



HEAVY TRUCK



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2026

State of *the Industry*



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Overview

These are truly unique times. The typical concerns of truck dealers have been upended by world events and alterations to domestic policy. Changes are so dramatic that CDK revised its annual survey of dealers to determine what the true state of the industry is today.

The responses were clear — especially when it came to the impact of tariffs.

Nearly half (44%) of dealers said that tariffs have led to less demand for heavy trucks. And while dealers responded that they're trying to partially absorb the increases due to both tariffs and inflation, they admitted that some costs simply must be passed on to customers.

Tariffs seemed to cast a shadow across much of this year's survey, with dealers expressing frustration that they have a harder time planning for the future.

And while inflation and supply chain concerns were present in the study, it was fielded just days before recent events in the Middle East. That shock to the industry in terms of oil and diesel prices isn't reflected in the study let alone what that means for global supply chains of everything from fertilizer and helium to computer chips, which roiled many industries just a few years ago.

The world outside the dealer's door is tumultuous, but this year's findings also show respondents making decisive pivots to address both old and new challenges.



44%

of dealers said that tariffs have led to less demand for heavy trucks.



30%

of dealers said Total Operating Profits declined in 2025. (vs. 23% in 2024)



63%

said they were optimistic about the next year. (vs. 79% in 2024)



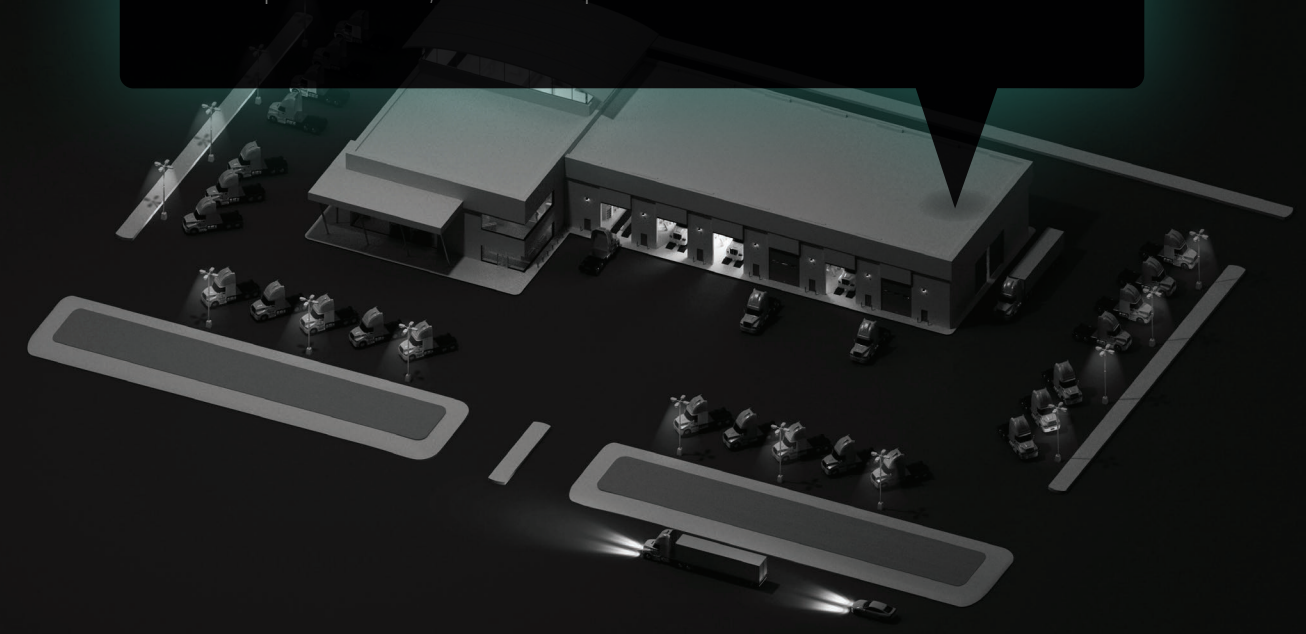
27%

said they were pessimistic about the next year. (vs. 13% in 2024)

10%
Neutral

“
It's a very difficult market to navigate, as the demand is low and traffic is not what it was 12 months ago.
”

Department Head, 11 to 15 Rooftops



Demographics

This year's survey received responses from a range of dealers. Answers came from multiple departments and roles, including Accounting, Administration, Parts, Service and Sales.



18%
Executive Leadership



82%
Department Heads

DEPARTMENT

Service	28%
Parts	23%
Accounting	18%
Administration	14%
Sales	13%
Others	3%
Marketing	1%

LOCATION

United States	82%
Canada	18%

DEALERSHIP SIZE

1-2 rooftops	24%
3-5 rooftops	33%
6-10 rooftops	18%
11-15 rooftops	8%
16 rooftops+	18%

MONTHLY NEW AND USED UNITS SOLD

Less than 10 units	15%
10-49 units	44%
50-99 units	14%
100+ units	6%
Not sure	21%

