CV Link™ Update *Bulletin*

October 1, 2026

Q3 2026 REVIEW AND FORECAST

Power Systems Research
Data · Forecasting · Solutions™

www.powersys.com | +1-651-905-8400 | info@powersys.com

CV Link™ is a comprehensive market database containing forecasted commercial vehicle production volumes and original equipment manufacturers, vehicle platforms and regional economic analysis. This document outlines important forecast trends as well as the additions and enhancements applied to the database in the third quarter of 2026.



Inside

I. Executive Notes 3
II. Introduction 5
III. CV Link™ Data Update Notes 6
IV. Forecast Trends 10
V. Research Methodology 12
VI. Forecast Methodology 13
VII. Contact Information 14



Someone once said,

Data Without Analysis Is Just a Bunch of Numbers.

We agree. That's why our proprietary databases are only the starting point for the way we serve you.

We start with our numbers, and they drive our solid analysis, forecasting and strategic solutions to give you the results you need.

Solid data. It's the starting point that makes our business intelligence different from most consultants.

Since 1976, we've been building and maintaining databases that track global production of equipment powered by engines and alternative sources, such as electric motors and hybrid packages.

If you need data, forecasting or strategic market analysis for key power industry segments, let's talk.

You can reach us at info@powersys.com or www.powersys.com, or +1 651.905.8400.

Do it today. Why wait for success?

Power Systems Research
Data · Forecasting · Solutions

1365 Corporate Center Curve | St. Paul, MN 55121

+1 651.905.8400 | www.powersys.com

St. Paul, USA | Beijing, China | Brussels, Belgium | Detroit, USA | Moscow, Russia | Pune, India | Sao Paulo, Brazil | Tokyo, Japan

I. Executive Notes



Staying at the Forefront of Data Center Trends

It seems as though every day we see news about the production and development of data centers and the related arguments about possible benefits and downsides of these large data centers.

The amount of news generated about data centers isn't surprising, since there are more than 11,000 of these centers in operation or in production globally today.

While articles about battles over where to locate these centers are frequent, it is helpful to note that there is one important common element in these discussions and that is the need for more power. As demand increases for more capability from AI as well as other computing and data storage needs, having the necessary power—both primary and backup—beyond that available from the infrastructure grid is an ongoing requirement.

That's where the markets that Power Systems Research (PSR) track come into play.

Our dependance on data centers and the critical services they provide is growing every day. Data centers essentially power the digital world, enabling seamless connectivity, storage, and processing of vast quantities of data. These facilities support essential services, from powering global communication networks and cloud platforms, to driving innovation in artificial intelligence, healthcare, and financial systems.

One might think that data centers use diesel generator sets as the common source of primary and backup power since this is the most cost effective and proven power technology.

While it's true that diesel generator sets often are employed, there are environmental and technology

Author



Joe Zirnhelt is President and CEO of Power Systems Research.

questions that also come into play. For example, if the power requirements are scaled to a certain size, then use of gas turbines in place of, or in addition to, diesel or natural gas generator sets, may be part of the solution.

Another twist to this trend involves growth in future requirements as more renewable energy targets are developed in certain countries for sourcing data center power. Future data centers that have larger power requirements may employ a mix of technologies where engine power is just one piece of the puzzle and wind and solar and Battery Energy Storage systems also are used.

At PSR, we are monitoring data center growth trends and we're analyzing the possible impact of this growth on the demand and production of equipment PSR tracks. PSR is actively working to better delineate the purpose of the generator sets that might be used to power data centers.

We realize that having this type of insight is important to be able to identify the size of the market for power generation equipment and components used in data centers and critical power applications.

We will have more to share on this topic in future updates but for the time being you should be aware of our work in this area and of our awareness of these important trends.

As we prepared this Q3 2026 update, we incorporated important insights we gathered during the third quarter to provide our best outlook for 2026 as well as our five-year forecast.

We hope you find this database update valuable at this important time. As always, we appreciate your feedback and continued dialogue as you review this latest update.

If you are facing new challenges or issues that require data-driven solutions, talk to us. We can be an important resource.

