

# Europe's Top 5 Medium & Heavy Truck Manufacturers - Annual Strategy Dossier - 2023 - Strategy Focus & Priorities, Key Strategies & Plans, SWOT, Trends & Growth Opportunities and Market Outlook - Daimler, Volvo, Traton, DAF, Iveco

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## Abstracts

“The European Medium & Heavy Truck Market Projected to maintain its Cruising Speed & Growth Momentum in 2023 led by Strong Freight & Construction Activity, Emerging Replacement Demand for Ageing In-Service Fleets and Ongoing Transition towards Electrification amid an Uncertain Global Macroeconomic Environment and Production Capacity Constraints”

The European Medium & Heavy Truck market has been cruising steadily amid strong transport activity marked by high freight volumes as well as rates and robust fleet utilization levels across operators bolstering aftermarket revenue stream for the industry while the demand for trucks and order backlogs have been surging in a predominantly supply side led market scenario. The industry OEMs have been looking to increase production rates to meet surging demand levels, with the book-to-bill ratios hovering around 1, while battling continued supply chain disruptions & constraints, component shortages, rising input costs and an increasingly uncertain global macroeconomic environment marked by inflationary pressures, rising interest rates & tectonic geopolitical shifts. The trucking industry's ongoing transition towards de-carbonization, led by the mass production of battery electric & hydrogen fuel cell based trucks, is the overarching theme which is likely to gain further momentum going forward. Most key industry OEMs are now transitioning towards series production of Zero Emission Vehicles (ZEV) while also collaborating amongst each other and with domain specialists for development of the requisite ecosystem for transition towards sustainability. Additionally, automation, electrification and further evolution of connectivity based

service models remain key areas of focus for the truck manufacturers.

The industry continues to make steady progress towards transition to sustainable transportation through the development of a range of sustainable technologies geared towards de-carbonization of transportation over long term while continuing the development of innovative services & business models configured on connectivity, digitalization & autonomy. The efforts have primarily been led by electrification, focused on both battery electric & hybrid technologies, with most industry OEMs transitioning towards series production & commercial deliveries of electric trucks. This is likely to be followed by the mass market production, introduction & adoption of hydrogen powered trucks in the 2030s which is likely to be supported & further accelerated by key initiatives, like the H2Accelerate program by the industry in EU to accelerate the uptake of green hydrogen, and the creation of First Movers Coalition; geared towards jumpstarting the scalability of sustainable technologies through the end of current decade.

The high average age of in-service truck fleets in the EU owing to production capacity constraints over the recent years, rapid energy transition towards de-carbonization and strong construction activity with continued infrastructure investments are likely to collectively provide significant growth opportunities to the industry over near to medium term in form of fleet replacements, expansion & recapitalizations, especially, in a volatile & uncertain crude oil price environment from an economics & policy perspective. That's despite projections for the slowdown of the world economy over near term owing to market headwinds, the ongoing war in Ukraine and rising inflation levels necessitating a wave of monetary policy tightening by central banks across the globe.

Trucking, thus, is projected to maintain its overall cruising speed as well as growth momentum in 2023 across most markets with a year-on-year growth of up to 10% projected for traditional markets, i.e., North American Class 8 and EU30 market for heavy trucks, while the growth rate for emerging markets in Asia, led by China and India, is likely to be around 15%.

Against this backdrop, the report provides comprehensive insights & strategic analysis into the European Medium & Heavy Truck Market and the Industry OEMs.

Report Excerpts:

1. Analysis of Daimler's ambitious plan to achieve 60% market share in the Global Zero-Emission Vehicles (ZEVs) Market by 2030 and plans to produce only ZEVs by 2039.

2. Insights into Daimler's medium term growth strategy aimed at boosting profitability to 10%+ level in the EU by 2025. Also, plans for rapid transition to sustainable technologies under Daimler's medium term technology strategy.
3. Volvo's rapid electrification of its heavy truck portfolio, focus on growing services business and plans to turn Asia and North America into key pivots of its medium term growth strategy.
4. Adoption of collaboration route by industry behemoths, namely, Daimler, Volvo & Traton for the creation of sustainability ecosystem to accelerate the journey towards de-carbonization.
4. PACCAR's rapid strides on the technology development pathway with focus on electrification, hydrogen-based propulsion & autonomous technologies powered by industry collaborations.
5. Navistar's 4.0 Strategy focused on boosting profitability with a EBITDA target of 12% for 2024 while gaining market share through new product offerings and customer segmentation.
6. Trucking projected to maintain its cruising speed & overall growth momentum in 2023 with strong market drivers, indicators & fundamentals.

#### For Whom:

The report, with its unique disposition & strategy focus, is a niche, key & vital information resource on the European Medium & Heavy Truck Market. It would be indispensable for those having interest, stakes or investments in any of the Truck OEMs covered and all those with operational or strategic involvement and/or stakes in the European Medium & Heavy Truck Market. The report will be extremely useful for Key Decision-Makers, Program Managers, Global Procurement Managers, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, Associated Equipment Manufacturers 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, Financing & Leasing Companies, Researchers and all those associated with the Trucking industry.

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