CUSTOMER MIX BY ROOFTOPS

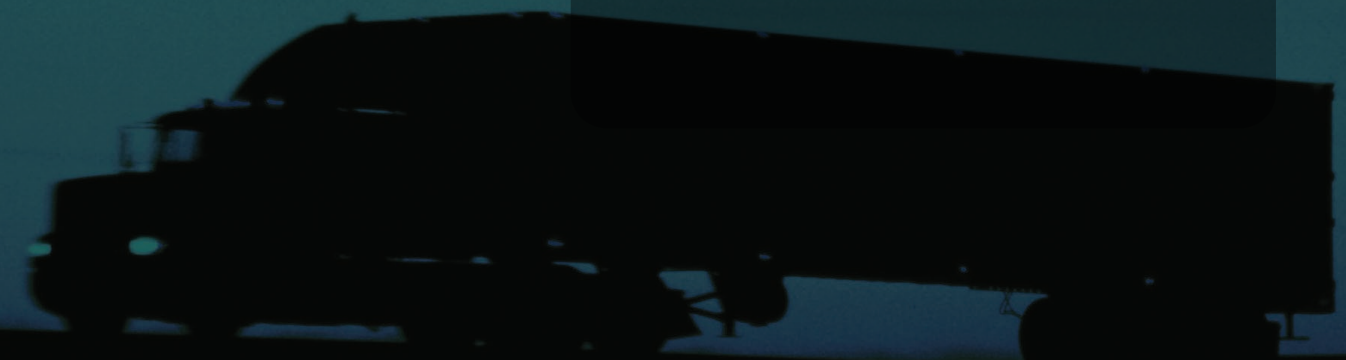
Mostly fleet customers	14%
More fleets than individual owner-operator	30%
Balanced mix	27%
More individual owner-operator than fleets	18%
Mostly individual owner-operator	6%
Not sure	5%

DEALERSHIP TECH ADOPTION

Trendsetters	44%
Status Quo	56%

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.



Global Challenges Hit Home

With the arrival of so many headwinds, CDK researchers had to rethink how we addressed the challenges dealers face. Instead of a single list, this year we categorized these obstacles in terms of internal and external trends. This allowed us to add new options around tariffs and supply chains, and it also brought to light a rather shocking disparity.

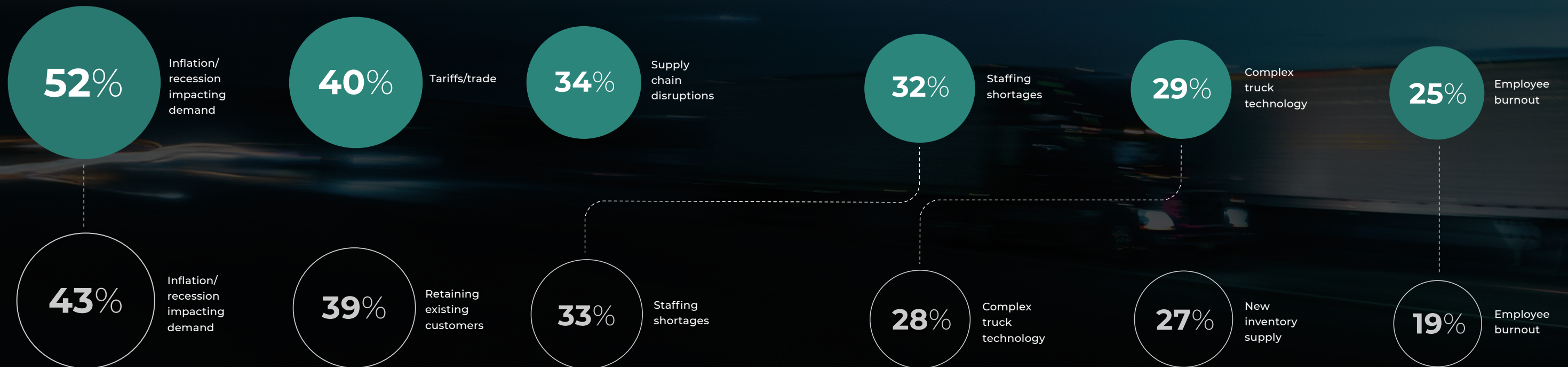
When it comes to the top challenges weighing on truck dealers, external forces made up eight of the top 10. And this study was conducted just before events in the Middle East unfolded.

The biggest challenge for dealers in 2025 remained inflation and related fears around a potential recession. Not only is this the number one challenge,

but it also increased from 43% last year to 52% this year. Tariffs came in second with 40% — but with no comparison, it's hard to gauge if this is more pressing after a year of tariff reality, or better than how dealers felt in early 2025 before the tariffs rolled out.

Top Challenges

● 2025 ○ 2024



And while no one likes to presume, it's a safe assumption that concerns about fuel price volatility would be far higher than 19% if the survey had ended in March instead of February.

When it came to internal challenges that dealers have more direct control over, the numbers were mixed. Employee burnout and managing Parts inventory saw the biggest rise in concern from dealers, while there was significant improvement in retaining existing customers and the need for IT infrastructure, falling 22 and 14 percentage points respectively from 2024 to 2025.

Top External Challenges

	2024		2025
Inflation/recession fears	43%	↑	52%
Tariffs	—		40%
Supply chain disruptions	—		34%
Liability/insurance costs	—		33%
Rising wage rates	—		32%
Environment/emission regulations	—		25%
Volatile interest rates	28%	↓	25%
Changes in the spot freight market	26%	↓	25%
Fuel price volatility	12%	↑	19%

Top Internal Challenges

	2024		2025
Staffing shortages	33%	↓	32%
Increasing technology in trucks	27%	↑	29%
Employee burnout	17%	↑	25%
Customer convenience expectations	25%	↓	20%
Managing Parts inventory	16%	↑	20%
Managing adoption of autonomous vehicles	—		20%
Need for IT infrastructure	32%	↓	18%
Meeting OEM compliance	19%	↓	18%
Retaining existing customers	39%	↓	17%

“
Employee hours were cut, expenses were cut, inventory was minimized.”