Thanks for reading and for being a valued client of Power Systems Research. **PSR**



II. Introduction



Power Systems Research (PSR) has developed and maintained comprehensive market data specific to the power products and drivetrain industry since 1976. Because accurate and reliable market data has always been at the heart of its activities, PSR has developed a unique family of highly specialized databases. These core databases include:

- **EnginLink™** – Engine Production and Forecast Database
- **OE Link™** – Original Equipment Production and Forecast Database
- **CV Link™** – Commercial Vehicle Production and Forecast Database
- **PartsLink™** – Original Equipment Population Database

The **PowerLink™ 3.0** dashboard effectively combines all market databases into one Internet-based tool. Using this system, subscribers can easily access, organize and download the latest engine-powered market data anytime, anywhere in the world.

The PowerLink™ 3.0 dashboard has extensive reporting capabilities and allows for customization and report distribution within your organization. This innovative system sharpens your business and planning strategies by finding hidden opportunities and targeting potential customers. The PowerLink™ 3.0 dashboard is your link to a competitive advantage in the marketplace.

CV Link™ is continuously updated; this Update Bulletin reflects changes made to CV Link™ during the previous quarter. Included in this Update Bulletin are CV Link™ database notes listing significant data modifications and an explanation of our research and forecast methodology. Additional Power Systems Research initiatives also are outlined here.

Please feel free to circulate these research notes to your colleagues and internal data users

If you have any questions regarding this update, please contact us via email at support@powersys.com or by phone at 651-905-8400. Our support email account is monitored 8-5 CDT M-F by associates at our corporate offices and at our data center.

Thank you for your continued support of Power Systems Research. **PSR**

III. CV Link™ Data Update Notes

New Assumptions for Q3 2026

Medium/Heavy Vehicle Forecast

NORTH AMERICA

Cummins: B7.2 Liter Engine. Cummins has pushed back the start of production for the B7.2 liter engine until 2028. At that time, the B7.2 will begin superseding the current B6.7 liter engine in medium truck and bus applications. However, the natural gas B6.7 liter engine will remain in production.

X10 Natural Gas Engine. Cummins will supersede their current L9 and X12 natural gas engines with the new agnostic X10 engine by 2028. Cummins will end production of all L9 and X12 engines in North America by 2028.

L9 and X12 Engines. Cummins will continue to install the L9 and X12 engine platforms into 2027 as they ramp up production of the MY 2027 X10 engine platform. By 2028, the L9 and X12 engines should no longer be available in North America.

Kenworth: Cummins B7.2 Engine. In 2028, Kenworth will supersede the current PX-7 medium engine platform with the new Cummins emission compliant B7.2 liter medium engine platform. Cummins will end production of the current B6.7 liter engine at the end of 2027. The natural gas version of the current PX-7 will remain in production. At the time of this publish, PACCAR has not announced whether they will badge the new Cummins B7.2 liter engine as a PX engine.

Cummins X10 Engine. At the end of 2027, Kenworth will supersede the current PACCAR PX-9 medium/heavy engine platform with the new Cummins emission compliant X10 liter medium engine platform. Cummins

Author



Chris Fisher is the Senior Commercial Vehicle Analyst at Power Systems Research.

EnginLink™

If you need engine data and forecasts, you need **EnginLink™**

EnginLink™ is the definitive source of global production, forecast and specification data for IC engines. And now it includes information on electric and hybrid-drive systems.

It contains model level detail for power sources used in off-road equipment and on-highway vehicles.

Call today. +1 651.905.8400, or email us at info@powersys.com.

Call Today.
Why wait for success?

Power Systems Research
Data · Forecasting · Solutions™

1365 Corporate Center Curve | Eagan, MN 55121

+1 651.905.8400 | www.powersys.com

will end production of the current L9 liter engine at the end of 2027. At the time of this publish, PACCAR has not announced whether they will badge the new Cummins X10 liter engine as a PX engine.

Medium Trucks. At the end of 2025, Kenworth transferred their medium truck production from the plant in Canada to plants in the United States for U.S. sales. The BEVs were transferred to the Renton plant while the ICE models were transferred to the Chillicothe plant. Kenworth will still assemble truck models for the Canadian market at their Canadian plant. The production shift was a direct result of the current tariff increases and it is currently unknown if the production will be transferred back to Canada in the future.

