pa	4.3.1.1.3 Global Bus Air Conditioning (AC) Condenser	
Cooling Electric Fans Market Overview by Geographic Region. 173 4.3.1.2 Global Bus HVAC Blowers Market Overview		172
4.3.1.2.1 Global Bus HVAC Blowers Market Overview by Geographic Region	Cooling Electric Fans Market Overview by Geographic Region .	
Geographic Region		177
Global Medium Truck Production Overview by Geographic Region		178
Region	PART B: REGIONAL MARKET PERSPECTIVE1	182
Global Heavy Truck Production Overview by Geographic Region	Global Medium Truck Production Overview by Geographic	100
Region	Global Heavy Truck Production Overview by Geographic	182
Overview by Geographic Region	Region	184
Global Bus Production Overview by Geographic Region		186
REGIONAL MARKET OVERVIEW	Global Bus Production Overview by Geographic Region	190
1. ASIA-PACIFIC		
1.1 Asia-Pacific Medium & Heavy Truck Production Overview . 196 1.1.1 Asia-Pacific Medium Truck Production Overview by Country		
1.1.1 Asia-Pacific Medium Truck Production Overview by Country	9	
Country	REGIONAL MARKET OVERVIEW 1 1. ASIA-PACIFIC	9 6 196
1.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview	REGIONAL MARKET OVERVIEW 1 1. ASIA-PACIFIC	9 6 196
Market Overview	REGIONAL MARKET OVERVIEW	1 96 1 96 196
Market Overview by Vehicle Type	REGIONAL MARKET OVERVIEW	1 96 1 96 196
1.2.2 Asia-Pacific Medium & Heavy Truck Fans & Blowers Market Overview by Country	REGIONAL MARKET OVERVIEW	1 96 196 196 197 .198
Market Overview by Country	REGIONAL MARKET OVERVIEW	1 96 196 196 197 .198
Market Overview by Type	REGIONAL MARKET OVERVIEW	1 96 196 196 197 .198
Fans Market Overview	REGIONAL MARKET OVERVIEW	1 96 196 197 197 198 199
1.2.3.1.1 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Country	REGIONAL MARKET OVERVIEW	196 196 196 197 .198 199 200 202
Fans Market Overview by Country	REGIONAL MARKET OVERVIEW	196 196 197 197 198 199 200 202 204
Fans Market Overview by Vehicle Type	REGIONAL MARKET OVERVIEW	196 196 197 197 198 199 200 202 204 3
1.2.3.1.3 Asia-Pacific Medium & Heavy Truck Engine Cooling Fans Market Overview by Fan Type	REGIONAL MARKET OVERVIEW	196 196 197 197 198 199 200 202 204 1 206 ng 207
1.2.3.1.3.1 Asia-Pacific Medium & Heavy Truck Engine Cooling Mechanical Fans Market Overview	REGIONAL MARKET OVERVIEW	196 196 196 197 198 199 200 202 204 1 206 ng 207 ng
Cooling Mechanical Fans Market Overview	REGIONAL MARKET OVERVIEW	196 196 197 198 199 200 202 204 1 206 ng 207 ng 209
Mechanical Fans Market Overview by Country	REGIONAL MARKET OVERVIEW	196 196 197 198 199 200 202 204 1 206 ng 207 ng 209
1.2.3.1.3.1.2 Asia-Pacific Medium & Heavy Truck Engine Cooling Mechanical Fans Market Overview by Vehicle Type 216 1.2.3.1.3.1.2.1 Asia-Pacific Medium Truck Engine Cooling Mechanical Fans Market Overview by Country	REGIONAL MARKET OVERVIEW	196 196 196 197 198 199 200 202 204 206 ng 207 ng 209 ng 211 213
1.2.3.1.3.1.2.1 Asia-Pacific Medium Truck Engine Cooling Mechanical Fans Market Overview by Country	REGIONAL MARKET OVERVIEW	196 196 196 197 198 199 200 202 204 206 ng 207 ng 211 213
Mechanical Fans Market Overview by Country	REGIONAL MARKET OVERVIEW	196 196 197 198 199 200 202 204 207 19 207 19 209 19 211 213
Mechanical Fans Market Overview by Country	REGIONAL MARKET OVERVIEW	196 196 197 198 199 200 202 204 207 19 207 19 209 19 211 213
1.2.3.1.3.2 Asia-Pacific Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview	REGIONAL MARKET OVERVIEW	196 196 196 197 198 199 200 202 204 1 206 ng 207 ng 211 213 ng 214 216
Overview	REGIONAL MARKET OVERVIEW	196 196 197 197 198 200 202 204 3 206 207 709 211 213 214 216 218
1.2.3.1.3.2.1 Asia-Pacific Medium & Heavy Truck Air	REGIONAL MARKET OVERVIEW	196 196 197 198 199 200 202 204 3 206 ng 207 ng 211 213 214 216 220
Conditioning (AC) Condensor Cooling Flortric Fans Market	REGIONAL MARKET OVERVIEW	196 196 197 198 199 200 202 204 3 206 ng 207 ng 211 213 214 216 218
Overview by Country	REGIONAL MARKET OVERVIEW	196 196 197 198 199 200 202 204 3 206 ng 207 ng 211 213 214 216 218



Global Commercial Vehicle Fans and Blowers Market – Medium Trucks, Heavy Trucks and Buses Oct 2015 |533 Pages | 725 Charts | Price \$6030

1.2.3.1.3.2.2 Asia-Pacific Medium & Heavy Truck Air
Conditioning (AC) Condenser Cooling Electric Fans Market
Overview by Vehicle Type225
1.2.3.1.3.2.2.1 Asia-Pacific Medium Truck Air Conditioning (AC)
Condenser Cooling Electric Fans Market Overview by Country. 227
1.2.3.1.3.2.2.2 Asia-Pacific Heavy Truck Air Conditioning (AC)
1.2.3.1.3.2.2.2 Asia-Pacific Heavy Truck All Conditioning (AC)
Condenser Cooling Electric Fans Market Overview by Country229
1.2.3.2 Asia-Pacific Medium & Heavy Truck HVAC Blowers
Market Overview231
1.2.3.2.1 Asia-Pacific Medium & Heavy Truck HVAC Blowers
Market Overview by Country232
1.2.3.2.2 Asia-Pacific Medium & Heavy Truck HVAC Blowers
Market Overview by Vehicle Type234
1.2.3.2.2.1 Asia-Pacific Medium Truck HVAC Blowers Market
Overview by Country236
1.2.3.2.2.2 Asia-Pacific Heavy Truck HVAC Blowers Market
Overview by Country238
1.3 Asia-Pacific Bus Production Overview240
1.4 Asia-Pacific Bus Fans & Blowers Market Overview241
1.4.1 Asia-Pacific Bus Fans & Blowers Market Overview by
Country242
1.4.2 Asia-Pacific Bus Fans & Blowers Market Overview by
Type
1.4.2.1 Asia-Pacific Bus Engine Cooling Fans Market Overview . 246
1.4.2.1.1 Asia-Pacific Bus Engine Cooling Fans Market
Overview by Country247
1.4.2.1.2 Asia-Pacific Bus Engine Cooling Fans Market
Overview by Fan Type249
1.4.2.1.2.1 Asia-Pacific Bus Engine Cooling Mechanical Fans
Market Overview251
1.4.2.1.2.1.1 Asia-Pacific Bus Engine Cooling Mechanical Fans
Market Overview by Country252
1.4.2.1.2.2 Asia-Pacific Bus Air Conditioning (AC) Condenser
Cooling Electric Fans Market Overview254
1.4.2.1.2.2.1 Asia-Pacific Bus Air Conditioning (AC) Condenser
Cooling Electric Fans Market Overview by Country255
1.4.2.2 Asia-Pacific Bus HVAC Blowers Market Overview257
1.4.2.2.1 Asia-Pacific Bus HVAC Blowers Market Overview by
Country258
200.11.3
2. EUROPE260
2. EUROPE
2. EUROPE260
EUROPE
EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
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2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE
2. EUROPE

2.2.3.1.3.2.2.2 European Heavy Truck Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview by Country 293
2.2.3.2 European Medium & Heavy Truck HVAC Blowers
Market Overview
Market Overview by Country296
2.2.3.2.2 European Medium & Heavy Truck HVAC Blowers Market Overview by Vehicle Type298
2.2.3.2.2.1 European Medium Truck HVAC Blowers Market Overview by Country
2.2.3.2.2.2 European Heavy Truck HVAC Blowers Market
Overview by Country
2.4 European Bus Fans & Blowers Market Overview305
2.4.1 European Bus Fans & Blowers Market Overview by Country
2.4.2 European Bus Fans & Blowers Market Overview by Type 308 2.4.2.1 European Bus Engine Cooling Fans Market Overview 310
2.4.2.1.1 European Bus Engine Cooling Fans Market Overview
by Country
by Fan Type
2.4.2.2.1 European Bus Engine Cooling Mechanical Fans Market Overview
2.4.2.2.1.1 European Bus Engine Cooling Mechanical Fans Market Overview by Country316
2.4.2.2.2 European Bus Engine Cooling Electric Fans Market
Overview
Overview by Country
2.4.2.2.3 European Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview
2.4.2.2.3.1 European Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview by Country
2.4.2.3 European Bus HVAC Blowers Market Overview
2.4.2.3.1 European Bus HVAC Blowers Market Overview by Country
3. NORTH AMERICA327
3.1 North American Medium & Heavy Truck Production
Overview
Country
Country
3.2 North American Medium & Heavy Truck Fans & Blowers Market Overview
3.2.1 North American Medium & Heavy Truck Fans & Blowers
Market Overview by Vehicle Type
Market Overview by Country333
Market Overview by Country

3.2.3.1.3.2.2.1 North American Medium Truck Air Conditioning (AC)
Condenser Cooling Electric Fans Market Overview by Country358 3.2.3.1.3.2.2.2 North American Heavy Truck Air Conditioning (AC)
Condenser Cooling Electric Fans Market Overview by Country 360
3.2.3.2 North American Medium & Heavy Truck HVAC
Blowers Market Overview
3.2.3.2.1 North American Medium & Heavy Truck HVAC Blowers Market Overview by Country
3.2.3.2.2 North American Medium & Heavy Truck HVAC
Blowers Market Overview by Vehicle Type
3.2.3.2.2.1 North American Medium Truck HVAC Blowers
Market Overview by Country
3.2.3.2.2.2 North American Heavy Truck HVAC Blowers Market Overview by Country
3.3 North American Bus Production Overview
3.4 North American Bus Fans & Blowers Market Overview 372
3.4.1 North American Bus Fans & Blowers Market Overview
by Country
3.4.2 North American Bus Fans & Blowers Market Overview by Type
3.4.2.1 North American Bus Engine Cooling Fans Market
Overview
3.4.2.1.1 North American Bus Engine Cooling Fans Market
Overview by Country
3.4.2.1.2 North American Bus Engine Cooling Fans Market Overview by Fan Type
3.4.2.1.2.1 North American Bus Engine Cooling Mechanical
Fans Market Overview
3.4.2.1.2.1.1 North American Bus Engine Cooling Mechanical
Fans Market Overview by Country
3.4.2.1.2.2 North American Bus Engine Cooling Electric Fans Market Overview
3.4.2.1.2.2.1 North American Bus Engine Cooling Electric Fans
Market Overview by Country
3.4.2.1.2.3 North American Bus Air Conditioning (AC)
Condenser Cooling Electric Fans Market Overview 388
3.4.2.1.2.3.1 North American Bus Air Conditioning (AC) Condenser
Cooling Electric Fans Market Overview by Country389
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country
Cooling Electric Fans Market Overview by Country

4.2.2.1.2.2.2 South American Medium & Heavy Truck Air

4.2.3.1.3.2.2 30dtil American Median & neavy mack An
Conditioning (AC) Condenser Cooling Electric Fans Market
Overview by Vehicle Type423
4.2.3.1.3.2.2.1 South American Medium Truck Air Conditioning (AC)
Condenser Cooling Electric Fans Market Overview by Country
4.2.3.1.3.2.2.2 South American Heavy Truck Air Conditioning (AC)
Condenser Cooling Electric Fans Market Overview by Country, 427
4.2.3.2 South American Medium & Heavy Truck HVAC
Blowers Market Overview429
4.2.3.2.1 South American Medium & Heavy Truck HVAC
Blowers Market Overview by Country430
4.2.3.2.2 South American Medium & Heavy Truck HVAC
Blowers Market Overview by Vehicle Type432
4.2.3.2.2.1 South American Medium Truck HVAC Blowers
Market Overview by Country434
4.2.3.2.2.2 South American Heavy Truck HVAC Blowers
Market Overview by Country436
4.3 South American Bus Production Overview438
4.4 South American Bus Fans & Blowers Market Overview 439
4.4.1 South American Bus Fans & Blowers Market Overview
by Country440
4.4.2 South American Bus Fans & Blowers Market Overview
by Type442
4.4.2.1 South American Bus Engine Cooling Fans Market
Overview444
4.4.2.1.1 South American Bus Engine Cooling Fans Market
Overview by Country445
4.4.2.1.2 South American Bus Engine Cooling Fans Market
Overview by Fan Type447
4.4.2.1.2.1 South American Bus Engine Cooling Mechanical
Fans Market Overview449
4.4.2.1.2.1.1 South American Bus Engine Cooling Mechanical
Fans Market Overview by Country450
4.4.2.1.2.2 South American Bus Air Conditioning (AC)
Condenser Cooling Electric Fans Market Overview452
4.4.2.1.2.2.1 South American Bus Air Conditioning (AC) Condenser
Cooling Electric Fans Market Overview by Country453
4.4.2.2 South American Bus HVAC Blowers Market Overview 455
4.4.2.2.1 South American Bus HVAC Blowers Market
Overview by Country456
E DECT OF WORLD
5. REST OF WORLD
5.1 Rest of World Medium Truck Production Overview458
Country459
60uni y459

