Reinventing the Truck

Understand the impact of new technologies and powertrain shifts on the logistics, trucking and energy industries

A 2018 Multi-client Study
Heavy duty commercial vehicles account for over a third of the world’s refined product demand. Could disruptive forces radically alter long-established trends?

**Key factors impacting the heavy duty trucking industry**

- Regulatory pressure
- Increasing efficiency
- Powertrain technology
- Labor shortages
- Increasing utilization
- Connectivity
- Technology development
- Economic uncertainty
- Amazon effect
- Autonomous trucking

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The next 20 years will bring major change across the transportation and energy sectors. Decarbonization may greatly impact crude oil demand while increasing opportunities for gas and electricity. Powertrain systems will be greatly altered to meet new, stringent regulations. And autonomous technologies may significantly alter business models. IHS Markit is uniquely positioned to look within and across these inter-related industries and offer insights into the changing landscape. Our 2018 multi-client study will address:

- **The logistical system of the future**: How will technology and regulation shape the supply chain and what role will trucking play in tomorrow’s movement of goods?
- **Regulating trucking**: How will regulation shape future choices for truck manufacturers, suppliers and operators?
- **The trucking business models of the future**: What business models will evolve and how will these impact drive-train technologies?
- **The economics of trucking**: What will be the predominant fuel of choice by market?
- **The impact on energy and chemicals**: How will other industries be affected?
An interconnected view for interconnected industries

The future of the trucking industry has far reaching consequences for the oil & gas, power, and chemical industries. This study will help answer critical strategic business questions across multiple industries.

TRUCKING OEMS & SUPPLIERS
- How will changes in technology impact suppliers?
- Will today’s supply chain endure?
- How will business models evolve?
- How will economics be affected by the transformation in the trucking sector?
- Are cross-industry partnerships the key to success, or even survival?

POWER
- What will be asked of the electric grid infrastructure and how will it evolve?
- How will the recharging infrastructure develop in the medium and heavy commercial vehicle sector?

OIL & GAS
- What will be the impact on the downstream industry and when will peak oil demand arrive?
- How will crude oil prices be impacted by changes in the automotive eco-system?
- Upstream implications: What will the global oil supply curve look like?
- What will be the balance between gasoline and diesel, and can natural gas and hydrogen expand their use in transportation?

CHEMICALS
- What will be the impact of changing feedstocks on chemicals production?
- How will design changes in the automotive sector affect the demand for chemicals and materials such as thermoplastic polymers and synthetic elastomers?

Don’t just read the study!

Participate in interactive workshops to discuss the scope and findings.

Sign on before March 13th and be an active participant, helping shape the scope of the study.

Study timeline
- 14 March 2018 - First workshop to outline and scope the research (Detroit)
- May 2018 - Final workshop to discuss key findings and implications
- July 2018 - Delivery of final report and data

Study deliverables/parameters:
- Two interactive workshops
- Excel data sets with output from automotive modeling and fuel demand modeling in two scenarios: Rivalry and Autonomy
- Geography: China, Europe, Japan and the United States
- Time: To 2040
- Commercial demand segments: Medium and heavy duty trucks
Unparalleled expertise

With leading analysts in the automotive, oil, electric power, and chemical sectors, IHS Markit offers unparalleled insight into the coming changes. Our modeling expertise in these industries delivers comprehensive analytics and datasets—a high-value combination to guide decision making during what will be a tumultuous period for the future of these industries.

Every day, over 50,000 customers in 140+ countries rely on insights from IHS Markit, including:

- >85% of the Fortune Global 500
- >75% of the Fortune US 1000
- 94/100 Largest US corporates
- 49/50 Largest US banks
- 10/10 Largest automobile companies in the world
- 49/50 Largest global oil companies

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About IHS Markit

IHS Markit (Nasdaq: INFO) is the automotive industry’s leading source for market-wide insight, expertise and advanced planning solutions. With a reputation of enabling better decisions and better results for nearly a century, the world’s leading OEMs, suppliers and their transportation partners rely on IHS Markit to power growth, improve efficiency and drive a sustainable competitive advantage.

Automotive offerings and expertise at IHS Markit span every major market and the entire automotive value chain—from product planning to marketing, sales and the aftermarket. Headquartered in London, our automotive team is part of IHS Markit’s information and analytics powerhouse that includes more than 15,000 colleagues in 150 countries, covering energy, chemical, aerospace and defense, maritime, financial, technology, media and telecommunications. For additional information, please visit www.ihsmarkit.com or email automotive@ihsmarkit.com.

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