Freightliner: Portland Plant. DTNA will close the Portland truck production plant Oct. 30, 2026 with no plans to re-open. The Freightliner eM2 and eCascadia truck production volume will be transferred to the Mt. Holley plant.

Mt. Holley Plant. DTNA will bring back 400 production line workers who were among 2,000 laid off in July 2025 amid broader cuts across DTNA's North American manufacturing network. Those layoffs included workers in Saltillo, Mexico.

Saltillo Plant. Freightliner is adding workers at its Saltillo, Mexico, manufacturing plant as production ramps up across North America. Freightliner is adding first-shift staffing in Saltillo, a company spokeswoman said, while eliminating planned down days and adding Saturday overtime as customer demand improves across the continent, particularly in the United States.

Peterbilt: Cummins B7.2 Engine. In 2028, Kenworth will supersede the current PX-7 medium engine platform with the new Cummins emission compliant B7.2 liter medium engine platform. Cummins will end production of the current B6.7 liter engine at the end of 2027. The natural gas version of the current PX-7 will remain in production. At the time of this publish, PACCAR has not announced whether they will badge the new Cummins B7.2 liter engine as a PX engine.

Cummins X10 Engine. At the end of 2027, Peterilt will supersede the current PACCAR PX-9 medium/ heavy engine platform with the new Cummins emission

OE Link™

Your source for OEM production and forecast data

OE Link™ is the definitive source of global OEM production and forecast data for with engine installation detail for the full range of highway vehicle and off-road segments. And now it includes information on electric and hybrid-drive systems.

Data includes model level detail on vehicle, mobile and stationary equipment applications in 13 key industry segments.

Call today. +1 651.905.8400, or email us at info@powersys.com.

Call Today.
Why wait for success?

Power Systems Research
Data · Forecasting · Solutions™

1365 Corporate Center Curve | Eagan, MN 55121

+1 651.905.8400 | www.powersys.com

compliant X10 liter medium engine platform. Cummins will end production of the current L9 liter engine at the end of 2027. At the time of this publish, PACCAR has not announced whether they will badge the new Cummins X10 liter engine as a PX engine.

Medium Trucks. At the end of 2025, Peterbilt transferred their medium truck production from the plant in Canada to plants in the United States for U.S. sales. The BEVs were transferred to the Renton plant while the ICE models were transferred to the Denton plant. Peterbilt will still assemble truck models for the Canadian market at their Canadian plant. The production shift was a direct result of the current tariff increases and it is currently unknown if the production will be transferred back to Canada at some point in the future.

Western Star: Portland Plant. DTNA will close the Portland truck production plant Oct. 30, 2026, with no plans to re-open. The Western Star 47X and 49X truck production volume will be transferred to the Cleveland plant.

SOUTH AMERICA

Agrale: Battery Electric Buses. Agrale started production of the MT17 and MT27 battery electric bus platforms in Argentina in 2026.

BYD: Battery Electric Bus. The BYD BC86S01 bus started assembly at the Hino plant in Columbia in 2026. These are likely bus kits imported from China for final assembly.

Scania: Motor Coach Updates. Scania updated their K series motor coach lineup in Brazil in 2026.

Volkswagen: Meteor Truck Platform. In 2026, Volkswagen added variations of their Meteor heavy truck platform with both 6x2 and 6x4 axle configurations in Brazil.

EUROPE

Breda-Menarini: Updated Models and Ownership. Breda Menarini was acquired by Seri Industrial in July 2024 and plans to introduce production of the Flash and Airon electric buses in 2027 at their assembly plant in Italy.

COMPONENTS

Looking for component data?

We can help.

Many components are already included in our databases. If the ones you require are not, we may be able to identify them for you.

The **Components & Consumables Module Directory** provides a quick overview of components data available in our EnginLink™, OE Link™, CV Link™ and PartsLink™ proprietary databases.

The modules are not stand-alone products; they can be purchased only as part of a subscription/extract to one of the databases, EnginLink™, OE Link™, CV Link™ or PartsLink™.