Department Head, 6 to 10 Rooftops

Tariff Impact

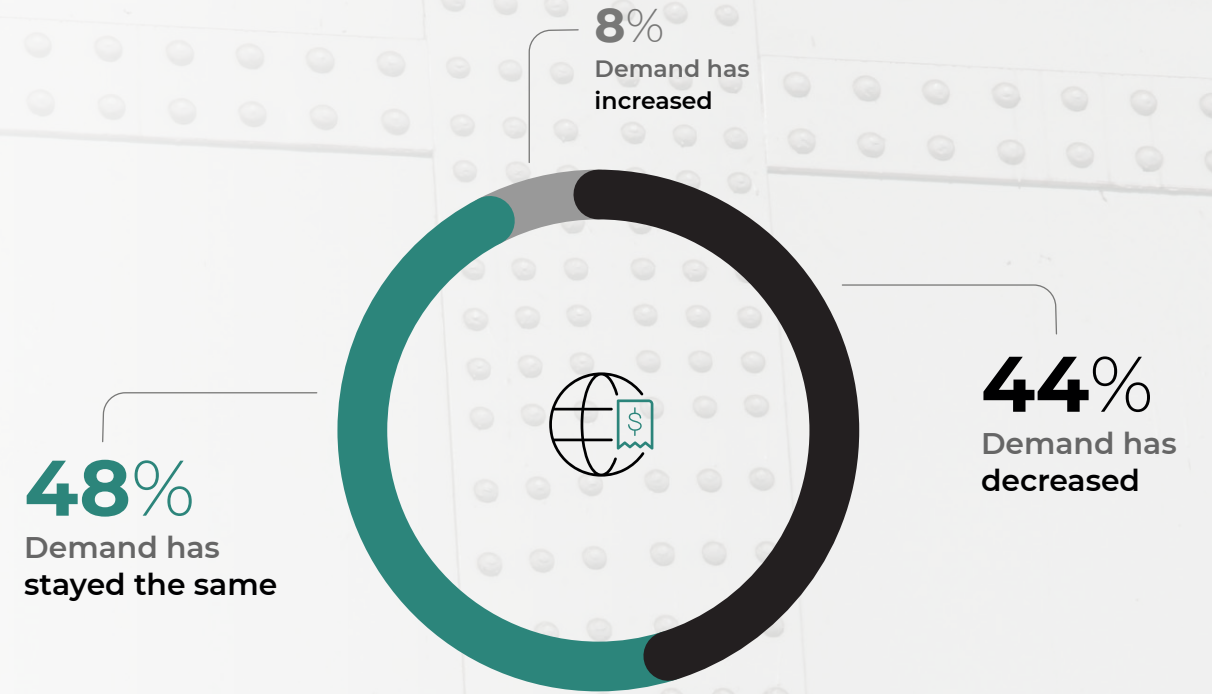
The announcement and initial rollout of tariffs in early 2025 set off a wave of concern that the economy could see prices of all goods drastically increase. The sense was that this shock could come almost overnight. That didn't happen, but prices of many goods were severely impacted over a longer time frame throughout the year and continue today.

Nearly half of dealers in our study (44%) saw this impact and said it led to a decrease in demand for trucks. While a slightly higher number (48%) said demand remained the same, it may be attributed

to the slow pace of the effect. As for the 8% that said it led to an increase in demand, this group is likely seeing gains from customers pulling purchases forward to escape even higher prices further down the road.

This decrease in demand was unevenly distributed across the industry. Operators with five or fewer rooftops saw the most significant decreases between 50% and 55%, while the largest operators, 11+ rooftops, saw the lowest at 32%. These large groups also saw the biggest increase in demand despite tariffs at 12%.

Impact of Tariffs on the Overall Business



“

Costs have gone up partially due to inflation or other reasons but also due to the tariffs. We have started ordering bulk to save money, but also have passed increases onto our customers when we cannot purchase bulk.

Department Head, 11 to 15 Rooftops

“

We have passed some increase to customers but have absorbed the cost increase internally for the most part. It is important to show customers that we are willing to participate in the “pain” of the tariff policies and not expecting them to carry all cost increases on their shoulders.

Department Head, 16+ Rooftops

Impact of Tariffs	1-2 Rooftops	3-5 Rooftops	6-10 Rooftops	11+ Rooftops
Demand has decreased	50%	55%	36%	32%
Demand has stayed the same	45%	36%	61%	56%
Demand has increased	5%	9%	4%	12%

How Dealers Respond

Whether it was external or internal challenges weighing most on dealers, the response to them saw a significant shift from last year. Cost reduction rose from the third most common strategy in 2024 to first in 2025, with 57% of dealers responding, compared to 43% last year. This is a clear and expected response to the added pressures of tariffs, inflation and supply chain challenges.

While cutting costs was clearly the biggest change in 2025, there were other areas that seemed to take a back seat. Dealers focused far less on training, falling from 44% to 34%. Attention to finding new opportunities for both truck and Parts inventory also declined — another area where the recent appearance of increased supply chain concerns may have changed how dealers responded.

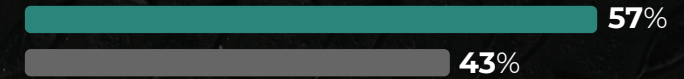
Not likely to have changed in recent days is the loss of focus on sales and service of EVs, which fell from 29% last year to just 23% this year. The change in federal policies over electrification has generally been seen as positive in the industry and there were no clearly negative comments about electrification from respondents. There were a handful of positive responses about the technology, namely improvements in familiarity and more seamless adoption of the tech inside dealer facilities.



Top Changes Implemented in 2025 vs. 2024

■ 2025 ■ 2024

Cost reduction

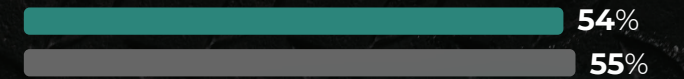


“

Focus on cost controls/payroll reduction is priority during off market conditions.

