



# Supplying HCV OEMs Report

This report examines the current state of the HCV market looking at the market recovery following the recent economic crisis. The report analyses the key drivers currently affecting the industry, in particular, fuel efficiency, reduced emissions, safety, industry profitability and the changing nature of supplier/oem relationships.

The report also features analysis of these key OEM's in China, India and Europe: Daimler, Man Truck Bus AG, Scania, AB Volvo, Iveco, Navistar/International, Paccar, Hino, Isuzu, UD Trucks, Tata, Ashok Leyland, China FAW and DongFeng Motor Corporation.

## Background to this Research

The global truck industry is today in recovery mode across the key developed markets with OEMs predicting considerable growth limited in NAFTA and Europe by their ability and the ability of the supply base to bring capacity back on-stream. Meanwhile the developing markets of China and India continue to exercise the industry in terms of both growth and appropriate product development.

However, the industry that is emerging from the global financial crisis has changed and is beginning its response to a broad range of big challenges. Sales volumes began a slow recovery during 2010, which is gathering pace through 2011, but the headline figures mask several underlying trends, some of which are rooted in the increasing regulatory burden, and some of which result from reshaping the business and responding to the challenges of profitability in a volatile market, preparing for the growing competition from Indian and Chinese OEMs.

## Table of Contents

### Introduction 7

Market recovery and the legacy of the economic crisis	7
Maintaining technology development	10
Reshaping OEMs and suppliers	11
Global sourcing issues	13
Dealing with raw material volatility	14
Current economic situation	16

### Key drivers 22

Fuel Efficiency	22	
Reduced Emissions	26	
Safety	28	
Industry profitability	30	
The Changing Nature of Supplier/OEM Relationships	34	
<b>European OEMs</b>	<b>37</b>	
OEM Perspective	39	
Daimler	39	
Doing business with Daimler	44	
MAN TRUCK & BUS AG	51	
Doing business with MAN	55	
MAN Latin America	61	
SCANIA	66	
Doing business with Scania	68	
AB VOLVO	71	
Volvo 3P	76	
Doing Business with Volvo	78	
IVECO	81	
Doing Business with Iveco	83	
North American OEMs	85	
NAVISTAR / INTERNATIONAL	87	
Doing Business with Navistar	89	
PACCAR	92	
Purchasing strategy and supply chain management	93	
Doing Business with Paccar	95	
Asian OEMs	97	
Production outlook	98	
HINO	101	
Doing business with Hino	103	
ISUZU	106	
Doing Business with Isuzu	108	
UD Trucks	109	
Doing business with U D trucks	112	

## Indian OEMS 113

Tata 116  
Doing business with Tata 117

Ashok Leyland 119  
Doing Business with Ashok Leyland 120

## Chinese OEMS 123

China FAW (CFAGC) 124  
Doing Business with China FAW 127  
DongFeng Motor Corporation 128  
Doing business with Dongfeng 129

## Figures

Figure 1: Regional sales forecast > 6 tonne GVW	9
Figure 2: Global sales forecast > 6 tonne GVW	9
Figure 3: Total Asia sales forecast > 6 tonne GVW	10
Figure 4: Indexed returns from truck suppliers	11
Figure 5: Medium duty and heavy duty truck sales North America	18
Figure 6: Medium duty and heavy duty truck sales Western Europe	19
Figure 7: Medium duty and heavy duty truck sales Eastern Europe	20
Figure 8: Medium duty and heavy duty truck sales Asia	20
Figure 9: Europe heavy truck sales actual and trend 1993 - 2020E	21
Figure 4: Total operating costs 40 tonne tractor	22
Figure 5: Variation in vehicle utilisation	23
Figure 6: Average test consumption (litres/100 km)	24
Figure 7: European emissions standards (PM versus NOx)	26
Figure 8: European compliance costs compared to Euro 0	26
Figure 9: US emissions standards (PM versus NOx)	27
Figure 10: Bendix/ Knorr Bremse ABD22X air disc brake	28
Figure 11: Truck safety systems evolution	29
Figure 12: Industry profitability 2008 and 2009	30
Figure 13: Unit sales and revenue 2008 and 2009	31
Figure 14: Estimated sales, revenue and EBIT 2015	32
Figure 15: Profit share between premium, value and low cost segments 2015	33
Figure 16: OEM core competencies and outsourcing potential	34
Figure 17: Factors that affect the decision to outsource	35
Figure 18: Changing OEM competence requirements	36
Figure 20: Western Europe production forecast	37
Figure 26: Daimler trucks locations	39
Figure 27: Graphic representation of how Daimler does business with its suppliers	41
Figure 28: Daimler Trucks Global Excellence strategy	42
Figure 29: Production capacity flexibility management at Daimler	42
Figure 30: Regional programmes implemented 2009/ 2010/ 2011	43
Figure 31: Overview of Daimler's Procurement Trucks and Buses (PTB) organisation	44