5.1.2 Rest of World Heavy Truck Production Overview by
Country460
5.2 Rest of World Medium & Heavy Truck Fans & Blowers
Market Overview461 5.2.1 Rest of World Medium & Heavy Truck Fans & Blowers
5.2.1 Rest of World Medium & Heavy Truck Fans & Blowers
Market Overview by Vehicle Type462
5.2.2 Rest of World Medium & Heavy Truck Fans & Blowers
Market Overview by Country464
5.2.3 Rest of World Medium & Heavy Truck Fans & Blowers
Market Overview by Type466
5.2.3.1 Rest of World Medium & Heavy Truck Engine Cooling Fans Market Overview468
5.2.3.1.1 Rest of World Medium & Heavy Truck Engine
Cooling Fans Market Overview by Country469
5.2.3.1.2 Rest of World Medium & Heavy Truck Engine
Cooling Fans Market Overview by Vehicle Type471
5.2.3.1.3 Rest of World Medium & Heavy Truck Engine
Cooling Fans Market Overview by Fan Type473
5.2.3.1.3.1 Rest of World Medium & Heavy Truck Engine
Cooling Mechanical Fans Market Overview475
5.2.3.1.3.1.1 Rest of World Medium & Heavy Truck Engine
Cooling Mechanical Fans Market Overview by Country 476
5.2.3.1.3.1.2 Rest of World Medium & Heavy Truck Engine
Cooling Mechanical Fans Market Overview by Vehicle Type 478
5.2.3.1.3.1.2.1 Rest of World Medium Truck Engine Cooling
Mechanical Fans Market Overview by Country 480
5.2.3.1.3.1.2.2 Rest of World Heavy Truck Engine Cooling
Mechanical Fans Market Overview by Country 482
5.2.3.1.3.2 Rest of World Medium & Heavy Truck Air
Conditioning (AC) Condenser Cooling Electric Fans Market
Overview
5.2.3.1.3.2.1 Rest of World Medium & Heavy Truck Air
Conditioning (AC) Condenser Cooling Electric Fans Market
Overview by Country
5.2.3.1.3.2.2 Rest of World Medium & Heavy Truck Air
Conditioning (AC) Condenser Cooling Electric Fans Market
Overview by Vehicle Type
5.2.3.1.3.2.2.1 Rest of World Medium Truck Air Conditioning (AC)
Condenser Cooling Electric Fans Market Overview by Country 489 5.2.3.1.3.2.2.2 Rest of World Heavy Truck Air Conditioning (AC)
Condenser Cooling Electric Fans Market Overview by Country 491 5.2.3.2 Rest of World Medium & Heavy Truck HVAC Blowers
5.2.3.2 Rest of World Medium & Heavy Truck HVAC Blowers Market Overview493
5.2.3.2.1 Rest of World Medium & Heavy Truck HVAC
5.2.3.2.1 Rest of World Medium & Heavy Truck HVAC Blowers Market Overview by Country494
biowers ivial ket Overview by courtily494

Blowers Market Overview by Vehicle Type	498 ket 500 502 503 by 504
5.4.2.1 Rest of World Bus Engine Cooling Fans Market	506
Overview	
5.4.2.1.2 Rest of World Bus Engine Cooling Fans Market Overview by Fan Type 5.4.2.1.2.1 Rest of World Bus Engine Cooling Mechanical F Market Overview 5.4.2.1.2.1 Rest of World Bus Engine Cooling Mechanica Fans Market Overview by Country 5.4.2.1.2.2 Rest of World Bus Air Conditioning (AC) Condenser Cooling Electric Fans Market Overview 5.4.2.1.2.2.1 Rest of World Bus Air Conditioning (AC) Conder Cooling Electric Fans Market Overview by Country 5.4.2.2 Rest of World Bus HVAC Blowers Market Overview 5.4.2.1 Rest of World Bus HVAC Blowers Market Overview 5.4.2.2.1 Rest of World Bus HVAC Blowers Market Overview by Country	511 fans 513 I 514 516 nser 517 v519 ew 520
PART C: GUIDE TO THE INDUSTRY	522 526 528 531
PART D: ANNEXURE	532

5.2.3.2.2 Rest of World Medium & Heavy Truck HVAC

LIST OF CHARTS, TABLES & FIGURES

PART A: GLOBAL MARKET PERSPECTIVE

Chart 1: Global Production Analysis (2010-2020) for Automotive/Transportation Vehicles by Vehicle Type in Units....71 Chart 2: Glance at 2010, 2015 and 2020 Global Production Share (%) Analsysis for Automotive/Transportation Vehicles by Vehicle Type in Units. Chart 3: Global Production Analysis (2010-2020) for Medium & Heavy Trucks by Vehicle Type in Units... Chart 4: Glance at 2010, 2015 and 2020 Global Production Share (%) Analysis for Medium & Heavy Trucks by Vehicle Type..........74 Chart 5: Global Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Trucks in Volume ('000 Units) and Value (USD Chart 6: Global Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units... Chart 7: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Chart 8: Global Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks in USD Million Chart 9: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Chart 10: Global Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Trucks by Type - Fans and Blowers in '000

Chart 11: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by Type - Fans and Blowers..... Chart 12: Global Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Trucks by Type – Fans and Blowers in USD Chart 13: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by Type - Fans and Blowers... Chart 14: Global Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling in Volume ('000 Units) and Value (USD Million) Chart 15: Global Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Geographic Region -Asia-Pacific, Europe, North America, South America and Rest of World in '000 Chart 16: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World Chart 17: Global Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World in USD Million.... Chart 18: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World Chart 19: Global Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks

and Heavy Trucks in '000 Units.....

Chart 20: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks..... 90 Chart 21: Global Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in USD Million Chart 22: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks..... 92 Chart 23: Global Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Fan Type - Mechanical Fans and Electric Fans in '000 Units ... Chart 24: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Fan Type - Mechanical Fans and Electric Fans... Chart 25: Global Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Fan Type – Mechanical Fans and Electric Fans in USD Million .. Chart 26: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Fan Type - Mechanical Fans and Electric Fans ... Chart 27: Global Market Analysis (2010-2020) for Mechanical Fans in Medium & Heavy Truck Engine Cooling in Volume ('000 Units) and Value (USD Million) Chart 28: Global Market Analysis (2010-2020) for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World in '000 Units Chart 29: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World..



Chart 30: Global Market Analysis (2010-2020) for Mechanical Fans

Global Commercial Vehicle Fans and Blowers Market – Medium Trucks, Heavy Trucks and Buses

Oct 2015 | 533 Pages | 725 Charts | Price \$6030

in Medium & Heavy Truck Engine Cooling by Geographic Region –	
Asia-Pacific, Europe, North America, South America and Rest of World in USD Million100)
Chart 31: Glance at 2010, 2015 and 2020 Global Value Market Share	
(%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America,	
South America and Rest of World101	
Chart 32: Global Market Analysis (2010-2020) for Mechanical Fans	
in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units102	,
Chart 33: Glance at 2010, 2015 and 2020 Global Volume Market	
Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy	
Trucks	
Chart 34: Global Market Analysis (2010-2020) for Mechanical Fans	
in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in USD Million104	
Chart 35: Glance at 2010, 2015 and 2020 Global Value Market	
Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck	
Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks105	
Chart 36: Global Market Analysis (2010-2020) for Mechanical Fans	
in Medium Truck Engine Cooling by Geographic Region – Asia- Pacific, Europe, North America, South America and Rest of World	
in '000 Units	,
Chart 37: Glance at 2010, 2015 and 2020 Global Volume Market	
Share (%) Analysis for Mechanical Fans in Medium Truck Engine Cooling by Geographic Region – Asia-Pacific, Europe, North	
America, South America and Rest of World107	,
Chart 38: Global Market Analysis (2010-2020) for Mechanical Fans	
in Medium Truck Engine Cooling by Geographic Region – Asia- Pacific, Europe, North America, South America and Rest of World	
in USD Million	
Chart 39: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Mechanical Fans in Medium Truck Engine	
Cooling by Geographic Region – Asia-Pacific, Europe, North	
America, South America and Rest of World	
Chart 40: Global Market Analysis (2010-2020) for Mechanical Fans in Heavy Truck Engine Cooling by Geographic Region – Asia-	
Pacific, Europe, North America, South America and Rest of World	
in '000 Units110 Chart 41: Glance at 2010, 2015 and 2020 Global Volume Market	1
Share (%) Analysis for Mechanical Fans in Heavy Truck Engine	
Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World111	
Chart 42: Global Market Analysis (2010-2020) for Mechanical Fans	
in Heavy Truck Engine Cooling by Geographic Region – Asia-	
Pacific, Europe, North America, South America and Rest of World in USD Million112	
Chart 43: Glance at 2010, 2015 and 2020 Global Value Market	
Share (%) Analysis for Mechanical Fans in Heavy Truck Engine Cooling by Geographic Region – Asia-Pacific, Europe, North	
America, South America and Rest of World113	
Chart 44: Global Market Analysis (2010-2020) for Electric Fans in	
Medium & Heavy Truck AC Condenser Cooling in Volume ('000 Units) and Value (USD Million)114	
Chart 45: Global Market Analysis (2010-2020) for Electric Fans in	
Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling by Geographic Region – Asia-Pacific, Europe, North America,	
South America and Rest of World in '000 Units115	,
Chart 46: Glance at 2010, 2015 and 2020 Global Volume Market	
Share (%) Analysis for Electric Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling by Geographic Region –	
Asia-Pacific, Europe, North America, South America and Rest of	
World	
Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling by	
Geographic Region – Asia-Pacific, Europe, North America, South	
America and Rest of World in USD Million117 Chart 48: Glance at 2010, 2015 and 2020 Global Value Market	
Share (%) Analysis for Electric Fans in Medium & Heavy Truck Air	
Conditioning (AC) Condenser Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of	
World118	;
Chart 49: Global Market Analysis (2010-2020) for Electric Fans in	
Medium & Heavy Truck AC Condenser Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units119	,
Chart 50: Glance at 2010, 2015 and 2020 Global Volume Market	
Share (%) Analysis for Electric Fans in Medium & Heavy Truck AC Condenser Cooling b Vehicle Type – Medium Trucks and Heavy	
Trucks120	,
Chart 51: Global Market Analysis (2010-2020) for Electric Fans in Medium & Heavy Truck AC Condenser Cooling by Vehicle Type –	
Medium Trucks and Heavy Trucks in USD Million121	

Chart 52: Glance at 2010, 2015 and 2020 Global Value Market	С
Share (%) Analysis for Electric Fans in Medium & Heavy Truck AC	Н
Condenser Cooling b Vehicle Type – Medium Trucks and Heavy	N
Trucks	C
Chart 53: Global Market Analysis (2010-2020) for Electric Fans in	S
Medium Truck Air Conditioning (AC) Condenser Cooling by Geographic Region – Asia-Pacific, Europe, North America, South	G A
America and Rest of World in '000 Units	C
Chart 54: Glance at 2010, 2015 and 2020 Global Volume Market	T
Share (%) Analysis for Electric Fans in Medium Truck Air	Α
Conditioning (AC) Condenser Cooling by Geographic Region –	C
Asia-Pacific, Europe, North America, South America and Rest of World124	S
Chart 55: Global Market Analysis (2010-2020) for Electric Fans in	A
Medium Truck Air Conditioning (AC) Condenser Cooling by	C
Geographic Region – Asia-Pacific, Europe, North America, South	ir
America and Rest of World in USD Million	C
Chart 56: Glance at 2010, 2015 and 2020 Global Value Market	ir C
Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Geographic Region –	S
Asia-Pacific, Europe, North America, South America and Rest of	В
World	C
Chart 57: Global Market Analysis (2010-2020) for Electric Fans in	В
Heavy Truck Air Conditioning (AC) Condenser Cooling by	C
Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World in '000 Units127	S B
Chart 58: Glance at 2010, 2015 and 2020 Global Volume Market	C
Share (%) Analysis for Electric Fans in Heavy Truck Air	C
Conditioning (AC) Condenser Cooling by Geographic Region –	C
Asia-Pacific, Europe, North America, South America and Rest of	Ε
World	A
Chart 59: Global Market Analysis (2010-2020) for Electric Fans in	C S
Heavy Truck Air Conditioning (AC) Condenser Cooling by Geographic Region – Asia-Pacific, Europe, North America, South	R
America and Rest of World in USD Million	R
Chart 60: Glance at 2010, 2015 and 2020 Global Value Market Share	С
(%) Analysis for Electric Fans in Heavy Truck Air Conditioning (AC)	Ε
Condenser Cooling by Geographic Region – Asia-Pacific, Europe, North	A
America, South America and Rest of World	C S
Medium & Heavy Truck HVAC in Volume ('000 Units) and Value	R
(USD Million)	R
Chart 62: Global Market Analysis (2010-2020) for Blowers in	C
Medium & Heavy Truck HVAC by Geographic Region –	E
Asia-Pacific, Europe, North America, South America and Rest of World in '000 Units	'(C
Chart 63: Glance at 2010, 2015 and 2020 Global Volume Market	S
Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by	N
Geographic Region – Asia-Pacific, Europe, North America, South	C
America and Rest of World	E
Chart 64: Global Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC by Geographic Region –	C
Asia-Pacific, Europe, North America, South America and Rest of	S
World in USD Million	V
Chart 65: Glance at 2010, 2015 and 2020 Global Value Market	C
Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by	ir
Geographic Region – Asia-Pacific, Europe, North America, South	V
America and Rest of World	C B
Medium & Heavy Truck HVAC by Vehicle Type –	N
Medium Trucks and Heavy Trucks in '000 Units	С
Chart 67: Glance at 2010, 2015 and 2020 Global Volume Market	S
Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by	G
Type – Medium Trucks and Heavy Trucks137 Chart 68: Global Market Analysis (2010-2020) for Blowers in	A C
Medium & Heavy Truck HVAC by Vehicle Type –	В
Medium Trucks and Heavy Trucks in USD Million	A
Chart 69: Glance at 2010, 2015 and 2020 Global Value Market	С
Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by	S
Type – Medium Trucks and Heavy Trucks	G
Chart 70: Global Market Analysis (2010-2020) for Blowers in Medium Truck HVAC by Geographic Region – Asia-Pacific, Europe,	A C
North America, South America and Rest of World in '000 Units 140	E
Chart 71: Glance at 2010, 2015 and 2020 Global Volume Market	C
Share (%) Analysis for Blowers in Medium Truck HVAC by	В
Geographic Region – Asia-Pacific, Europe, North America, South	A
America and Rest of World	C
Chart 72: Global Market Analysis (2010-2020) for Blowers in Medium Truck HVAC by Geographic Region – Asia-Pacific,	S G
Europe, North America, South America and Rest of World in	C
USD Million142	В
Chart 73: Glance at 2010, 2015 and 2020 Global Value Market	Α
Share (%) Analysis for Blowers in Medium Truck HVAC by	C
Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World143	S
America and Nest of World	G

Chart 74: Global Market Analysis (2010-2020) for Blowers in Heavy Truck HVAC by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World in '000 Units 144 Chart 75: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Geographic Region - Asia-Pacific, Europe, North America, South America and Rest of World... Chart 76: Global Market Analysis (2010-2020) for Blowers in Heavy Truck HVAC by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World in USD Million. Chart 77: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World Chart 78: Global Market Analysis (2010-2020) for Fans & Blowers in Buses in Volume ('000 Units) and Value (USD Million) ... Chart 79: Global Market Analysis (2010-2020) for Fans & Blowers in Buses by Type – Fans and Blowers in '000 Units Chart 80: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Fans & Blowers in Buses by Type – Fans and Chart 81: Global Market Analysis (2010-2020) for Fans & Blowers in Buses by Type – Fans and Blowers in USD Million ... Chart 82: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Fans & Blowers in Buses by Type – Fans and Chart 83: Global Market Analysis (2010-2020) for Fans in Bus Engine Cooling in Volume ('000 Units) and Value (USD Million)... Chart 84: Global Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World in '000 Units..... Chart 85: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Fans in Bus Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World .. Chart 86: Global Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World in USD Million 156 Chart 87: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Fans in Bus Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World ... Chart 88: Global Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Fan Type – Mechanical Fans and Electric Fans in Chart 89: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Fans in Bus Engine Cooling by Fan Type -Mechanical Fans and Electric Fans .. Chart 90: Global Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Fan Type - Mechanical Fans and Electric Fans in Chart 91: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Fans in Bus Engine Cooling by Fan Type -Mechanical Fans and Electric Fans Chart 92: Global Market Analysis (2010-2020) for Mechanical Fans in Bus Engine Cooling in Volume ('000 Units) and Value (USD Chart 93: Global Market Analysis (2010-2020) for Mechanical Fans in Bus Engine Cooling by Geographic Region - Asia-Pacific, Europe, North America, South America and Rest of World in '000 Units 163 Chart 94: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Mechanical Fans in Bus Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World... Chart 95: Global Market Analysis (2010-2020) for Mechanical Fans in Bus Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World in USD Million... Chart 96: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Mechanical Fans in Bus Engine Cooling by Geographic Region – Asia-Pacific, Europe, North America, South America and Rest of World...... Chart 97: Global Market Analysis (2010-2020) for Electric Fans in Bus Engine Cooling in Volume ('000 Units) and Value (USD Million) 167 Chart 98: Global Market Analysis (2010-2020) for Electric Fans in Bus Engine Cooling by Geographic Region – Europe and North America in '000 Units.. Chart 99: Glance at 2010, 2015 and 2020 Global Volume Market Share (%) Analysis for Electric Fans in Bus Engine Cooling by Geographic Region – Europe and North America...... Chart 100: Global Market Analysis (2010-2020) for Electric Fans in Bus Engine Cooling by Geographic Region – Europe and North America in USD Million ... Chart 101: Glance at 2010, 2015 and 2020 Global Value Market Share (%) Analysis for Electric Fans in Bus Engine Cooling by Geographic Region – Europe and North America......



