

Class 8 Truck Market in North America 2017-2022

<https://marketpublishers.com/r/CE3C803BFAAEN.html>

Date: December 2017

Pages: 65

Price: US\$ 3,000.00 (Single User License)

ID: CE3C803BFAAEN

Abstracts

INTRODUCTION- North America has been an economic powerhouse for more than a century now. It has continued to be on top because the US, Canada and Mexico are close-knit markets. This market has benefitted from some disrupting innovations, the presence of skilled workers and a strong internal market. There is no other industry apart from trucking which has benefitted more from NAFTA which came into effect 23 years ago. The truck manufacturers, Fleet operators grew more than 4 times ever since this agreement got underway.

Seamless freight movement is what fuels mega economies. In North America, more than 66% of the trade that happens between the participating countries the US, Canada and Mexico happens via Trucks. Other modes of transportation like rail, Air pipeline when cumulatively combined carries only the remaining 34% of the freight. Trucks also have a major role in multimodal shipments, more often than not providing the first and last mile connectivity to factories, warehouses, and stores

MARKET DYNAMICS- Strength in manufacturing, growing retail sales, and signs of a slowly improving housing market are all acting as drivers of truck tonnage volumes but they are also facing a lot of headwinds. The fleet operators in North America have a tough job cut out on their hands. The industry is grappling with Technician shortage, rising lifetime equipment ownership costs, driver shortage, upcoming GHG-2 emission and ELD mandate.

As long-haul freight continues to reduce of late, there has been a growing list of trucking companies who are opting for lower Class of trucks to get their goods delivered. With growing digitization of supply chain, there has been a spurt in regionalisation of freight to fulfil orders in shorter times. Earlier, where it was like a truckload carrier would wait till the trailer reached its optimal capacity, now there is no time to wait. This is prompting small fleet operators, typically having 5-6 Class 8 tractors to move down a few classes

and get more vehicles to augment their fleet size. This will act as a major challenge to this market.

COMPETITIVE LANDSCAPE- The Class 8 Truck market in North America is fairly consolidated with only 5 companies making up for complete pie. Daimler is the undoubted leader in the Class 8 truck North American Market. It has held the no 1 tag for more than a decade now. Freightliner has been the unanimous choice of fleet operators across North America as they are cheap to buy, easy to maintain and they fetch a reasonable resale price even after 5 years/400K miles on the odometer. The market leader is actively pursuing autonomous technology and truck platooning in Oregon. It has also stated that the first version of the truck platooning system will have two trucks with active steering capability for the rear truck. In autonomous systems, it is keen on launching an autonomous system before 2020

THIS REPORT WILL ANSWER FOLLOWING QUESTIONS

1. The market size (both volume and value) of Class 8 trucks in North America in 2017-2022 and every year in between?
2. The impact of upcoming mandates on this market.
3. The market size and forecast segmented by end-use segments (Vocational and Line haul)
4. The market size and forecast segmented by fuel type (Diesel and Natural gas)
5. Market share of OEMs in both vocational and linehaul segments
6. Future growth plans of Truck manufacturers
7. Latest trends in all truck segments
8. Will electric and autonomous class 8 trucks really happen?
9. Will regional haul overshadow long haul?
10. The impact of renegotiation of NAFTA on Class 8 truck market.

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