Figure 32: Daimler's performance based criteria	44	
Figure 33: Daimler cost savings through material optimisation	45	
Figure 34: A graphic representation of Daimler's EBSC system	48	
Figure 35: MAN Truck & Bus key figures 2010/ 2011	51	
Figure 36: MAN Truck & Bus AG production network	52	
Figure 37: MAN's internationalisation strategy	53	
Figure 38: MAN Truck & Bus divisional goals	54	
Figure 40: Man Truck & Bus AG supplier pyramid	59	
Figure 40: Scania global locations	66	
Figure 41: Scania worldwide truck registrations 2007 to 2010	67	
Figure 42: Scania supplier categories	69	
Figure 43: Volvo Group geographic distribution of employees 2010	72	
Figure 44: Volvo Group structure	73	
Figure 45: Volvo Group Global presence	74	
Figure 46: Volvo Truck deliveries and net sales by market 2009 - 2010	75	
Figure 47: Volvo 3P divisional structure	76	
Figure 46: A schematic of Volvo's quality procedures	80	
Figure 49: The post demerger of the Fiat and Fiat Industrial Groups	81	
Figure 50: Iveco revenue and net margin forecast	81	
Figure 51: Iveco platform strategy	82	
Figure 51: FTP engine production compared to other global producers	83	
Figure 54: North America retail sales of Class 8 trucks Jan 2008 - Oct 2010	84	
Figure 31: US class 8 production forecast	85	
Figure 55: US production forecast	86	
Figure 57: Navistar global market volumes and shares	87	
Figure 58: Navistar's three pillar strategy	87	
Figure 59: Navistar seeks to leverage platform commonality	88	
Figure 60: Paccar market share 2000 vs 2010	92	
Figure 61: Paccar supply covered by long-term agreements	93	
Figure 60: Paccar supplier numbers 2000 - 2010	93	
Figure 37: Global purchasing at PACCAR	96	
Figure 38: PACCAR supplier requirements	96	
Figure 39: Schematic of Paccar new supplier progress	96	
Figure 66: Japanese production outlook 2005 - 2015	99	
Figure 67: Hino's global presence 2011	103	
Figure 68: Toyota purchasing schematic	104	
Figure 69: Hino module development and production	105	
Figure 66: Isuzu global performance FY09 to FY11	106	
Figure 67: Isuzu Japanese volume sales and market shares FY07 to FY11	107	
Figure 68: Isuzu Mid-Term Business Plan April 2008 – March 2011	108	
Figure 69: Isuzu's Alliance Strategy	108	
Figure 70: A schematic diagram of Nissan Diesel's relationships with customers and suppliers	112	
Figure 75: Growth in the number of Indian OEMs	113	
Figure 76: Ashok Leyland unit sales and market share 2008 - 2011	119	

## Tables

Table 1: US emissions compliance costs	27
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Table 2: Daimler Truck unit sales 2009/ 2010	40
Table 3: Volvo Truck deliveries by brand and market	72
Table 4: Navistar truck and engine manufacturing plants	89
Table 5: Paccar three major commodity groups	95
Table 6: Japanese truck production 2008 - 2016	100
Table 7: UD Trucks production performance 2008 - 2010	110
Table 8: Indian truck production 2008 - 2013	114
Table 9: Tata Motors code of conduct	118