Oct 2015 |533 Pages | 725 Charts | Price \$6030

Chart 102: Global Market Analysis (2010-2020) for Electric Fans in Bus AC Condenser Cooling in Volume ('000 Units) and Value (USD
Million)
Chart 103: Global Market Analysis (2010-2020) for Electric Fans in
Bus Air Conditioning (AC) Condenser Cooling by Geographic
Region – Asia-Pacific, Europe, North America, South America and
Rest of World in '000 Units
Chart 104: Glance at 2010, 2015 and 2020 Global Volume Market
Share (%) Analysis for Electric Fans in Bus Air Conditioning (AC)
Condenser Cooling by Geographic Region – Asia-Pacific, Europe,
North America. South America and Rest of World174
Chart 105: Global Market Analysis (2010-2020) for Electric Fans in
Bus Air Conditioning (AC) Condenser Cooling by Geographic
Region – Asia-Pacific, Europe, North America, South America and
Rest of World in USD Million
Chart 106: Glance at 2010, 2015 and 2020 Global Value Market
Share (%) Analysis for Electric Fans in Bus Air Conditioning (AC)
Condenser Cooling by Geographic Region – Asia-Pacific, Europe,
North America, South America and Rest of World176
Chart 107: Global Market Analysis (2010-2020) for Blowers in Bus
HVAC in Volume ('000 Units) and Value (USD Million)177
Chart 108: Global Market Analysis (2010-2020) for Blowers in Bus
HVAC by Geographic Region – Asia-Pacific, Europe, North
America, South America and Rest of World in '000 Units
Chart 109: Glance at 2010, 2015 and 2020 Global Volume Market
Share (%) Analysis for Blowers in Bus HVAC by Geographic Region
- Asia-Pacific, Europe, North America, South America and Rest of
World179
Chart 110: Global Market Analysis (2010-2020) for Blowers in Bus
HVAC by Geographic Region – Asia-Pacific, Europe, North
America, South America and Rest of World in USD Million 180
Chart 111: Glance at 2010, 2015 and 2020 Global Value Market
Share (%) Analysis for Blowers in Bus HVAC by Geographic Region
- Asia-Pacific, Europe, North America, South America and Rest of
World
VVOIIU
PART B: REGIONAL MARKET PERSPECTIVE 182

Share (%) Analysis for Blowers in Bus HVAC by Geographic Region
- Asia-Pacific, Europe, North America, South America and Rest of
World181
PART B: REGIONAL MARKET PERSPECTIVE 182
Chart 112: Global Production Analysis (2010-2020) for Medium
Trucks by Geographic Region in Units182
Chart 113: Glance at 2010, 2015 and 2020 Global Production
Share (%) Analysis for Medium Trucks by Geographic Region 183
Chart 114: Global Production Analysis (2010-2020) for Heavy
Trucks by Geographic Region in Units
Chart 115: Glance at 2010, 2015 and 2020 Global Production
Share (%) Analysis for Heavy Trucks by Geographic Region 185
Chart 116: Global Market Analysis (2010-2020) for Fans & Blowers
in Medium & Heavy Trucks by Geographic Region –
Asia-Pacific, Europe, North America, South America and Rest of
World in '000 Units186
Chart 117: Glance at 2010, 2015 and 2020 Global Volume Market
Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks
by Geographic Region – Asia-Pacific, Europe, North America,
South America and Rest of World187
Chart 118: Global Market Analysis (2010-2020) for Fans & Blowers
in Medium & Heavy Trucks by Geographic Region –
Asia-Pacific, Europe, North America, South America and Rest of
World in USD Million188
Chart 119: Glance at 2010, 2015 and 2020 Global Value Market
Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks
by Geographic Region – Asia-Pacific, Europe, North America,
South America and Rest of World189
Chart 120: Global Production Analysis (2010-2020) for Buses by
Geographic Region in Units190
Chart 121: Glance at 2010, 2015 and 2020 Global Production
Share (%) Analysis for Buses by Geographic Region191
Chart 122: Global Market Analysis (2010-2020) for Fans & Blowers
in Buses by Geographic Region – Asia-Pacific, Europe, North
America, South America and Rest of World in '000 Units 192
Chart 123: Glance at 2010, 2015 and 2020 Global Volume Market
Share (%) Analysis for Fans & Blowers in Buses by Geographic
Region – Asia-Pacific, Europe, North America, South America and
Rest of World
Chart 124: Global Market Analysis (2010-2020) for Fans & Blowers
in Buses by Geographic Region – Asia-Pacific, Europe, North
America, South America and Rest of World in USD Million 194
Chart 125: Glance at 2010, 2015 and 2020 Global Value Market
Share (%) Analysis for Fans & Blowers in Buses by Geographic
Region – Asia-Pacific, Europe, North America, South America and
Rest of World
170

Chart 128: Asia-Pacific Production Analysis (2010-2020) for
Medium Trucks by Country in Units
Share (%) Analysis for Medium Trucks by Country
Chart 130: Asia-Pacific Production Analysis (2010-2020) for Heavy
Trucks by Country in Units
Chart 131: Glance at 2010, 2015 and 2020 Asia-Pacific Production
Share (%) Analysis for Heavy Trucks by Country
Blowers in Medium & Heavy Trucks in Volume ('000 Units) and
Value (USD Million)199
Chart 133: Asia-Pacific Market Analysis (2010-2020) for Fans in
Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units
Chart 134: Glance at 2010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Analysis for Fans in Medium & Heavy Truck
Engine Cooling by Vehicle Type – Medium Trucks and Heavy
Trucks
Chart 135: Asia-Pacific Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium
Trucks and Heavy Trucks in USD Million201
Chart 136: Glance at 2010, 2015 and 2020 Asia-Pacific Value
Market Share (%) Analysis for Fans in Medium & Heavy Truck
Engine Cooling by Vehicle Type – Medium Trucks and Heavy
Trucks
Blowers in Medium & Heavy Trucks by Country –
Australia, China, India, Indonesia, Japan, Korea, Malaysia,
Pakistan, Philippines, Taiwan and Thailand in '000 Units202
Chart 138: Glance at 2010, 2015 and 2020 Asia-Pacific Volume Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by
Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia,
Pakistan, Philippines, Taiwan and Thailand202
Chart 139: Asia-Pacific Market Analysis (2010-2020) for Fans &
Blowers in Medium & Heavy Trucks by Country –
Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand in USD Million 203
Chart 140: Glance at 2010, 2015 and 2020 Asia-Pacific Value Market
Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by
Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia,
Pakistan, Philippines, Taiwan and Thailand
Blowers in Medium & Heavy Trucks by Type – Fans and Blowers in
000 Units
Chart 142: Glance at 2010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Analysis for Fans & Blowers in Medium & Heavy
Frucks by Type – Fans and Blowers
Blowers in Medium & Heavy Trucks by Type – Fans and Blowers in
USD Million205
Chart 144: Glance at 2010, 2015 and 2020 Asia-Pacific Value
Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Frucks by Type – Fans and Blowers
Chart 145: Asia-Pacific Market Analysis (2010-2020) for Fans in
Medium & Heavy Truck Engine Cooling in Volume ('000 Units) and
Value (USD Million)
Chart 146: Asia-Pacific Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Country – Australia,
China, India, Indonesia, Japan, Korea, Malaysia, Pakistan,
Philippines, Taiwan and Thailand in '000 Units
Chart 147: Glance at 2010, 2015 and 2020 Asia-Pacific Volume Market
Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by
Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand207
Chart 148: Asia-Pacific Market Analysis (2010-2020) for Fans in
Medium & Heavy Truck Engine Cooling by Country – Australia,
China, India, Indonesia, Japan, Korea, Malaysia, Pakistan,
Philippines, Taiwan and Thailand in USD Million
Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling
by Country – Australia, China, India, Indonesia, Japan, Korea,
Malaysia, Pakistan, Philippines, Taiwan and Thailand
Chart 150: Asia-Pacific Market Analysis (2010-2020) for Fans in
Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units
Chart 151: Glance at 2010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Analysis for Fans in Medium & Heavy Truck
Engine Cooling by Vehicle Type – Medium Trucks and Heavy
Trucks
Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium
Trucks and Heavy Trucks in USD Million210
Chart 153: Glance at 2010, 2015 and 2020 Asia-Pacific Value Market
Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling

01 1454 4 1 5 10	**
	: Market Analysis (2010-2020) for Fans in
Medium & Heavy Truc	ck Engine Cooling by Fan Type – Mechanical
Fans and Electric Fans	in '000 Units
Chart 155: Glance at 20	010, 2015 and 2020 Asia-Pacific Volume
	ysis for Fans in Medium & Heavy Truck Engine
	Mechanical Fans and Electric Fans211
	: Market Analysis (2010-2020) for Fans in
Medium & Heavy Truc	k Engine Cooling by Fan Type – Mechanical
Fans and Electric Fans	in USD Million 212
	010, 2015 and 2020 Asia-Pacific Value Market
	Fans in Medium & Heavy Truck Engine Cooling
	ical Fans and Electric Fans212
	: Market Analysis (2010-2020) for
	edium & Heavy Truck Engine Cooling in
Volume ('000 Units) a	nd Value (USD Million)213
Chart 159: Asia-Pacific	Market Analysis (2010-2020) for Mechanical
	vy Truck Engine Cooling by Country –
	Indonesia, Japan, Korea, Malaysia, Pakistan,
	d Thailand in '000 Units214
Chart 160: Glance at 2	010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Ana	lysis for Mechanical Fans in Medium &
	poling by Country – Australia, China, India,
	ea, Malaysia, Pakistan, Philippines, Taiwan
and manand	
	Market Analysis (2010-2020) for Mechanical
	vy Truck Engine Cooling by Country –
Australia, China, India,	Indonesia, Japan, Korea, Malaysia, Pakistan,
Philippines Taiwan and	d Thailand in USD Million215
	010, 2015 and 2020 Asia-Pacific Value Market
	Mechanical Fans in Medium & Heavy Truck
	ntry – Australia, China, India, Indonesia, Japan,
Korea, Malaysia, Pakist	an, Philippines, Taiwan and Thailand215
Chart 163: Asia-Pacific	Market Analysis (2010-2020) for Mechanical
	vy Truck Engine Cooling by Vehicle Type –
	eavy Trucks in '000 Units216
	010, 2015 and 2020 Asia-Pacific Volume
	lysis for Mechanical Fans in Medium &
Heavy Truck Engine Co	poling by Vehicle Type – Medium Trucks and
Heavy Trucks	216
Chart 165: Asia-Pacific	Market Analysis (2010-2020) for Mechanical
	vy Truck Engine Cooling by Vehicle Type –
	eavy Trucks in USD Million217
	010, 2015 and 2020 Asia-Pacific Value
Market Share (%) Ana	lysis for Mechanical Fans in Medium &
Market Share (%) Ana	
Market Share (%) Ana Heavy Truck Engine Co	lysis for Mechanical Fans in Medium &
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and 217
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks Chart 167: Asia-Pacific	lysis for Mechanical Fans in Medium & boling by Vehicle Type – Medium Trucks and 217 : Market Analysis (2010-2020) for
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks Chart 167: Asia-Pacific Mechanical Fans in Me	lysis for Mechanical Fans in Medium & ooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks Chart 167: Asia-Pacific Mechanical Fans in Mo Australia, China, India	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and modern 217 Market Analysis (2010-2020) for edium Truck Engine Cooling by Country – Indonesia, Japan, Korea, Malaysia,
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks Chart 167: Asia-Pacific Mechanical Fans in M Australia, China, India Pakistan, Philippines, Chart 168: Glance at 20	lysis for Mechanical Fans in Medium & coling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks	lysis for Mechanical Fans in Medium & soling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks	lysis for Mechanical Fans in Medium & coling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Co Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cot Heavy Truck Engine Cot Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cot Heavy Truck Engine Cot Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cot Heavy Truck Engine Cot Heavy Trucks	lysis for Mechanical Fans in Medium & coling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cot Heavy Truck Engine Cot Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine C. Heavy Truck Engine C. Heavy Trucks	lysis for Mechanical Fans in Medium & soling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Come Heavy Truck Engine Come Heavy Trucks Engine Come Heavy Trucks Engine Come Heavy Trucks Engine Mechanical Fans in Mechani	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cot Heavy Truck Engine Cot Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cot Heavy Truck Engine Cot Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine C. Heavy Truck Engine C. Heavy Trucks	lysis for Mechanical Fans in Medium & soling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & soling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cot Heavy Truck Engine Cot Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cot Heavy Truck Engine Cot Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cot Heavy Truck Engine Cot Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cotheavy Truck Engine Cotheavy Truck Engine Cotheavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & soling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cotheavy Truck Engine Cotheavy Truck Engine Cotheavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Truck Engine Cc Heavy Trucks	lysis for Mechanical Fans in Medium & cooling by Vehicle Type – Medium Trucks and
Market Share (%) Ana Heavy Truck Engine Cc Heavy Truck Saise Pacific Mechanical Fans in M. Australia, China, India Pakistan, Philippines, Chart 169: Asia-Pacific Mechanical Fans in M. Australia, China, India Pakistan, Philippines, Chart 170: Glance at 2C Share (%) Analysis for N. Cooling by Country – A. Malaysia, Pakistan, Philippines, Chart 171: Asia-Pacific Mechanical Fans in He. Australia, China, India Pakistan, Philippines, Chart 172: Glance at 2C Market Share (%) Analysis Chart 172: Glance at 2C Market Share (%) Analysis Chart 173: Asia-Pacific Mechanical Fans in He. Australia, China, India Pakistan, Philippines, Chart 173: Asia-Pacific Mechanical Fans in He. Australia, China, India Pakistan, Philippines, Chart 174: Glance at 2C Share (%) Analysis for N. Cooling by Country – A. Malaysia, Pakistan, Philippines, Chart 175: Asia-Pacific Fans in Medium & Heav (1000 Units) and Value Chart 176: Asia-Pacific Fans in Medium & Heav (1000 Units) and Value Chart 176: Asia-Pacific Fans Heavy Truck Country – Australia, Chi	lysis for Mechanical Fans in Medium & poling by Vehicle Type – Medium Trucks and



