



Beyond the Truck

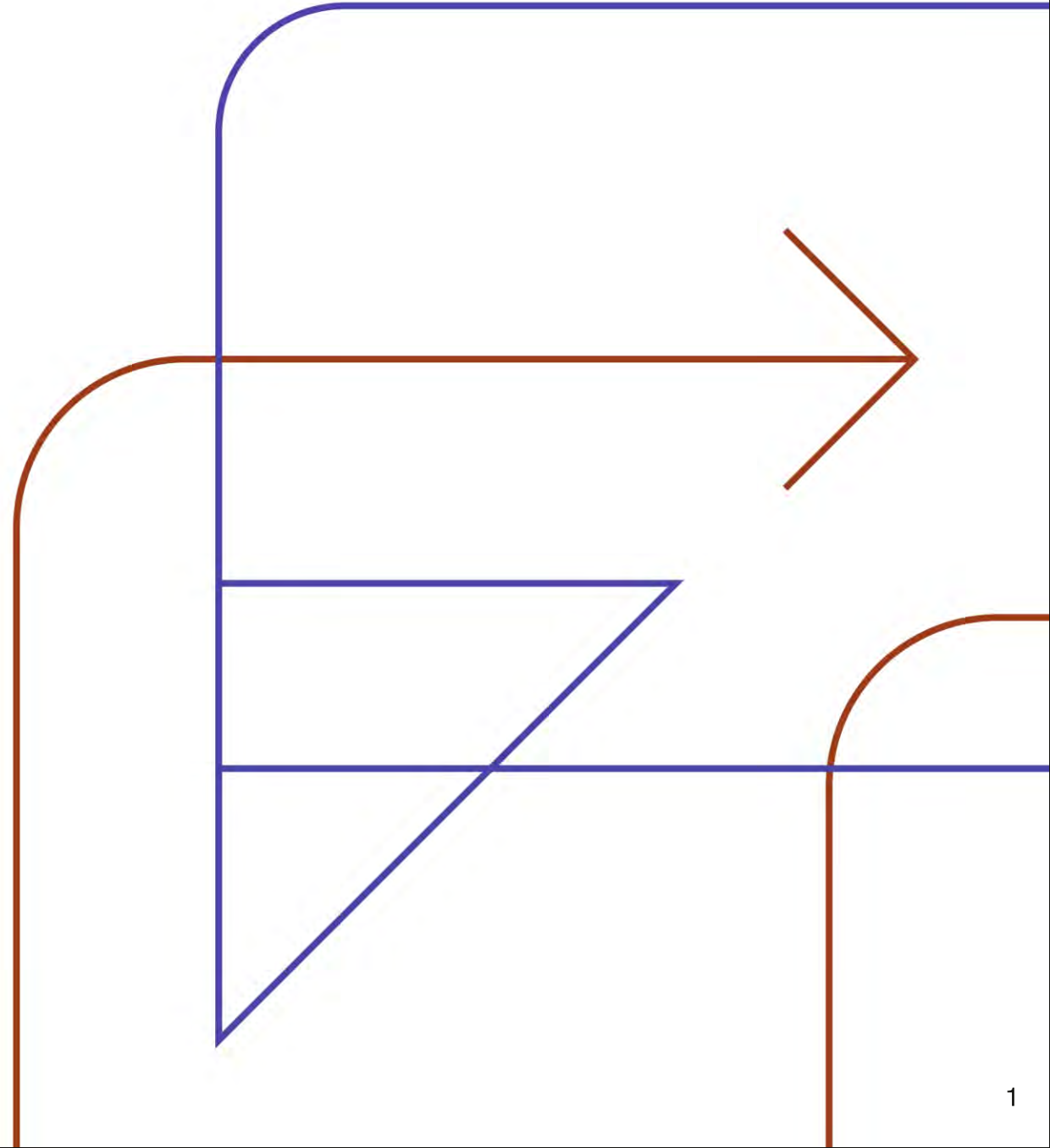
What IAA Transportation 2026 Revealed About Software, Operations and the Next Transport Ecosystem

Review · Outlook · Trends · Valtech Mobility · Hall 11, Stand C03 · 15–20 September, Hanover

A Word Before You Read On



Andrea Sroczynski
SVP Strategic Growth & Business
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A Word Before You Read On

IAA Transportation is a stage for products, technologies and ambitious claims. Somewhere between the launches and presentations, the most valuable conversations happen. We went to Hanover with a 12-person team spanning market intelligence, experience design, software-defined vehicles, commercial-vehicle delivery and autonomous mobility operations. Not to hand out brochures, but to listen. Over 200 conversations and countless test drives later, we came home with more questions than we arrived with, which we take as a good sign.

We also brought "Parcel Panic", a small arcade game to our booth. Visitors had to balance Technology, People, Process, and Business Case at the same time, and almost everyone found that hard to do, no matter how they tried. The game was fun, but it made a serious point: nobody solves mobility by getting just one of those four right and ignoring the rest. Commercial transportation and passenger mobility are converging fast, but they carry different histories, constraints, and lessons already learned the hard way. There's real value in comparing notes.

This report is our attempt at exactly that. Each colleague covers their own corner of what we saw and heard. Maybe you haven't yet had the chance to talk through what's actually on your mind these days, or which of the four dimensions from Parcel Panic deserves more attention in your world right now. Either way, we're confident we'll find the right person on our side to continue that conversation with.



