

2025

# STATE OF THE INDUSTRY



HEAVY TRUCK

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HEAVY TRUCK





# HEAVY TRUCK

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# Overview

As it has for several years, CDK Heavy Truck surveyed management and staff at truck dealerships about the challenges they currently face and how the industry has changed over the past year.

While it has been a relatively good year overall for the U.S. economy, with real gross domestic product rising 2.8% and low unemployment rates, 2024 was a down year for the heavy-duty truck market. Sales declined by nearly 10% from 2023, with several factors believed to play a role, including continued high interest rates and challenges with customer retention.

Despite these ongoing economic challenges, dealers are progressing in several areas, such as shifting focus away from reducing staff

shortages and instead improving training for the staff they currently have to better the customer experience. Dealers are also considering increased investments in information technology infrastructure to help improve sales and fleet management.

This report includes direct quotes from respondents that highlight the overall results and how exactly they're facing issues on the ground.





# Demographics

The 2025 survey received **122 responses** from a range of dealers. Answers came from multiple departments and roles, including Accounting, Administration, Parts, Service and Sales.



**20%**  
Executive  
Leadership



**80%**  
Department  
Heads



## DEPARTMENT

Service	25%
Sales	20%
Parts	19%
Administration	17%
Accounting	11%
Others	8%
Marketing	0%



## DEALERSHIP SIZE

1 to 2 rooftops	24%
3 to 5 rooftops	33%
6 to 10 rooftops	20%
11 to 15 rooftops	6%
16 rooftops+	16%
Not sure	1%



## MONTHLY NEW AND USED UNITS SOLD

Less than 10 units	16%
10-49 units	61%
50-99 units	9%
100+ units	5%
Not sure	8%



## DEALERSHIP TECH ADOPTION

Trendsetters	42%
Status Quo	58%



## LOCATION

United States	78%
Canada	22%

## Trendsetters vs. Status Quo

To help understand respondents' willingness or ability to integrate new ideas into their operations, they were asked if they were the first to try something new in their business or to wait until there was more of a consensus. CDK classifies the first group as trendsetters and the other status quo. Trendsetters are early adopters willing to try new ideas or concepts, while the followers of the status quo wait to see how these ideas work for other dealers before investing.



# Challenges Shift

Many of the concerns highlighted by respondents to our 2025 survey stayed roughly the same as the year before. The effects of inflation on demand, elevated interest rates, and the need to educate buyers on complex new truck technologies remains a top concern.

The most significant change from our 2024 survey was a lower concern with staffing shortages and parts supplies. Last year, 55% of respondents called out staff shortages as a concern, while this year, only 33% did, likely due to slower sales and reduced overall pressure in the labor market. Only 16% of respondents named parts supply a challenge this year, half of the number reported in 2024. Slower vehicle sales have relieved some pressure on suppliers to provide parts to OEMs, making more parts available to dealers. With less competition for parts and shorter wait times, dealers can increase their service capacity.

Shooting up the list of challenges was retaining existing customers, now ranked second among dealers and up from 11 last year. The number of dealers who identified this challenge nearly doubled from 20% in 2023 to 39% in 2024.

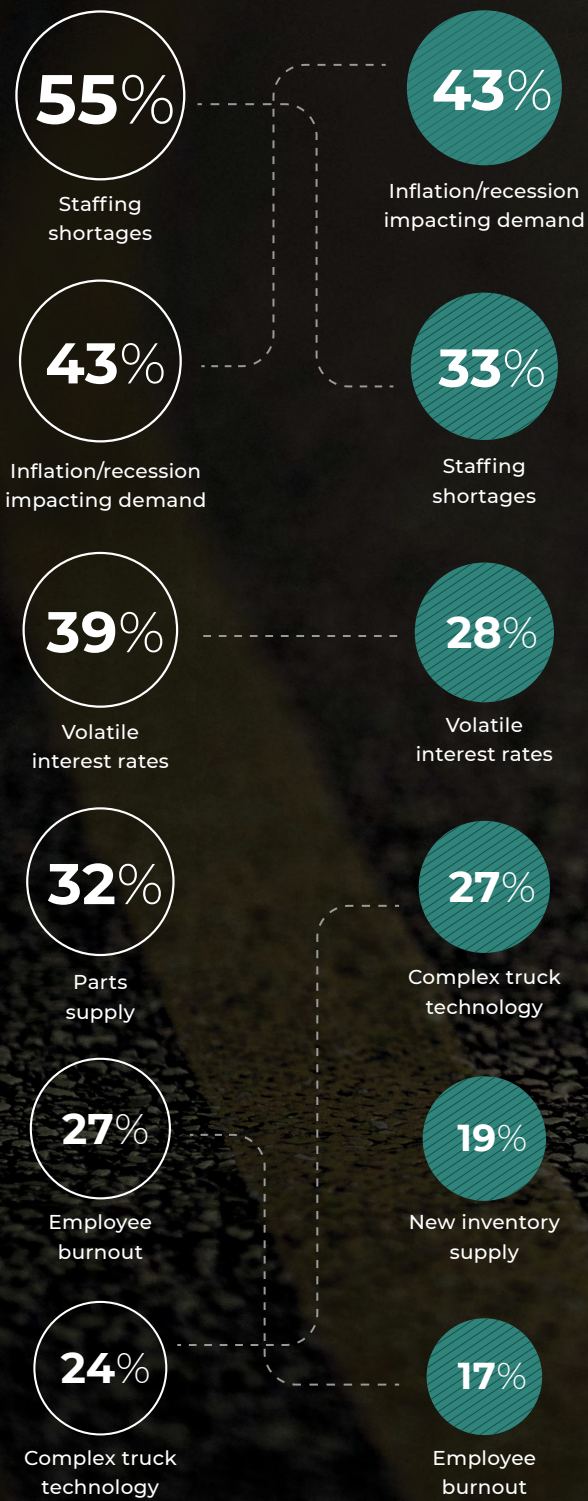
Meanwhile, the need for more IT infrastructure, including systems like a CMS or DMS, was identified as a top challenge for the first time, with 32% of respondents reporting it as an issue. Again, slowing sales are likely a contributing factor here as dealers try to use their resources more efficiently as revenue declines. These IT systems can provide a better customer experience, will draw in more sales and improve cybersecurity for the dealership.

