

Truck Platooning Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Technology Type (Adaptive Cruise Control, Forward Collision Avoidance, Lane Departure Warning, and Active Brake Assist), By Infrastructure Type (V2V, V2I, and GPS), By Autonomous Level (Semi-Autonomous and Full-Autonomous), By Region, Competition

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Abstracts

Global Truck Platooning Market has valued at USD 1 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 10.2% through 2028. A developing technique called truck platooning allows trucks to communicate and follow one another closely, which reduces air resistance and improves efficiency and fuel economy. The trucks can closely follow each other thanks to a mix of linked vehicle technologies and production systems that communicate via V2V infrastructure and other systems. As a result, truckers constantly exchange information and coordinate their movements with nearby trucks. The need for truck platooning is growing along with the adoption of new-generation trucks throughout logistics and transportation operations. Due to the enormous R&D investment from industry leaders like Pelton Technology Inc., Scania AB, and Volkswagen, the technology is still in its infancy and is constantly evolving. Additionally, it is projected that global fleet managers' rising desire for effective fleet operations will accelerate market expansion.

Key Market Drivers

Fuel Efficiency and Cost Reduction

One of the primary drivers of the global truck platooning market is the pursuit of fuel efficiency and cost reduction. Truck platooning involves a group of trucks driving closely together, benefiting from reduced air resistance. As a result, platooning can lead to substantial fuel savings, which is a critical consideration for fleet operators aiming to minimize operational costs. The reduction in fuel consumption is particularly pronounced at highway speeds, making platooning an attractive option for long-haul trucking operations. Lower fuel expenses translate into improved profitability and competitive advantages for logistics companies, fostering the adoption of platooning technology.

Environmental Sustainability and Emissions Reduction

The global focus on environmental sustainability and the reduction of greenhouse gas emissions is another significant driver of the truck platooning market. Transportation is a major contributor to carbon emissions, and the trucking industry plays a pivotal role in this regard. Platooning helps decrease emissions by optimizing fuel consumption and reducing the carbon footprint of freight transport. Governments and regulatory bodies worldwide are implementing stringent emissions standards and offering incentives for sustainable transportation practices. Consequently, truck platooning emerges as a solution that aligns with these sustainability goals, encouraging its adoption and driving market growth.

Driver Shortages and Labor Costs

A pressing challenge in the trucking industry is the shortage of qualified commercial truck drivers. As experienced drivers retire and new recruits are in short supply, there is a growing need for technology that can mitigate the impact of driver shortages. Truck platooning addresses this challenge by allowing a single driver to lead a convoy of vehicles, with the trailing trucks operating autonomously but under human supervision. This reduction in the number of required drivers can help companies overcome labor shortages and reduce labor costs, which are often a significant portion of their expenses. Thus, platooning technology is seen as a solution to enhance operational efficiency and address the industry's labor challenges.

Advancements in Vehicle Automation

The ongoing advancements in vehicle automation and autonomous driving technologies are instrumental in driving the adoption of truck platooning. These technologies enable

trucks to communicate with each other, maintain safe following distances, and synchronize their movements. Automation enhances the precision and reliability of platooning operations, making it more appealing to fleet operators. While full automation remains a long-term goal, current level 2 and level 3 automation systems, which include features like adaptive cruise control and lane-keeping assistance, can be integrated into platooning systems, contributing to their safety and efficiency.

Safety Improvements

Safety is a paramount concern in the trucking industry, and truck platooning offers several safety advantages. By maintaining a consistent and short following distance, platoons reduce the risk of rear-end collisions, which are among the most common accidents involving commercial trucks. Moreover, platooning systems incorporate advanced driver-assistance technologies, such as adaptive cruise control and collision avoidance systems, which enhance overall safety. These systems help drivers maintain control and react to potential hazards more effectively. As a result, safety-conscious fleet operators are increasingly adopting platooning technology as part of their efforts to minimize accidents and protect their drivers and cargo.

Infrastructure Development

The expansion and development of infrastructure play a crucial role in driving the growth of the global truck platooning market. To support platooning operations effectively, infrastructure upgrades are needed. These upgrades include dedicated platooning lanes, advanced traffic management systems, and vehicle-to-infrastructure (V2I) communication infrastructure. Governments and transportation authorities in various countries are recognizing the potential benefits of platooning and are investing in the necessary infrastructure enhancements. As more dedicated platooning lanes and V2I communication systems are deployed, the adoption of platooning technology becomes more viable and attractive to fleet operators.

