

Strategy Playbooks - 2025 - Europe's Top 5 Medium & Heavy Truck Manufacturers - Daimler, Volvo, Traton (MAN & Scania), DAF, Iveco - Strategy Focus, Key Strategies & Plans, SWOT, Trends & Growth Opportunities, Business and Market Outlook

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Abstracts

European Medium & Heavy Truck Market in Normalization Mode while Gearing-Up for a more Sustainable Future amid Global Macroeconomic Complexities & Uncertainties

The European Medium & Heavy Truck market has been in the normalization mode after having been in the turbocharged growth mode over the recent years marked by extraordinary growth, driven by post-pandemic pent-up demand amid easing out of supply chain disruptions & constraints, which enabled the industry OEMs to effectively ramp-up production rates to meet rising demand levels. The market tailwinds drove steady order intake, slight contraction in delivery volumes and strong book-to-bill ratios across most industry OEMs in 2024 and even supercharged the in-service fleet utilization levels and aftermarket service volumes across fleet operators and industry OEMs respectively.

The European heavy truck market (EU30) contracted marginally in 2024, in terms of new truck registrations, after a blockbuster 2023, with truck demand being largely driven by replacements while fleet utilization remained at normal levels. The forecast for 2025 indicates a further contraction of up to 15% year-on-year as part of cyclical normalization. The demand for zero emission vehicles remains strong despite their relatively higher sticker prices. However, favorable trends, like the introduction of CO2 price loading on conventional, Diesel & Petrol trucks, in 2025 and significant reduction in CO2 emission limits are likely to create a level playing field for them and facilitate faster adoption & transition by fleets to BEVs, FCEVs and other sustainable fuels-

powered Trucks. The industry, too, continues to work towards rapid development of charging infrastructure and electric mobility ecosystem, under the partnership model, which is likely to accelerate the ongoing transition towards sustainability across Europe. The full commercialization of autonomous trucks now is likely to disrupt the truck market over near term with the emergence of new business & service models configured around them. However, rising defense levels are likely to provide a significant growth opportunity to truck makers, especially in the specialty vehicles segment, over near to medium term with Europe actually spearheading that growth wave in defense spending with almost \$693 billion spent in 2024 by European nations on defense at a massive 17% year-on-year growth rate, as per SIPRI, and demand skyrocketing for trucks-based missile defense and strike systems globally.

The taming of inflation, monetary policy easing and the relative easing of supply chain woes globally have come as welcome news for the world economy in 2025, however, policy instabilities, macroeconomic uncertainties & trade tensions created by Trump's protectionism & tariff wars and continuing military conflicts across Ukraine & the Middle East exacerbated by a deteriorating world order and rising defense spending levels amid slowing economic growth & rising debt levels pose a serious challenge to it over near term. Overall, the world economic growth is forecasted to grow merely by 2.8% for 2025 (and 3% for 2026), as per IMF, a level which is almost 900 bps below the average pre-pandemic growth rate registered for the world economy through the 2010s decade.

Against this backdrop, the report provides a comprehensive insights and analysis into the overarching strategy focus and strategy playbooks of the Europe's Top 5 medium & heavy truck manufacturers from the near to medium term perspective amid a highly dynamic, complex, challenging & uncertain operating environment. The report starts with a detailed business and financial snapshot analysis on each truck maker incorporating charts, tables and data-based insights. An insightful & comprehensive SWOT framework analysis is also included on each company providing a comprehensive assessment & analysis of the prevailing internal as well as external business environment of the company. The framework analyzes the company's core, inherent strengths & weaknesses, as part of the internal environment assessment, and assesses potential growth opportunities as well as emerging threats, as part of the external environment assessment.

The report also incorporates analysis & assessment of key market, technology & industry trends, along with issues & challenges, which are likely to impact and shape industry's future over near to medium term while providing insights & inputs to be incorporated into the broader strategic planning & decision making processes, thereby,

making it relevant, useful and essential from a competitive analysis standpoint. The report also identifies key driving & restraining forces for the industry & assesses their potential degree of impact through a force field analysis. The report concludes by providing a comprehensive outlook & demand forecast on the European Medium & Heavy Truck market for the medium term.

Report Excerpts:

1. Analysis of Daimler's strategy of achieving competitive differentiation, based on technologies, aimed at delivering substantial value addition to customers.
2. Decryption of Volvo's plans to further deepen market presence and grow its market share in North America with its 3-pronged growth strategys, focus on services business and to leverage its head start in ZEVs effectively across other key, growth markets.
3. Analysis of Traton's internal transformation and 'Concentration-of-Capabilities' approach to group-wide operations for enhanced competitiveness, growth focus in North America spearheaded by the 'International' brand strategy, massive R&D spending and active push for deeper inroads in China.
4. Strong focus on scaling-up and growing services business to boost profitability and provide structural stability to business portfolio across most trucking OEMs.
5. Zero Emission Vehicles (ZEVs) to form a substantial share of truck sales across most industry OEMs by the end of current decade.
6. Tightening regulatory emissions, digital transformation, continued push for autonomy and pursuit of measures to create a level playing field for conventional and zero emission vehicles underway across most mature markets.

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 Medium & Heavy Truck Market. The report will be especially useful for:-

Key Decision-Makers

Fleet Owners, Operators and Managers

Top Management of Industry Players, OEMs & Other Companies

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, Industry Analysts and all those associated with the industry in general

Educators, B-School Students and Other Academicians

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