Executive, 3 to 5 Rooftops

Changes in pricing strategies



“

Pricing became more transparent and negotiation time dropped significantly.

Department Head, 16+ Rooftops

Simplify Sales and Service



“

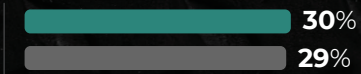
Digital payment and financing options improved transaction speed.

Department Head, 16+ Rooftops

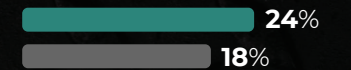
Investment in training



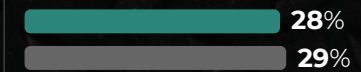
Changes in hiring processes



Photos/videos Service estimates



Digital commerce enhancements



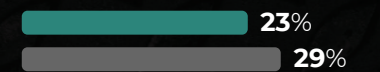
New sources of inventory



Mobile RO workflow



EV service/charging investment



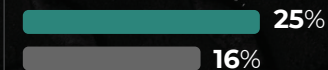
New sources of Parts inventory



Improve truck-buying experience



Stronger partnerships with OEMs



Trendsetter | Status Quo

Trendsetters vs. Status Quo

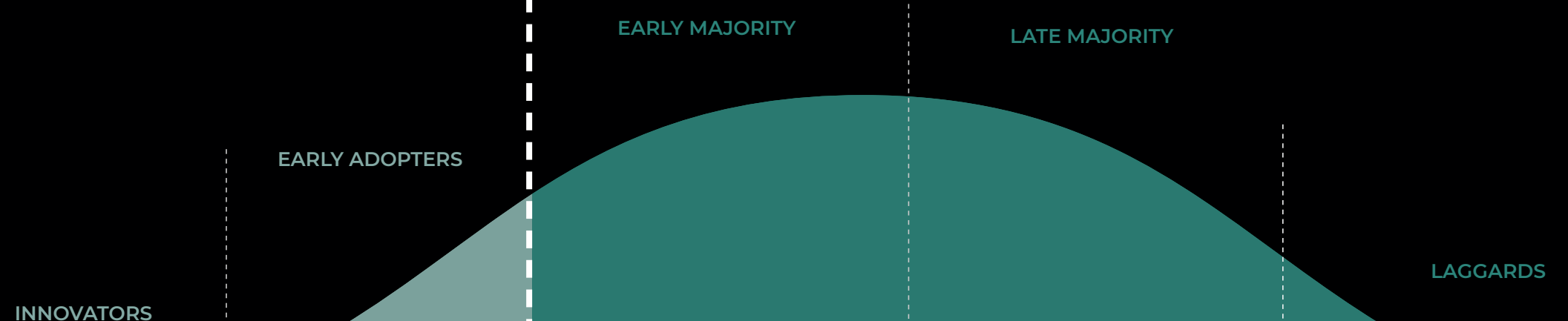
Over the past two years, both Trendsetters and Status Quo respondents focused on the same core areas but with different intensity. This year, there were more significant differences between the two and the intensity ratcheted up, especially among Trendsetters.

While Trendsetters were more attentive to their teams in terms of training and hiring practices, this group was also laser focused on reducing costs. Far more (67%) said they addressed cost reduction compared to 49% of the Status Quo group. Similarly, more Trendsetters (60%) said they changed their pricing strategies compared to those in the Status Quo at 49%. Last year the results were the opposite, with the Status Quo more focused on both these areas than Trendsetters.

And while Trendsetters outpaced the Status Quo in these areas, they outpaced them significantly when it came to utilizing enhanced technologies (37% versus 21%), forging partnerships with OEMs (36% versus 17%), and investing in electrification (31% versus 17%).

Changes Implemented in 2025

	Trendsetter	Status Quo
Reduce excess costs	67%	49%
Change in pricing strategies	60%	49%
Changes in hiring processes	41%	21%
Digital commerce enhancements	37%	21%
Stronger partnerships with OEMs	36%	17%
New sources of Parts inventory	33%	19%
EV service/charging investment	31%	17%