Industry Collaboration and Standards

Collaboration within the trucking industry and the establishment of industry standards are vital drivers of the global truck platooning market. Manufacturers, technology providers, logistics companies, and regulatory bodies are working together to define standards and protocols for platooning systems. Collaboration fosters interoperability among different platooning solutions, ensuring that trucks from various manufacturers can platoon seamlessly. Standardization also provides clarity and consistency in

regulations, making it easier for fleet operators to navigate the legal landscape and adopt platooning technology. As the industry continues to work together to develop common standards, the adoption of platooning technology becomes more streamlined and conducive to growth.

Key Market Challenges

Regulatory and Legal Hurdles

One of the primary challenges facing the global truck platooning market is the complex regulatory and legal landscape. Platooning technology involves the coordination of multiple trucks traveling closely together, which may not align with existing road safety and traffic regulations. The regulatory framework for platooning varies from one country to another and even among states or regions within a country. This fragmented regulatory landscape poses a significant obstacle to the widespread adoption of platooning technology. In some jurisdictions, there are concerns related to issues like liability in the event of accidents, the minimum following distance between platooning trucks, and the training and certification requirements for platoon drivers. Furthermore, the lack of standardized regulations and varying interpretations of existing laws can lead to uncertainty for companies looking to invest in platooning systems. The industry's challenge is to work collaboratively with governments and regulatory bodies to establish clear and consistent standards that ensure both safety and legal compliance.

Infrastructure Development and Investment

The successful deployment of truck platooning technology requires a supportive infrastructure, including dedicated platooning lanes, advanced traffic management systems, and vehicle-to-infrastructure (V2I) communication infrastructure. However, developing this infrastructure presents a formidable challenge. Many regions lack the necessary infrastructure, and retrofitting existing roadways can be costly and disruptive. Governments and transportation authorities must invest in building and upgrading infrastructure to accommodate platooning operations. This includes creating designated platooning lanes, optimizing road signage and traffic management systems, and deploying V2I communication infrastructure. The challenge lies in securing the necessary funding, coordinating with various stakeholders, and prioritizing these infrastructure improvements among competing transportation projects.

Technological Complexity and Standardization

Truck platooning technology is inherently complex, involving sophisticated communication systems, automation, and vehicle-to-vehicle (V2V) communication. Different manufacturers and technology providers may offer their proprietary platooning systems, each with its own unique features and capabilities. The lack of standardization in platooning technology poses a significant challenge to the market. The absence of common technical standards can hinder interoperability between trucks from different manufacturers, making it difficult for fleets to mix and match vehicles and platooning systems. It also complicates regulatory compliance and certification processes, as regulators may need to evaluate and approve multiple, distinct technologies. Standardization efforts are essential to ensure that platooning systems are compatible, safe, and easy to adopt. However, achieving consensus among stakeholders in a highly competitive and rapidly evolving market is no small feat.

Safety and Liability Concerns

Safety is a paramount concern in the trucking industry, and the implementation of platooning technology introduces unique safety and liability challenges. Platooning relies on precise coordination between trucks and real-time communication to maintain safe following distances and react to changing traffic conditions. Any failure or interruption in these systems could lead to accidents or safety hazards. Determining liability in the event of accidents or malfunctions is a complex issue. Questions arise about whether the driver of the lead truck, the driver of the following truck, the technology provider, or a combination thereof should be held responsible in case of an incident. Resolving these liability concerns is critical for ensuring the market's growth and the adoption of platooning technology.

Driver Acceptance and Transition Period

Truck platooning introduces a significant shift in the role of commercial truck drivers. While platooning systems can automate many aspects of driving, a human driver is still required to oversee the platoon, intervene if necessary, and handle tasks beyond the automated capabilities of the system. This transition period, where drivers must adapt to their evolving role, can be challenging. Driver acceptance and training are essential factors in the successful implementation of platooning technology. Drivers may have concerns about their job security, job satisfaction, and the potential for increased workload due to monitoring platooning systems. Ensuring that drivers are adequately trained and comfortable with platooning technology is crucial to overcoming these challenges and maximizing the benefits of automation.