Oct 2015 |533 Pages | 725 Charts | Price \$6030

Market Chara (0) Analysis for Floatis Fore in Madistre Character
Market Share (%) Analysis for Electric Fans in Medium & Heavy
Truck Air Conditioning (AC) Condenser Cooling by Country –
Australia, China, India, Indonesia, Japan, Korea, Malaysia,
Pakistan, Philippines, Taiwan and Thailand223
Chart 178: Asia-Pacific Market Analysis (2010-2020) for Electric
Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser
Cooling by Country – Australia, China, India, Indonesia, Japan,
Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand in USD
Million
Chart 179: Glance at 2010, 2015 and 2020 Asia-Pacific Value
Market Share (%) Analysis for Electric Fans in Medium & Heavy
Truck Air Conditioning (AC) Condenser Cooling by Country –
Australia, China, India, Indonesia, Japan, Korea, Malaysia,
Pakistan, Philippines, Taiwan and Thailand224
Chart 180: Asia-Pacific Market Analysis (2010-2020) for Electric
Fans in Medium & Heavy Truck AC Condenser Cooling by Vehicle
Type – Medium Trucks and Heavy Trucks in '000 Units
Chart 181: Glance at 2010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Analysis for Electric Fans in Medium & Heavy
Truck AC Condenser Cooling b Vehicle Type – Medium Trucks and
Heavy Trucks
Chart 182: Asia-Pacific Market Analysis (2010-2020) for Electric
Fans in Medium & Heavy Truck AC Condenser Cooling by Vehicle
Type – Medium Trucks and Heavy Trucks in USD Million 226
Chart 183: Glance at 2010, 2015 and 2020 Asia-Pacific Value
Market Share (%) Analysis for Electric Fans in Medium & Heavy
Truck AC Condenser Cooling b Vehicle Type – Medium Trucks and
Heavy Trucks
Chart 184: Asia-Pacific Market Analysis (2010-2020) for Electric Fans
in Medium Truck Air Conditioning (AC) Condenser Cooling by
Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia,
Pakistan, Philippines, Taiwan and Thailand in '000 Units227
Chart 185: Glance at 2010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Analysis for Electric Fans in Medium Truck Air
Conditioning (AC) Condenser Cooling by Country – Australia,
China, India, Indonesia, Japan, Korea, Malaysia, Pakistan,
Philippines, Taiwan and Thailand227
Chart 186: Asia-Pacific Market Analysis (2010-2020) for Electric Fans
in Medium Truck Air Conditioning (AC) Condenser Cooling by
Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia,
Pakistan, Philippines, Taiwan and Thailand in USD Million228
Chart 187: Glance at 2010, 2015 and 2020 Asia-Pacific Value
Market Share (%) Analysis for Electric Fans in Medium Truck Air
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia,
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan,
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand228
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thalland
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thalland
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand
Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand

Chart 197: Asia-Pacific Market Analysis (2010-2020) for Blowers in	
Medium & Heavy Truck HVAC by Vehicle Type – Medium Trucks	
and Heavy Trucks in '000 Units	
Chart 198: Glance at 2010, 2015 and 2020 Asia-Pacific Volume	
Market Share (%) Analysis for Blowers in Medium & Heavy Truck	
HVAC by Type – Medium Trucks and Heavy Trucks	
Medium & Heavy Truck HVAC by Vehicle Type – Medium Trucks	
and Heavy Trucks in USD Million235	
Chart 200: Glance at 2010, 2015 and 2020 Asia-Pacific Value	
Market Share (%) Analysis for Blowers in Medium & Heavy Truck	
HVAC by Type – Medium Trucks and Heavy Trucks	
Chart 201: Asia-Pacific Market Analysis (2010-2020) for Blowers in	
Medium Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan	
and Thailand in '000 Units	
Chart 202: Glance at 2010, 2015 and 2020 Asia-Pacific Volume	
Market Share (%) Analysis for Blowers in Medium Truck HVAC by	
Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia,	
Pakistan, Philippines, Taiwan and Thailand	
Medium Truck HVAC by Country – Australia, China, India, Indonesia,	
Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand in	
USD Million237	
Chart 204: Glance at 2010, 2015 and 2020 Asia-Pacific Value Market	
Share (%) Analysis for Blowers in Medium Truck HVAC by Country –	
Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Chart 205: Asia-Pacific Market Analysis (2010-2020) for Blowers in	
Heavy Truck HVAC by Country – Australia, China, India, Indonesia,	
Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
in '000 Units	
Chart 206: Glance at 2010, 2015 and 2020 Asia-Pacific Volume	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea,	
Malaysia, Pakistan, Philippines, Taiwan and Thailand238	
Chart 207: Asia-Pacific Market Analysis (2010-2020) for Blowers in	
Heavy Truck HVAC by Country – Australia, China, India, Indonesia,	
Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
in USD Million	
Chart 208: Glance at 2010, 2015 and 2020 Asia-Pacific Value Market Share (%) Analysis for Blowers in Heavy Truck HVAC by	i
Charl 208: Glance at 2010, 2015 and 2020 Asia-Pacific Value Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea,	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand239	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand 239 Chart 209: Asia-Pacific Production Analysis (2010-2020) for Buses	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country — Australia, China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand	

Chart 224, Clares at 2010, 2015 and 2020 Asia Pasific Value
Chart 224: Glance at 2010, 2015 and 2020 Asia-Pacific Value
Market Share (%) Analysis for Fans in Bus Engine Cooling by
Country – China, India, Indonesia, Japan, Korea, Malaysia,
Pakistan, Taiwan and Thailand248
Chart 225: Asia-Pacific Market Analysis (2010-2020) for Fans in
Bus Engine Cooling by Fan Type – Mechanical Fans and Electric
Fans in '000 Units
Chart 226: Glance at 2010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Analysis for Fans in Bus Engine Cooling by Fan
Type – Mechanical Fans and Electric Fans
Chart 227: Asia-Pacific Market Analysis (2010-2020) for Fans in
Bus Engine Cooling by Fan Type – Mechanical Fans and Electric
Fans in USD Million
Chart 228: Glance at 2010, 2015 and 2020 Asia-Pacific Value
Market Share (%) Analysis for Fans in Bus Engine Cooling by Fan
Type – Mechanical Fans and Electric Fans
Chart 229: Asia-Pacific Market Analysis (2010-2020) for Mechanical Fans in
Bus Engine Cooling in Volume ('000 Units) and Value (USD Million) 251
Chart 230: Asia-Pacific Market Analysis (2010-2020) for Mechanical
Fans in Bus Engine/Radiator by Country – China, India, Indonesia, Japan,
Korea, Malaysia, Pakistan, Taiwan and Thailand in '000 Units252
Chart 231: Glance at 2010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Analysis for Mechanical Fans in Bus Engine
Cooling by Country – China, India, Indonesia, Japan, Korea,
Malaysia, Pakistan, Taiwan and Thailand
Chart 232: Asia-Pacific Market Analysis (2010-2020) for
Mechanical Fans in Bus Engine Cooling by Country – China, India,
Indonesia, Japan, Korea, Malaysia, Pakistan, Taiwan and Thailand
in USD Million
Chart 233: Glance at 2010, 2015 and 2020 Asia-Pacific Value
Market Share (%) Analysis for Mechanical Fans in Bus Engine
Cooling by Country – China, India, Indonesia, Japan, Korea,
Malaysia, Pakistan, Taiwan and Thailand
Chart 234: Asia-Pacific Market Analysis (2010-2020) for Electric
Fans in Bus AC Condenser Cooling in Volume ('000 Units) and
Value (USD Million)
Chart 235: Asia-Pacific Market Analysis (2010-2020) for Electric
Fans in Bus Air Conditioning (AC) Condenser Cooling by Country –
China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Taiwan
and Thailand in '000 Units
Chart 236: Glance at 2010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Analysis for Electric Fans in Bus Air Conditioning
(AC) Condenser Cooling by Country – China, India, Indonesia,
Japan, Korea, Malaysia, Pakistan, Taiwan and Thailand
Chart 237: Asia-Pacific Market Analysis (2010-2020) for Electric
Fans in Bus Air Conditioning (AC) Condenser Cooling by Country –
China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Taiwan
and Thailand in USD Million
Chart 238: Glance at 2010, 2015 and 2020 Asia-Pacific Value Market
Share (%) Analysis for Electric Fans in Bus Air Conditioning (AC)
Condenser Cooling by Country – China, India, Indonesia, Japan, Korea,
Malaysia, Pakistan, Taiwan and Thailand256
Chart 239: Asia-Pacific Market Analysis (2010-2020) for Blowers in
Bus HVAC in Volume ('000 Units) and Value (USD Million) 257
Chart 240: Asia-Pacific Market Analysis (2010-2020) for Blowers in
Bus HVAC by Country – China, India, Indonesia, Japan, Korea,
Malaysia, Pakistan, Taiwan and Thailand in '000 Units
Chart 241: Glance at 2010, 2015 and 2020 Asia-Pacific Volume
Market Share (%) Analysis for Blowers in Bus HVAC by Country –
China India Indonesia Janan Koroa Malausia Dakistan Taiwan
China, India, Indonesia, Japan, Korea, Malaysia, Pakistan, Taiwan
and Thailand258
and Thailand



Global Commercial Vehicle Fans and Blowers Market – Medium Trucks, Heavy Trucks and Buses Oct 2015 | 533 Pages | 725 Charts | Price \$6030

Chart 251: European Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Truck by Vehicle Type - Medium Trucks and Heavy Trucks in '000 Units..... Chart 252: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Truck by Vehicle Type - Medium Trucks and Heavy Trucks 264 Chart 253: European Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Truck by Vehicle Type - Medium Trucks and Heavy Trucks in USD Million265 Chart 254: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Truck by Vehicle Type - Medium Trucks and Heavy Trucks......265 Chart 255: European Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Trucks by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in '000 Units Chart 256: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom Chart 257: European Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Trucks by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in USD Million......267 Chart 258: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Blowers in Medium & Heavy Trucks by Type - Fans and Blowers in Chart 260: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by Type – Fans and Blowers..... Chart 261: European Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Trucks by Type - Fans and Blowers in Chart 262: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by Type - Fans and Blowers Chart 263: European Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling in Volume ('000 Units) and Value (USD Million) ... Chart 264: European Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in '000 Units Chart 265: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom271 Chart 266: European Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in USD Million.... Chart 267: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom272 Chart 268: European Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks in '000 Units..... Chart 269: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks273 Chart 270: European Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks in USD Million... Chart 271: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks.... 274 Chart 272: European Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Fan Type – Mechanical Fans and Electric Fans in '000 Units Chart 273: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Fan Type – Mechanical Fans and Electric Fans......275

Page 9

Chart 274: European Market Analysis (2010-2020) for Fans in	C
Medium & Heavy Truck Engine Cooling by Fan Type – Mechanical	iı
Fans and Electric Fans in USD Million	C
Chart 275: Glance at 2010, 2015 and 2020 European Value Market	F
Share (%) Analysis for Fans in Medium & Heavy Truck Engine	S
Cooling by Fan Type – Mechanical Fans and Electric Fans 276 Chart 276: European Market Analysis (2010-2020) for Mechanical	C N
Fans in Medium & Heavy Truck Engine Cooling in Volume ('000	T
Units) and Value (USD Million)	A
Chart 277: European Market Analysis (2010-2020) for Mechanical	H
Fans in Medium & Heavy Truck Engine Cooling by Country –	T
Austria, Belarus, Belgium, Czech Republic, France, Germany,	C
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in '000 Units278	ii C
Chart 278: Glance at 2010, 2015 and 2020 European Volume Market	F
Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck	S
Engine Cooling by Country – Austria, Belarus, Belgium, Czech	C
Republic, France, Germany, Hungary, Italy, Netherlands, Poland,	S
Portugal, Spain, Sweden and The United Kingdom278	C
Chart 279: European Market Analysis (2010-2020) for Mechanical	Е
Fans in Medium & Heavy Truck Engine Cooling by Country –	I ¹
Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and	(
The United Kingdom in USD Million	iı
Chart 280: Glance at 2010, 2015 and 2020 European Value Market	_
Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck	C
Engine Cooling by Country – Austria, Belarus, Belgium, Czech	N
Republic, France, Germany, Hungary, Italy, Netherlands, Poland,	Ţ
Portugal, Spain, Sweden and The United Kingdom279 Chart 281: European Market Analysis (2010-2020) for Mechanical	F
Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type –	iı
Medium Trucks and Heavy Trucks in '000 Units	_
Chart 282: Glance at 2010, 2015 and 2020 European Volume	C
Market Share (%) Analysis for Mechanical Fans in Medium &	S
Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and	C
Heavy Trucks	I
Chart 283: European Market Analysis (2010-2020) for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type –	i
Medium Trucks and Heavy Trucks in USD Million	
Chart 284: Glance at 2010, 2015 and 2020 European Value Market	(
Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck	S
Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks 281	C
Chart 285: European Market Analysis (2010-2020) for Mechanical	N
Fans in Medium Truck Engine Cooling by Country – Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary,	C E
Italy, Netherlands, Poland, Portugal, Spain, Sweden and The	l
United Kingdom in '000 Units	į
Chart 286: Glance at 2010, 2015 and 2020 European Volume	C
Market Share (%) Analysis for Mechanical Fans in Medium Truck	İI
Engine Cooling by Country – Austria, Belarus, Belgium, Czech	0
Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom282	S
Chart 287: European Market Analysis (2010-2020) for Mechanical	(
Fans in Medium Truck Engine Cooling by Country – Austria,	S
Belarus, Belgium, Czech Republic, France, Germany, Hungary,	(.
Italy, Netherlands, Poland, Portugal, Spain, Sweden and The	C
United Kingdom in USD Million	F
Chart 288: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Mechanical Fans in Medium Truck Engine	(
Cooling by Country – Austria, Belarus, Belgium, Czech Republic,	iı
France, Germany, Hungary, Italy, Netherlands, Poland, Portugal,	Ċ
Spain, Sweden and The United Kingdom	S
Chart 289: European Market Analysis (2010-2020) for Mechanical	C
Fans in Heavy Truck Engine Cooling by Country – Austria, Belarus,	S
Belgium, Czech Republic, France, Germany, Hungary, Italy,	(
Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in '000 Units	F
Chart 290: Glance at 2010, 2015 and 2020 European Volume	Ċ
Market Share (%) Analysis for Mechanical Fans in Heavy Truck	i
Engine Cooling by Country – Austria, Belarus, Belgium, Czech	C
Republic, France, Germany, Hungary, Italy, Netherlands, Poland,	(
Portugal, Spain, Sweden and The United Kingdom	S
Chart 291: European Market Analysis (2010-2020) for Mechanical Fans in Heavy Truck Engine Cooling by Country – Austria, Belarus,	S
Belgium, Czech Republic, France, Germany, Hungary, Italy,	(,
Netherlands, Poland, Portugal, Spain, Sweden and The United	C
Kingdom in USD Million	P
Chart 292: Glance at 2010, 2015 and 2020 European Value Market	C
Share (%) Analysis for Mechanical Fans in Heavy Truck Engine	N
Cooling by Country – Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal,	(
Spain, Sweden and The United Kingdom285	N
Chart 293: European Market Analysis (2010-2020) for Electric Fans	E
in Medium & Heavy Truck AC Condenser Cooling in Volume ('000	N
Units) and Value (USD Million)	K

