

# **Annual Strategy Dossier - 2018 - World's 7 Leading Medium & Heavy Truck Manufacturers - Strategic Focus, Key Strategies & Plans, SWOT, Trends & Growth Opportunities, Market Outlook - Daimler, Volvo, MAN, Scania, PACCAR, Navistar, Iveco**

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## **Abstracts**

The Global Medium and Heavy Truck market has been in the supercruise mode led by steady demand growth traction across most key markets globally, led by North America & Europe, with good capacity utilization and profitability driving momentum for fleet renewal & expansion activities. The U.S. economy has been on a solid footing with strong economic recovery along with robust freight demand & rates and transport capacity constraints boosting demand for new Class 8 trucks with the U.S. market projected to register a 30% year on year growth in new truck registrations for 2018. Further, the proposed infrastructure development bill, outlining massive planned investments worth \$1.5 trillion towards infrastructure repair and rebuilding, are likely to have tremendous potential for the industry over medium term once the modalities are thoroughly fine-tuned and if it gets the green light from the Congressional leaders. European markets, too, have been on a steady growth path over the recent years with the EU economy revving up with new MHCV truck registrations in the EU witnessing modest growth in 2017 with the same trend likely to be maintained in 2018.

Amongst BRIC markets, Brazilian market continues to make steady demand recovery with the economy in the resurgence mode with truck demand boosted by good agricultural output and pursuit of a low interest rate regimen. China's push for infrastructure development under fiscal stimulus measures has bolstered demand for construction equipment and trucking segments significantly as of late with over 1 million heavy duty trucks registered in China in 2017. The Chinese infrastructure led juggernaut is likely to be on the roll over near term with demand levels likely to be sustained with

slight correction. Demand growth in India, too, is on the upward growth trajectory with strong economic activity level and overall confidence as well as optimism.

Amongst the downside risks & uncertainties, the most prominent one is the rising crude oil prices, which have crossed the \$70 per barrel mark translating clearly into an increase in operating costs and direct impact on profitability for fleet operators. The fuel prices are likely to further escalate going forward with the Trump pull out from the Iran Nuclear Deal. Further, the probable outbreak of a potential U.S.-China trade war over import tariffs and Trump's likely pull out from NAFTA going forward could completely derail the ongoing global economic recovery over near term.

The industry OEMs are busy ramping up production rates to meet robust demand levels across most markets while fine tuning their supply chains to operate efficiently in top gear. The OEMs are also renewing their product portfolios in alignment with the market upturn through new product introductions incorporating cutting edge technologies and features focused on enhanced performance as well as productivity while optimizing the total cost of ownership. The focus on services business growth and portfolio expansion has also been growing across OEMs as soaring fleet utilization levels spur demand for maintenance, repair and overhaul activities.

The trucking industry continues to be at the forefront of a technology led transformation phase marked by confounding uncertainties and disruptions. The focus on CASE (Connected, Autonomous, Shared & Services and Electric) technologies continues to be at the core of this with OEMs continuing to integrate an array of sensors, equipment & technologies on-board truck models. The battle for electric trucks is getting fierce with Volvo joining the fray with plans to foray into electric medium duty truck segment, with its new FL and FE models, which are going to be introduced in Europe from 2019.

Against this backdrop, this annual 2018 edition of the report series analyses the Overarching Strategic Focus & Priorities and provides comprehensive insights into the Key Strategies & Plans being conceptualized, formulated & implemented by the World's 7 leading Medium & Heavy Truck Manufacturers for the near to medium term horizon as they gear up to meet the inflection in global demand for trucks. The initial sections of the report provide a snapshot & overview on the market positioning & financial performance of each industry OEM while the SWOT Analysis framework analyses the core Strengths & Weaknesses and identifies potential Growth Opportunities & avenues and imminent/emerging Threats for each truck manufacturer. The middle sections of the report provide comprehensive analysis of the overall Strategy Focus as well as Insights into the Key Strategies and Plans for the OEMs. The

concluding sections of the report provide analysis of key & emerging market & technology trends, issues & challenges and risk factors. The report concludes by providing a Force Field framework analysis on the Global Medium & Heavy Truck Market and assessing the medium term Demand Outlook for Trucks along-with Inputs on Market Evolution & Growth Projections.

Relevance & Usefulness: The report will be useful for:

Strategic Planning, Assessment & Decision-Making Processes

Competitor Analysis & Comparative Analysis of covered Industry OEMs

Identification of & Insights into Potential Growth Opportunities & Avenues

Analysis of Near to Medium Term Strategy Focus and Key Strategies & Plans for all OEMs

Medium Term Strategic Outlook, Inputs on Market Evolution & Growth Projections

Analysis of Emerging Market, Sector-specific & Technology Trends

Contingency planning for current Strategies & Programs

Identifying & highlighting areas for making potential Strategic Changes, Adjustments & Realignment

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics

For Whom:

The report is essential & a must have for Senior Industry Personnel and all those with strategic interest & stakes in the Global Medium & Heavy Commercial Vehicles Market. The report will be extremely useful for Key Decision-Makers, Program & Procurement Managers, Top Management of Industry Players & Other Companies, Suppliers, Vendors, Fleet Operators & Logistics Solutions Providers, Associated Equipment Manufacturers, Technology Solutions Providers, Sales & Distribution Channels, MRO

Services Providers and other Key Players in the Industry Value Chain. The report will also be useful for existing & potential Investors, Industry & Company Analysts, M&A Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists, PR & Advertising Agencies seeking/working on projects, Researchers and all those associated with the industry.

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