Initial Costs and Return on Investment

While platooning technology promises long-term benefits, such as fuel savings and increased operational efficiency, there are significant upfront costs associated with adopting and implementing these systems. Fleets must invest in the purchase and installation of platooning hardware and software, as well as training drivers and ensuring compliance with regulatory requirements. Calculating the return on investment (ROI) for platooning technology can be challenging, especially for smaller fleet operators. The ROI depends on factors such as fuel savings, maintenance costs, labor savings, and the frequency of platooning opportunities. Fleets must carefully assess their specific operating conditions and business models to determine whether the initial investment in platooning technology is justified.

Public Perception and Social Acceptance

The success of truck platooning technology also hinges on public perception and social acceptance. The sight of closely following platooning trucks may raise concerns among other road users about safety and congestion. Moreover, there may be apprehensions about job displacement if automation leads to reduced demand for truck drivers. To overcome these challenges, it is essential to engage in public outreach and education efforts. Demonstrating the safety benefits and reduced environmental impact of platooning technology can help build public trust. Additionally, involving relevant stakeholders, including labor unions and advocacy groups, in discussions about the implementation of platooning can address concerns about job displacement and foster a more cooperative and accepting environment.

Key Market Trends

Advancements in Autonomous Driving Technology

One of the most prominent trends in the global truck platooning market is the continuous advancement of autonomous driving technology. Autonomous driving systems have reached various levels of automation, with levels 2 and 3 automation playing a significant role in enabling truck platooning. These levels of automation include features such as adaptive cruise control, lane-keeping assistance, and automated braking. Truck manufacturers and technology providers are actively developing and deploying these advanced autonomous driving features, which are integral to the safe and efficient operation of platooning systems. These technologies allow trucks to maintain safe following distances, stay within designated lanes, and

respond to changing traffic conditions. As autonomous driving technology continues to evolve and mature, it enhances the capabilities and reliability of truck platooning, making it an increasingly attractive option for fleet operators seeking greater efficiency and safety.

Connectivity and Vehicle-to-Vehicle (V2V) Communication

Connectivity and vehicle-to-vehicle (V2V) communication are fundamental trends that underpin the effectiveness of truck platooning. Trucks in a platoon need to communicate with each other in real-time to maintain precise following distances and coordinate their actions. V2V communication facilitates this communication and enables trucks to operate as a cohesive unit. Advancements in connectivity technologies, such as 5G, are enhancing the reliability and speed of V2V communication. This trend is particularly important as it allows platooning trucks to react quickly to changing traffic conditions and maintain safe spacing. Additionally, improvements in cybersecurity measures are critical to protect against potential hacking threats, ensuring the integrity of V2V communication systems. As V2V communication capabilities continue to evolve, the feasibility and safety of truck platooning increase. This trend is closely tied to the development of vehicle-to-infrastructure (V2I) communication, which involves trucks communicating with traffic management systems and infrastructure components, further optimizing platooning operations and traffic flow.

Expansion of Platooning Trials and Pilots

Platooning trials and pilots are expanding globally as various stakeholders seek to gain practical experience and insights into platooning technology. These trials involve real-world testing of platooning systems, often in collaboration with industry players, technology providers, and government agencies. Many countries and regions have initiated platooning trials to evaluate the technology's benefits and challenges. For instance, the European Union has funded numerous platooning projects, including the European Truck Platooning Challenge, which involved platooning demonstrations across several European countries. These trials provide valuable data on fuel savings, safety improvements, and the impact of platooning on traffic flow. They also serve as a means to engage with regulators and the public, addressing concerns and building support for platooning technology. As more trials take place and demonstrate the viability of platooning, it paves the way for broader adoption and commercial deployment.

Collaboration and Partnerships

Collaboration and partnerships among industry players are becoming increasingly prevalent in the global truck platooning market. Given the multifaceted nature of platooning technology, collaboration is essential to address the challenges and complexities involved in its implementation. Truck manufacturers are collaborating with technology providers and research institutions to develop and refine platooning systems. Similarly, logistics companies and fleet operators are partnering with technology providers to pilot and integrate platooning technology into their operations. Government agencies and transportation authorities are also actively engaging with industry stakeholders to establish regulatory frameworks and infrastructure support. These collaborative efforts are beneficial in several ways. They allow for the sharing of expertise and resources, leading to more robust and efficient platooning solutions. Additionally, collaboration helps standardize platooning technologies, ensuring interoperability and safety. The global nature of the trucking industry makes cross-border collaboration and standardization efforts particularly crucial for the success of platooning technology.