Key Figures at a Glance

The show in numbers · Hanover, 15–20 September 2026

140,000+

visitors on site,
including 113,000 trade
visitors

1,589

exhibitors from 46
countries – the
broadest international
line-up yet

150+

world premieres and
new product launches

8,500

test drives across the
show

40%

international visitor
share – a new record

77%

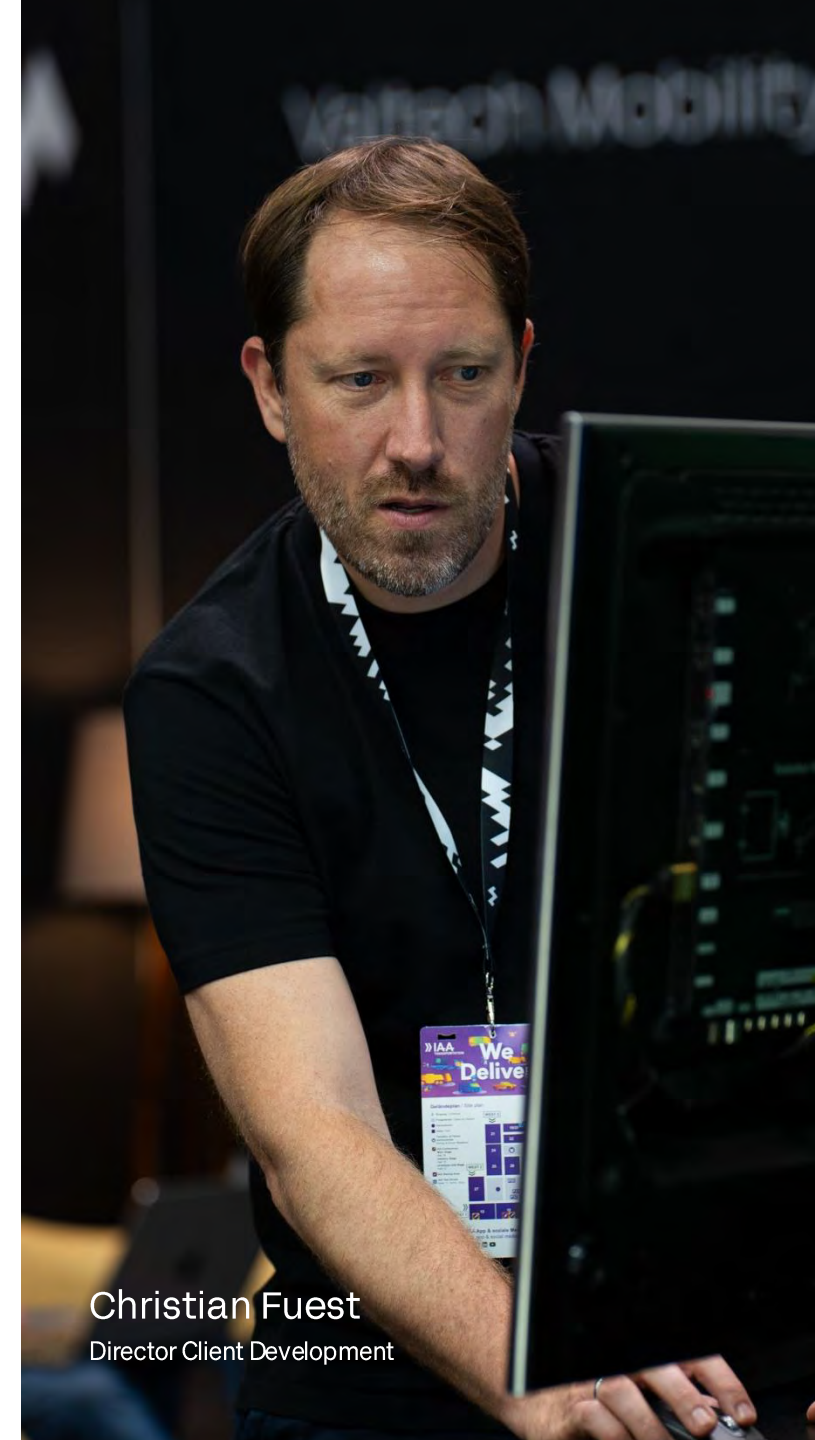
of trade visitors
influenced purchasing
or procurement
decisions

Attendance remained close to the 2024 record, while international participation reached a new high. The show was slightly smaller in exhibitor numbers, but broader in geographic reach.

Five Things That Stood Out

Five things stood out on the floor. Here's what the coverage actually shows for each – the first three in detail on the next page.

- 01** **Software-defined vehicles.** The VDA names SDV as one of the show's core themes, on equal footing with the engine, axle and gearbox.
- 02** **Electric trucks with real-world range (700+ km).** 700 km is emerging as a new reference point among premium long-haul electric concepts and models.
- 03** **A much bigger software push than 2024.** Software had a much stronger strategic presence than in 2024, even where operational adoption remains limited.
- 04** **A much bigger Chinese presence.** Over 300 Chinese companies exhibited, several truck brands for the first time – real competition now, not curiosity.
- 05** **The driver back at the center.** OEM messaging leaned hard into driver comfort – sitting oddly next to the first cab-less "robo-vans" one hall over.



Christian Fuest
Director Client Development

Boom, Not Brakes: The Mood at the Show



Denise Dilara Kuyumcu
Growth & Client Success



Boom, Not Brakes: The Mood at the Show

Anyone who has mostly followed the automotive industry lately knew cost pressure, uncertainty, restraint. At IAA Transportation 2026, surprisingly little of that was noticeable: many conversations, especially with fleet operators, sounded almost euphoric. Whether with four vehicles or 400, business is booming, and many operators are looking to grow. "The money is lying in the street," as one visitor put it to us. Operational optimism was stronger than the wider industry narrative suggested – but investment speeds differed sharply by technology.

This optimism showed up at different speeds, though. Electric was more present than ever, but several companies had to scale back their own plans because the OEMs themselves turned out slower than announced – the belief in electric as the future isn't shaken, only the timeline has shifted.