“The usage of digital technology is preferred by customers, as today’s experience shows that customers are more focused on buying trucks online. Additionally, the digital expectations of customers are more positive than in-person experiences. It increased both efficiency and operational effectiveness. Digital tools and online sales platforms made it easier to connect with customers beyond the local area.”

— Dealer with 3-5 Rooftops

## TOP CHALLENGES

○ 2023 ● 2024



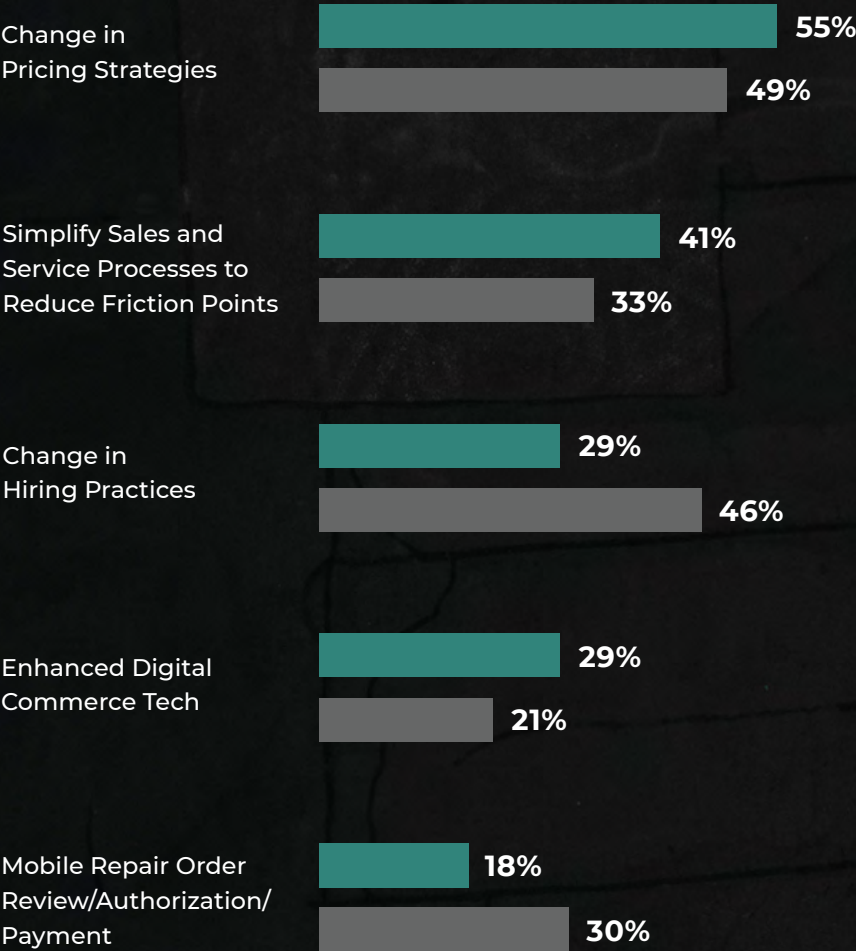
Overall, uncertainty about the economy due to expected trade disputes within North America and globally will lead to continued downward pressure on truck sales in 2025. While inflation tapered off significantly through 2024, dealers are concerned it'll increase again in 2025 if significant new tariffs are imposed and maintained, which will likely lead to interest rates remaining high. As a result, dealers are looking to increase their reach beyond just their local areas.