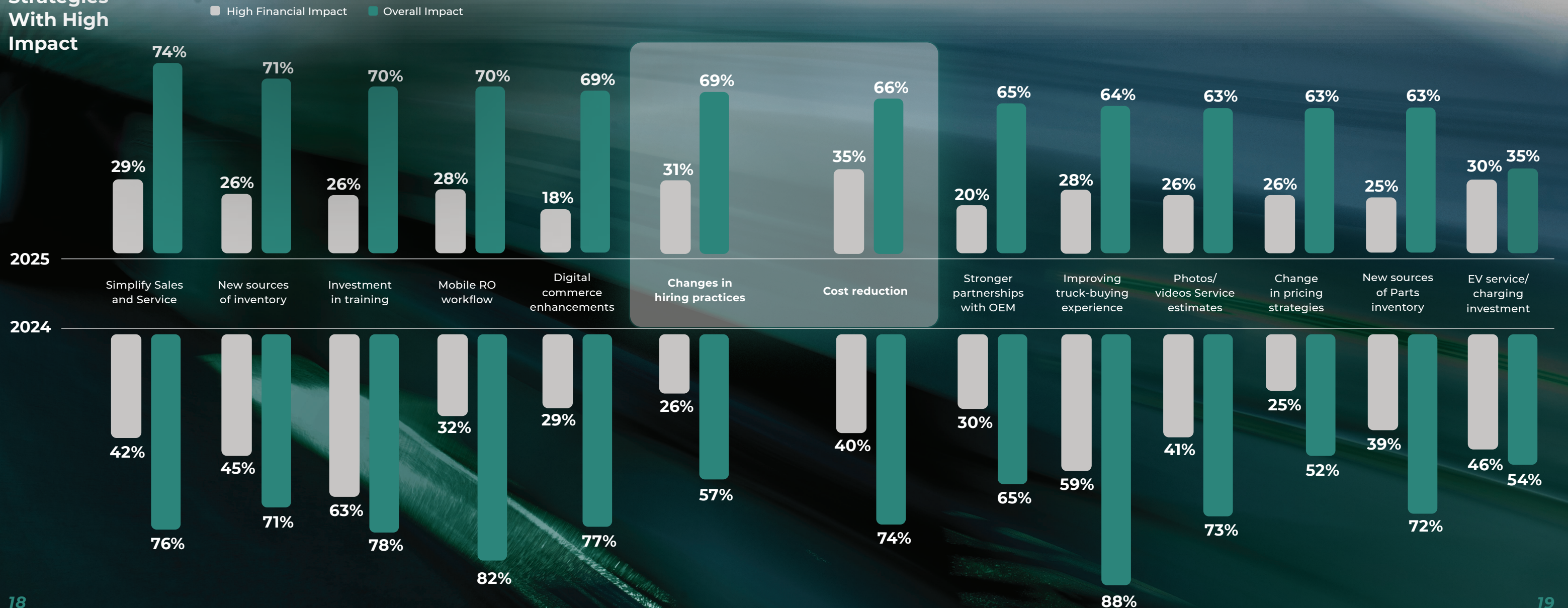
Strategies That Moved the Needle

The tariff cloud looming across the industry seems to have also impacted the overall performance of the strategies dealers implemented. Compared to last year, dealers reported significantly less of an operational and financial impact across the board.

For example, last year 63% of dealers said training led to a positive financial impact on their business compared to just 26% this year. But no matter the strategy, the financial impact didn't top 35%, while eight out of 13 strategies saw at least that much last year. However, despite the numbers being lower, the

majority of dealers said they'd keep these strategies in place moving forward. Three-quarters (75%) or more of dealers said they'd continue to execute against eight of the 13 strategies in 2025, and only one fell below 69%: EV investment at 51%.

Strategies With High Impact



Operational Performance Lags

There's very little sugarcoating the results when it comes to how we track critical operating variables in 2025. No category improved more than 30% this past year, while all but one exceeded that number in 2024. Take a second and reread that last sentence.

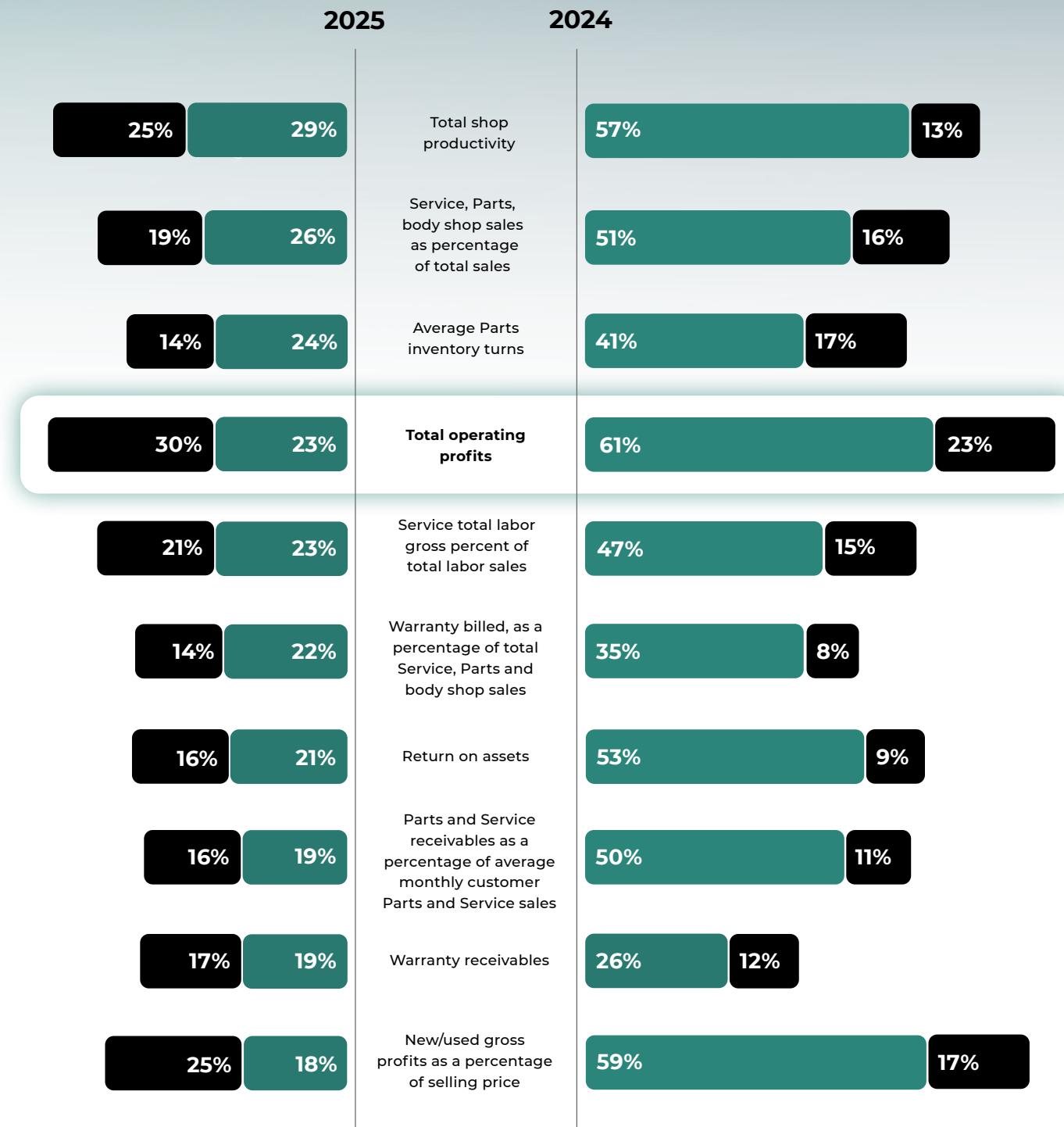
The most vital area to track for any business is operating profits, and far less than half as many dealers reported improved profits (23%) compared to last year (61%). There was the addition of a new response option of "I don't know," which may have skewed how we compare year over year, but even that 18% wouldn't have made up that much ground when it came to operating profits. The gross profits of new and used sales as a percentage of the selling price saw a similar decline. These were also the only two factors with more respondents registering a decline compared to those saying there were improvements.