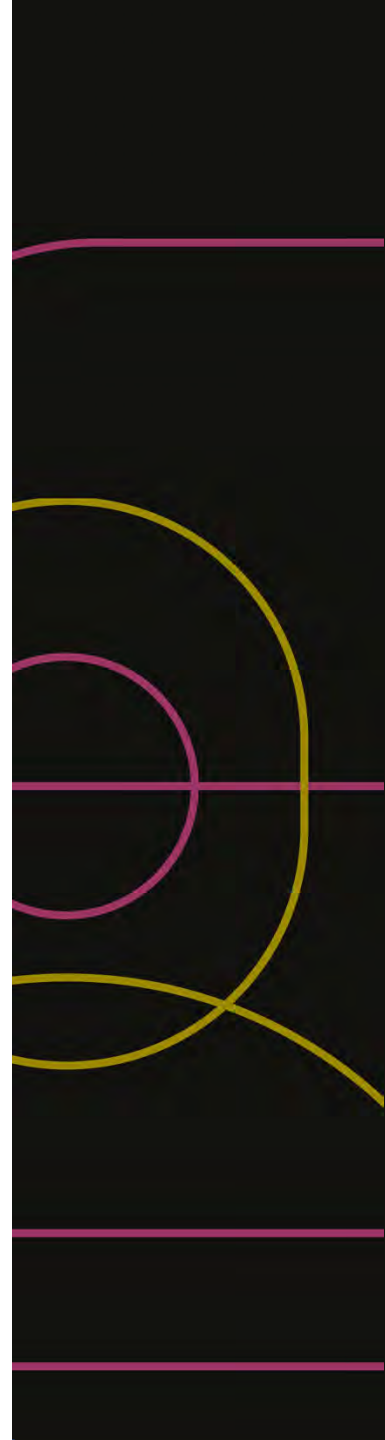
With artificial intelligence, it was the other way round: AI was strikingly rare as a topic on the show floor. In many operational conversations, AI still felt less mature than the public debate suggests, often due to trust, unclear ownership and limited readiness of processes and data.



Multiple Powertrains, New Competitors and a Very Personal Product

Alongside electric, biomethane, natural gas and hydrogen were present too, fuelled further by high petrol and diesel prices, anyone driving a lot of kilometres does the maths more carefully on which drivetrain actually pays off. This side-by-side of so many drivetrain alternatives looks like window-dressing in places, when OEMs want a bit of everything in their portfolio instead of taking a clear position, on the other hand they need exactly that revenue to invest in real solutions. Underneath this technical diversity, though, one thing hasn't changed: what a truck means to the person driving it.

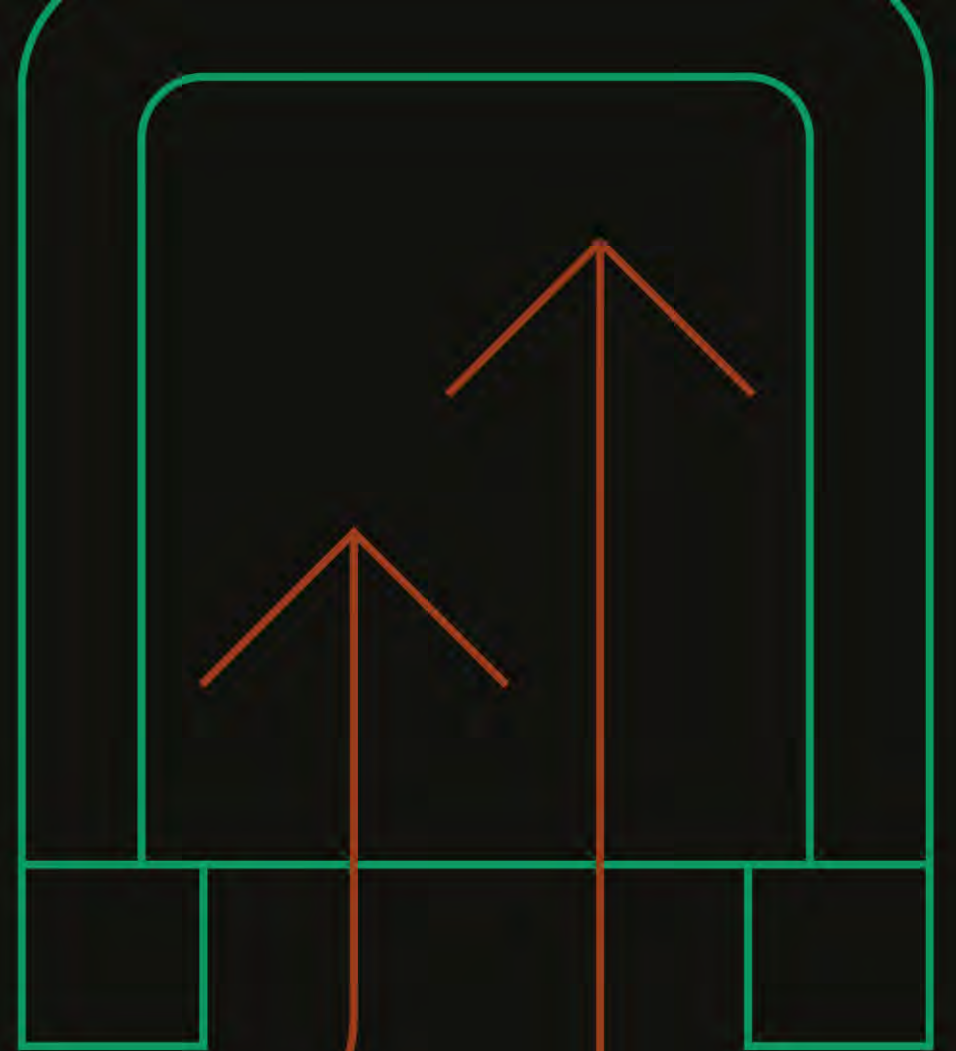
Beneath all the technical debate, though, the truck remains something very personal: drivers identify strongly with their vehicle, through price, size, equipment, brand, down to a deliberately rough engine sound. The truck is not just a work tool, it's also a status symbol, and that very sense of identity is now meeting growing pressure from outside: hardly any topic came up as often as competitive pressure from China. Chinese competitors were visibly benchmarking European products in detail while presenting increasingly complete vehicle and technology portfolios of their own. Innovation pressure now also comes from outside, at high speed, and that belongs in every competitive analysis.



A Hardware-First Show with a Clear Integration Gap



Thorben Krieger
Principal Consultant



Where the Most Practical Conversations Happened

Summary

The IAAT is strongly hardware-focused, primarily a trade fair for hardware manufacturers (trucks, trailers, fittings, special solutions), not a logistics fair. The big industry topic is the drivetrain shift (diesel → hydrogen, LPG, electric drive). Underexposed: autonomous driving and end-to-end integration.

Autonomy at the margins, integration a gap

Genuine autonomy (L4/L5) and yard logistics outside public roads were barely a topic; autonomy mostly showed up as driver-assistance systems. Very little was said about end-to-end integration either – one visiting consultant remarked that ours was the first booth at the show willing to talk about it at all.