Chart 294: European Market Analysis (2010-2020) for Electric Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in '000 Units Chart 295: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Electric Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling by Country -Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom Chart 296: European Market Analysis (2010-2020) for Electric Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling by Country – Austria, Belarus, Belgium, Czech Republic France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in USD Million... Chart 297: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Electric Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom Chart 298: European Market Analysis (2010-2020) for Electric Fans in Medium & Heavy Truck AC Condenser Cooling by Vehicle Type - Medium Trucks and Heavy Trucks in '000 Units...... Chart 299: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Electric Fans in Medium & Heavy Truck AC Condenser Cooling b Vehicle Type - Medium Trucks and Chart 300: European Market Analysis (2010-2020) for Electric Fans in Medium & Heavy Truck AC Condenser Cooling by Vehicle Type - Medium Trucks and Heavy Trucks in USD Million Chart 301: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Electric Fans in Medium & Heavy Truck AC Condenser Cooling b Vehicle Type – Medium Trucks and Heavy Chart 302: European Market Analysis (2010-2020) for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in '000 Units Chart 303: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom Chart 304: European Market Analysis (2010-2020) for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in USD Million...... Chart 305: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom... Chart 306: European Market Analysis (2010-2020) for Electric Fans in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in '000 Units Chart 307: Glance at 2010, 2015 and 2020 European Volume Market Share (%) Analysis for Electric Fans in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country – Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom... Chart 308: European Market Analysis (2010-2020) for Electric Fans in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country – Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in USD Million..... Chart 309: Glance at 2010, 2015 and 2020 European Value Market Share (%) Analysis for Electric Fans in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom... Chart 310: European Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC in Volume ('000 Units) and Value USD Million) Chart 311: European Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC by Country - Austria, Belarus, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom in '000 Units.....



Oct 2015 |533 Pages | 725 Charts | Price \$6030

Chart 312: Glance at 2010, 2015 and 2020 European Volume
Market Share (%) Analysis for Blowers in Medium & Heavy Truck
HVAC by Country – Austria, Belarus, Belgium, Czech Republic,
France, Germany, Hungary, Italy, Netherlands, Poland, Portugal,
Spain, Sweden and The United Kingdom296
Chart 313: European Market Analysis (2010-2020) for Blowers in
Medium & Heavy Truck HVAC by Country – Austria, Belarus,
Belgium, Czech Republic, France, Germany, Hungary, Italy,
Netherlands, Poland, Portugal, Spain, Sweden and The United
Kingdom in USD Million297
Chart 314: Glance at 2010, 2015 and 2020 European Value Market
Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by
Country – Austria, Belarus, Belgium, Czech Republic, France,
Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain,
Sweden and The United Kingdom297
Chart 315: European Market Analysis (2010-2020) for Blowers in
Medium & Heavy Truck HVAC by Vehicle Type –
Medium Trucks and Heavy Trucks in '000 Units298
Chart 316: Glance at 2010, 2015 and 2020 European Volume
Market Share (%) Analysis for Blowers in Medium & Heavy Truck
HVAC by Type – Medium Trucks and Heavy Trucks298
Chart 317: European Market Analysis (2010-2020) for Blowers in
Medium & Heavy Truck HVAC by Vehicle Type –
Medium Trucks and Heavy Trucks in USD Million299
Chart 318: Glance at 2010, 2015 and 2020 European Value Market
Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by
Type – Medium Trucks and Heavy Trucks
Chart 319: European Market Analysis (2010-2020) for Blowers in
Medium Truck HVAC by Country – Austria, Belarus, Belgium, Czech
Republic, France, Germany, Hungary, Italy, Netherlands, Poland,
Portugal, Spain, Sweden and The United Kingdom in '000 Units 300
Chart 320: Glance at 2010, 2015 and 2020 European Volume
Market Share (%) Analysis for Blowers in Medium Truck HVAC by
Country – Austria, Belarus, Belgium, Czech Republic, France,
Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain,
Sweden and The United Kingdom300
Chart 321: European Market Analysis (2010-2020) for Blowers in
Medium Truck HVAC by Country – Austria, Belarus, Belgium, Czech
Republic, France, Germany, Hungary, Italy, Netherlands, Poland,
Portugal, Spain, Sweden and The United Kingdom in USD Million 301
Chart 322: Glance at 2010, 2015 and 2020 European Value Market
Share (%) Analysis for Blowers in Medium Truck HVAC by Country
– Austria, Belarus, Belgium, Czech Republic, France, Germany,
- Austria, Belarus, Belgium, Czech Republic, France, Germany,
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom301
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom301 Chart 323: European Market Analysis (2010-2020) for Blowers in
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom301 Chart 323: European Market Analysis (2010-2020) for Blowers in Heavy Truck HVAC by Country – Austria, Belarus, Belgium, Czech
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom301 Chart 323: European Market Analysis (2010-2020) for Blowers in Heavy Truck HVAC by Country – Austria, Belarus, Belgium, Czech
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
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Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom
Hungary, Italy, Netherlands, Poland, Portugal, Spain, Sweden and The United Kingdom

Chart 334: European Market Analysis (2010-2020) for Fans &	(
Blowers in Buses by Type – Fans and Blowers in '000 Units 308	ľ
Chart 335: Glance at 2010, 2015 and 2020 European Volume	(
Market Share (%) Analysis for Fans & Blowers in Buses by Type –	F
Fans and Blowers	9
Chart 336: European Market Analysis (2010-2020) for Fans &	(
Blowers in Buses by Type – Fans and Blowers in USD Million 309	i
Chart 337: Glance at 2010, 2015 and 2020 European Value Market	E
Share (%) Analysis for Fans & Blowers in Buses by Type – Fans and	1
Blowers 309	k
Chart 338: European Market Analysis (2010-2020) for Fans in Bus	(
Engine Cooling in Volume ('000 Units) and Value (USD Million) 310	5
Chart 339: European Market Analysis (2010-2020) for Fans in Bus	(
Engine Cooling by Country – Belarus, Belgium, Czech Republic,	F
France, Germany, Italy, Netherlands, Poland, Serbia, Spain, Sweden	9
and The United Kingdom in '000 Units311	(
Chart 340: Glance at 2010, 2015 and 2020 European Volume	E
Market Share (%) Analysis for Fans in Bus Engine Cooling by	(
Country – Belarus, Belgium, Czech Republic, France, Germany,	Е
Italy, Netherlands, Poland, Serbia, Spain, Sweden and The United	(
Kingdom	
Chart 341: European Market Analysis (2010-2020) for Fans in Bus	(
Engine Cooling by Country – Belarus, Belgium, Czech Republic,	9
France, Germany, Italy, Netherlands, Poland, Serbia, Spain, Sweden	Е
and The United Kingdom in USD Million	F
Chart 342: Glance at 2010, 2015 and 2020 European Value Market	(
Share (%) Analysis for Fans in Bus Engine Cooling by Country –	E
Belarus, Belgium, Czech Republic, France, Germany, Italy,	(
Netherlands, Poland, Serbia, Spain, Sweden and The United Kingdom.]
Chart 343: European Market Analysis (2010-2020) for Fans in Bus	(
	9
Engine Cooling by Fan Type – Mechanical Fans and Electric Fans in	
'000 Units	E
Chart 344: Glance at 2010, 2015 and 2020 European Volume	F
Market Share (%) Analysis for Fans in Bus Engine Cooling by Fan	
Type – Mechanical Fans and Electric Fans	ı
	(
Chart 345: European Market Analysis (2010-2020) for Fans in Bus	1
Engine Cooling by Fan Type – Mechanical Fans and Electric Fans in	(
USD Million	
Chart 346: Glance at 2010, 2015 and 2020 European Value Market	F
Share (%) Analysis for Fans in Bus Engine Cooling by Fan Type –	١
Mechanical Fans and Electric Fans	(
	1
Chart 347: European Market Analysis (2010-2020) for Mechanical	(
Fans in Bus Engine Cooling in Volume ('000 Units) and Value (USD	
Million)	,
Chart 348: European Market Analysis (2010-2020) for Mechanical	(
Fans in Bus Engine Cooling by Country – Belarus, Belgium, Czech	ŀ
Republic, France, Germany, Italy, Netherlands, Poland, Serbia,	(
	F
Spain, Sweden and The United Kingdom in '000 Units316	(
Chart 349: Glance at 2010, 2015 and 2020 European Volume	8
Market Share (%) Analysis for Mechanical Fans in Bus Engine	,
Cooling by Country – Belarus, Belgium, Czech Republic, France,	1
Germany, Italy, Netherlands, Poland, Serbia, Spain, Sweden and	(
The United Kingdom	8
· ·	1
Chart 350: European Market Analysis (2010-2020) for Mechanical	(
Fans in Bus Engine Cooling by Country – Belarus, Belgium, Czech	Ì
Republic, France, Germany, Italy, Netherlands, Poland, Serbia,	,
Spain, Sweden and The United Kingdom in USD Million 317	č
Chart 351: Glance at 2010, 2015 and 2020 European Value Market	1
	(
Share (%) Analysis for Mechanical Fans in Bus Engine Cooling by	8
Country – Belarus, Belgium, Czech Republic, France, Germany,	,
Italy, Netherlands, Poland, Serbia, Spain, Sweden and The United	
Kingdom	(
Chart 352: European Market Analysis (2010-2020) for Electric Fans	1
in Bus Engine Cooling in Volume ('000 Units) and Value (USD	k
	(
Million)	8
Chart 353: European Market Analysis (2010-2020) for Electric Fans	1
in Bus Engine Cooling by Country – Poland and Sweden in '000	
Units	(
Chart 354: Glance at 2010, 2015 and 2020 European Volume	ľ
Market Share (%) Analysis for Electric Fans in Bus Engine Cooling	1
by Country – Poland and Sweden	(
	8
Chart 355: European Market Analysis (2010-2020) for Electric Fans	1
in Bus Engine Cooling by Country – Poland and Sweden in USD	
in Bus Engine Cooling by Country – Poland and Sweden in USD Million	1
	-
Million	1
Million	(
Million	8
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Million) i (
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Million) i () \ \ ()
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Million) i () \ \ ()

	01 1050 01 10010 0015 100005
	Chart 359: Glance at 2010, 2015 and 2020 European Volume
	Market Share (%) Analysis for Electric Fans in Bus Air Conditioning
	(AC) Condenser Cooling by Country – Belarus, Belgium, Czech
	Republic, France, Germany, Italy, Netherlands, Poland, Serbia,
	Spain, Sweden and The United Kingdom
	Chart 360: European Market Analysis (2010-2020) for Electric Fans
	in Bus Air Conditioning (AC) Condenser Cooling by Country –
	Belarus, Belgium, Czech Republic, France, Germany, Italy,
	Netherlands, Poland, Serbia, Spain, Sweden and The United
	Kingdom in USD Million
	Chart 361: Glance at 2010, 2015 and 2020 European Value Market
	Share (%) Analysis for Electric Fans in Bus Air Conditioning (AC)
	Condenser Cooling by Country – Belarus, Belgium, Czech Republic,
	France, Germany, Italy, Netherlands, Poland, Serbia, Spain,
	Sweden and The United Kingdom
	Chart 362: European Market Analysis (2010-2020) for Blowers in
	Bus HVAC in Volume ('000 Units) and Value (USD Million) 324
	Chart 363: European Market Analysis (2010-2020) for Blowers in
	Bus HVAC by Country – Belarus, Belgium, Czech Republic, France,
	Germany, Italy, Netherlands, Poland, Serbia, Spain, Sweden and
	The United Kingdom in '000 Units
	Chart 364: Glance at 2010, 2015 and 2020 European Volume Market
	Share (%) Analysis for Blowers in Bus HVAC by Country – Belarus,
	Belgium, Czech Republic, France, Germany, Italy, Netherlands,
	Poland, Serbia, Spain, Sweden and The United Kingdom325
	Chart 365: European Market Analysis (2010-2020) for Blowers in
	Bus HVAC by Country – Belarus, Belgium, Czech Republic, France,
	Germany, Italy, Netherlands, Poland, Serbia, Spain, Sweden and
• • • •	The United Kingdom in USD Million 326
	Chart 366: Glance at 2010, 2015 and 2020 European Value Market
	Share (%) Analysis for Blowers in Bus HVAC by Country – Belarus,
	Belgium, Czech Republic, France, Germany, Italy, Netherlands,
	Poland, Serbia, Spain, Sweden and The United Kingdom326
	· · · · · · · · · · · · · · · · · · ·
	NORTH AMERICA327
	Chart 367: North American Production Analysis (2010-2020) for
	Medium & Heavy Trucks by Vehicle Type in Units
	Chart 368: Glance at 2010, 2015 and 2020 North American
	Production Share (%) Analysis for Medium & Heavy Trucks by
	Vehicle Type
	Chart 369: North American Production Analysis (2010-2020) for
	Medium Trucks by Country in Units
	Chart 370: Glance at 2010, 2015 and 2020 North American
	Production Share (%) Analysis for Medium Trucks by Country328
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units329
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country
	Production Share (%) Analysis for Medium Trucks by Country
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country
	Production Share (%) Analysis for Medium Trucks by Country
	Production Share (%) Analysis for Medium Trucks by Country
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country
	Production Share (%) Analysis for Medium Trucks by Country
	Production Share (%) Analysis for Medium Trucks by Country328 Chart 371: North American Production Analysis (2010-2020) for Heavy Trucks by Country in Units
	Production Share (%) Analysis for Medium Trucks by Country