When looking at the other categories, declines were still worse compared to 2024 but only by single digits.



Critical Operating Variables

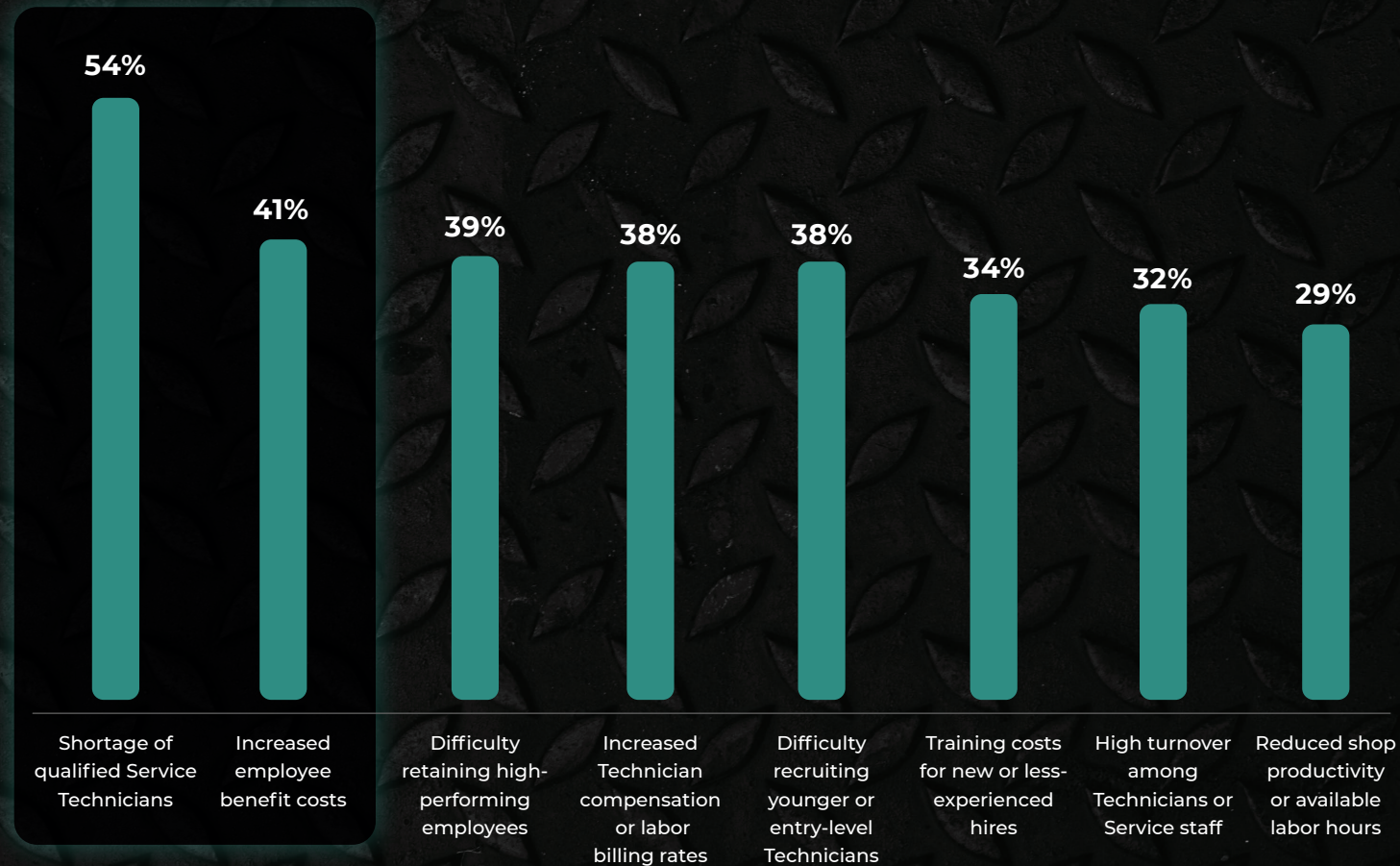
■ Declined ■ Improved



Staffing Challenges and Successes

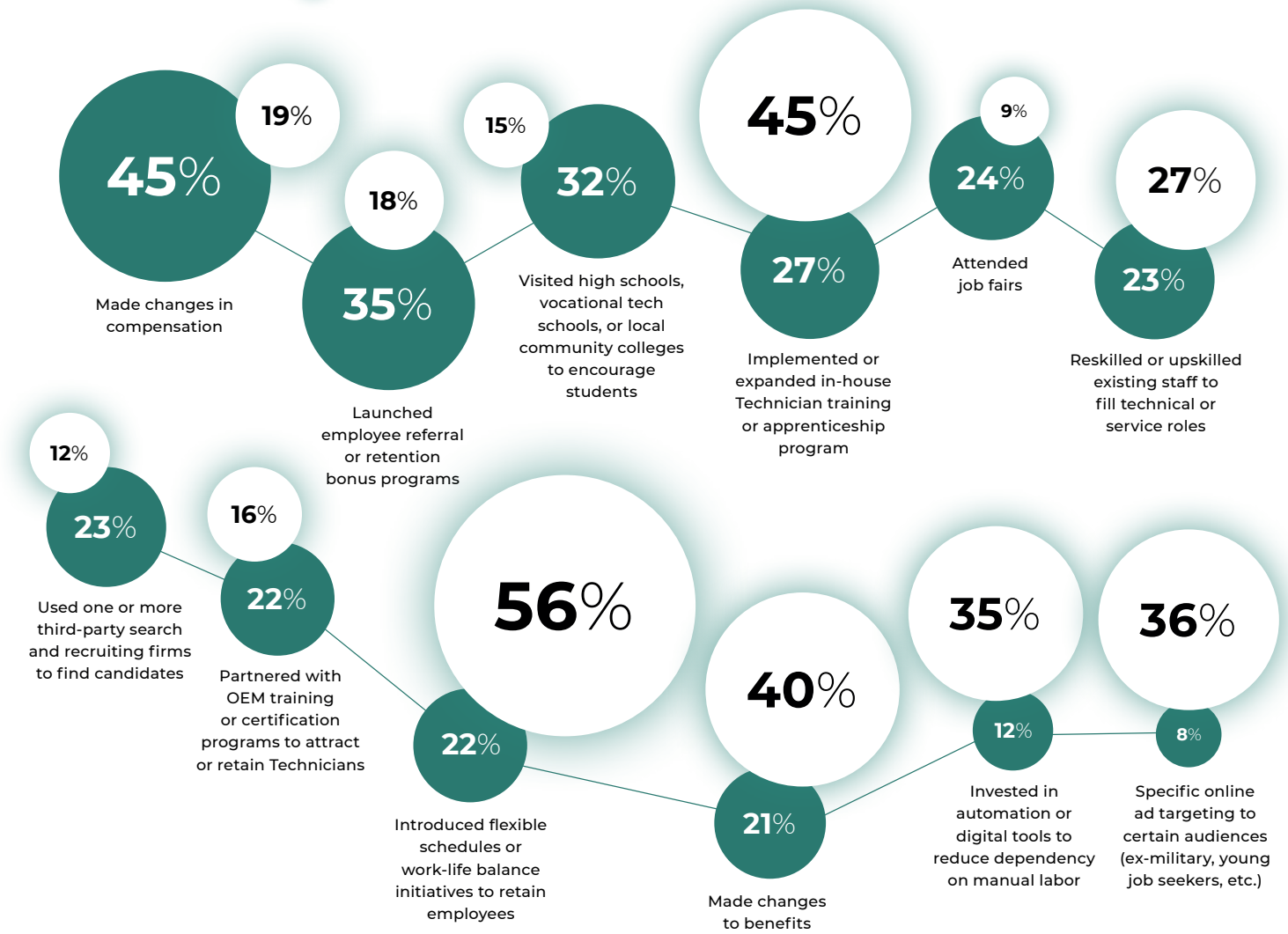
The shortage of qualified Service Technicians is a major concern for dealers historically and it was the top labor-related challenge dealers faced in 2025 as well. But an increase in benefit costs was a solid second, once again highlighting an outside force weighing on the industry.

Top Labor Challenges in 2025



Strategies To Address Labor Shortage

● Implementation Rate ● Success Rate



What was new in the results was a hard pivot in not only which strategies dealers used to address staffing challenges, but how successful each one was.

This year's study nearly doubled the options dealers could answer, and one of the new additions rocketed to the top. More than half of dealers (56%) said implementing flexible schedules to improve work-life balance was very successful with only 3% saying it wasn't successful at all. In years past, even as remote work or flexible schedules became normalized, management didn't view a dealership as a workplace that would see advantages to such an arrangement. Now, however, 22% of dealers offered flexible schedules to employees and it seems to have paid off. Other top strategies included more training and changes to benefits.

