



# Ringling the changes

One month into 2016, it's time to reflect on CV trends, the lessons of history - and trucks likely to deliver our requirements in the future. Brian Tinham reports from Iveco's 'State of the Nation'

Every year truck and van pundits flock to the 'State of the Nation' briefing staged not by the associations, nor the largest manufacturers, but by Iveco - arguably the most unjustly underrated brand. Last month saw the 30th occasion of this institution - at Iveco's new Basildon HQ - prompting the originally Italian, now British business (\$33 billion parent CNH Industrial is domiciled here) to consider three decades of change. And me to ponder what the trends suggest for the future.

Nigel Emms, Iveco's brand and communications director, kicked off by observing that in 1985 truck weights had just moved up to 38 tonnes, Bedford took 11% of the market and Ken Livingstone's Greater London Council was considering banning trucks at night and weekends. A familiar

prospect? As for the market, in the 1980s vehicles over 6 tonnes averaged at 55,000 units per annum, peaking at 65,200 in 1989 ahead of the 1991-2 recession, which witnessed a collapse to circa 29,000, with construction bearing the brunt. Again, ringing bells?

Then followed recovery and a decade of what now looks like stability ahead of the 2008 crash and double-dip recession - and we all know the rest. Or do we? Yes, many in the industry are



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aware of the impacts of Euro 6 emissions regulations, ECVTA (European Whole Vehicle Type Approval) and Driver CPC. Put simply, from an operator's perspective, they delivered respectively: cleaner, more fuel efficient but also costly trucks; consistency of manufacture with bodied vehicles, but at the expense of lead times and bodybuilder capacity; and, well, in large part, the driver shortage.

But there's more. Economic turbulence and legislative hurdles do not paint the whole picture. Markets - especially the currently resurgent construction sector and also consumers' home delivery demands - have conspired to force operators to reconsider their fleets' make-up. And further developments look likely.

Iveco rightly characterises shifting preferences as about operators seeking

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to improve efficiency. Emms cites long-haul operators moving inexorably to three-axle tractors at 44 tonnes, pulling high cube or double deck trailers – as borne out by the SMMT's (Society of Motor Manufacturers and Traders) CV registrations data for 2015 (page 5). He also points to pallet networks and urban distribution operators, where 6x2 rigids are replacing 18-tonners, while more productive, higher payload 12- to 16-tonners take over from 7.5-tonners.

"Each and every one of these delivers greater efficiencies per tonne-mile, but with fewer, larger trucks used more intensively," observes Emms, somewhat ruefully. But clearly, such movements impact all truck makers' volumes and ultimately the ranges they offer.

What about all-important construction trucks? Eight-wheelers have long since usurped six-wheelers as the

mainstream standard. As Emms put it: "These days, there are three times more concrete mixers sold on four-axle chassis than on three axles... And in tippers, the figure is 10 times more. Back in the 1980s, those two body types were much more popular on six-wheelers."

This story is likely to continue unfolding. As transfer stations replace off-road refuse disposal, and the CLOCS (Construction Logistics and Cyclist Safety) standard demands better nearside-front vision for drivers, the writing is surely on the wall. Operators will come to rethink their preference for tall N3G trucks. Low-entry cabs and standard-height chassis may seem niche today, but there is a growing body of opinion that sees them as the next logical conclusion. How quickly depends on the market beyond this country's shores.

### THINK THE UNTHINKABLE

Ditto double-drive. Why pay the capital and fuel costs of an 8x4 if you don't need to? Go for air suspended and you could also profit from lifting tag axles and rear steers on 8x2s. Regrouping the rear axles to a triple bogie (tridem) also looks attractive, with payload enhanced and manoeuvrability challenging six-wheelers. And as their popularity grows,

so prices will tumble in line with economies of scale and competition.

Next, consider urban trucks? Rigid and artics alike are unlikely to escape change. As Nick Pemberton (left), Iveco's director of its now separate truck business, says, where's the sense in even 4x2 day-cabbled tractors pulling single-axle urban trailers – popular though they may look in retail? Opinion is divided on likely outcomes – large rigids lack application flexibility and may suffer on residuals, while most OEMs would worry about the costs of developing smaller tractors for a market that's hard to scope. But what we have is overkill.

Maybe something more like Terberg's latest shunting tractors? More likely, a move to lower-power dedicated CNG (compressed natural gas) distribution tractors, as already offered by Iveco, Scania and others. As CNG availability improves, and towns and cities impose ever tighter limits on NOx and particulates emissions, this alternative fuel may yet seem attractive.

And how about 7-tonners, such as Iveco's New Daily – effectively a truck in van's clothing? Or its New Eurocargo, now available from 7.5–18 tonnes in chassis cab format (18–35 tonne gcw as urban tractor) with seven power ratings, from 160–320bhp, all distribution-friendly SCR (selective catalytic reduction) only? Iveco product director Martin Flach points to 11 transmission options, 15 wheelbases and 11,000 permutations. And he adds that in today's market, the factory has flexibility for anything up to 6x2 22-tonners.

There's a reason for New Eurocargo's crowning as International Truck of the Year 2016. Brand snobs may find it hard to swallow, but it's not just to do with its safety, technology, presentation, torque and fuel-efficiency improvements, significant though all these are. Is this the shape of multi-drop and urban distribution trucks to come? [IE](#)

### Internet shopping

Among LCVs internet shopping is primarily responsible for spawning massive growth in parcel delivery vans, particularly at 3.5 tonnes. Hardly surprising: operators are taking advantage of their flexibility, carrying capacity, driver availability and freedom from the diktats of O licensing. But the net effect, as Iveco sees it, is a drift away from its traditional 7.5–15 tonne gcw medium-duty heartland.

"At a massive 93,490 units, 2015 saw the largest 3.5-tonne van market ever – 18.1% up on 2014 and beating the previous, pre-recession 2007 record by over 8,000 units," comments the firm's Nigel Emms, noting also that 3.5-tonners now account for 92% of the 3.5–6 tonne van sector.

"The 3.5-tonner has benefited from two things: a move up-weight by retailers and tradesman from smaller vans; and a move down-weight by operators avoiding the hassles and costs of running trucks."

Will the numbers falter as light-duty Euro 6 is imposed on new vans in September this year? Iveco doesn't think so. And, given the reaction to mainstream van makers' Euro 6 engine introductions ahead of the legislation, you'll be hard pressed to find many disagreeing.