Industry-Specific Solutions and Use Cases

The adoption of truck platooning is increasingly driven by industry-specific solutions and use cases. While platooning offers general benefits, such as fuel savings and reduced emissions, industries with unique operational requirements are finding tailored applications for the technology. For example, the logistics and shipping industry sees platooning as a means to optimize freight transport and reduce operational costs. Long-haul trucking companies are implementing platooning to enhance the efficiency of cross-country routes. The agriculture sector is exploring platooning to streamline the transport of crops and equipment over large distances. Additionally, sectors like mining and construction are recognizing the potential of platooning for the transport of heavy machinery and materials within industrial sites. These industry-specific use cases are driving the development of customized platooning solutions that address the unique requirements and challenges of each sector.

Segmental Insights

Technology Type Analysis

Adaptive cruise control (ACC) market growth is anticipated to be fueled by strict government regulations relating to road safety. In 2022, the Adaptive Cruise Control (ACC) market category accounted for the largest proportion. Commercially available

adaptive cruise control and collision avoidance technologies are essential for the efficient operation of platooning. Consequently, there is a rising need for adaptive cruise control among platooned vehicles. With adaptive cruise control, the car's speed is automatically adjusted to match that of the car in front of it. Therefore, it is projected that increasing demand for precise speed matching among platooned vehicles will fuel the segment's expansion. During the projected period, the Forward Collision Warning (FCW) segment is anticipated to develop at the fastest rate. When cars are operated unattended, forward collision warning is crucial to prevent accidents.

Level of Autonomy Analysis

The market is divided into two categories based on degree of autonomy: semi-autonomous and completely autonomous. In 2022, the semi-autonomous segment led the market, and it is anticipated that this dominance will last the entire projection period. The majority of trucks on the market now use semi-autonomous technology. These trucks have connected technologies and advanced driver assistance systems (ADAS). As a result, it is probable that the growing platooning utilization of these semi-autonomous vehicles would propel market expansion during the projection period. Additionally, the adoption of autonomy in the trucking sector falls short of market expectations and is predicted to take a long time to mature. Therefore, fleet managers' only practical choice is to use semi-autonomous trucks.

Regional Insights

The biggest market share was held by Europe in 2022, and it is predicted that this supremacy will last the entire prediction period. Major trucking firms like Daimler, MAN, and others are present, which is promoting market expansion in the area. For example, most companies that offer truck platooning technology, including Volvo, Daimler, Scania, MAN, and others, are situated in Europe. The ENSEMBLE initiative also intends to introduce multi-brand truck platooning throughout Europe to increase efficiency and traffic safety, which is likely to spur market expansion. Furthermore, Europe has the strictest safety regulations of any other nation. For instance, from 2015, all trucks in Europe must feature advanced emergency braking and lane-keep assistance. During the projected period, the Asia Pacific market is anticipated to develop at the fastest rate. The adoption of commercial Technology platooning in the area is anticipated to be influenced by the region's quickly expanding trucking sector as well as the robust manufacturing and logistics industries in emerging nations like China, India, and others. Furthermore, APAC is the region with the highest truck sales. Therefore, it is projected that the large number of truck fleets and cutting-edge trucking technologies created by

major players operating in China, Japan, and India would drive the market's expansion in the future. In this market, North America is anticipated to have significant growth. The deployment of autonomous car technologies is receiving more support and promotion from North American governments.

Key Market Players

AB Volvo

Daimler

Scania

Peloton Technology

Continental AG

Volkswagen AG

Wabco

Navistar, Inc.

MAN

ZE Friedrichshafen AG

Bendix Commercial Vehicles Systems LLC

Report Scope:

In this report, the Global Truck Platooning Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Truck Platooning Market, By Technology Type:

Adaptive Cruise Control

Forward Collision Avoidance

Lane Departure Warning

Active Brake Assist

Truck Platooning Market, By Infrastructure Type:

V2V

V2I

GPS

Truck Platooning Market, By Level of Autonomy:

Semi-autonomous

Full-autonomous

Truck Platooning Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Truck Platooning Market.

Available Customizations:

Global Truck Platooning Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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