

# **World'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, PACCAR, Iveco**

<https://marketpublishers.com/r/W3424221BE41EN.html>

Date: May 2023

Pages: 350

Price: US\$ 1,700.00 (Single User License)

ID: W3424221BE41EN

## **Abstracts**

“Trucking Projected to maintain its Cruising Speed & Growth Momentum in 2023 led by Ageing In-Service Fleets, Good Freight & Construction Activity and Ongoing Transition towards Electrification amid an Uncertain Global Macroeconomic Environment and Production Capacity Constraints”

The Global medium & heavy truck market witnessed a dynamic year in 2022 with the demand for new & used trucks consistently outpacing supply across most key global markets with the exception of China. The industry OEMs have been vying to increase production rates to meet surging demand levels, with the book-to-bill ratios hovering around 1, while battling continued supply chain disruptions, production capacity constraints, component shortages, rising input costs in an increasingly complex & uncertain global macroeconomic environment marked by inflationary pressures, rising interest rates & tectonic geopolitical shifts. The ongoing transition towards decarbonization, led by the mass production of battery electric & hydrogen fuel cell based trucks, is the trucking industry's current overarching theme and 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 creation of the requisite ecosystem for the transition towards sustainability. Additionally, automation, electrification and further evolution of connectivity based service models configured on digitalization remain key areas of focus across truck manufacturers.

The high average age of in-service truck fleets across most markets 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, ongoing war in Ukraine and rising inflation levels which have led to a wave of monetary policy tightening 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 World's Top Medium & Heavy Truck Manufacturers.

#### Report Excerpts:

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. Also, decryption of Daimler's medium term technology strategy underpinned by rapid transition to sustainable & autonomous technologies marked by significant R&D investments.

Adoption of collaboration route by industry behemoths, namely, Daimler, Volvo & Traton to accelerate the journey towards electrification.

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.

PACCAR's rapid strides on the technology development pathway with focus on electrification, hydrogen-based propulsion & autonomous technologies powered by strategic industry collaborations.

Navistar's 4.0 Strategy focused on boosting profitability with a EBITDA target of 12% for 2024 while focusing on gaining market share through new product offerings and customer segmentation.

Trucking projected to maintain its cruising speed & overall growth momentum in 2023 across most markets with strong Demand drivers, Indicators & Market fundamentals.

For Whom:

The report, with its unique disposition & strategy focus, is a niche, key & vital information resource on the Global Medium & Heavy Truck Market and the industry OEMs. 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 Global 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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