# Adapting to a Shifting Landscape

## LARGEST PIVOTS IN STRATEGY

■ 2023 ■ 2024



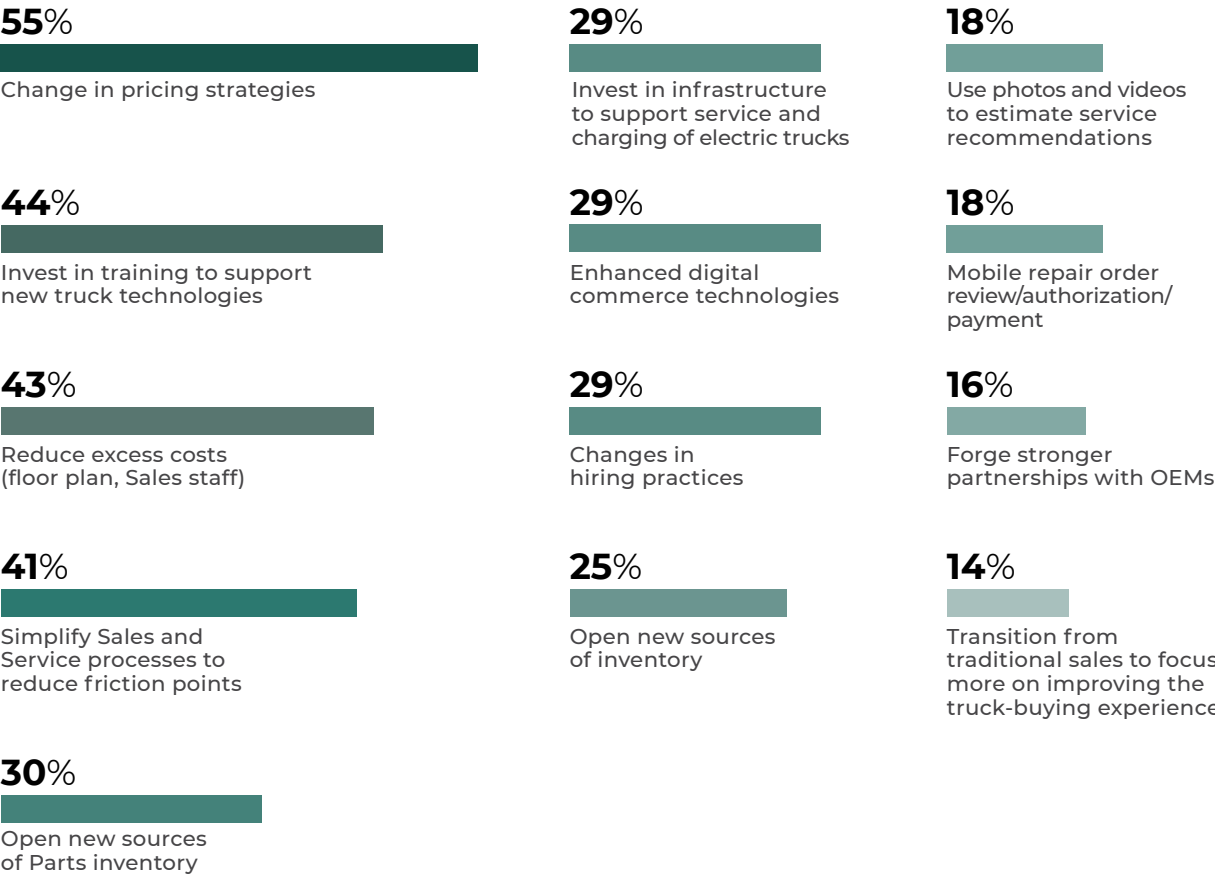
As sales and labor market pressures have declined, there's significantly less concern this year on hiring practices, with only 29% of respondents citing this category as a concern compared to 46% in 2024.

Instead, there's a growing focus on enabling the staff dealers do have to provide better service to customers. Digital commerce is a key enabler in making the buying experience smoother

and faster and reducing friction points throughout the process. Since vehicle availability is paramount for commercial vehicle operators, smoothing out the service process to minimize downtime is also crucial. Mobile repairs are an increasingly important part of maximizing customer resource utilization, so improving order reviews, authorization and payments will make life easier for dealers and operators.

In a down market, pricing flexibility, maintaining an existing customer base, and potentially conquering sales from competitors can help increase revenue. Thus, it's no surprise that most respondents highlighted pricing as a strategy to address challenges in 2025.

