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# Commercial Vehicle Service Analysis Report

Quarterly Report: Q2-2023

A Comprehensive Review of  
**Service Costs and Activity by VMRS System Code**

## Report Overview

The Decisiv Commercial Vehicle Service Analysis Report on 2023 Q2 costs presents a continuation of improving news overall for fleets and service providers in the form of more favorable parts and labor expenses.

Between 2023 Q1 and 2023 Q2, combined parts and labor costs across the 25 VMRS system categories tracked in this report were 1.3% lower. The steep decline followed negligible increases in the previous two quarters of 0.8% in 2023 Q1 and 0.9% in 2022 Q4. This is in clear contrast to much larger increases that had been seen in earlier quarters.

In 2023 Q2, labor costs dropped by 0.8%, the first decrease in the past four quarters. At the same time, parts costs declined for the second period in a row, down 1.6% between the last two quarters following a 0.4% decrease between 2022 Q4 and 2023 Q1.

On a year-over-year basis, from 2022 Q2 to 2023 Q2 combined parts and labor costs were still rising but only by 5.57%, a dramatic reduction compared to the rate of increase of 15% seen one year earlier.

While service operations can expect to see elevated parts prices and labor rates remain until economic and inflation pressures diminish further, recent analyses indicating falling backlogs for new trucks continue to mean that less repair-intensive new and replacement vehicles are finally reaching fleets. Data showing that OEM build rates and truck sales are roughly equal also points to a steadier supply of new equipment that hasn't been seen for some time.

Overall, OEMs are facing fewer of the supply chain disruptions that had previously and negatively impacted production capacity and are steadily eliminating pent up demand for new vehicles.

Industry factors are also affecting labor costs. In July, according to the American Trucking Associations, truck tonnage declined by 3% compared with the same month in 2022, representing the fifth consecutive year-over-year drop. Combined, lower freight volumes and an influx of newer trucks into fleets are decreasing the demand for service and repair activity.

## Report Highlights

The data reflecting lower parts and labor expenses in this quarter's report indicates how a number of factors interactively impact service activity. Changes in mileage related to freight volumes, the effect of newer versus aging trucks and the ongoing stabilization of the supply chain all impact each other and have a resulting effect on fleet service operations.

Looking ahead, there is a growing expectation that service and repair costs will find a new equilibrium and consequently settle into a more predictable cycle similar to what was experienced in the past.

The data that Decisiv collects and analyzes for this report on 25 Vehicle Maintenance Reporting Standard (VMRS) system level codes accounts for more than 97% of total parts and labor costs for more than 7 million assets and over 300,000 monthly maintenance and repair events at more than 5,000 service locations.

Data on the top ten VMRS code categories shows that engines and related systems accounted for the largest percentage of all costs in 2023 Q2. In total, Powerplant (35.9%), Exhaust (12.9%), Cooling (6.1%), and Fuel Systems (5.3%) equaled 60.2% of costs in 2023 Q2.

Between 2023 Q1 and 2023 Q2 and Year-over-Year (YoY) from 2022 Q2 to 2023 Q2, the following changes were realized in costs for the top ten VMRS codes:

- **Powerplant**— Parts and labor costs between the past two quarters rose 2.0% with the bulk of the increases coming from higher parts prices. On a YoY basis, increases were roughly equal between parts and labor, and combined costs jumped 6.4%.
- **Exhaust**— Combined parts and labor costs between quarters rose only 0.1% on a slight parts cost increase (0.9%) and a reduction of 1.2% in labor expenses. YoY exhaust costs went up 7.9% following increases in the previous three quarters but rose more slowly compared to the 11.1% rise seen in the previous report.
- **Cooling**— A 1.4% decrease in parts costs between the two most recent quarters was offset by a 2.6% increase in labor expenses. On balance, the combined costs rose just 0.2%. YoY, combined costs in this category were up just 1.8% compared to a 14% rise in the previous comparison.
- **Brakes**— Lower costs were evident between the past two quarters with parts costs down 2.2% and labor expenses dropping 1.5% for a combined 1.9% decrease. YoY, combined costs were up just 2.2% reflecting a slight drop of 0.8% in parts costs and a 5.7% rise in labor expenses. In the previously quarterly analysis, combined YoY costs had risen 9%.
- **Fuel System**— Following slightly lower costs in 2023 Q1, combined parts and labor expenses rose 2.0%. Significantly, the 0.5% increase in combined costs in the YoY comparison was considerably lower than the 7.4% annual rise recorded in the previous quarterly report.
- **Cab and Sheet Metal**— Following no change in the previous report, combined parts and labor costs between quarters were down 5.6% in this quarterly analysis with the largest drop (8.4%) coming from lower parts expenses. YoY parts and labor costs combined rose 13.5%.
- **Clutch**— YoY parts and labor costs continued to increase, rising 13.0% after a 10% jump in the previous report. Between the past two quarters 4.5% higher parts costs and 2.4% higher labor costs drove combined expenses up 3.6%.
- **Frame**— Parts and labor costs continued falling by 5.2% between the last two quarters after recording a 3.7% decrease between 2023 Q1 and 2022 Q4. YoY a small decrease of 0.4% in parts costs and a 2.1% increase in labor expenses led to a negligible rise of 0.4% overall.
- **Air Conditioning, Heating & Ventilation**— The most significant cost increases were seen in this VMRS system category. Across the board there were increases in parts and labor costs of 7.4% between quarters and 10.7% on an annual basis. Of note is that YoY parts costs accounted for the largest increase at 15.1% while in the quarterly comparison labor cost rose higher by 13.0%.
- **Transmission**— While annual parts and labor costs were up 6.4% in the previous report, those expenses rose only 2.4% YoY in the current analysis based on a 5.1% rise in parts expenses and labor costs that were 1.6% lower. Between the past two quarters, combined costs continued to fall, dropping 0.2% in the most recent comparison after a 2.5% decrease in the previous report.