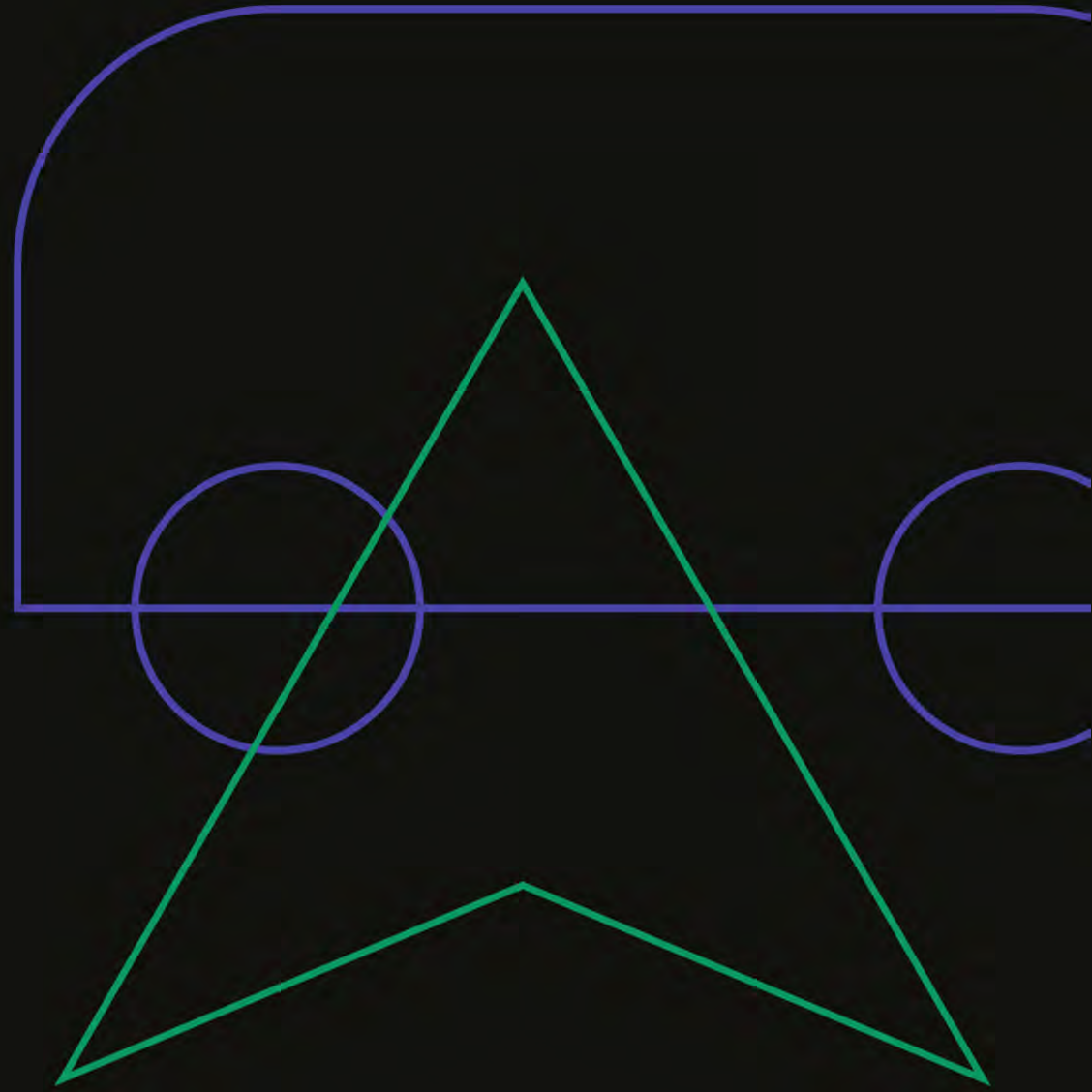
The most productive conversations

Surprisingly many logistics companies were on site, typically running 70–150 vehicles. For them, integration mattered most, along with navigation and user experience. These were not abstract discussions. Many visitors were actively looking for practical ways to connect navigation, vehicle systems and day-to-day fleet operations.

The Ecosystem is the New Battleground



Marian Reinheimer & Jens Oppler
Market Intelligence & Offering Strategy



The Ecosystem is the New Battleground

The biggest shift we observed was not a single technology. It was the growing dependence between technologies. An electric truck needs energy access. An autonomous vehicle needs operational oversight. An AI service needs trusted data. And none of them creates value if the fleet cannot integrate them into daily work. This is also why total cost of ownership is becoming a system-level question – shaped by energy access, infrastructure, uptime, service coverage and software reliability together, not by any single component. Competitive advantage is likely to move toward those who can turn individual technologies into reliable transport outcomes.

Commercial vehicles already have a head start here: manufacturers, trailer and body builders, operators and technology partners are used to working together. But collaboration based on experience is no longer enough.

As electrification, AI and autonomy demand end-to-end visibility, the industry needs interoperability by design – shared processes, data and system architectures, not just goodwill between partners. This is also reshaping the fleet manager's role: from administration and firefighting toward orchestration, acting as data strategist, risk manager and operational architect at once. In the end, customers aren't buying technologies. They're buying transport that works, reliably and at a fair cost.

Adjacent field to watch:

Defense logistics shows early signs of the same pattern: resilience, dual-use infrastructure and cyber-resilient connectivity all depend on interoperable systems and trusted data. Not a main theme yet – but one worth watching.