## ALL STRATEGIES IMPLEMENTED IN 2024



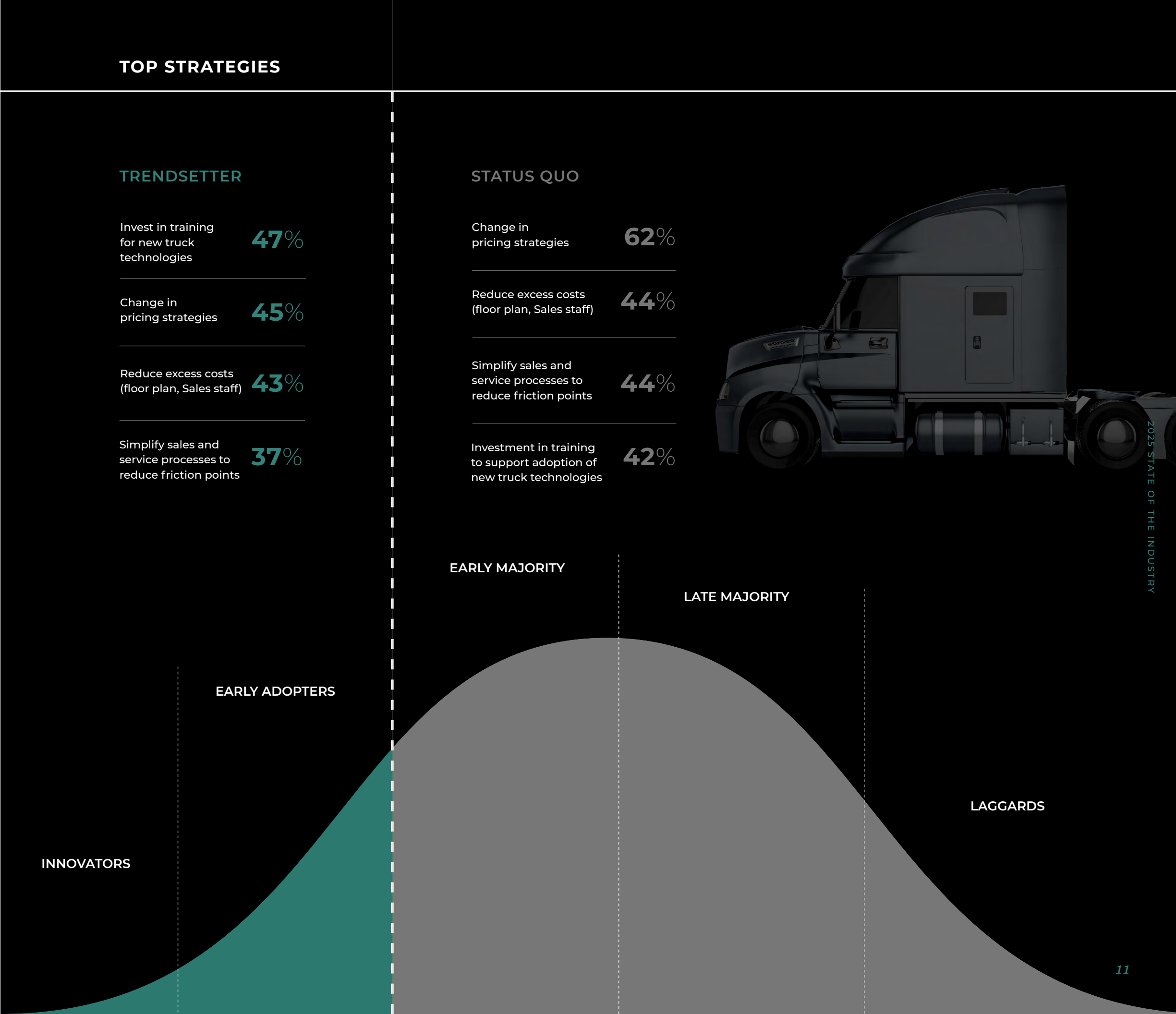


# Trendsetters vs. Status Quo

As the market has become more challenging, there's been a significant shift toward maintaining the status quo this past year rather than taking risks on unproven concepts. Trendsetters and the status group had the same top four focus areas for 2025 as in 2024, but the ordering of those priorities differs. Three focus areas have relatively similar numbers for both groups.

For the status quo group, pricing strategies were the most important likely because they're the most straightforward and best-understood means of responding to a volatile market. Only 45% of trendsetters selected pricing strategies, while 62% of the status quo group did.

The status quo group reported a more positive impact from three strategies: infrastructure investments, stronger relationships with OEMs, and pricing strategies. The status quo group was also more likely to utilize tried-and-tested strategies like pricing, so they'd also see more benefits from it than the trendsetters. Trendsetters were likely already more advanced in infrastructure investments and OEM relationships, so they probably experienced less impact year to year.





# Return on Strategic Investment

All of the focus areas in the survey were deemed to have had a strong overall positive impact on business in 2024, but two in particular also stood out with a higher financial impact on profitability. Transitioning from traditional sales to focus more on improving the truck-buying experience through education and removing friction points clearly

helped pull in customers, and according to 59% of respondents, it had a notable impact on the bottom line. Similarly, 63% of respondents reported that investing in training staff to understand and explain the benefits of new truck technology to customers had a high financial impact on profitability, as new technologies on vehicles typically carry higher margins.

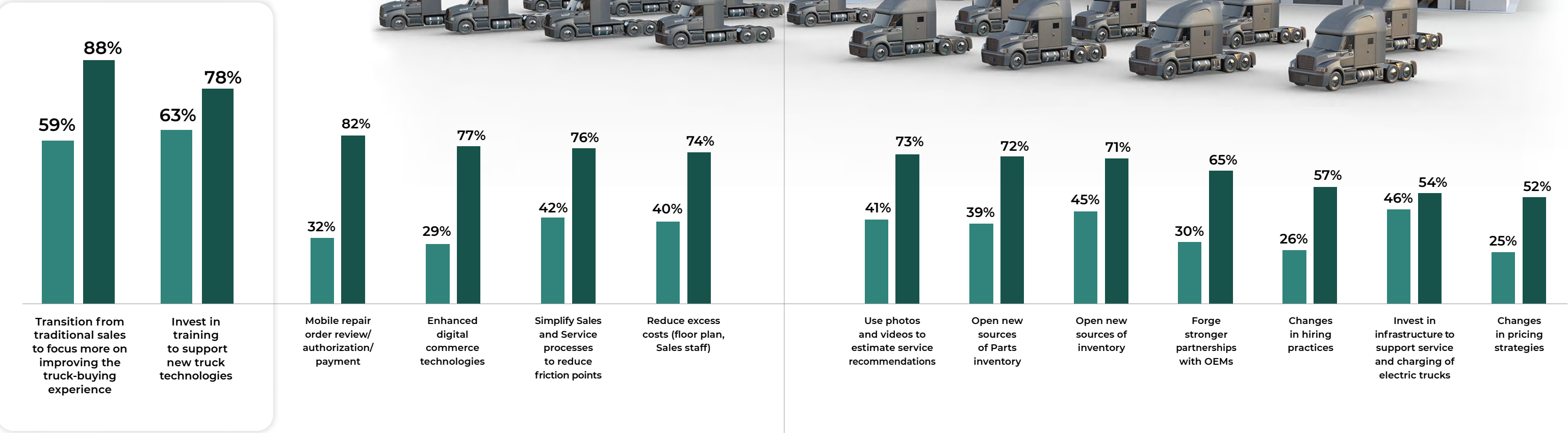


“Now that our staff are well trained, they complete their tasks quickly.”

Nearly 4 out of 5 dealers said training had a high financial impact

## STRATEGIES WITH HIGH IMPACT IN 2024

High Operational Impact    High Financial Impact





STRATEGIES WITH HIGH POSITIVE IMPACT IN 2024

	TRENDSETTERS	STATUS QUO
Transition from traditional sales to focus more on improving the truck buying experience	100%	78%
Use photos and videos to estimate service recommendations	100%	65%
Forge stronger partnerships with OEMs	93%	82%
Open new sources of Parts inventory	93%	57%
Reduce excess costs (floor plan, Sales staff)	91%	61%
Mobile repair order review/authorization/payment	90%	75%
Simplify Sales and Service processes to reduce friction points	89%	68%
Invest in training to support new truck technologies	83%	73%
Enhance digital commerce technologies	82%	75%
Changes in hiring practices	57%	57%

This year, the difference in the reported positive impact of different strategies between the trendsetter and the status quo groups was generally much smaller than last year. In the case of most of these strategies, the trendsetters saw a higher positive impact than the status quo group, probably because they went for more complete implementations.