Call today. +1 651.905.8400, or email us at info@powersys.com.

Power Systems Research
Data · Forecasting · Solutions™

1365 Corporate Center Curve | Eagan, MN 55121

+1 651.905.8400 | www.powersys.com

Mercedes: New Plant. Mercedes plans to open a new truck production plant in Cheb, Czech Republic in 2030 to produce its line of heavy trucks. The new plant will have an intital production capacity of 25,000 trucks and will absorb come of the production that is currently at the Worth plant in Germany. While currently unknown, it is likely the heavy Actros and Arocs truck platforms will initially be produced at the Cheb plant.

Cummins Engines. Mercedes plans to introduce the Cummins medium engines into production in Germany at the end of 2028 or early 2029 ahead of the Euro 7 emission regulations in Europe. PSR previouly estimated the introduction earlier in the forecast period to align with the previous Euro 7 introduction date which was scheduled for July 2027. The implementation date has been moved out until May 2029.

JAPAN AND KOREA

Mitsubishi Fuso: Vision Zero Emission Trucks. PSR removed the Mitsubishi Fuso zero-emission battery elecric and fuel cell truck platform from the production forecast. This platform was used for prototypes and never entered seriel production.

GREATER CHINA

No Significant Changes This Quarter

SOUTH ASIA

Isuzu: Truck Upgrades. Isuzu upgraded their truck assembly engine lineup in Malaysia to meet Euro 4 emission standards. The truck platforms include the NPR (Elf) and Forward medium and heavy trucks.

Kenworth: Engine Upgrades. Kenworth will supersede the T360 truck platform equipped with the Cummins ISL 9 liter engine with the new X10 engine starting in 2028.

Mercedes: Truck Upgrades. In 2025, Mercedes updated their heavy truck models assembled in Malaysia. Three variants of the Actros and two variants of the Arocs were introduced. While Malaysia only requires Euro 4 emission standards, the Mercedes trucks now install the OM470 (10.7 Liter) and OM471 (12.8 Liter) Euro 5 engine platforms.

Mitsubishi Fuso: Truck Upgrades. To meet the current Euro 4 emission standards in Malaysia, Mitsubishi Fuso upgraded the engines in their commercial truck lineup for their medium duty Canter and medium and heavy duty Fighter truck platforms.

Scania: Truck Upgrades. Ahead of the Euro 4 emission regulation implementation, Scania updated their truck assembly lineup in Malaysia. Along with their current P series platform, Scania is now assembling their G, L, S and some R series platforms at their assembly plant in Malaysia. Scania brings the CKD kits in from Sweden for final assembly in Malaysia. This lineup will also be able to meet the Euro 5 emission standards once implemented.

UD Truck: Truck Upgrades. UD Trucks upgraded their truck and engine lineup for their assembled trucks in Malaysia ahead of the Euro 4 Emisson regulations. The lineup consists of the updated Questor and the Croner which replaced the Condor platform. The trucks will also be able to meet the Euro 5 emission standards when implemented. **PSR**



IV. Forecast Trends

North America

Medium and heavy truck production in North America is expected to increase by 13.4% this year compared with the low 2025 production. Class 8 truck production is expected to increase by 13.8% this year as order rates for class 8 trucks improved strongly throughout much of the year.

Improvement in freight rates and freight demand along with tightening truck capacity and some level of truck pre-buy ahead of the 2027 GHG emission regulations is expected to drive increased truck production this year. While truck sales have been down for much of this year, production levels are expected to be strong in the second half of the year.

The primary risk to the 2026 production forecast is that truck fleets might cancel or postpone truck purchases this year. However, at the time of this writing few if any truck orders have been cancelled due to the high price of diesel fuel or increasing interest rates.

Europe

Medium and heavy truck production in Europe is expected to increase by 7.4% this year compared to 2025. After very low truck demand during the past few years, it appears truck demand has bottomed out and has started to improve with order rates generally increasing. Truck demand in Western Europe is expected to improve this year as the fleets will need to replace their older trucks purchased in 2022 and 2023. Tightening truck capacity will also drive demand throughout the rest of the year. So far, significantly higher fuel costs have not caused fleets to cancel truck orders scheduled for the fourth quarter of this year.