Chart 385: Glance at 2010, 2015 and 2020 North American Value

Global Commercial Vehicle Fans and Blowers Market – Medium Trucks, Heavy Trucks and Buses Oct 2015 | 533 Pages | 725 Charts | Price \$6030

Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by Type – Fans and Blowers..... Chart 386: North American Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling in Volume ('000 Units) and Value (USD Million) Chart 387: North American Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Country - Canada, Mexico and The United States in '000 Units.......338 Chart 388: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Country – Canada, Mexico and The Chart 389: North American Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Country – Canada, Mexico and The United States in USD Million Chart 390: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Country - Canada, Mexico and The United Chart 391: North American Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type -Medium Trucks and Heavy Trucks in '000 Units Chart 392: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Chart 393: North American Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type -Medium Trucks and Heavy Trucks in USD Million Chart 394: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Chart 395: North American Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Fan Type -Mechanical Fans and Electric Fans in '000 Units ... Chart 396: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Fan Type - Mechanical Fans and Electric Chart 397: North American Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Fan Type -Mechanical Fans and Electric Fans in USD Million.... Chart 398: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Fan Type - Mechanical Fans and Electric Fans .. Chart 399: North American Market Analysis (2010-2020) for Mechanical Fans in Medium & Heavy Truck Engine Cooling in Volume ('000 Units) and Value (USD Million) Chart 400: North American Market Analysis (2010-2020) for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Country - Canada, Mexico and The United States in '000 Units 345 Chart 401: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Country - Canada, Mexico and The United States... Chart 402: North American Market Analysis (2010-2020) for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Country - Canada, Mexico and The United States in USD Million Chart 403: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Country - Canada, Mexico and The Chart 404: North American Market Analysis (2010-2020) for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks in '000 Units. 347 Chart 405: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks ... Chart 406: North American Market Analysis (2010-2020) for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks in USD Million .. 348 Chart 407: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type - Medium Trucks and Heavy Trucks .. Chart 408: North American Market Analysis (2010-2020) for Mechanical Fans in Medium Truck Engine Cooling by Country -Canada, Mexico and The United States in '000 Units..... Chart 409: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Mechanical Fans in Medium Truck Engine Cooling by Country - Canada, Mexico and The United States

Chart 410. North American Market Archivis (2010 2020) for	
Chart 410: North American Market Analysis (2010-2020) for Mechanical Fans in Medium Truck Engine Cooling by Country –	
Canada, Mexico and The United States in USD Million	
Chart 411: Glance at 2010, 2015 and 2020 North American Value	
Market Share (%) Analysis for Mechanical Fans in Medium Truck Engine	
Cooling by Country – Canada, Mexico and The United States	
Mechanical Fans in Heavy Truck Engine Cooling by Country –	
Canada, Mexico and The United States in '000 Units351	
Chart 413: Glance at 2010, 2015 and 2020 North American	
Volume Market Share (%) Analysis for Mechanical Fans in Heavy	
Truck Engine Cooling by Country – Canada, Mexico and The United States	
Chart 414: North American Market Analysis (2010-2020) for	
Mechanical Fans in Heavy Truck Engine Cooling by Country –	
Canada, Mexico and The United States in USD Million352	
Chart 415: Glance at 2010, 2015 and 2020 North American Value	
Market Share (%) Analysis for Mechanical Fans in Heavy Truck Engine Cooling by Country – Canada, Mexico and The United	
States	
Chart 416: North American Market Analysis (2010-2020) for	
Electric Fans in Medium & Heavy Truck AC Condenser Cooling in	
Volume ('000 Units) and Value (USD Million)353	
Chart 417: North American Market Analysis (2010-2020) for	
Electric Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling by Country – Canada, Mexico and The United	
States in '000 Units	
Chart 418: Glance at 2010, 2015 and 2020 North American	
Volume Market Share (%) Analysis for Electric Fans in Medium &	
Heavy Truck Air Conditioning (AC) Condenser Cooling by Country –	
Canada, Mexico and The United States	
Electric Fans in Medium & Heavy Truck Air Conditioning (AC)	
Condenser Cooling by Country – Canada, Mexico and The United	
States in USD Million	
Chart 420: Glance at 2010, 2015 and 2020 North American Value	
Market Share (%) Analysis for Electric Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser Cooling by Country –	
Canada, Mexico and The United States	
Chart 421: North American Market Analysis (2010-2020) for	
Electric Fans in Medium & Heavy Truck AC Condenser Cooling by	
Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units 356	
Chart 422: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Electric Fans in Medium &	
Heavy Truck AC Condenser Cooling b Vehicle Type – Medium	
Trucks and Heavy Trucks	
Chart 423: North American Market Analysis (2010-2020) for Electric	
Fans in Medium & Heavy Truck AC Condenser Cooling by Vehicle	
Type – Medium Trucks and Heavy Trucks in USD Million	
Market Share (%) Analysis for Electric Fans in Medium & Heavy	
Truck AC Condenser Cooling b Vehicle Type – Medium Trucks and	
Heavy Trucks357	
Chart 425: North American Market Analysis (2010-2020) for	
Electric Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by Country – Canada, Mexico and The United States in	
'000 Units	
Chart 426: Glance at 2010, 2015 and 2020 North American	
Volume Market Share (%) Analysis for Electric Fans in Medium	
Truck Air Conditioning (AC) Condenser Cooling by Country –	
Canada, Mexico and The United States	
Electric Fans in Medium Truck Air Conditioning (AC) Condenser	
Cooling by Country – Canada, Mexico and The United States in	
USD Million359	
Chart 428: Glance at 2010, 2015 and 2020 North American Value	
Market Share (%) Analysis for Electric Fans in Medium Truck Air	
Conditioning (AC) Condenser Cooling by Country – Canada, Mexico and The United States	
Chart 429: North American Market Analysis (2010-2020) for	
Electric Fans in Heavy Truck Air Conditioning (AC) Condenser	
Cooling by Country - Canada, Mexico and The United States in	
'000 Units	
Chart 430: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Electric Fans in Heavy Truck	
Air Conditioning (AC) Condenser Cooling by Country – Canada,	
Mexico and The United States	
Chart 431: North American Market Analysis (2010-2020) for	
Electric Fans in Heavy Truck Air Conditioning (AC) Condenser	
Cooling by Country – Canada, Mexico and The United States in USD Million	
Chart 432: Glance at 2010, 2015 and 2020 North American Value	
Market Share (%) Analysis for Electric Fans in Heavy Truck Air	
Conditioning (AC) Condenser Cooling by Country – Canada, Mexico	
and The United States	

Chart 433: North American Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC in Volume ('000 Units) and Value (USD Million) Chart 434: North American Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC by Country - Canada, Mexico and The United States in '000 Units..... Chart 435: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by Country - Canada, Mexico and The United Chart 436: North American Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC by Country - Canada, Mexico and The United States in USD Million..... Chart 437: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by Country - Canada, Mexico and The United States 364 Chart 438: North American Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC by Vehicle Type -Medium Trucks and Heavy Trucks in '000 Units.... Chart 439: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by Type - Medium Trucks and Heavy Trucks365 Chart 440: North American Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC by Vehicle Type -Medium Trucks and Heavy Trucks in USD Million Chart 441: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by Type - Medium Trucks and Heavy Trucks ... Chart 442: North American Market Analysis (2010-2020) for Blowers in Medium Truck HVAC by Country - Canada, Mexico and The United States in '000 Units..... Chart 443: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Blowers in Medium Truck HVAC by Country - Canada, Mexico and The United States 367 Chart 444: North American Market Analysis (2010-2020) for Blowers in Medium Truck HVAC by Country - Canada, Mexico and The United States in USD Million.... Chart 445: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Blowers in Medium Truck HVAC by Country - Canada, Mexico and The United States Chart 446: North American Market Analysis (2010-2020) for Blowers in Heavy Truck HVAC by Country - Canada, Mexico and The United States in '000 Units...... Chart 447: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country - Canada, Mexico and The United States Chart 448: North American Market Analysis (2010-2020) for Blowers in Heavy Truck HVAC by Country – Canada, Mexico and The United States in USD Million..... Chart 449: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country - Canada, Mexico and The United States Chart 450: North American Production Analysis (2010-2020) for Buses by Country in Units Chart 451: Glance at 2010, 2015 and 2020 North American Production Share (%) Analysis for Buses by Country...... Chart 452: North American Market Analysis (2010-2020) for Fans & Blowers in Buses in Volume ('000 Units) and Value (USD Million)..... 372 Chart 453: North American Market Analysis (2010-2020) for Fans & Blowers in Buses by Country - Canada and The United States in Chart 454: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Fans & Blowers in Buses by Country - Canada and The United States...... Chart 455: North American Market Analysis (2010-2020) for Fans & Blowers in Buses by Country - Canada and The United States in USD Million..... Chart 456: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Fans & Blowers in Buses by Country - Canada and The United States..... Chart 457: North American Market Analysis (2010-2020) for Fans & Blowers in Buses by Type - Fans and Blowers in '000 Units... 375 Chart 458: Glance at 2010, 2015 and 2020 North American Volume Market Share (%) Analysis for Fans & Blowers in Buses by Type - Fans and Blowers...... Chart 459: North American Market Analysis (2010-2020) for Fans & Blowers in Buses by Type - Fans and Blowers in USD Million 376 Chart 460: Glance at 2010, 2015 and 2020 North American Value Market Share (%) Analysis for Fans & Blowers in Buses by Type – Fans and Blowers Chart 461: North American Market Analysis (2010-2020) for Fans in Bus Engine Cooling in Volume ('000 Units) and Value (USD Million)377 Chart 462: North American Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Country - Canada and The United States



Global Commercial Vehicle Fans and Blowers Market – Medium Trucks, Heavy Trucks and Buses Oct 2015 | 533 Pages | 725 Charts | Price \$6030

Chart 463: Glance at 2010, 2015 and 2020 North American
Volume Market Share (%) Analysis for Fans in Bus Engine Cooling
by Country – Canada and The United States
Chart 464: North American Market Analysis (2010-2020) for Fans
in Bus Engine Cooling by Country – Canada and
The United States in USD Million
Chart 465: Glance at 2010, 2015 and 2020 North American Value
Market Share (%) Analysis for Fans in Bus Engine Cooling by
Country – Canada and The United States
Chart 466: North American Market Analysis (2010-2020) for Fans
in Bus Engine Cooling by Fan Type – Mechanical Fans and Electric
Fans in '000 Units
Chart 467: Glance at 2010, 2015 and 2020 North American
Volume Market Share (%) Analysis for Fans in Bus Engine Cooling
by Fan Type – Mechanical Fans and Electric Fans 380
Chart 468: North American Market Analysis (2010-2020) for Fans
in Bus Engine Cooling by Fan Type – Mechanical Fans and Electric
Fans in USD Million
Chart 469: Glance at 2010, 2015 and 2020 North American Value
Market Share (%) Analysis for Fans in Bus Engine Cooling by Fan
Type – Mechanical Fans and Electric Fans
Chart 470: North American Market Analysis (2010-2020) for
Mechanical Fans in Bus Engine Cooling in Volume ('000 Units) and
Value (USD Million)
Chart 471: North American Market Analysis (2010-2020) for
Mechanical Fans in Bus Engine Cooling by Country – Canada and
The United States in '000 Units
Chart 472: Glance at 2010, 2015 and 2020 North American
Volume Market Share (%) Analysis for Mechanical Fans in Bus
Engine Cooling by Country – Canada and The United States 383
Chart 473: North American Market Analysis (2010-2020) for
Mechanical Fans in Bus Engine Cooling by Country – Canada and
The United States in USD Million
Chart 474: Glance at 2010, 2015 and 2020 North American Value
Market Share (%) Analysis for Mechanical Fans in Bus Engine
Cooling by Country – Canada and The United States
Chart 475: North American Market Analysis (2010-2020) for
Electric Fans in Bus Engine Cooling in Volume ('000 Units) and
Value (USD Million)
Chart 476: North American Market Analysis (2010-2020) for
Electric Fans in Bus Engine Cooling by Country – Canada and The
United States in '000 Units
United States in '000 Units

SOUTH AMERICA394	
Chart 490: South American Production Analysis (2010-2020) for Medium & Heavy Trucks by Vehicle Type in Units394	
Chart 491: Glance at 2010, 2015 and 2020 South American	
Production Share (%) Analysis for Medium & Heavy Trucks by	
Vehicle Type	
Chart 492: South American Production Analysis (2010-2020) for Medium Trucks by Country in Units	
Chart 493: Glance at 2010, 2015 and 2020 South American	
Production Share (%) Analysis for Medium Trucks by Country 395	
Chart 494: South American Production Analysis (2010-2020) for Heavy Trucks by Country in Units	
Chart 495: Glance at 2010, 2015 and 2020 South American	
Production Share (%) Analysis for Heavy Trucks by Country 396	
Chart 496: South American Market Analysis (2010-2020) for Fans	
& Blowers in Medium & Heavy Trucks in Volume ('000 Units) and Value (USD Million)397	
Chart 497: South American Market Analysis (2010-2020) for Fans	
in Medium & Heavy Truck Engine Cooling by Vehicle Type –	
Medium Trucks and Heavy Trucks in '000 Units	
Volume Market Share (%) Analysis for Fans in Medium & Heavy	
Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy	
Trucks	
in Medium & Heavy Truck Engine Cooling by Vehicle Type –	
Medium Trucks and Heavy Trucks in USD Million	
Chart 500: Glance at 2010, 2015 and 2020 South American Value	
Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy	
Trucks	
Chart 501: South American Market Analysis (2010-2020) for Fans	
& Blowers in Medium & Heavy Trucks by Country – Argentina, Brazil and Venezuela in '000 Units	
Chart 502: Glance at 2010, 2015 and 2020 South American	
Volume Market Share (%) Analysis for Fans & Blowers in Medium	
& Heavy Trucks by Country – Argentina, Brazil and Venezuela . 400	
Chart 503: South American Market Analysis (2010-2020) for Fans & Blowers in Medium & Heavy Trucks by Country – Argentina,	
Brazil and Venezuela in USD Million	
Chart 504: Glance at 2010, 2015 and 2020 South American Value	
Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by Country – Argentina, Brazil and Venezuela	
Chart 505: South American Market Analysis (2010-2020) for Fans	
& Blowers in Medium & Heavy Trucks by Type –	
Fans and Blowers in '000 Units	
Volume Market Share (%) Analysis for Fans & Blowers in Medium	
& Heavy Trucks by Type – Fans and Blowers402	
Chart 507: South American Market Analysis (2010-2020) for Fans	
& Blowers in Medium & Heavy Trucks by Type – Fans and Blowers in USD Million403	
Chart 508: Glance at 2010, 2015 and 2020 South American Value	
Market Share (%) Analysis for Fans & Blowers in Medium & Heavy	
Trucks by Type – Fans and Blowers	
in Medium & Heavy Truck Engine Cooling in Volume ('000 Units)	
and Value (USD Million)	
Chart 510: South American Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Country – Argentina,	
Brazil and Venezuela in '000 Units	
Chart 511: Glance at 2010, 2015 and 2020 South American Volume	
Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine	
Cooling by Country – Argentina, Brazil and Venezuela	
in Medium & Heavy Truck Engine Cooling by Country – Argentina,	
Brazil and Venezuela in USD Million	
Chart 513: Glance at 2010, 2015 and 2020 South American Value Market Share (%) Analysis for Fans in Medium & Heavy Truck	
Engine Cooling by Country – Argentina, Brazil and Venezuela 406	
Chart 514: South American Market Analysis (2010-2020) for Fans	
in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units	
Chart 515: Glance at 2010, 2015 and 2020 South American	
Volume Market Share (%) Analysis for Fans in Medium & Heavy	
Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy	
Trucks	
in Medium & Heavy Truck Engine Cooling by Vehicle Type –	
Medium Trucks and Heavy Trucks in USD Million	
Chart 517: Glance at 2010, 2015 and 2020 South American Value Market Share (%) Analysis for Fans in Medium & Heavy Truck	
Engine Cooling by Vehicle Type – Medium Trucks and Heavy	
Trucks 408	

