

Reinventing the Truck

Disruptive forces continue to alter long-established trends in the trucking and energy industries

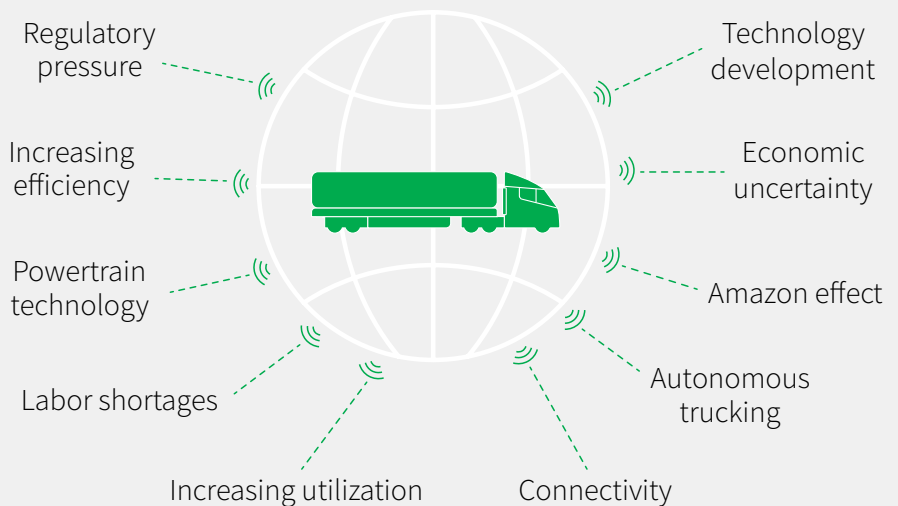
KEY ISSUES ADDRESSED:

- **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?

The Reinventing the Truck study provides analysis of adoption of alternative power train technologies, total cost of ownership analysis, and disruptive forces in play which are affecting companies' strategic decision-making. For example, new regulations will impact powertrain choices and relative costs. Autonomous technologies may significantly alter business models. And decarbonization is already impacting refined product demand while increasing opportunities for natural gas and electricity. IHS Markit is uniquely positioned to look within and across these inter-related industries and offer insights into this changing landscape.

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



An interconnected view for interconnected industries

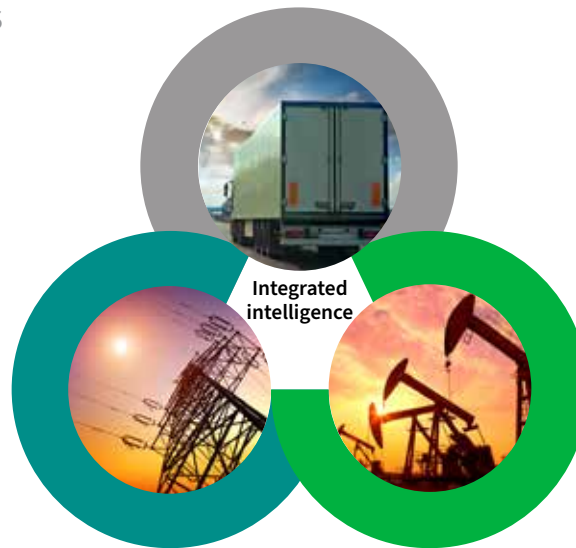
The future of the trucking industry has far reaching consequences for the oil & gas, power, and chemical industries.

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?

Study Deliverables

The Reinventing the Truck update will include excel data sets for sales, fleet and fuel demand outlooks to 2050 in two scenarios. The power point Summary Report will provide detail on the policy, technology, and cost assumptions used in the sales and fleet modeling and also in the total cost of ownership analysis. The research includes the following key markets: China, US, Europe, Japan.

For more information www.ihsmarket.com

CUSTOMER CARE

NORTH AND SOUTH AMERICA

T +1 800 447 2273
+1 303 858 6187 (Outside US/Canada)

EUROPE, MIDDLE EAST AND AFRICA

T +44 1344 328 300

ASIA PACIFIC

T +604 291 3600

E CustomerCare@ihsmarket.com

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