2019 TRUCK AND TRAILER SERVICE STUDY



A COMPREHENSIVE STUDY OF THE MEDIUM AND HEAVY DUTY TRUCK AND TRAILER SERVICE MARKET

2019 U.S. TRUCK AND TRAILER SERVICE STUDY Table of Contents

EXECUTIVE SUMMARY AND KEY OBSERVATIONS

- 7 Executive Summary and Key Observations
- 8 Comparative Studies
- 9 Service Study Highlights
- 17 Service Outsourcing Distance
- 19 Truck Operator Internal Service Work Profile
- 29 Fleets Priorities and Future Concerns
- 33 Service Study Outlook

METHODOLOGY

35	Methodology
35	Methodology

36 New Features

SERVICEABLE UNIVERSE

- 37 Medium Duty Class 6 & 7 Universe
- 41 Heavy Duty Class 8 Universe
- 44 Diesel Engine Universe
- 48 Trailer Universe
- 52 2024 Outlook

NON-COMPONENT SERVICE PRACTICES

59	Paint & Body
59	In-House vs. Outsourcing
66	Point of Service
69	Vehicle Refurbishing
79	Vehicle Disposal Rationale
84	Investing in Existing Equipment vs. Disposal
86	Telematics
95	"Over-the-Air" Software Updates
96	VMRS Usage for Service Transactions



COMPONENT SERVICE PRACTICES

99	Overview
100	PM A
107	PM B
114	Cooling System
121	Tire Mounting/Dismounting
128	Wheel Seals & Bearings
135	Brake Shoes and Hardware
142	Air Compressor Service
149	Air Brake Systems
156	Engine Overhauls
163	Emissions Components
170	Alternators & Starters
177	Kingpins
184	Steering Pumps & Gears
191	Clutch/Transmission
198	Driveshaft/Driveline
205	Drive Axles/Differentials
212	Suspension Components
219	Fuel System Repairs
226	Air Conditioning Systems
233	ECMs
240	Transmission Control Module
247	Sensors
254	Electronics/Wiring
261	Paint & Body
268	Trailer Body Repair
275	APUs

SERVICE SHOP PRACTICES

281	Overview
281	Shop Hours
284	Truck Operator Shop Activity by Work Shifts
288	Importance of Service Availability by Time Slot
294	Customer Expectations – Acceptable Wait Time
301	Service Provider Performance
308	Service Provider Switching
314	Breakdown Service



SERVICE SHOP PRACTICES (con't)

- 318 Operator Concerns About Service Outsourcing
- 319 Mobile Service Providers
- 324 Contract Maintenance Service

WARRANTY

Warranty Work Performed
Electrical Diagnostics
Emissions System
Automatic Transmissions ECU/ECM
Diesel Engines
Sensors
Diesel Engine ECU/ECM
ABS Brake Systems
Point of Service
Diesel Engines
Manual Transmissions and Drive Axles
Brake Systems
Electrical Diagnostics
Diesel Engine ECU/ECM
Auto Transmission ECU/ECM
Diagnostics: Sensors
ABS Brake Systems
Steering Systems
Chassis and Suspension Systems
Engine Emission Systems
Cab & Body
Hours Lost to Warranty Service
Customer Satisfaction with Warranty Support

SERVICE TRANSACTIONS

- 403 Service Transactions
- 406 Fleet Management Software
- 409 Service Record Management



SERVICE TECHNICIANS

- 413 Number Employed
- 415 Education Level
- 419 Average Age
- 421 Average Turnover Rate
- 425 Annual Training Investment
- 427 Training Methods

SERVICE PROVIDER PRACTICES

- 431 Total Service Provider Market
- 432 Background
- 432 Service Capacity
- 433 Views of Competition
- 437 Service Provider Operations
- 442 Service Labor Mix
- 448 Mobile Maintenance
- 451 Service Technician Issues
- 459 Service Tools and Equipment

OUTLOOK

467 Outlook

APPENDIX