Those who are willing to take chances on trying new business strategies and really commit to them are more likely to see benefits when they work. When evaluating the impact of business changes, the survey respondents who categorize themselves as trendsetters saw more positive change, likely

because they were fully committed to it. On the other hand, those who prefer to stick with the status quo may adopt some of the same strategies, but they may not be inclined to adopt them as broadly across their business and thus may see more limited benefits.

Among the trendsetters, 100% reported a positive impact from transitioning to improved buying practices and using photos and video to provide service estimates. Both of these are essential to improving the customer experience before and after sales and are likely to lead to better customer retention.

“Online tools make the buying process smoother and more efficient. The process is much faster and easier for customers. The approach has shifted towards a more customer-centric, experience-oriented model, allowing dealerships to focus on building relationships with customers.”

— Dealer with 1-2 Rooftops



# Operational Improvements

Looking back at 2024, respondents clearly indicate that despite challenges with declining sales, the focus on improving efficiency in many operational areas of the business has made a meaningful positive impact. Among respondents, 60% reported an improvement in operating profits, while 17% saw no change. Only 23% reported a decline. Similarly, profit margins on new and used sales also increased by 59% and remained stable for 24% of respondents, with only 17% reporting declines.

Productivity improvements can likely be traced back to a number of specific focus areas. The reduced pressure in the labor market combined with improved compensation and benefits typically leads to reduced staff turnover. Rather than training new staff regularly, retaining existing staff and focusing on training them on improved processes and tools leads to overall productivity improvements.

Ensuring a reliable supply of parts so that service and repairs can be completed quickly and trucks can get back on the road is another contributor to both customer satisfaction and retention as well as cost savings. Not having to carry excessive parts inventory when reliable sources are available significantly cuts expenses.

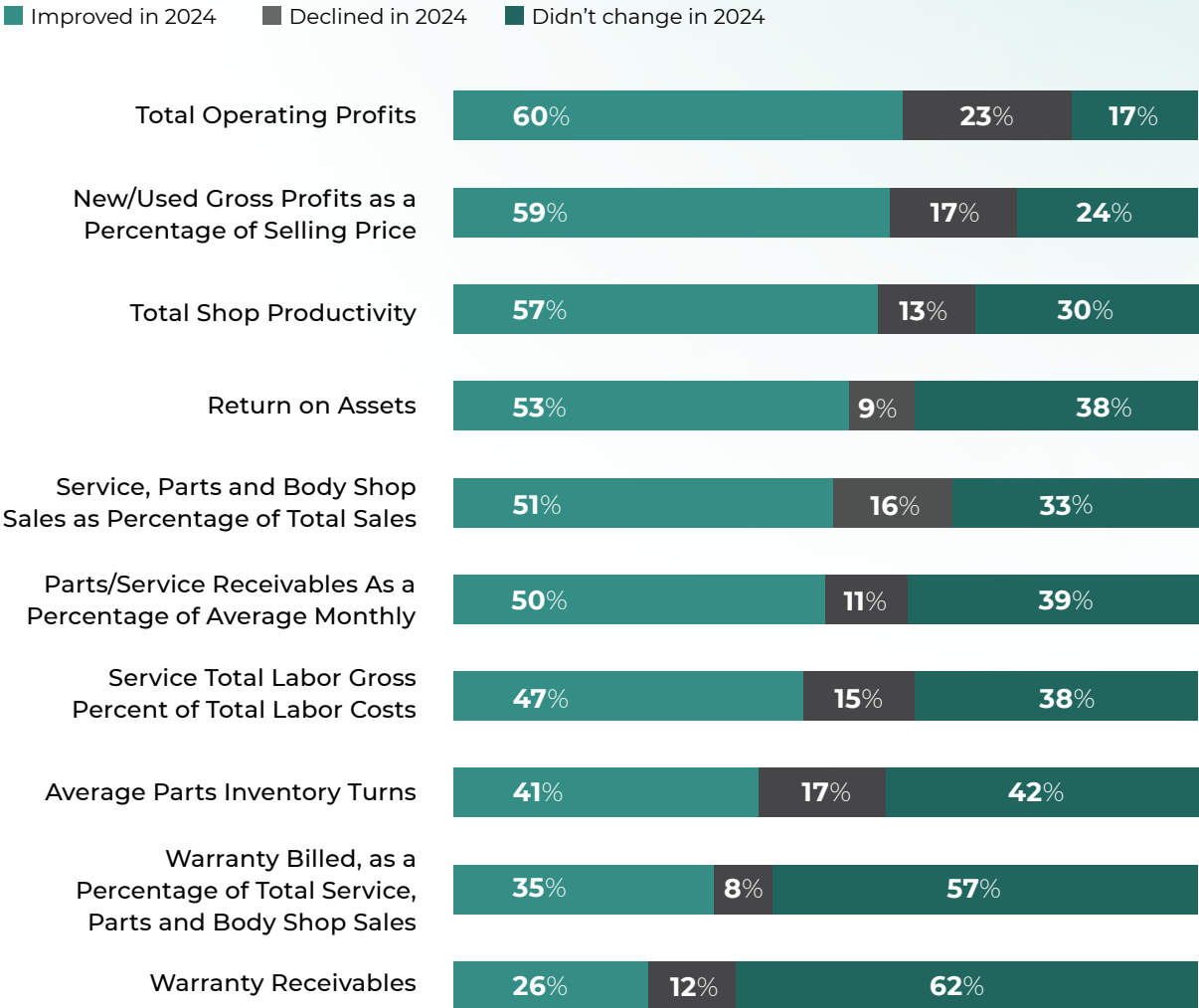
Given that 55% of respondents plan to change pricing strategies in 2025 to address the market challenges, the strong profitability reported above provides maneuvering room for dealers to adjust. It also provides the opportunity to invest in technology while continuing to emphasize cost reduction, which will help these dealers stay profitable.