Under the Hood: SDV, Range and the Software Push



Christian Fuest
Director Client Development



Under the Hood: SDV, Range and the Software Push

Software-defined vehicles

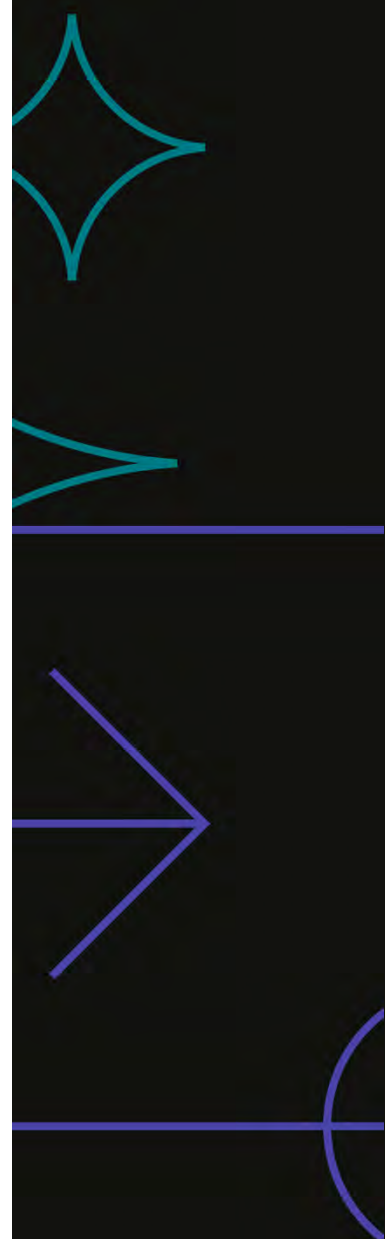
The VDA names SDV as one of the show's core themes, alongside alternative drivetrains, autonomous driving and AI logistics. The truck is increasingly described as a software-defined system that reads its surroundings, trades data with trailers, control centers and charging infrastructure, and drives itself more of the time. Our take: SDV is shifting from a marketing label to an architecture decision – and that shift matters more than any single feature it enables.

Range past 700 km

MAN's eTGX now claims up to 720 km, but that's a manufacturer number for one specific configuration, not something anyone's driven and verified. Volvo says 700 km for its own setup. Mahle's 800+ km figure is for a range-extender concept that isn't in series production yet, and only about half of that is actually electric. Still, the shift is real. Two years ago, premium long-haul configs were talking 400–500 km. Now it's 600–700+. Our take: range is becoming less of a vehicle-only discussion and more of an infrastructure and operating-model question. And these OEM figures still need to survive contact with a real depot before they're comparable across brands.

A much bigger software push than 2024

SDV was already a topic in 2024, but mostly as individual supplier demos – one item among several. In 2026, software, AI and autonomous driving sit on equal footing with the engine, axle and gearbox, and Chinese OEMs are bundling e-platform, battery, electronics and fleet services into single packages. Our take: the bigger change since 2024 isn't the technology itself – it's how central software has become to the pitch.



New Competitors, New Expectations

A much bigger Chinese presence

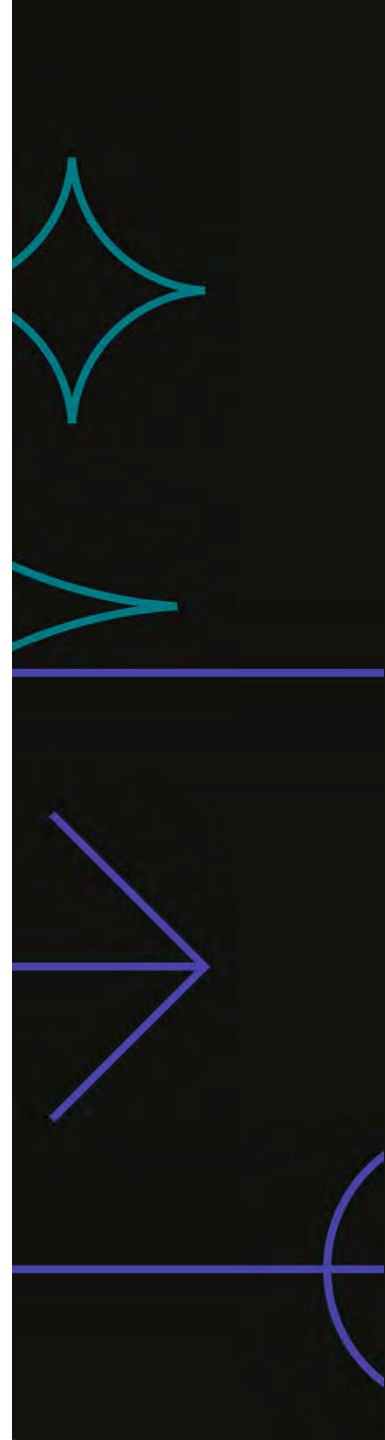
Over 300 Chinese companies exhibited in 2026 with vehicles, batteries, autonomous driving, and logistics software. At least half a dozen Chinese truck brands (BYD, SANY, Foton, Superpanther, Farizon, Sinotruk) showed their own electric trucks, several for the first time. Two of those brands already build in Steyr, Austria, and customers are ordering. That's real competition now, not exhibition-stage curiosity – and it's raising the bar not just on price and hardware, but on the digital experience buyers expect to come with the vehicle. In 2024, Chinese participation was visible too, but smaller and mostly limited to supplier and sensor start-ups like Smarter Eye.

The driver is back at the center

European OEMs are responding on a different front. MAN built its entire 2026 portfolio around the line "Driving.People.Partner" and gave the eTGX new driver-comfort features: wireless charging, EasyControl switches, a 230V outlet, a mechanical night lock. DAF launched a "Single Driver Luxury Package." Scania is selling comfort on its new Dynamic range. FORVIA showed a new driver's seat with interior monitoring built in. The trend spans several major OEMs, though it sits oddly next to the automation on display one hall over, including the first "robo-vans" with no cab at all. Both stories are running side by side this year, not against each other.

Also worth knowing

The mood depended heavily on whom we spoke to. Fleet demand often sounded confident, while manufacturers and carriers remained cautious about margins, infrastructure and investment timing. BEV share of new heavy-truck registrations is still only about 5%. Vehicle availability is advancing faster than infrastructure, economics and fleet adoption.



SDV Is Reaching Commercial Vehicles, but on Their Own Terms



Daniel Elhs
SME SDV



SDV Is Reaching Commercial Vehicles, but on Their Own Terms

Commercial vehicles cannot simply inherit passenger-car SDV architectures. Uptime, lifecycle, body variance, fleet integration and serviceability require a distinct approach.