Chart 518: South American Market Analysis (2010-2020) for Fans	
in Medium & Heavy Truck Engine Cooling by Fan Type –	
Mechanical Fans and Electric Fans in '000 Units 409	
Chart 519: Glance at 2010, 2015 and 2020 South American	
Volume Market Share (%) Analysis for Fans in Medium & Heavy	
Truck Engine Cooling by Fan Type – Mechanical Fans and Electric	
Fans	
Chart 520: South American Market Analysis (2010-2020) for Fans	
in Medium & Heavy Truck Engine Cooling by Fan Type –	
Mechanical Fans and Electric Fans in USD Million	
Chart 521: Glance at 2010, 2015 and 2020 South American Value	
Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine	
Cooling by Fan Type – Mechanical Fans and Electric Fans410	
Chart 522: South American Market Analysis (2010-2020) for	
Mechanical Fans in Medium & Heavy Truck Engine Cooling in	
Volume ('000 Units) and Value (USD Million)411	
Chart 523: South American Market Analysis (2010-2020) for	
Mechanical Fans in Medium & Heavy Truck Engine Cooling by	
Country – Argentina, Brazil and Venezuela in '000 Units	
Chart 524: Glance at 2010, 2015 and 2020 South American	
Volume Market Share (%) Analysis for Mechanical Fans in Medium	
& Heavy Truck Engine Cooling by Country – Argentina, Brazil and	
Venezuela	
Chart 525: South American Market Analysis (2010-2020) for	
Mechanical Fans in Medium & Heavy Truck Engine Cooling by	
Country - Argentina, Brazil and Venezuela in USD Million 413	
Chart 526: Glance at 2010, 2015 and 2020 South American Value	
Market Share (%) Analysis for Mechanical Fans in Medium &	
Heavy Truck Engine Cooling by Country – Argentina, Brazil and	
Venezuela413	
Chart 527: South American Market Analysis (2010-2020) for	
Mechanical Fans in Medium & Heavy Truck Engine Cooling by	
Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units 414	
Chart 528: Glance at 2010, 2015 and 2020 South American	
Volume Market Share (%) Analysis for Mechanical Fans in Medium	
& Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks	
and Heavy Trucks	
Chart 529: South American Market Analysis (2010-2020) for	
Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle	
Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle	
Type – Medium Trucks and Heavy Trucks in USD Million415	
Type – Medium Trucks and Heavy Trucks in USD Million415 Chart 530: Glance at 2010, 2015 and 2020 South American Value	
Type – Medium Trucks and Heavy Trucks in USD Million415 Chart 530: Glance at 2010, 2015 and 2020 South American Value Market Share (%) Analysis for Mechanical Fans in Medium &	
Type – Medium Trucks and Heavy Trucks in USD Million415 Chart 530: Glance at 2010, 2015 and 2020 South American Value Market Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and	
Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million415 Chart 530: Glance at 2010, 2015 and 2020 South American Value Market Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and	
Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	
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Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	
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Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	
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Type – Medium Trucks and Heavy Trucks in USD Million	
Type – Medium Trucks and Heavy Trucks in USD Million	



Global Commercial Vehicle Fans and Blowers Market – Medium Trucks, Heavy Trucks and Buses Oct 2015 | 533 Pages | 725 Charts | Price \$6030

Chart 543: Glance at 2010, 2015 and 2020 South American Value
Market Share (%) Analysis for Electric Fans in Medium & Heavy
Truck Air Conditioning (AC) Condenser Cooling by Country –
Argentina, Brazil and Venezuela422
Chart 544: South American Market Analysis (2010-2020) for
Electric Fans in Medium & Heavy Truck AC Condenser Cooling by
Vehicle Type - Medium Trucks and Heavy Trucks in '000 Units. 423
Chart 545: Glance at 2010, 2015 and 2020 South American
Volume Market Share (%) Analysis for Electric Fans in Medium &
Heavy Truck AC Condenser Cooling b Vehicle Type – Medium
Trucks and Heavy Trucks
Chart 546: South American Market Analysis (2010-2020) for Electric
Fans in Medium & Heavy Truck AC Condenser Cooling by Vehicle
Type – Medium Trucks and Heavy Trucks in USD Million424
Chart 547: Glance at 2010, 2015 and 2020 South American Value
Market Share (%) Analysis for Electric Fans in Medium & Heavy
Truck AC Condenser Cooling b Vehicle Type – Medium Trucks and
Heavy Trucks
Chart 548: South American Market Analysis (2010-2020) for Electric
Fans in Medium Truck Air Conditioning (AC) Condenser Cooling by
Country – Argentina, Brazil and Venezuela in '000 Units425
Chart 549: Glance at 2010, 2015 and 2020 South American
Volume Market Share (%) Analysis for Electric Fans in Medium
Truck Air Conditioning (AC) Condenser Cooling by Country –
Argentina, Brazil and Venezuela
Chart 550: South American Market Analysis (2010-2020) for
Electric Fans in Medium Truck Air Conditioning (AC) Condenser
Cooling by Country – Argentina, Brazil and Venezuela in USD
Million
Chart 551: Glance at 2010, 2015 and 2020 South American Value
Market Share (%) Analysis for Electric Fans in Medium Truck Air
Conditioning (AC) Condenser Cooling by Country – Argentina,
Brazil and Venezuela
Chart 552: South American Market Analysis (2010-2020) for Electric
Fans in Heavy Truck Air Conditioning (AC) Condenser Cooling by
Country - Argentina, Brazil and Venezuela in '000 Units427
Chart 553: Glance at 2010, 2015 and 2020 South American
Volume Market Share (%) Analysis for Electric Fans in Heavy Truck
Air Conditioning (AC) Condenser Cooling by Country – Argentina,
Brazil and Venezuela427
Chart 554: South American Market Analysis (2010-2020) for
Electric Fans in Heavy Truck Air Conditioning (AC) Condenser
Cooling by Country – Argentina, Brazil and Venezuela in USD
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
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Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million
Cooling by Country – Argentina, Brazil and Venezuela in USD Million

Chart 568: Glance at 2010, 2015 and 2020 South American Value Market Share (%) Analysis for Blowers in Medium Truck HVAC by Country – Argentina, Brazil and Venezuela
Type – Fans and Blowers
Fans and Blowers
Million)
Chart 585: South American Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Country – Argentina and Brazil in '000 Units
Chart 586: Glance at 2010, 2015 and 2020 South American
Volume Market Share (%) Analysis for Fans in Bus Engine Cooling by Country – Argentina and Brazil445
Chart 587: South American Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Country – Argentina and Brazil in USD Million
Chart 588: Glance at 2010, 2015 and 2020 South American Value Market Share (%) Analysis for Fans in Bus Engine Cooling by
Country – Argentina and Brazil
Chart 589: South American Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Fan Type – Mechanical Fans and Electric
Fans in '000 Units
Volume Market Share (%) Analysis for Fans in Bus Engine Cooling
by Fan Type – Mechanical Fans and Electric Fans 447
Chart 591: South American Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Fan Type – Mechanical Fans and Electric Fans in USD Million
Chart 592: Glance at 2010, 2015 and 2020 South American Value
Market Share (%) Analysis for Fans in Bus Engine Cooling by Fan
Type – Mechanical Fans and Electric Fans
Mechanical Fans in Bus Engine Cooling in Volume ('000 Units) and
Value (USD Million)
and Brazil in '000 Units
Volume Market Share (%) Analysis for Mechanical Fans in Bus
Engine Cooling by Country – Argentina and Brazil 450
Chart 596: South American Market Analysis (2010-2020) for
Mechanical Fans in Bus Engine Cooling by Country – Argentina and Brazil in USD Million
Chart 597: Glance at 2010, 2015 and 2020 South American Value
Market Share (%) Analysis for Mechanical Fans in Bus Engine
Cooling by Country – Argentina and Brazil451

Chart 598: South American Market Analysis (2010-2020) for
Electric Fans in Bus AC Condenser Cooling in Volume ('000 Units)
and Value (USD Million)
Chart 599: South American Market Analysis (2010-2020) for
Electric Fans in Bus Air Conditioning (AC) Condenser Cooling by
Country – Argentina and Brazil in '000 Units
Chart 600: Glance at 2010, 2015 and 2020 South American
Volume Market Share (%) Analysis for Electric Fans in Bus Air
Conditioning (AC) Condenser Cooling by Country – Argentina and
Brazil
Electric Fans in Bus Air Conditioning (AC) Condenser Cooling by
Country – Argentina and Brazil in USD Million
Chart 602: Glance at 2010, 2015 and 2020 South American Value
Market Share (%) Analysis for Electric Fans in Bus Air Conditioning
(AC) Condenser Cooling by Country – Argentina and Brazil 454
Chart 603: South American Market Analysis (2010-2020) for
Blowers in Bus HVAC in Volume ('000 Units) and Value (USD Million)
Chart 604: South American Market Analysis (2010-2020) for
Blowers in Bus HVAC by Country – Argentina and Brazil in '000
Units
Chart 605: Glance at 2010, 2015 and 2020 South American
Volume Market Share (%) Analysis for Blowers in Bus HVAC by
Country – Argentina and Brazil
Chart 606: South American Market Analysis (2010-2020) for
Blowers in Bus HVAC by Country – Argentina and Brazil in USD Million
Chart 607: Glance at 2010, 2015 and 2020 South American Value
Market Share (%) Analysis for Blowers in Bus HVAC by Country –
Argentina and Brazil
REST OF WORLD458
Chart 608: Rest of World Production Analysis (2010-2020) for
Medium & Heavy Trucks by Vehicle Type in Units
Production Share (%) Analysis for Medium & Heavy Trucks by
Vehicle Type
Chart 610: Rest of World Production Analysis (2010-2020) for
Medium Trucks by Country in Units
Chart 611: Glance at 2010, 2015 and 2020 Rest of World Production
Share (%) Analysis for Medium Trucks by Country459
Chart 612: Rest of World Production Analysis (2010-2020) for
Heavy Trucks by Country in Units
Chart 613: Glance at 2010, 2015 and 2020 Rest of World Production Share (%) Analysis for Heavy Trucks by Country 460
Chart 614: Rest of World Market Analysis (2010-2020) for Fans &
Blowers in Medium & Heavy Trucks in Volume ('000 Units) and
Value (USD Million)
Chart 615: Rest of World Market Analysis (2010-2020) for Fans in
Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium
Trucks and Heavy Trucks in '000 Units
Chart 616: Glance at 2010, 2015 and 2020 Rest of World Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck
Engine Cooling by Vehicle Type – Medium Trucks and Heavy
Trucks
Chart 617: Rest of World Market Analysis (2010-2020) for Fans in
Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
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Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
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Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million
Trucks and Heavy Trucks in USD Million



${\bf Global\ Commercial\ Vehicle\ Fans\ and\ Blowers\ Market-Medium\ Trucks, Heavy\ Trucks\ and\ Buses}$

Oct 2015 | 533 Pages | 725 Charts | Price \$6030

Chart 626: Glance at 2010, 2015 and 2020 Rest of World Value	
Market Share (%) Analysis for Fans & Blowers in Medium & Heavy Trucks by Type – Fans and Blowers467	
Chart 627: Rest of World Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling in Volume ('000 Units) and	
Value (USD Million)468	
Chart 628: Rest of World Market Analysis (2010-2020) for Fans in	
Medium & Heavy Truck Engine Cooling by Country – Russia, South Africa, Turkey and Ukraine in '000 Units469	
Chart 629: Glance at 2010, 2015 and 2020 Rest of World Volume	
Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Country – Russia, South Africa, Turkey and	
Ukraine	
Chart 630: Rest of World Market Analysis (2010-2020) for Fans in	
Medium & Heavy Truck Engine Cooling by Country – Russia, South Africa, Turkey and Ukraine in USD Million470	
Chart 631: Glance at 2010, 2015 and 2020 Rest of World Value	
Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Country – Russia, South Africa, Turkey and	
Ukraine	
Chart 632: Rest of World Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium	
Trucks and Heavy Trucks in '000 Units471	
Chart 633: Glance at 2010, 2015 and 2020 Rest of World Volume	
Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy	
Trucks	
Chart 634: Rest of World Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium	
Trucks and Heavy Trucks in USD Million	
Chart 635: Glance at 2010, 2015 and 2020 Rest of World Value	
Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy	
Trucks	
Chart 636: Rest of World Market Analysis (2010-2020) for Fans in Medium & Heavy Truck Engine Cooling by Fan Type – Mechanical	
Fans and Electric Fans in '000 Units473	
Chart 637: Glance at 2010, 2015 and 2020 Rest of World Volume Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine	
Cooling by Fan Type – Mechanical Fans and Electric Fans	
Chart 638: Rest of World Market Analysis (2010-2020) for Fans in	
Medium & Heavy Truck Engine Cooling by Fan Type – Mechanical Fans and Electric Fans in USD Million474	
Chart 639: Glance at 2010, 2015 and 2020 Rest of World Value	
Market Share (%) Analysis for Fans in Medium & Heavy Truck Engine Cooling by Fan Type – Mechanical Fans and Electric Fans474	
Chart 640: Rest of World Market Analysis (2010-2020) for	
Mechanical Fans in Medium & Heavy Truck Engine Cooling in Volume ('000 Units) and Value (USD Million)475	
Chart 641: Rest of World Market Analysis (2010-2020) for Mechanical	
Fans in Medium & Heavy Truck Engine Cooling by Country – Russia,	
South Africa, Turkey and Ukraine in '000 Units476 Chart 642: Glance at 2010, 2015 and 2020 Rest of World Volume	
Market Share (%) Analysis for Mechanical Fans in Medium &	
Heavy Truck Engine Cooling by Country – Russia, South Africa, Turkey and Ukraine	
Chart 643: Rest of World Market Analysis (2010-2020) for Mechanical	
Fans in Medium & Heavy Truck Engine Cooling by Country – Russia, South Africa, Turkey and Ukraine in USD Million	
Chart 644: Glance at 2010, 2015 and 2020 Rest of World Value	
Market Share (%) Analysis for Mechanical Fans in Medium &	
Heavy Truck Engine Cooling by Country – Russia, South Africa, Turkey and Ukraine477	
Chart 645: Rest of World Market Analysis (2010-2020) for	
Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units478	
Chart 646: Glance at 2010, 2015 and 2020 Rest of World Volume	
Market Share (%) Analysis for Mechanical Fans in Medium &	
Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks478	
Chart 647: Rest of World Market Analysis (2010-2020) for Mechanical	
Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and Heavy Trucks in USD Million	
Chart 648: Glance at 2010, 2015 and 2020 Rest of World Value	
Market Share (%) Analysis for Mechanical Fans in Medium & Heavy Truck Engine Cooling by Vehicle Type – Medium Trucks and	
Heavy Trucks479	
Chart 649: Rest of World Market Analysis (2010-2020) for	
Mechanical Fans in Medium Truck Engine Cooling by Country – Russia, South Africa, Turkey and Ukraine in '000 Units480	
Chart 650: Glance at 2010, 2015 and 2020 Rest of World Volume	
Market Share (%) Analysis for Mechanical Fans in Medium Truck Engine Cooling by Country – Russia, South Africa, Turkey and	
Ukraine	

