

European Medium & Heavy Truck Market - Top 5 Truck Manufacturers - Annual Strategy Dossier - 2024 - Daimler, Volvo, Traton, DAF, Iveco

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Abstracts

Trucking is headed for a soft landing and is poised to cool down in 2024 as well as over near term across traditional markets with projected softening of demand, after registering strong growth for 2022 & 2023, with order intake for new trucks declining, owing to softening of freight rates as well as volumes across traditional markets, while the industry OEMs focus upon & hustle to deliver previously ordered trucks to customers & fleet operators amid continued supply chain disturbances in a difficult, complex & uncertain global macroeconomic environment. New heavy truck registrations in Europe grew by 15% year-on-year for 2023 with 341,892 heavy trucks registered across EU30. However, the forecast for 2024 indicates a market correction & normalization with new, heavy truck registrations projected to contract by 18% across EU30 for 2024 to the 280,000 trucks level while fleet utilization remains at usual levels providing steady aftermarket revenues growth potential for the OEMs. The high cost of capital, owing to a sustained high interest rate credit environment, is impacting & deferring fleet replacement decisions which are also likely to be favorable for the used trucks and truck rental leasing segments over near term. Further, the global economy is projected to be heading towards a slowdown following continued monetary policy tightening by central banks globally over the recent years to check inflation creating a tight credit environment amid sustained geopolitical instability & conflicts with ongoing Israeli military operations in Gaza causing tensions and keeping the entire Middle East region as well as the entire world on the edge, and the ongoing Russia-Ukraine war, which continues unabated and enters its third year in 2024.

Trucking's ongoing transition towards de-carbonization, led by the mass production of battery electric & hydrogen fuel cell based trucks, has been the overarching theme along with the development of innovative services & business models configured on

connectivity, digitalization & autonomy, which is likely to gain further momentum going forward. Most key industry OEMs are now focusing on ramping-up of production of Zero Emission Vehicles (ZEV) while also collaborating among each other and with other industry specialists for development of the requisite ecosystem for smooth transition towards sustainability. Further, the proposed Euro 7 emission standards for Trucks, which will be much more stricter & are scheduled to come into effect across EU from 2027, are likely to significantly increase the direct acquisition costs & indirect operating costs for the operators while having a limited impact on the environment with the industry instead pushing for a like-for-like replacement of existing fleets with electric alternatives rather than investing significantly towards R&D for complying with the proposed Euro 7 norms. The stricter regulatory stance & approaches, however, is likely to bring in additional, direct & indirect costs for buyers & fleet operators going forward in a tight credit market environment and is likely to impact fleet recapitalizations by operators while also forcing OEMs to invest further towards R&D for developing technologies to meet upcoming emission norms rather than focusing on ramping up production of Zero-Emission Vehicles (ZEVs).

Against this backdrop, the report provides comprehensive insights & strategic analysis into the overarching Strategy Focus as well as Key Strategies & Plans for the Europe's Top Medium & Heavy Truck Manufacturers. The report provides a detailed analysis on key industry OEMs, including, key product portfolios & key truck platforms across segments, financial analysis & SWOT framework analysis. The report also provides the likely market scenario for trucking in Europe over near to medium term with an analysis of key market & technological trends, issues & challenges, market developments & potential growth opportunities which could be leveraged by the industry value chain. The report concludes by analyzing market evolution and projecting demand outlook for the European Medium & Heavy Truck Market for the near to medium term horizon.

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 European/Global Trucking Market. The report will be especially useful for:-

Key Decision-Makers across the Trucking Industry

Program Managers

Top Management of Industry OEMs, Players across Industry Value Chain &

Other Companies

Suppliers, Vendors, Technology & Services Providers and other Key Players
across 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

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