- | SDV has arrived as a recognised topic in commercial vehicles and logistics – visible in the strong turnout for the SDV tour
- | On the show floor itself, though, it still functions more as a background theme than a headline topic – referenced rather than led with
- | Several suppliers at the show largely present toolkits originally built for the passenger-car market, with commercial-vehicle-specific adaptations still emerging

The Tension Field for Commercial-Vehicle OEMs

Many commercial-vehicle OEMs are caught between specific requirements, uptime, TCO, fleet integration, long lifecycles, body variety, and SDV solutions developed primarily for the passenger-car market, whether from suppliers or from within their own group.

Movement in the market

Coretura

Volvo Group and Daimler Truck are jointly building their own SDV platform (partners include Accenture): a purpose-built platform, not a one-size-fits-all passenger-car solution.

Tata x Iveco

A consolidation move, not an SDV move. As of late September 2026, the acquisition was in its final stage, with completion targeted for early November 2026 – a date that may have shifted by the time this is read. Open question: can the positive patterns from Tata × JLR be transferred to trucks?

Tesla Semi

A single new entrant, not a market trend. The European Semi was presented at the show, with deliveries targeted for late 2027. A software-first approach worth watching – but one vendor's move, not proof of broad SDV adoption in commercial vehicles.

Today, the Driver is Becoming the Integration Layer



Philipp Plum
Principal Technology Consultant

Three Technical Observations from the Show Floor

A full week around the show, including the press day, made the differences in digital maturity highly visible

01 Connectivity is established – integration is not

Truck OEMs increasingly treat telematics, fleet portals and connected services as standard. Across trailers and body builders, digital maturity varies considerably - from advanced condition monitoring and predictive maintenance to isolated remote controls. The biggest gap is no longer connectivity itself, but how these systems work together.

02 Fleets do not buy buzzwords – they buy uptime

The conversations ranged from operators with just four or 20 vehicles, already experimenting with AI and custom-built solutions, to fleets of 400+ vehicles looking to systematically analyze vehicle usage, maintenance and driving behavior. Digitalization delivers real value when it reduces downtime, costs and operational uncertainty.

03 Autonomy needs more than fleet management

Autonomous driving was surprisingly underrepresented at the show. Yet traditional tracking is far from sufficient for autonomous fleets: missions, vehicle health, trailers and bodies, routing, charging, remote operations and exception handling all need to work together. The more autonomous the vehicle becomes, the more important orchestration outside the vehicle becomes.



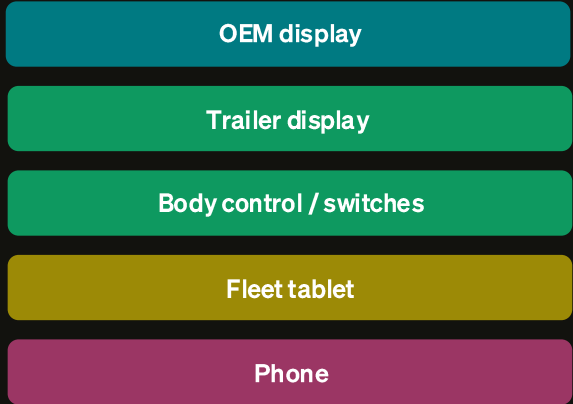
Today, the Driver is Becoming the Integration Layer

The technical foundations for a unified cockpit are emerging, but the workflow is still fragmented across providers.

01 TODAY

Five touchpoints. One job.

Modern trucks are connected, but the driver's workplace remains fragmented. OEM displays, trailer systems, body controls, fleet tablets and smartphone apps often operate independently. Even when the necessary data exists, the driver must switch between devices and interfaces to complete a single task.

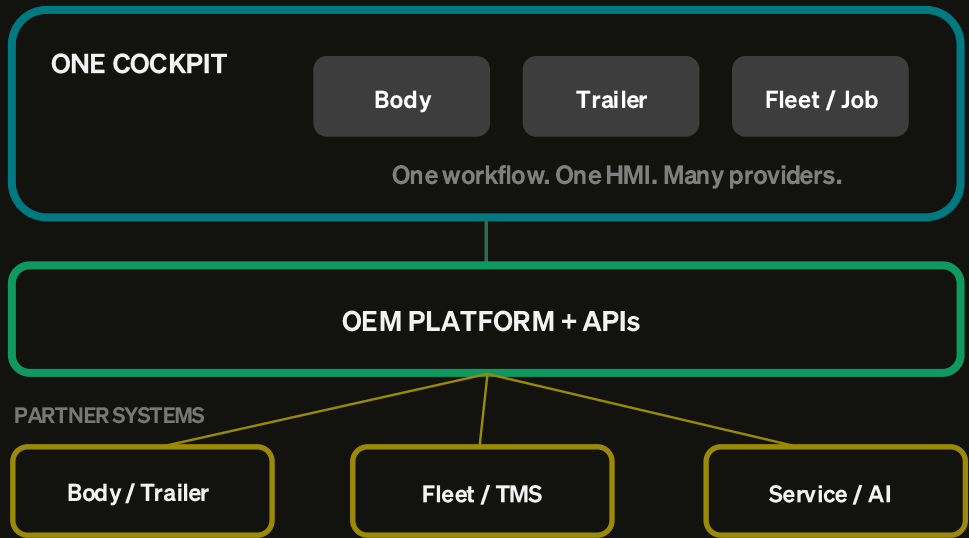


Today, the driver becomes the integration layer

02 TARGET

One cockpit. Many providers.

Trailer and body functions, fleet management, navigation and maintenance information should come together in one seamless driver experience.



This requires more than moving existing apps to another screen. Identity, vehicle signals, cross-OEM compatibility, usability and functional safety need to work together.

03 WHY NOW?

The technical foundation is starting to open.

Different ecosystems are emerging or are being standardized and opened up for third-party integration, making it more realistic than it was a few years ago.

- **PACCAR Connect**
open partner platform + apps can be registered for the Connect tablet
 - **Volvo Connect**
Marketplace + Developer Portal + services on the built-in display
 - **MAN / RIO**
Marketplace + DataPackages / APIs + third-party data integration
 - **AAOS ecosystem**
direct in-vehicle app distribution is established - vehicle access still depends on OEM APIs
- Opportunity:** integration by design across truck, trailer, body and fleet - not another standalone dashboard

Connected Trucks. Fragmented Workplace.