The Decisiv Commercial Vehicle Service Analysis Report also tracks costs for an additional 15 VMRS system codes. Among them, the five largest expense categories in 2023 Q2 were Lighting (4.9%), Steering (3.1%), Cranking (2.9%), Driveshafts (1.6%), and Wheels, Rims, Hubs and Bearings (1.3%).

With labor expenses impacted by the cost of living and parts costs fluctuating geographically, the report shows differences across four U.S. regions and Canada. In 2023 Q2, combined costs were highest in the West followed by the South, Northeast, Midwest, and Canada. Higher costs in some regions may also be attributable to the number of trucking operations and reflect higher levels of service activity in those areas.

## Service Activity

In Q2 2023, data showing the number of service events for each of the top VMRS System Codes indicates that the five systems requiring the most service were Powerplant, Exhaust, Cab and Sheet Metal, Brakes, and Cooling.

Overall service transaction activity decreased by 0.2% from Q1 to Q2. In Q2 2023, there were decreases in quarter-over-quarter service activity for Powerplant (-8%), Exhaust (-5%), and Cooling (-7%). There was no change in transaction volumes for Cab and Sheet Metal while Brake service increased by 5%. Other systems realizing quarterly service activity decreases included Fuel (-7%), Lighting (-10%), Cranking (-10%), and Charging (-13%).

The five largest increases were seen in Air Conditioning, Heating and Ventilation at 65%, Suspension (16%), Tires (21%), Filter Kits (19%), and Wheels, Rims, Hubs, and Bearings (13%).

Year-over-Year from Q2 2022 to Q2 2023 service activity increased across nearly all of the 25 VMRS System codes. The largest of those increases were for Power Take Off (30%) and Transmission (automatic/automated) at 28%. The related systems in vocational vehicles could be requiring more service due to the rise in construction activity driven by infrastructure spending.

Additionally, service activities for Clutch, Transmission (manual) and Driveshafts were down, perhaps a reflection of the growing use of AMTs that do not require clutch repairs, are less susceptible to driving behavior, and do not stress drivelines.

## Overview

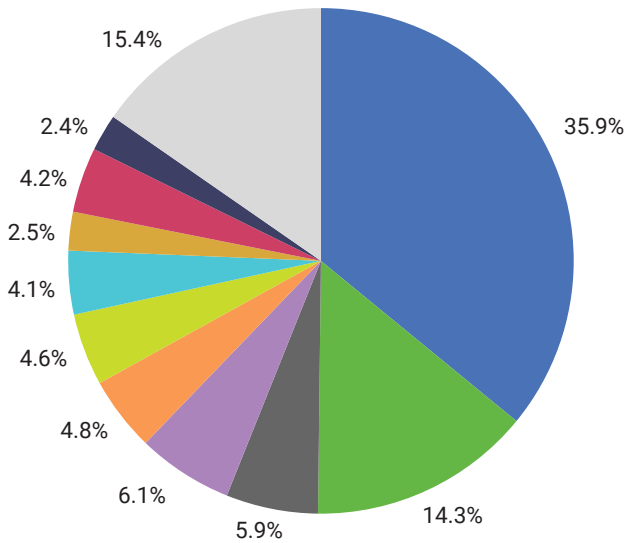
The Decisiv SRM Ecosystem is the industry’s preferred system of engagement for tracking and managing service and repair events for more than 7 million assets on the SRM platform. These summaries are compiled from more than 300,000 monthly service maintenance and repair events conducted at more than 5,000 service locations.