Chart 651: Rest of World Market Analysis (2010-2020) for	C
Mechanical Fans in Medium Truck Engine Cooling by Country –	iı
3 3 3 3	
Russia, South Africa, Turkey and Ukraine in USD Million 481	T
Chart 652: Glance at 2010, 2015 and 2020 Rest of World Value	C
Market Share (%) Analysis for Mechanical Fans in Medium Truck	Ν
Engine Cooling by Country – Russia, South Africa, Turkey and	Н
Ukraine	
Chart 653: Rest of World Market Analysis (2010-2020) for	İI
Mechanical Fans in Heavy Truck Engine Cooling by Country –	T
Russia, South Africa, Turkey and Ukraine in '000 Units	C
Chart 654: Glance at 2010, 2015 and 2020 Rest of World Volume	N
Market Share (%) Analysis for Mechanical Fans in Heavy Truck	H
Engine Cooling by Country – Russia, South Africa, Turkey and	C
Ukraine	iı
Chart 655: Rest of World Market Analysis (2010-2020) for	а
Mechanical Fans in Heavy Truck Engine Cooling by Country –	C
Russia, South Africa, Turkey and Ukraine in USD Million 483	Ν
Chart 656: Glance at 2010, 2015 and 2020 Rest of World Value	H
Market Share (%) Analysis for Mechanical Fans in Heavy Truck	C
Engine Cooling by Country – Russia, South Africa, Turkey and	iı
Ukraine	а
Chart 657: Rest of World Market Analysis (2010-2020) for Electric	C
Fans in Medium & Heavy Truck AC Condenser Cooling in Volume	Ν
('000 Units) and Value (USD Million)	H
Chart 658: Rest of World Market Analysis (2010-2020) for Electric	C
Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser	iı
Cooling by Country – Russia, South Africa, Turkey and Ukraine in	а
'000 Units	C
Chart 659: Glance at 2010, 2015 and 2020 Rest of World Volume	Ν
Market Share (%) Analysis for Electric Fans in Medium & Heavy	C
Truck Air Conditioning (AC) Condenser Cooling by Country –	Č
Russia, South Africa, Turkey and Ukraine	İI
Chart 660: Rest of World Market Analysis (2010-2020) for Electric	а
Fans in Medium & Heavy Truck Air Conditioning (AC) Condenser	C
Cooling by Country – Russia, South Africa, Turkey and Ukraine in	Ν
USD Million	C
Chart 661: Glance at 2010, 2015 and 2020 Rest of World Value	C
Market Share (%) Analysis for Electric Fans in Medium & Heavy	İI
Truck Air Conditioning (AC) Condenser Cooling by Country –	а
Russia, South Africa, Turkey and Ukraine	C
Chart 662: Rest of World Market Analysis (2010-2020) for Electric	N
Fans in Medium & Heavy Truck AC Condenser Cooling by Vehicle	C
Type – Medium Trucks and Heavy Trucks in '000 Units	C
Chart 663: Glance at 2010, 2015 and 2020 Rest of World Volume	ir
Market Share (%) Analysis for Electric Fans in Medium & Heavy	а
Truck AC Condenser Cooling b Vehicle Type – Medium Trucks and	
	C
Heavy Trucks	N
Chart 664: Rest of World Market Analysis (2010-2020) for Electric	C
Fans in Medium & Heavy Truck AC Condenser Cooling by Vehicle	C
Type – Medium Trucks and Heavy Trucks in USD Million 488	Е
Chart 665: Glance at 2010, 2015 and 2020 Rest of World Value	C
Market Share (%) Analysis for Electric Fans in Medium & Heavy	P
Truck AC Condenser Cooling b Vehicle Type – Medium Trucks and	C
Heavy Trucks	В
Chart 666: Rest of World Market Analysis (2010-2020) for Electric Fans	C
in Medium Truck Air Conditioning (AC) Condenser Cooling by Country –	
Russia, South Africa, Turkey and Ukraine in '000 Units	В
	L
Chart 667: Glance at 2010, 2015 and 2020 Rest of World Volume	C
Market Share (%) Analysis for Electric Fans in Medium Truck Air	Ν
Conditioning (AC) Condenser Cooling by Country – Russia, South	_
Africa, Turkey and Ukraine	_
Chart 668: Rest of World Market Analysis (2010-2020) for Electric Fans	C
	В
in Medium Truck Air Conditioning (AC) Condenser Cooling by Country –	l
Russia, South Africa, Turkey and Ukraine in USD Million	C
Chart 669: Glance at 2010, 2015 and 2020 Rest of World Value	N
Market Share (%) Analysis for Electric Fans in Medium Truck Air	- 11
Conditioning (AC) Condenser Cooling by Country – Russia, South	_
Africa, Turkey and Ukraine	C
	В
Chart 670: Rest of World Market Analysis (2010-2020) for Electric Fans	C
in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country –	N
Russia, South Africa, Turkey and Ukraine in '000 Units491	F
Chart 671: Glance at 2010, 2015 and 2020 Rest of World Volume	
Market Share (%) Analysis for Electric Fans in Heavy Truck Air	C
Conditioning (AC) Condenser Cooling by Country – Russia, South	В
	C
Africa, Turkey and Ukraine	N
Chart 672: Rest of World Market Analysis (2010-2020) for Electric Fans	F
in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country –	
Russia, South Africa, Turkey and Ukraine in USD Million	C
Chart 673: Glance at 2010, 2015 and 2020 Rest of World Value	E
	C
Market Share (%) Analysis for Electric Fans in Heavy Truck Air	
Market Share (%) Analysis for Electric Fans in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country – Russia, South	Е
Market Share (%) Analysis for Electric Fans in Heavy Truck Air	B
Market Share (%) Analysis for Electric Fans in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country – Russia, South Africa, Turkey and Ukraine	E L
Market Share (%) Analysis for Electric Fans in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country – Russia, South Africa, Turkey and Ukraine	E L C
Market Share (%) Analysis for Electric Fans in Heavy Truck Air Conditioning (AC) Condenser Cooling by Country – Russia, South Africa, Turkey and Ukraine	E L

Chart 675: Rest of World Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC by Country – Russia, South Africa,
Turkey and Ukraine in '000 Units
HVAC by Country – Russia, South Africa, Turkey and Ukraine 494 Chart 677: Rest of World Market Analysis (2010-2020) for Blowers
in Medium & Heavy Truck HVAC by Country – Russia, South Africa, Turkey and Ukraine in USD Million
Market Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by Country – Russia, South Africa, Turkey and Ukraine 495 Chart 679: Rest of World Market Analysis (2010-2020) for Blowers
in Medium & Heavy Truck HVAC by Vehicle Type – Medium Trucks and Heavy Trucks in '000 Units
Chart 680: Glance at 2010, 2015 and 2020 Rest of World Volume Market Share (%) Analysis for Blowers in Medium & Heavy Truck HVAC by Type – Medium Trucks and Heavy Trucks
Chart 681: Rest of World Market Analysis (2010-2020) for Blowers in Medium & Heavy Truck HVAC by Vehicle Type – Medium Trucks
and Heavy Trucks in USD Million
HVAC by Type – Medium Trucks and Heavy Trucks
and Ukraine in '000 Units
Country – Russia, South Africa, Turkey and Ukraine
in Medium Truck HVAC by Country – Russia, South Africa, Turkey and Ukraine in USD Million
Market Share (%) Analysis for Blowers in Medium Truck HVAC by Country – Russia, South Africa, Turkey and Ukraine
in Heavy Truck HVAC by Country – Russia, South Africa, Turkey and Ukraine in '000 Units
Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Russia, South Africa, Turkey and Ukraine500
Chart 689: Rest of World Market Analysis (2010-2020) for Blowers in Heavy Truck HVAC by Country – Russia, South Africa, Turkey and Ukraine in USD Million
Chart 690: Glance at 2010, 2015 and 2020 Rest of World Value Market Share (%) Analysis for Blowers in Heavy Truck HVAC by Country – Russia, South Africa, Turkey and Ukraine
Chart 691: Rest of World Production Analysis (2010-2020) for Buses by Country in Units
Production Share (%) Analysis for Buses by Country
Blowers in Buses in Volume ('000 Units) and Value (USD Million)503 Chart 694: Rest of World Market Analysis (2010-2020) for Fans & Blowers in Buses by Country – Russia, South Africa, Turkey and
Ukraine in '000 Units
 Russia, South Africa, Turkey and Ukraine
Ukraine in USD Million
Market Share (%) Analysis for Fans & Blowers in Buses by Country – Russia, South Africa, Turkey and Ukraine
Blowers in Buses by Type – Fans and Blowers in '000 Units 506 Chart 699: Glance at 2010, 2015 and 2020 Rest of World Volume Market Share (%) Analysis for Fans & Blowers in Buses by Type –
Fans and Blowers
Chart 701: Glance at 2010, 2015 and 2020 Rest of World Value Market Share (%) Analysis for Fans & Blowers in Buses by Type – Fans and Blowers
Chart 702: Rest of World Market Analysis (2010-2020) for Fans in Bus Engine Cooling in Volume ('000 Units) and Value (USD Million)508
Chart 703: Rest of World Market Analysis (2010-2020) for Fans in Bus Engine Cooling by Country – Russia, South Africa, Turkey and Ukraine in '000 Units
Chart 704: Glance at 2010, 2015 and 2020 Rest of World Volume Market Share (%) Analysis for Fans in Bus Engine Cooling by Country – Russia, South Africa, Turkey and Ukraine509



Chart 705: Rest of World Market Analysis (2010-2020) for Fans in

Global Commercial Vehicle Fans and Blowers Market – Medium Trucks, Heavy Trucks and Buses Oct 2015 | 533 Pages | 725 Charts | Price \$6030

Bus Engine Cooling by Country – Russia, South Africa, Turkey and
Ukraine in USD Million510
Chart 706: Glance at 2010, 2015 and 2020 Rest of World Value
Market Share (%) Analysis for Fans in Bus Engine Cooling by
Country – Russia, South Africa, Turkey and Ukraine510
Chart 707: Rest of World Market Analysis (2010-2020) for Fans in
Bus Engine Cooling by Fan Type – Mechanical Fans and Electric
Fans in '000 Units
Chart 708: Glance at 2010, 2015 and 2020 Rest of World Volume
Market Share (%) Analysis for Fans in Bus Engine Cooling by Fan
Type – Mechanical Fans and Electric Fans511
Chart 709: Rest of World Market Analysis (2010-2020) for Fans in
Bus Engine Cooling by Fan Type – Mechanical Fans and Electric
Fans in USD Million512
Chart 710: Glance at 2010, 2015 and 2020 Rest of World Value
Market Share (%) Analysis for Fans in Bus Engine Cooling by Fan
Type – Mechanical Fans and Electric Fans512
Chart 711: Rest of World Market Analysis (2010-2020) for
Mechanical Fans in Bus Engine Cooling in Volume ('000 Units) and
Value (USD Million)513
Chart 712: Rest of World Market Analysis (2010-2020) for
Mechanical Fans in Bus Engine Cooling by Country – Russia, South
Africa, Turkey and Ukraine in '000 Units514
Chart 713: Glance at 2010, 2015 and 2020 Rest of World Volume
Market Share (%) Analysis for Mechanical Fans in Bus Engine Cooling
by Country – Russia, South Africa, Turkey and Ukraine

Chart 714: Rest of World Market Analysis (2010-2020) for
Mechanical Fans in Bus Engine Cooling by Country – Russia, South
Africa, Turkey and Ukraine in USD Million515
Chart 715: Glance at 2010, 2015 and 2020 Rest of World Value
Market Share (%) Analysis for Mechanical Fans in Bus Engine
Cooling by Country – Russia, South Africa, Turkey and Ukraine 515
Chart 716: Rest of World Market Analysis (2010-2020) for Electric
Fans in Bus AC Condenser Cooling in Volume ('000 Units) and
Value (USD Million)516
Chart 717: Rest of World Market Analysis (2010-2020) for Electric
Fans in Bus Air Conditioning (AC) Condenser Cooling by Country –
Russia, South Africa, Turkey and Ukraine in '000 Units517
Chart 718: Glance at 2010, 2015 and 2020 Rest of World Volume
Market Share (%) Analysis for Electric Fans in Bus Air Conditioning
(AC) Condenser Cooling by Country – Russia, South Africa, Turkey
and Ukraine517
Chart 719: Rest of World Market Analysis (2010-2020) for Electric
Fans in Bus Air Conditioning (AC) Condenser Cooling by Country –
Russia, South Africa, Turkey and Ukraine in USD Million 518
Chart 720: Glance at 2010, 2015 and 2020 Rest of World Value
Market Share (%) Analysis for Electric Fans in Bus Air Conditioning
(AC) Condenser Cooling by Country – Russia, South Africa, Turkey
and Ukraine518
Chart 721: Rest of World Market Analysis (2010-2020) for Blowers
in Bus HVAC in Volume ('000 Units) and Value (USD Million) 519
Chart 722: Rest of World Market Analysis (2010-2020) for Blowers in Bus
HVAC by Country – Russia, South Africa, Turkey and Ukraine in '000 Units . 520

Market Share (%) Analysis for Blowers in Bus HVAC by Country – Russia, South Africa, Turkey and Ukraine
Russia, South Africa, Turkey and Ukraine521
TABLES: Table 1: Major Applications for Fans in Different Segments of Automotive/Transportation Vehicles 3 Table 2: Major Applications for Blowers in Different Segments of Automotive/Transportation Vehicles 3
FIGURES: 4 Figure 1: Basic Engine Cooling System

Chart 723: Glance at 2010, 2015 and 2020 Rest of World Volume

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