Dealers also learned from their mistakes. Attending job fairs was one of the least successful strategies last year and in 2025. But far fewer dealers decided to do so this year — that number fell from 33% to 24%. And if only 9% of dealers rated the activity as very successful compared to 35% rating it as not successful at all (the highest negative response in 2025), it's unlikely that number will shift upward in 2026.

In contrast, very few dealers focused on outreach to military or young job seekers — just 8% in 2025 compared to 36% last year. But this smaller group in 2025 saw terrific results, with 36% saying it was very successful compared to 14% last year.

Looking Ahead

As we look at the year ahead, the number of optimistic dealers did indeed drop. Three out of five dealers said they're optimistic compared to four out of five last year. But when you drill down to the specific reasons for optimism, there was far less of a shift.

And to bolster this optimism a bit more, with the exception of growth in Fixed Operations revenue, most of the reasons for optimism dealers experienced last year remain at similar levels this year.

But you can't forget the pessimists — especially now that there are more than twice as many this year at 27%. Like the optimists, the reasons for pessimism were either unchanged or lower compared to last year, save one.

When last year's study was completed in January 2025, tariffs were a possibility, not a guarantee. Yet, they were still the top reason for pessimism at 63%. This year, with more clarity on the impact of tariffs, that number grew only slightly to 69%. Tariffs in one form or another are likely to continue throughout 2026. It'll be interesting to see whether greater clarity leads to more or less pessimism as they become the new normal.