“Changing pricing practices has helped us to use that savings into different departments as well as invest more in the infrastructure of the organization. The focus is shifted more towards gaining profit and thinking about investing more into the technology.”

— Dealer with 1-2 Rooftops

The most significant declines reported in 2025 were related to warranty billing and receivables, with a majority of respondents reporting that those numbers declined. That’s consistent with the industry trend of more operators keeping trucks in service longer instead of purchasing new vehicles, so more trucks are out of warranty. Half of the respondents reported increased Service Parts sales, with another third showing no change.

## CRITICAL OPERATING VARIABLES IN 2024



“We could see a difference in the bottom line when we focused on reducing expenses. It helped to source more parts and also partner with other online parts sales sources.”

— Dealer with 6-10 Rooftops





# Spotlight on Staffing

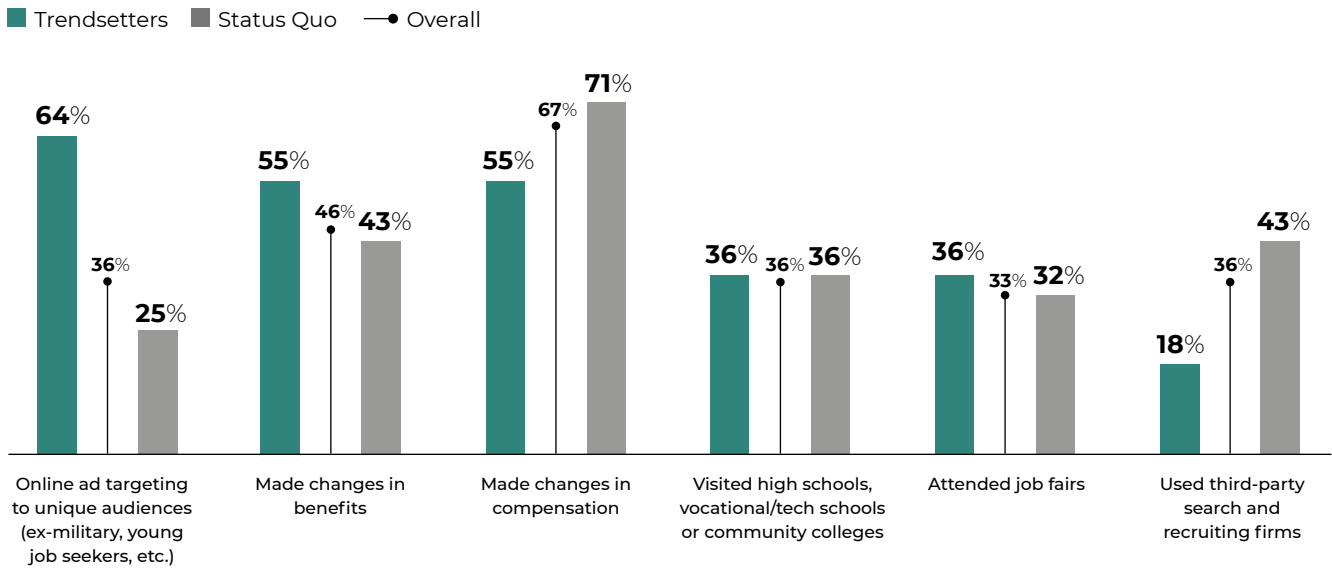
On the staffing front, the decline in sales and the broader loosening of labor markets substantially reduced the need to recruit new staff. As a result, there was a substantive decline in the importance of attending job fairs, using third-party recruiters, and visiting high schools.

Interestingly, there was a more significant gap between the trendsetter and status quo groups for using specific online ad targeting and working with local businesses and youth groups. In 2025, trendsetters increased ad targeting from 39% to 64%,