René Arbeithuber

Director Market Engagement & Experience



Connected Trucks. Fragmented Workplace.

Trucks Digital In-cabin Experience Report: Display, tachograph, fleet tablet, phone apps: up to four touchpoints for one job.

Challenges		Market pressure	
0 / 11	In none of the 11 vehicles reviewed could we see a live job integrated into the in-vehicle workflow under show conditions.	12+	Chinese brands plan to sell heavy trucks in Europe – up to 30% cheaper. When hardware becomes interchangeable, the driver experience sets brands apart.
0 / 11	None shows available truck parking in its navigation – a top driver pain. The live data exists; even Mercedes puts it on the phone.		
0 / 11	No assistant knows the job. Voice opens windows at best. General AI is slowly arriving (Tesla, Chinese OEMs) – without the work context.	9 / 11	keep physical buttons and knobs for key vehicle functions – easy to use without looking, with gloves, on bumpy roads.
8/11	pages of PDF manual on one truck's screen. Only Volvo explains the truck in a more user-friendly way – yet 500,000 open driver jobs demand fast onboarding.	45 min	DAF plans e-truck charging stops right in the navigation – with filters for drive-through and 2+ charge points. At 325 kW, a 20–80% charge fits the legal break.
Dated	Several interfaces still follow interaction and visual patterns that feel disconnected from current driver expectations.	5	Opportunity building blocks exist – app platforms, open parking data, charging planning, voice AI, driver coaching. Nobody joins them into one driver workplace.

Show conditions: no truck had a test user logged in; 4 of 11 systems were offline or switched off at times – digital services were barely demonstrable.
Sources: own review and interviews (11 trucks, 11 manufacturers), exhibitor directory, IRU 2025, ATRI, Dekra, BMV, OEM press releases (Daimler Truck, Volvo, Scania), industry reports.

The Data Flows Around the Silo, Not Through It



Felix Eichert
Business Circle Lead



The Data Flows Around the Silo, Not Through It

Four stops along one truck's data path, and how each actor works around the same interoperability gap.

OEM / Vehicle

The truck already generates the data: tire pressure, axle load, camera feeds. It stays inside the brand's own cloud. Two OEM brands that share one vehicle platform each said, independently, that they don't get the other's telematics.

Aftermarket Telematics

The resulting aftermarket has become highly fragmented, with a rapidly growing number of providers and overlapping digital services. (Study by Diconium / 144 providers, 900+ digital services compared)

Dispatcher / TMS

Freight platforms that never depended on OEM data move loads across every brand on the yard anyway. One freight-exchange operator put it plainly: match carrier and customer, brand of truck irrelevant.

Driver / Loading Dock

All that intelligence stops short of the dock. One in-house fleet still checks loading by eye and asked for a camera, not another dashboard. A small carrier still logs pallets by hand, one scan at a time.

Every station solved its own version of the data problem.
The one closest to the driver still hasn't.

Digital in the Middle, Analogue at Both Ends

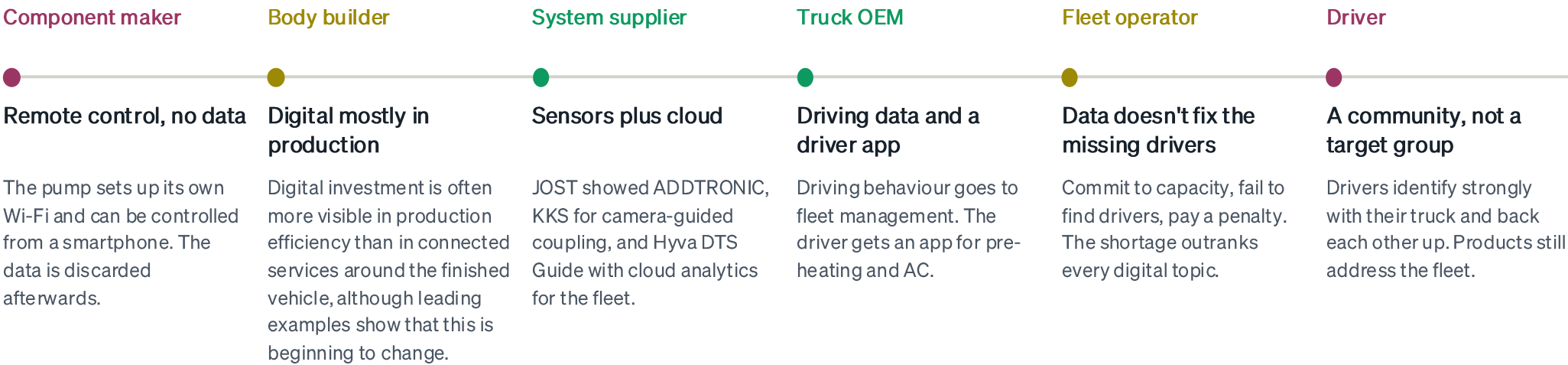


Benjamin Bohr
Principal Consultant



Digital in the Middle, Analogue at Both Ends

Six stations along a truck's value chain. Digitalisation rises toward the middle and falls off again toward the people at both ends.



Each stage optimises what it controls. Between the stages, it stays analogue.

502,000 unfilled driver positions in Europe (IRU 2025, 13 percent). The scarcest factor in the chain is the one addressed least by digital tools.