Author



Chris Fisher is the Senior Commercial Vehicle Analyst at Power Systems Research.

Need Intelligence?

Download Complimentary PSR Industry Reports

Our Targeted Industry Reports Provide Timely Global Data and Analysis

Truck Production Index (TPI)

Truck Production Index - South America

Alternative Power Reports

DataPoint Reports

Trade Show Reports

PowerTALK News

Download Current Reports at powersys.com

Power Systems Research
Data · Forecasting · Solutions™

1365 Corporate Center Curve | Eagan, MN 55121

+1 651.905.8400 | www.powersys.com



South America

Medium and heavy commercial vehicle production is expected to decline by 4% this year compared with 2025. Production in Argentina is expected to increase by 17.4% as the economy is improving and inflation is down significantly from a year ago. MHCV production in Brazil is expected to decline by 5.7% this year while vehicle production in Columbia is forecasted to increase by 10.8% in 2026.

South Asia

After a strong level of vehicle replacement during the past few years, commercial vehicle production is expected to increase by 3.8% this year compared with 2025. In India, truck and freight capacity has mostly rebalanced and MHCV production is expected to increase by 4% this year compared with 2025. Demand is expected to grow in mid-term owing to a strong macroeconomic environment, healthy fleet utilization levels, Government capex on infrastructure projects, and stable freight demand.

Japan/Korea

Medium and heavy commercial vehicle production in Japan and South Korea is expected to increase by 5% in 2026 over last year. Commercial vehicle production is expected to increase by 6.5 % in Japan and decline by 6.5% South Korea this year. In Japan, infrastructure spending and the continued need for the fleets to replace older trucks will be the primary reasons for increased truck demand this year.

In South Korea, periodic diesel fuel shortages and very high fuel cost is partially responsible for the lower truck demand during the first half of the year. Fuel availability and reduced fuel prices are expected to improve as the year progresses.

Greater China

Medium and heavy commercial vehicle production in Greater China is expected to decline by 4.2% this year compared to 2025. Domestic truck sales are expected to be slightly lower in 2026 compared to last year. In 2025, thanks to the “China IV” phase-out and renewal subsidy policy, part of the replacement demand for 2026 was pulled forward; therefore, domestic sales in 2026 will face certain growth pressure and will most likely experience a small decline of approximately 5%.

Exports are expected to remain at a high level. Although the Russian market may shrink due to policy factors, incremental growth in Africa, the Middle East, Southeast Asia, and Latin America will offset this. Chinese HDTs still have an obvious cost-performance advantage in overseas markets, and exports will become the “ballast stone” supporting total sales. **PSR**

V. Research Methodology

Power Systems Research (PSR) Research Methodology

Research begins with the gathering of information from primary and secondary sources. Next, the PSR analyst team reviews and validates all data against industry benchmarks. If our analysts discover anomalies in the data, additional research and validation is performed before publishing.