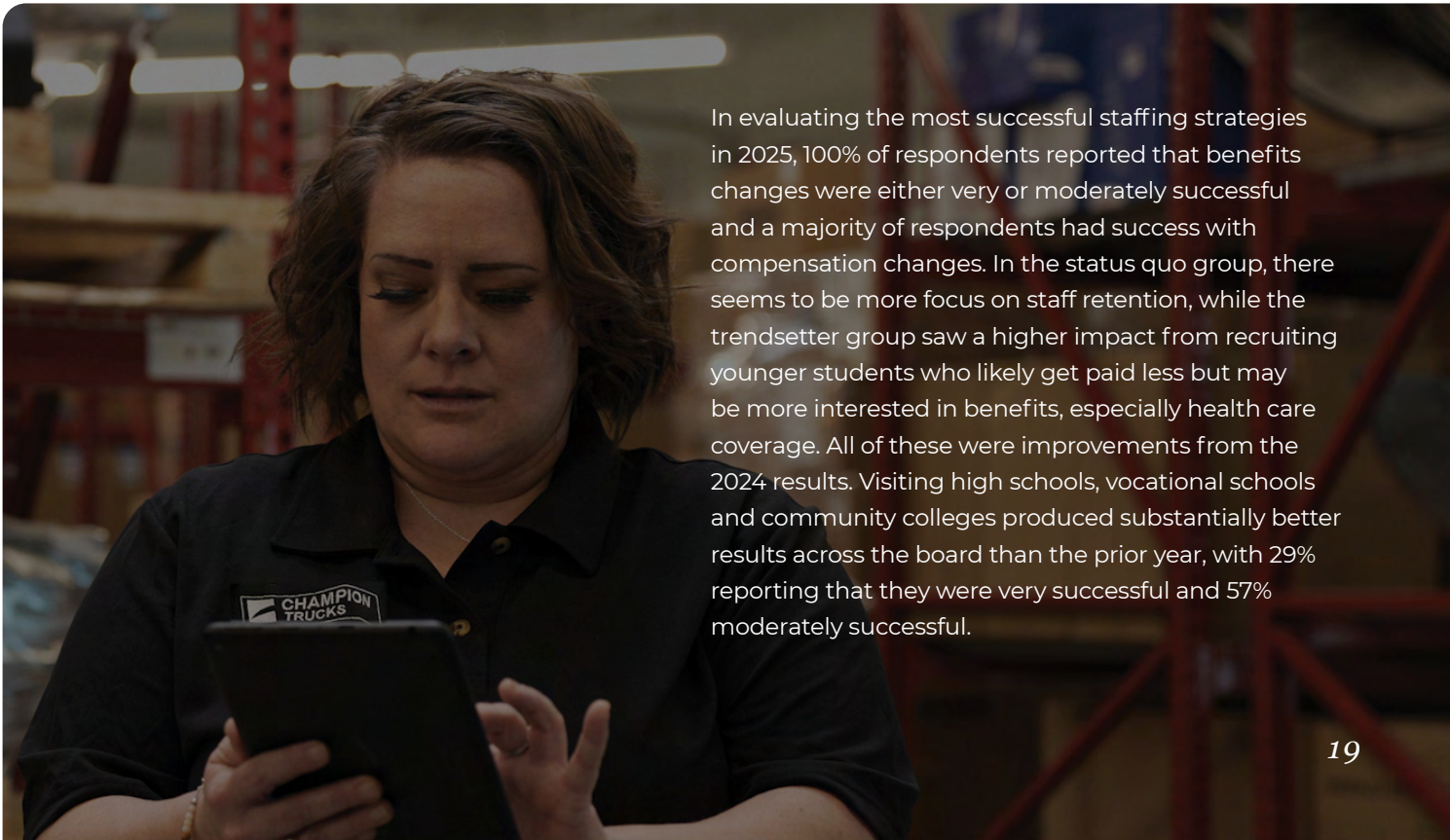
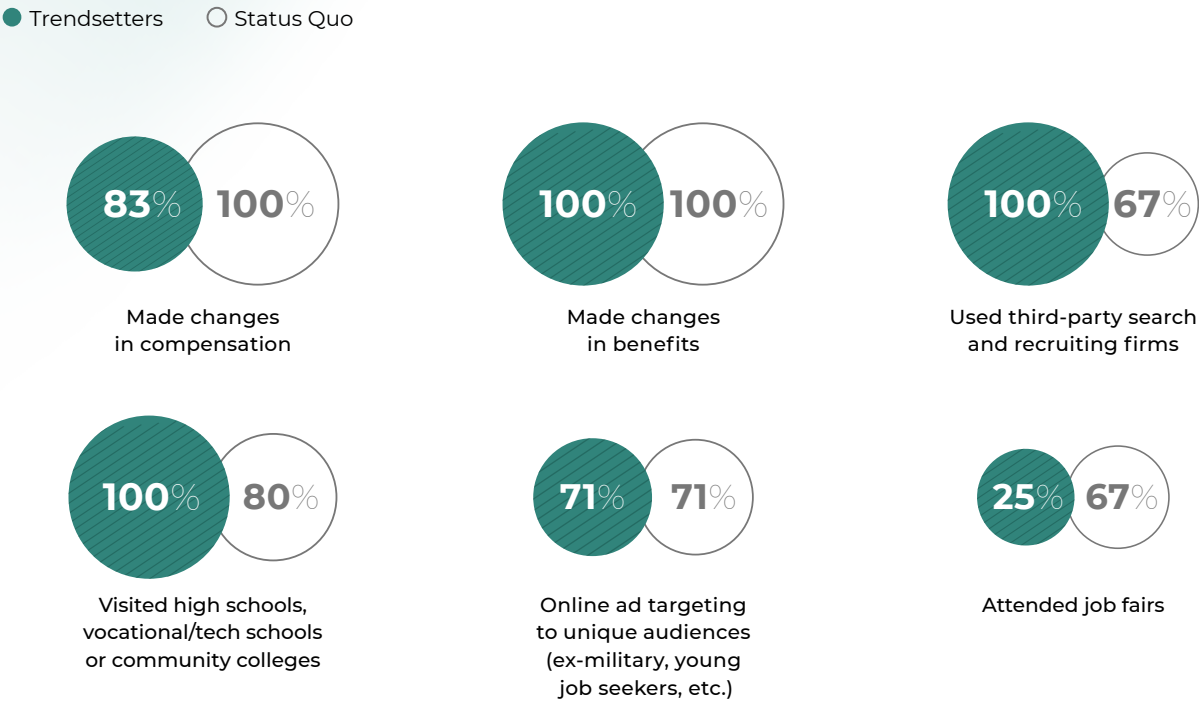
while the status quo group remained steady at 25%. Similarly, trendsetters increased outreach with local businesses and youth organizations from 24% to 55%, while the status quo group only increased from 15% to 25%. This is a sign that there's still some very specific and focused recruiting, but with an emphasis on certain skill sets and entry-level positions.

While overall recruiting efforts were down, the focus on compensation and benefits changes remained relatively high. This likely resulted in higher salaries and improved benefits packages aimed at retaining existing, experienced staff and offsetting the cost of inflation and high interest rates. Recruiting and training new staff in the processes and tools used by a business are a major expense. When turnover is reduced, those resources can instead focus on enhancing the capabilities of experienced staff in ways that benefit the business and customers.

