

European Medium & Heavy Truck Market - 2021-2026 - Market Dynamics, Competitive Landscape, OEM Strategies & Plans, Trends & Growth Opportunities and Market Outlook - Daimler, Volvo, Traton - MAN & Scania, DAF, Iveco

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Abstracts

The European Medium & Heavy Truck Market Cruising Steadily on the Autobahn to Recovery

The Global Trucking industry had been impacted significantly by the outbreak of COVID-19 in 2020 (with the clear exception of China), with declining volumes as well as profitability across OEMs with recovery seen in the later part of the year, led, primarily by the unprecedented surge in e-commerce volumes. The registration of heavy trucks in the EU plummeted in 2020 with a 27% year-on-year decline owing to pandemic & the imposition of spate of lockdowns across most EU nations.

Europe has been the core pivot and traditional flag-bearer for technological evolution of the global trucking industry given the critical role it plays in the European economy with over 75% of the freight within the continent moving by road and this trend is likely to be sustained over long term. The continent is also a trucking powerhouse and is home to three of the world's trucking behemoths, namely, Daimler, Volvo and the VW group which have traditionally dominated the global truck market with their size and scale of operations along with technological prowess.

The first half of the year 2021 has witnessed a steady improvement in freight prices as well as volumes across the EU, driving an uptick in freight market, which drove a surge in order intake across industry OEMs while operators moved swiftly to renew as well as expand their existing fleets. The industry also continues to make steady progress

towards development of sustainable technologies geared towards de-carbonization of transportation. The efforts have primarily been led by battery-electric & fuel cell technologies with the tipping point for electric trucks likely to come in form of the commencement of serial assembly of electric trucks across trucking giants, Daimler & Volvo, apart from most other OEMs; over near term. Further, mass market production & introduction of hydrogen powered trucks across Europe by 2030, too, is taking shape under the H2Accelerate initiative by the industry geared towards sustainability.

The rapid move towards de-carbonization of transportation & transition towards sustainability; along with Connectivity & Autonomous technologies; is collectively likely to drive significant replacement demand over medium term across most traditional markets. Also, it has already led to a spike in M&A activity, JVs & partnerships amongst leading industry players with the same likely to see a further uptick going forward. Further, the sustained rise in global crude oil prices is likely to give a further stimulus to transition towards alternate drivetrains across operators.

The Global Demand for medium & heavy trucks is projected to register a steady recovery & growth over near to medium term with most key global economies likely to witness an uptick in demand following the pursuit of fiscal intervention measures by nations & governments across most regions going forward coupled with strong global economic recovery projections by the IMF for 2021 & 2022, led by the U.S. However, managing supply side delays & disruptions, especially for semi-conductor chips, owing to the pandemic and its uncertain trajectory going forward, will be crucial to sustaining recovery over near term which is likely to continue well into 2022. The heavy-truck registrations in the EU are projected to be back to the pre-pandemic levels during the second half of 2021 with even a high single digit growth in heavy truck registrations, over the 2019 levels, projected for 2021, based on the prevailing order book positions across OEMs.

Against this backdrop, the report provides a holistic analysis on the European Medium & Heavy Commercial Vehicles market with focus on a blend of quantitative & qualitative analysis. The analysis follows a three tiered methodology with Tier 1 focusing on a thorough analysis of the market dynamics & competitive landscape for the European (EU 30+EFTA) market followed by Tier 2 which focuses on a comprehensive analysis of the key strategies & plans for the Top 5 Europe based industry OEMs with the scope of analysis covering their global operations. Tier 3 focuses on Market Analysis and projected demand growth evolution for the European market over medium term which covers analysis of key market & technological trends, issues & challenges, market developments & potential growth opportunities which could be leveraged by the OEMs

& the industry value chain.

Relevance & Usefulness:

Strategic Planning, Assessment & Decision-Making Processes

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

Medium Term Market Outlook, Inputs on Market Evolution & Demand Growth

Identification of & Insights into Potential Growth Opportunities & Avenues

Development of Custom, Market-specific Strategies aligned with Emerging Growth Opportunities

Formulation, Development & Shaping of Growth Strategies in an Unpredictable Environment

Conceptualization, Development & Shaping of Product Platform Specific Strategies

Adjustment & Alignment of Overall Strategy Focus for OEMs & Key Industry Players across Value Chain

For Whom:

The report is essential & a must have for Senior Industry Personnel and all those with strategic interest & stakes in the European as well as 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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MAN SE

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