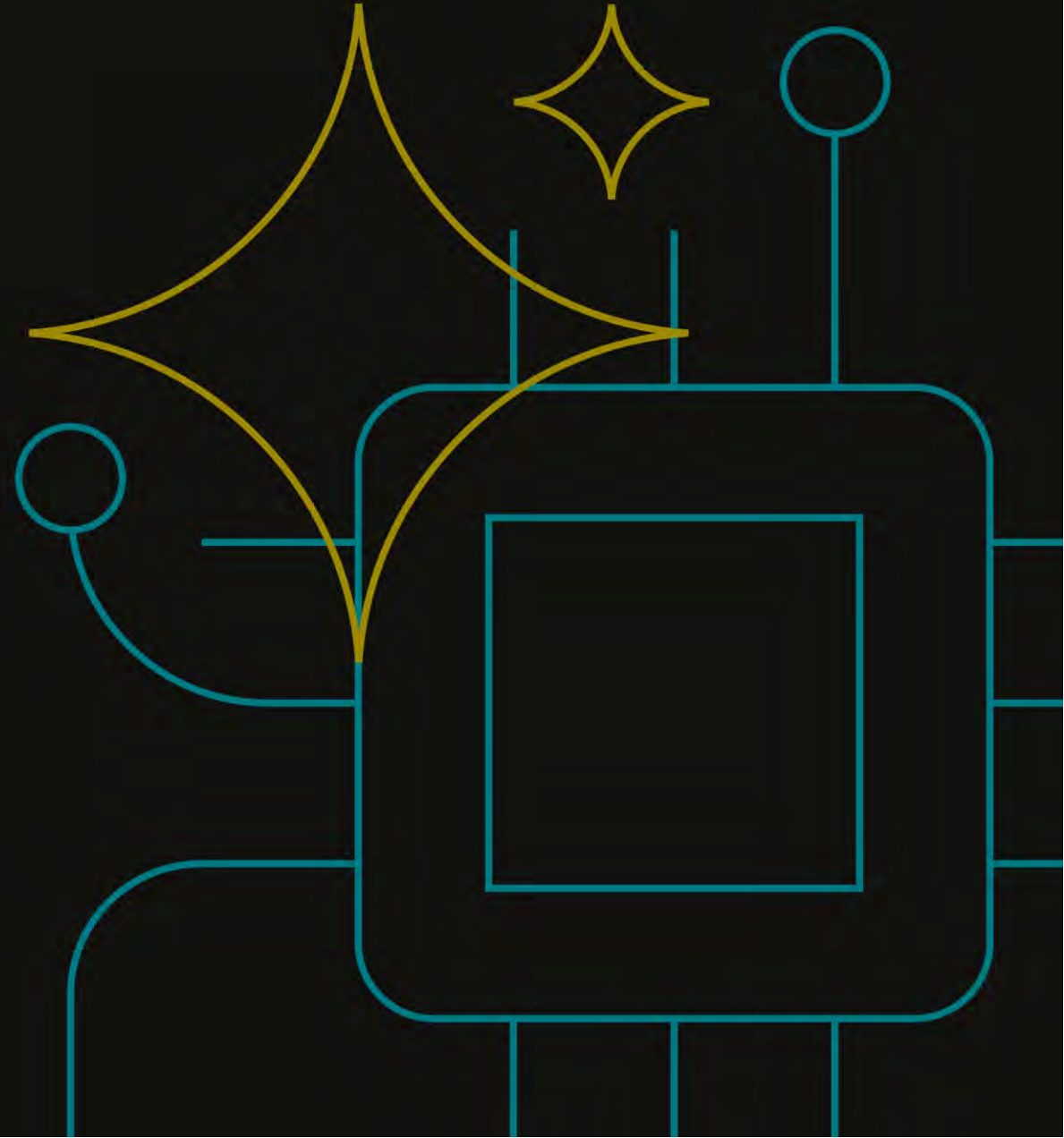
Not every body builder lags behind: Krone won the International Trailer Award at IAA 2026 for a system that evaluates a trailer's condition data early.

Sources: own conversations and site visit (IAA Transportation, Hannover, 16-20 Sept 2026), IRU Driver Shortage Report 2025, JOST World press release 03.09.2026, hyva.com (Digital Tipping Solutions), International Trailer Award 2027 (Night of the Stars, 14 Sept 2026).

Autonomy & Agentic Operations



Christian Fuest
Director Client Development



From Data Overload to Agentic Operations

From digital services to agentic operations

Digital services are already a purchase criterion in commercial vehicles, and the next front is agentic AI: software that doesn't just report data, but proposes or takes operational decisions across fleets and business processes. The immediate opportunity is not fully autonomous decision-making. It is reducing the manual effort required to turn fragmented vehicle, route and operational data into timely action. The companies most likely to benefit later are those that begin improving data quality, process ownership and decision rights now.

Connected trucks meet AI

What we heard echoed something we'd already seen ourselves: fleet managers don't need more data, they need faster and better decisions. Connected trucks already generate more information than most teams can process in time. Pairing real-time vehicle data with location intelligence lets fleets weigh trade-offs and react to disruptions – getting ahead of problems instead of just responding to them. For a mid-size fleet, this is less about buying a new platform and more about tightening the loop between data that already exists and the decisions it should inform.

The fleet manager is evolving

The role itself is shifting as a result: from pure vehicle administration and firefighting toward something closer to operational intelligence – using predictive insight and unified data to run operations, not just track them. Some of this is already real today, in the form of alerts, dashboards and basic predictive maintenance; full agentic decision-making is still mostly at pilot stage. Either way, the shift starts with data quality and process discipline, not with buying the most advanced tool first.



Let's continue the conversation if you are exploring:

- how to connect vehicle, body, trailer and fleet systems
- how software and data can improve uptime and driver workflows
- how to turn emerging technologies into viable commercial service

No pitch required. We are equally happy to compare observations.

Just contact growth@valtech-mobility.com



About Valtech Mobility

Valtech Mobility is a 100% subsidiary of Valtech and an OEM-independent specialist in software for connected mobility. We bring connected-vehicle, software, data and experience expertise into commercial transportation – working across OEM platforms, fleet operations and partner ecosystems. Our roots go back to 2009, when we began building some of the industry's first connected-car services together with the Volkswagen Group – work that laid the foundation for what we do today: connected vehicle platforms, business transactions in mobility, swarm and infrastructure services, and product development with optional operation.

Today, platforms we've built connect more than 40 million vehicles, drawing on experience across 1,100+ Start-of-Production milestones in 65 markets. Around 430 people across Germany, China and India combine deep OEM domain knowledge with agile, cross-functional delivery – because we believe lasting success in this complex world only comes from genuine, collaborative partnership.

Valtech Mobility

We make complex digital systems work.
In reality. In operation. At scale.



Valtech Mobility

Digitalization & Efficiency in
Transportation Logistics

