

# **Annual Industry Dossier - Global Trucking Industry - 2013-2014 - Key Trends, Issues & Challenges, SWOT, Force Field Analysis & Strategic Outlook**

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## **Abstracts**

The global trucking industry is facing difficult times with a slow start to 2013 that saw sluggish sales and pressure on order intake across most industry OEMs emanating from the demand slump experienced during the second half of 2012. Thus, the European industry for heavy duty trucks contracted by 13% during H1 2013 as against year ago levels with demand impacted by the difficult economic conditions while the North American market registered a decline of 11% on the back of an ongoing economic recovery in the U.S. with replacement demand in Class 8 & improvements in the construction truck segment amongst key positive developments for the industry. Amongst emerging markets, Brazil registered 13% growth in demand for heavy trucks segment driven by economic stimulus, good crop season & ongoing investments towards infrastructure development with upcoming, key international sporting events.

Sales levels, however, showed signs of improvements during Q2 across OEMs and almost all major OEMs have been aligning production levels in-line with the demand consequently. Almost, all key emerging economies on the other hand, especially China, grapple with inflationary pressures & are trying to stoke up economic growth momentum under a difficult, complex, challenging & uncertain Global Macroeconomic Environment. Most leading OEMs, thus, continue with their focus on development of new platforms as part of their product portfolio renewal strategy that has been a key demand driver. The OEMs also continue to develop & roll-out sustainable alternate fuel based powertrain technologies aimed at enhanced operating economics, in addition, to continued efforts towards further strengthening & deepening of existing presence across emerging markets, in order, to partially offset the ongoing demand slump in Western Europe & Latin America. Overall, the global truck market is projected to grow at 3%-4% annually over the medium term till 2020 with strong growth prospects over the long-term.

Against this backdrop, the report analyzes the global trucking industry and provides strategic insights into the key industry trends, challenges & risk factors that are likely to shape the future of the industry followed by an insightful industry SWOT & Force Field Analysis and strategic outlook for the industry for 2014.

### **Key Excerpts/Findings from the Report**

1. Product portfolio renewals driven by new platform development & replacement demand amongst key demand drivers across most traditional markets. Snapshot & analysis of the product portfolio strategies of key industry players.
2. Rising significance of emerging markets for the industry with the evolution of a value driven medium duty truck segment & custom product portfolio across most key industry OEMs. Analysis of the emerging markets focused strategies of most industry OEMs.
3. Development of Alternate fuel based powertrain technologies and products likely to face a spurt over medium term. Overview & Analysis of key industry developments over near to medium term in the alternate fuel domain.
4. Analysis of key demand drivers across emerging markets, including, rapid urbanization trend and continued spate of investments towards infrastructure development.
5. Analysis of Key Technological Innovations as well as developments Likely to Shape the Future of the Industry, including, Material Science Innovations.
6. Analysis of growth projections for 2013 & 2014 for North America, Europe & BRIC markets.

### **Usage & Relevance:**

The report provides & will be useful for:

Strategic Analysis and Vital Inputs essential for Strategic Planning & Decision-Making Process

Analysis of inherent Industry Strengths & Weaknesses

Identification & Analysis of Imminent Opportunities & Emerging Potential Threats

Gaining access to Key Industry Trends & Insights; crucial inputs for Decision-Makers

Analysis of Forces Driving and Restraining the Industry & their overall Dynamics

Identifying & highlighting areas for making Potential Strategic Changes, Adjustments and

Realignment of the internal strategy framework in-sync with emergent trends

Strategic Industry Outlook for 2014

**For Whom:**

The report would be essential for those having strategic interest in the Global Trucking industry & will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Suppliers, Distributors, Vendors and other Key Players in the Industry Value Chain as well as existing & potential Investors, industry & company analysts & those associated with the industry or any of these companies.

**Highlight:**

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, being built on the Microsoft PowerPoint platform; in addition, to being a ready self-reckoner as well as a quick reference guide driving, enabling & ensuring prompt and informed decision making.

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