## STRATEGIES TO ADDRESS STAFFING SHORTAGES IN 2024



## SUCCESSFUL STRATEGIES FOR STAFFING SHORTAGES IN 2024



In evaluating the most successful staffing strategies in 2025, 100% of respondents reported that benefits changes were either very or moderately successful and a majority of respondents had success with compensation changes. In the status quo group, there seems to be more focus on staff retention, while the trendsetter group saw a higher impact from recruiting younger students who likely get paid less but may be more interested in benefits, especially health care coverage. All of these were improvements from the 2024 results. Visiting high schools, vocational schools and community colleges produced substantially better results across the board than the prior year, with 29% reporting that they were very successful and 57% moderately successful.



# What's Next

Heavy truck dealers expect to contend with many of the same business challenges over the next year. These include economic factors, staffing shortages and customer retention.

When our survey was conducted, 79% of respondents had an optimistic outlook for 2025, 67% had an optimistic forecast for economic growth, and nearly half expected growth in Fixed Operations revenue. Thirty-two percent of respondents also expected lower interest rates and trucks with advanced technology that could command higher prices.

However, these results came before the actual impact of actions by the new administration. If tariffs against Canada, Mexico and China not only go into effect but remain in place for extended periods, they'll lead to potentially higher consumer prices. The Federal Reserve has already indicated that it's unlikely to lower interest rates soon, which will continue to put pressure on increasing truck prices due to financing costs.

On the other hand, increases in unemployment due to potentially a million or more federal employees losing their jobs will put downward pressure on economic growth, especially if cuts to federal spending accompany them. Proposed cuts to many federal services and departments will put further pressure on the prospects for growth.



## REASONS FOR OPTIMISM

	TOP REASONS	MOST IMPORTANT REASONS
Optimistic forecast for economic growth in my market area and the country	67%	38%
Growth in Fixed Operations revenue as more miles are logged by truckers	47%	15%
Better access to Parts inventories	42%	8%
Lower interest rates	32%	8%
Trucks with advanced technologies such as better driver-assist features and others that allow to charge higher prices	29%	23%
Pent-up demand for new trucks	28%	8%



## REASONS FOR PESSIMISM

	TOP REASONS	MOST IMPORTANT REASONS
Tariffs and other economic sanctions that limit trucking	63%	25%
Increasing wages and high turnover limiting revenue and high profit	56%	19%
Continuing decline in available skilled Service Techs crippling Fixed Operations revenue	56%	13%
Increasing environmental regulations resulting in very high truck prices	44%	25%
Oversaturated local market limiting opportunities	38%	14%
Local and state regulations that mandate a higher proportion of EV truck sales	25%	—



Uncertainty of any kind poses a challenge to business investments and leads to uneven truck sales. At a minimum, many businesses are likely to put off making decisions until businesses gain more clarity around public policies and their repercussions.



# Key Takeaways



## 1 FLEXIBILITY FOR AN UNCERTAIN FUTURE

Slowing sales and an uncertain economic environment over the next several years will require dealers to continue adapting. With the change in administration in Washington, D.C., and the likelihood of international trade disputes, both inflation and interest rates are likely to remain elevated. Regulatory changes are expected to impact the products OEMs will produce. As a result, dealers will need to optimize the efficiency of their operations from a human resource and technical perspective so that they maintain pricing flexibility.

## 2 STAFFING IS MORE AND LESS OF A PROBLEM

Slowing economic growth, a slackening labor market, and integrating more technology into dealership operations mean finding people may be easier, but getting people with the right skills may be more challenging. Dealers may have to invest in more training upfront, but there will likely be less upward pressure on wages.

## 3 2025 AND BEYOND WILL BE A CHAOTIC PERIOD

Politics and trade policy may have a much more significant impact on businesses in 2025 than they have for some time. An unpredictable administration will make planning more difficult for all businesses. Running an efficient operation and maximizing after-sales opportunities will be key enablers to success.





# ABOUT THIS STUDY

CDK Heavy Truck is committed to providing heavy truck dealers with the solutions they need to keep the industry moving faster and more confidently. Our annual survey helps us better understand dealer needs and the trends that affect them. These findings establish the landscape for much of the exploration our research and content teams produce throughout the year.



**PETER KAHN**  
CDK Head of Research

With over 20 years of experience in researching all aspects of the automotive and Heavy Truck industry, Peter’s work is focused mainly on how dealerships and brands can improve efficiencies and meet the changing needs of the vehicle buyer and service consumer.

As the Senior Director of the CDK Research and Insights group since 2015, Peter has produced work that covers a range of topics, such as Artificial Intelligence in the Dealership, Women in Automotive, the State of the Automotive Retail Industry, Job Seekers in Automotive Retail and many more that help inform decision-makers in our industry.



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Study Lead Researcher

Devika Birnale is a Market Research Analyst at CDK, where she works on a variety of research initiatives across thought leadership and the Product Technology and Marketing teams. Her research bridges the gap between end customers, dealerships and CDK. Devika holds a master’s degree in Marketing Intelligence from the University of San Francisco.



**ROHINI TRIPATHI**  
Study Lead Researcher

Rohini Tripathi is a Senior Market Research Analyst at CDK. She has nearly 10 years of experience in research with global organizations spanning different industries such as media and entertainment, CPG and automotive retail. At CDK, Rohini works on various research initiatives for the Product, Technology and Marketing teams and provides insights and analysis to help make business-related decisions.

No matter the issue for your dealership,  
CDK Heavy Truck is ready to offer the  
right support at the right time.

SALES, LEASING AND INVENTORY

FIXED OPERATIONS

DEALERSHIP OPERATIONS

IT INFRASTRUCTURE

OEM INTEGRATIONS



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