63%

Optimistic

Reasons for Optimism

Optimistic forecast for economic growth in my market area and the country	54%
Stronger OEM partnerships and support programs	34%
Better access to Parts inventories	33%
Lower interest rates	32%
Growth in digital retailing and online customer engagement opportunities	28%
Growth in Fixed Operations revenue as more miles are logged by truckers	28%
Pent-up demand for new trucks	27%
Anticipated improvements in labor availability or Technician retention	25%



27%

Pessimistic

Reasons for Pessimism

Tariffs and other economic sanctions that limit trucking	69%
Increasing wages and high turnover limiting revenue and profit growth	56%
Decline in used truck values or slower fleet turnover	50%
Ongoing supply chain or parts availability disruptions	44%
Rising insurance or liability costs impacting overall profitability	44%
Continuing decline in available skilled Service Techs crippling Fixed Operations	44%
OEM or manufacturer pressure reducing dealer flexibility or margins	38%
Oversaturated local market limiting opportunities	38%

Key Takeaways

1 Continuous Disruption Is Here To Stay

It's very easy to live in the now and adjust to the current turmoil in the industry and beyond landing at a dealer's doorstep. But some are reframing how industries like trucking operate, in a world of continuous disruption. The past decade has given little respite for transportation of any kind from COVID to supply chains to inflation to tariffs and now turmoil in the Middle East. Successful operators should reconsider that these challenges have a neat conclusion and instead adapt a flexible stance that enables responsiveness as conditions evolve.

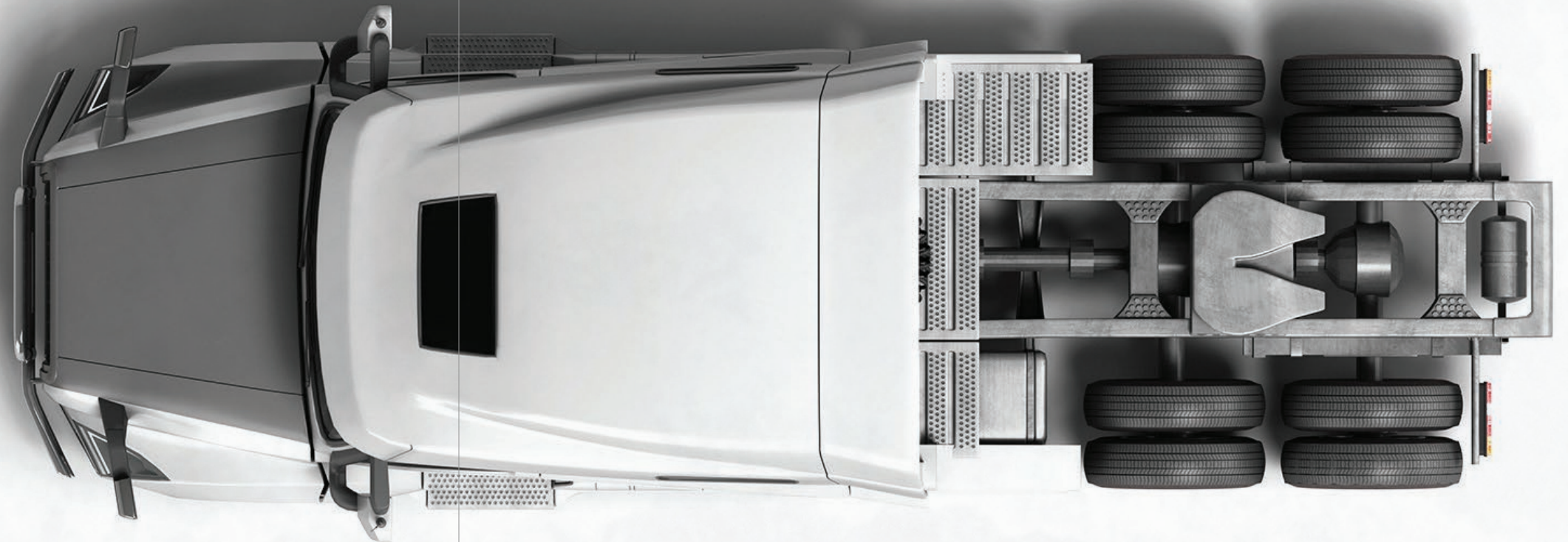
2 Staffing Problems Can Be Solved

One of the most positive findings in this year's study was seeing the impact multiple staffing strategies had on dealerships. Not only did dealers provide more ways to improve staffing struggles, but the ones who also implemented them saw better results this year as well. While flexible scheduling may not be feasible for every store and budget constraints may limit higher compensation, there are still ways to enhance recruitment and retention.

3 Turn to Efficiency in a Downturn

When profits are down and customers are cutting back, it's often difficult to plan for the future. The results of this year's study show that most dealers are clearly cutting costs and raising prices wherever possible. And while that addresses the bottom line directly, store leaders can unlock savings by improving efficiency in Sales or Service.

Technology can often help, whether it's trying new AI-powered solutions or simply making sure your teams are all trained on the latest versions of the systems you already have in place. Throughout the study, dealers proved they're willing to pivot in terms of strategy to meet old and new challenges, and this is one additional area to explore.



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.



Rohini Tripathi
Study Lead Researcher

Rohini is a research manager 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.



David Thomas
Study Lead Author

As director of Content Marketing, David champions thought leadership across all platforms, connecting CDK's vast expertise to the broader market and trends driving our industry forward. David has spent 20 years in the automotive world as a product evaluator, journalist and marketer for brands like Autoblog, Cars.com, Nissan and Harley-Davidson.

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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