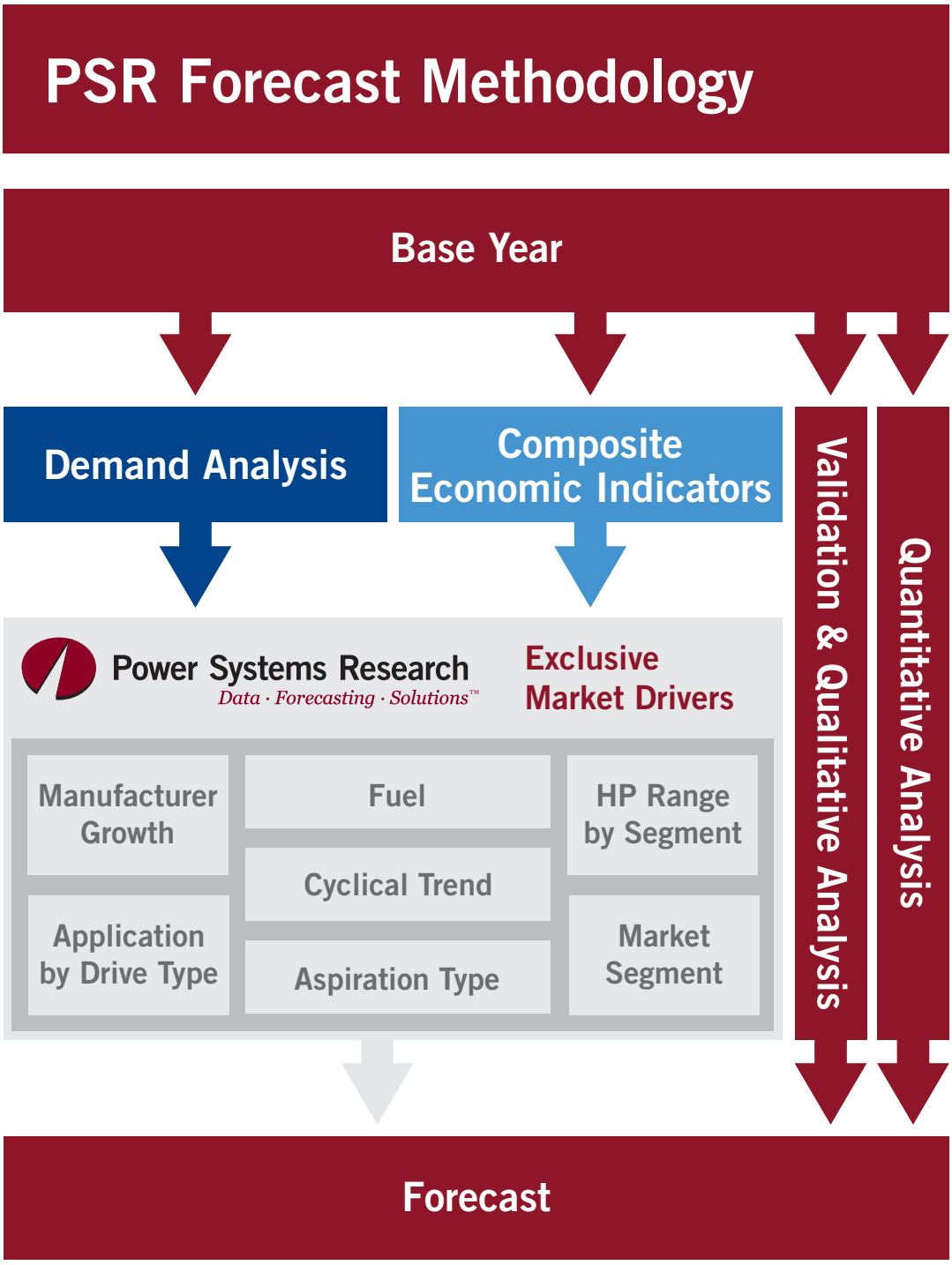
PSR RESEARCH METHODOLOGY



VI. Forecast Methodology

Power Systems Research (PSR) Forecast Methodology

The analysis begins with the Base Year and key historical data then adds current and future economic indicators and market demand. Next, our exclusive market drivers are entered and the Power System Research proprietary algorithm is applied. Extensive analysis and discussion by our PSR Analyst team validates and produces the forecast.





CONTACT US

Purchasing and Inquiries

Headquarters
St. Paul, USA
+1 651 905 8400
info@powersys.com

European Headquarters
Brussels, Belgium
+32 2 643 2828
infobr@powersys.com

Detroit, USA
+1 248 444 0545
infode@powersys.com

Frankfurt, Germany
+49 160 1807 044
infoge@powersys.com

Beijing, China
infocn@powersys.com

Pune, India
infoin@powersys.com

Campinas, Brazil
+55 19 3305 5657
infosa@powersys.com

Tokyo, Japan
+81 90 9139 0934
infojp@powersys.com

About Power Systems Research

Power Systems Research (PSR), established in 1976, is the leading source of data, analysis and forecasting on the global production of engines and engine-powered equipment, including class 8 vehicles. One of its databases, EnginLink,™ includes production figures down to the model level for OEMs in key market segments, such as commercial vehicles. PSR's global research network includes eight offices and stretches across 200 countries and four continents.

Power Systems Research

Data · Forecasting · Solutions™