

# **Strategy Digest - 2014 - Strategies, Plans, Strategic Priorities & Analysis on World's 7 Leading Truck-Makers - Daimler, Volvo, MAN, Scania, PACCAR, Navistar, Iveco**

<https://marketpublishers.com/r/S3334E6BC70EN.html>

Date: November 2013

Pages: 0

Price: US\$ 995.00 (Single User License)

ID: S3334E6BC70EN

## **Abstracts**

### **Overview & Rationale:**

The report is a comprehensive strategy digest that provides detailed analysis & strategic insights into the strategies, plans & strategic priorities of these 7 leading global Truck-makers going forward into 2014 amid a difficult global macroeconomic environment marked by slow pace of ongoing recovery in Western Europe from the debt crisis and a multitude of economic challenges in the United States. The EU economy finally made an egress from red by registering a 0.3% quarter on quarter GDP growth for Q2 2013 while the U.S. economy registered a decent 2.5% GDP growth for Q2. The growth projections for the second half of 2013 indicate towards a sub 2% GDP growth with the U.S. economy facing a host of fiscal & monetary policy challenges amid ongoing political tussle amongst Republicans & the Democrats over handling of fiscal matters & Fed's indications towards tightening measures fomenting further uncertainty regarding the overall fiscal & monetary policy stance. The Chinese economy registered a strong 7.5% GDP growth for Q3 2013 driven mostly by infrastructural investments which is likely to be ensued by a difficult outlook for 2014 with shooting inflation level and the currency being on a 20 year high that is likely to bring monetary policy measures to forefront over near term.

### **Global Trucking Industry Continues to Tread Cautiously on the Recovery Path:**

The U.S. heavy truck market registered a 11% decline through the first half of 2013 & a 9% contraction through the end of September in 2013 while the European market

contracted by 13% during H1 & by 4% through the first 9 months of 2013 despite significant order intake across OEMs in Q2 & Q3. In the U.S. market, the freight rates have remained tepid while the freight volumes have grown moderately during Q3 with spurt in consumer spending & strong housing starts that is likely to drive replacement demand across carriers & bolster class 8 truck production subsequently, especially, with improving corporate profits. The European market is likely to experience a spurt in deliveries during Q4 in wake of the upcoming Euro 6 emission standards likely to come into effect from January 01, 2014 besides the seasonal uptick in demand anticipated from November 2013 through January 2014. The OEMs, however, are maintaining a cautious stance with respect to the overall production rate with uncertainty over fiscal & monetary policy matters, especially, in the U.S. market.

### **Most Key Truck Markets Projected to Stay Flat in 2014:**

Overall, the total market for heavy duty trucks in Europe is pegged to stay at 230,000 units for 2013 and is projected to stay flat in 2014 at the 230,000 level. The U.S. market, too, is likely to settle at 240,000 heavy duty trucks in 2013 and is projected to register a low, single digit growth for 2014 with slow pace of economic recovery amid continued fiscal & economic challenges and the anticipated onset of a high interest rate economic environment. Amongst emerging markets, Brazil is likely to lead the growth trend for 2013 with a low interest rate environment and strong, continued construction & infrastructure development activity contributing to a strong, double digit growth rate. Going forward into 2014, almost all BRIC markets are projected to stay flat for 2014 with respect to the heavy & medium duty truck segments.

### **OEMs Fine-Tune Strategies with Emerging Trends:**

Most leading OEMs, in the meanwhile, continue with their focus on optimizing overall cost base with the initiation of efficiency programs across OEMs with pressure on profitability, especially, with fluctuations in global currency exchange rates emanating from macro-environmental uncertainties. The OEMs also continue to make significant investments towards R&D with the development of new truck platforms, engines & a range of drive-assist/safety and sustainable alternate fuel based powertrain technologies aimed at delivering enhanced operating economics & safety levels, in addition, to continued efforts towards further strengthening & deepening of existing presence across emerging markets. Overall, the global truck market is projected to grow at 3%-4% annually over the medium term through 2020 with strong growth prospects over long-term.

Against this backdrop, the report analyzes the strategies, plans & strategic priorities of these 7 leading global truck-makers against a difficult, uncertain & complex global macroeconomic environment & conditions.

### **Key Strategies & Plans included in the Report for each OEM:**

1. Product Portfolio Strategies & Plans
2. Market Specific Strategies & Plans - Traditional & Emerging Markets
3. R&D Strategies & Plans
4. Growth Strategies & Plans
5. Business and Corporate Strategies & Plans
6. Sales & Marketing Strategies & Plans
7. Production/Manufacturing Strategies & Plans

### **Excerpts/Findings from the Report:**

1. Analysis of Daimler's Global Modular Product Strategy, Plans to Gain Further Ground in North America and Global Leadership Strategy through 2020.
2. Analysis of Volvo's Strategic Product Offensive with continued, Rapid Product Portfolio Renewal and Strategic Focus on Bolstering Profitability & Boosting Operating Efficiency as part of 2013-2015 Strategy.
3. OEMs focus on Optimizing Cost Base through enhanced Operating Efficiency.
4. Growing Strategic Significance of Emerging Markets for all Key Global OEMs.
5. Continued Investments by OEMs towards R&D for New Product Development offering Superior Performance Features & Operating Economics and Technological Innovations focusing on enhanced Safety & Development besides continued development of Alternate Fuel-based Powertrain Technologies. Analysis of Product Portfolio Strategies across OEMs, especially, in wake of the Evolution of Medium Duty Truck Platform across OEMs targeted at Emerging Markets.
6. Sporadic Global Currency Exchange Rate Fluctuations putting further Pressure on Profitability across OEMs.

### **Relevance & Usefulness**

The report would be useful for:

Annual Strategy Reviews

Competitive Strategy Analysis & Assessment

Internal Strategic Assessment

Annual Strategic Planning Process

For making Potential Strategic Changes, Adjustments & Realignment

### **For Whom**

The report would be essential for those having strategic interest in the Global Trucking industry or any of these companies & will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Suppliers, Distributors, Vendors and other Key Players in the Industry Value Chain as well as existing & potential Investors, Industry & Company Analysts & those associated with the Industry or any of these Companies.

### **Highlight**

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, being built on the Microsoft PowerPoint platform; in addition, to being a ready self-reckoner as well as a quick reference guide driving, enabling & ensuring prompt and informed decision making.

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