

Comparative SWOT & Strategy Focus - 2018-2023 - North America's Top 4 Class 6-8 Truck Manufacturers - Daimler, Volvo, PACCAR, Navistar

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Abstracts

The Trucking industry continues to be at the forefront of a technology led transformation phase marked by confounding uncertainties and disruptions which are likely to be sustained over medium term. The focus on CASE (Connected, Autonomous, Shared & Services and Electric) technologies continues to be at the core of this trend with OEMs continuing to integrate an array of sensors, equipment & technologies on-board truck models with digitalization forming the backbone of this technology led trucking revolution. The battle for electric trucks is getting fierce with the world's top 2 largest truck manufacturers, namely, Daimler & Volvo lining up electric versions of their flagship truck models to take on recent industry incumbents & start-ups head on with the duo planning start of commercial, full scale production of electric trucks from 2021.

Daimler has outlined the electric version of its North American market leader, Cascadia, christened eCascadia, in the U.S. Class 8 market. Volvo has rapidly unveiled its contenders for the electric medium duty truck segment, with the new electric FL and FE models for Europe. The VW Group, represented by MAN & Scania in Europe, too, has been structuring & shaping its trucking business steadily as evinced by the introduction of its manufacturer agnostic RIO digital brand, aimed at the transport & logistics sectors and plans for capital markets listing over near term. The industry supply chain, too, has been gearing up rapidly for the electric bandwagon with suppliers outlining & fine tuning their business strategies for EVs and setting up new units to execute them. Electrification, in commercial vehicles, thus, is reaching the inflexion point now.

North America has traditionally been one of the biggest markets globally for medium and heavy duty trucks, classified under Class 6-8. The North American Class 6-8 truck market has been on a strong footing in 2017 and the projections for 2018 point towards

a robust double digit growth rate with a buoyant economy, strong housing starts and growth as well as positive developments in e-commerce and construction activity. 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. Overall, The North American Class 6-8 truck market has been on a strong upswing with the U.S. economy gaining growth momentum and supply side constraints driving freight rates up as strong & sustained freight demand is met by capacity shortfalls. The overall operating environment, too, has been favorable with robust utilization and profitability across operators boosting fleet renewals and expansions at an accelerated pace.

The current phase of trucking industry's development and its likely evolution over medium term is going to be defined and shaped by technology which has been rapidly evolving and is poised to disrupt markets at a lightning pace. The industry OEMs & players; which are able to adopt & incorporate right technologies for right applications to deliver overall value to customers, end users & stakeholders while creating significant competitive advantages for themselves by leveraging this technology led differentiation; will be at the forefront of this one of the most disruptive phases for the industry going forward which is likely to be marked by the introduction of a number of technology enabled entirely new business models and concepts.

The report provides a comprehensive Comparative SWOT framework analysis on the Top 4 Truck manufacturers in the Class 6-8 Truck market besides analyzing the overall, near term strategy focus across these OEMs. The framework analyzes the Strengths & Weaknesses of the OEMs from a standalone as well as relative perspective based on a comprehensive analysis of their Key Business Aspects, which include:

Product Portfolio Analysis & its Strategic Positioning

Breadth & Depth of Presence across Key Geographic Markets & Regions

Analysis of overall Cost Base, Structure & its Management

Analysis of Revenue streams, Resource Base & Key Competencies

Profitability, Key Profit Sources, Growth & Trend Analysis

Capital & Ownership Structure and Financial Strength

Key Competitor Analysis across Market Segments & Degree of Competitive Intensity

Competitive Market Positioning across Key Global Markets & Market Share

Overall Strategy Orientation & Focus, R&D Strategy, Technological Strength & Capabilities

The framework subsequently analyzes & identifies potentially significant, niche growth opportunities & avenues and imminent as well as emerging threats for each key industry OEM based on their strategic product portfolio & market positioning, core strengths & weaknesses and overall strategy focus & orientation against the backdrop of emerging market dynamics & trends. The report analyzes the overall degree of strategic responsiveness of OEMs to external environmental factors, which include, prevailing industry dynamics & emerging industry & market trends, issues, challenges & potential risk factors to assess their ability to be able to derive further business growth by capitalizing on potential growth opportunities effectively while negating threats simultaneously over near to medium term.

For Whom: Key Decision-Makers across Industry Value Chain

The report will be essential & a key resource for those associated with and having strategic interest in the North American Class 6-8 Truck Market. The report will be especially useful for

Key Decision-Makers

Program Managers

Top Management of Industry Players & Other Companies

Industry OEMs

Fleet Operators

Suppliers, Vendors, Technology & MRO Services Providers and other Key Players in the Industry Value Chain

Existing & potential Investors

Industry & Company Analysts

M&A Advisory Firms

Strategy & Management Consulting Firms

PE Firms, Venture Capitalists and Financing & Leasing Companies

Researchers and all those associated with the industry in general

Features, Benefits & Reasons to Procure:

Provides Macro View and Big Picture Quickly

Blend of Quantitative & Qualitative Analysis for Strategic Planning Process

Significant Time Savings with Ready, Comprehensive Analysis

Quality & Reliability backed by Over a Decade of Research and Coverage of the Industry

Most detailed & comprehensive resource available on Strategy and Analysis with detailed, Strategic Analysis on OEMs

Gain a Competitive Edge with Our Cutting Edge Analysis

Visual Representation enabling Easy Comprehension

Meetings & Presentation Ready Format for Quick Application

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Volvo Trucks North America
PACCAR Inc.
Navistar International Corporation

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