### Average Costs and Service Activity by VMRS System Code for Q2 2023

Code	System	Parts	Labor	Parts and Labor	Service Events
045	Powerplant	\$1,786	\$1,024	\$2,810	225,546
043	Exhaust	\$1,160	\$619	\$1,780	116,163
042	Cooling	\$910	\$656	\$1,565	53,254
013	Brakes	\$597	\$559	\$1,156	86,513
044	Fuel System	\$870	\$591	\$1,461	47,278
002	Cab and Sheet Metal	\$458	\$321	\$779	105,456
023	Clutch	\$1,853	\$1,334	\$3,187	20,498
014	Frame	\$1,615	\$870	\$2,484	16,120
001	A/C, Heating & Vent	\$498	\$511	\$1,009	62,400
027	Transmission/Auto	\$1,750	\$1,068	\$2,818	14,056

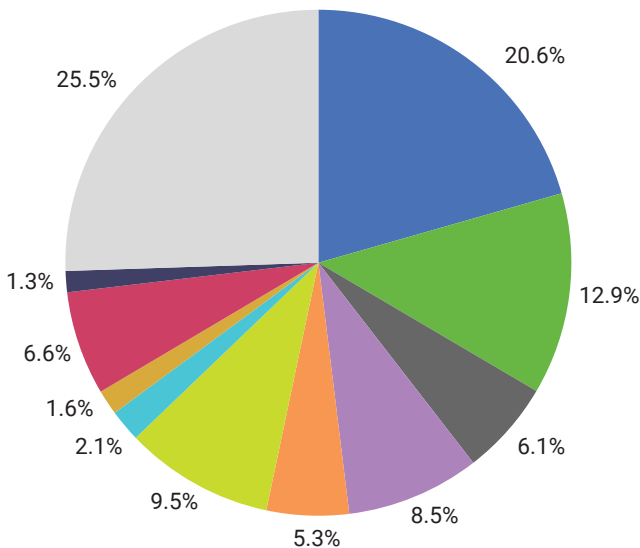
See supplement for details on 15 additional VMRS System Codes. These top 25 VMRS System Codes encompass 96% of service transactions managed on the Decisiv SRM Platform.

Composite View: Service Cost Distribution for Q2 2023



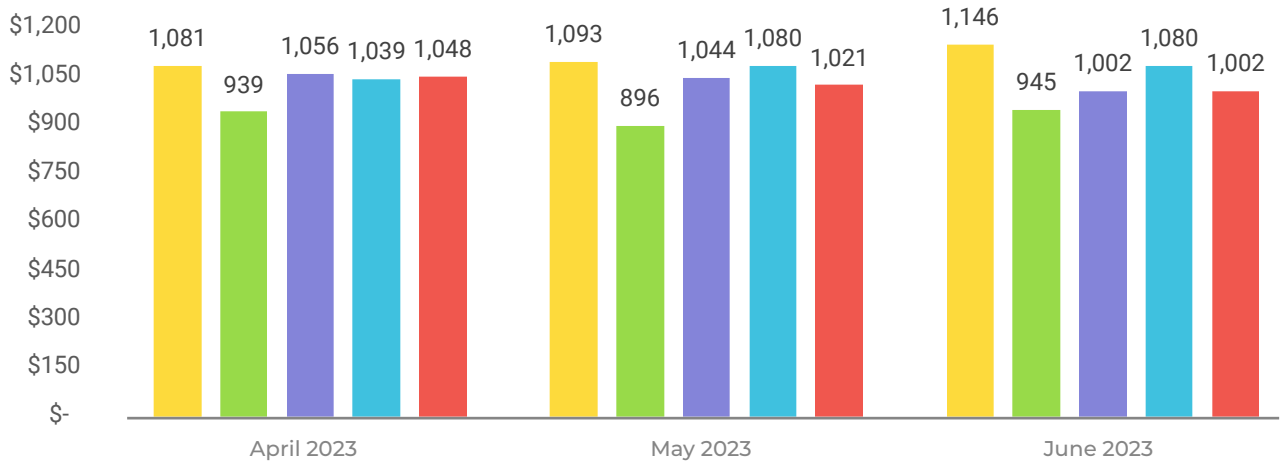
045	Powerplant	35.9%
043	Exhaust	14.3%
042	Cooling	5.9%
013	Brakes	6.1%
044	Fuel System	4.8%
002	Cab & Sheet Metal	4.6%
023	Clutch	4.1%
014	Frame	2.5%
001	A/C, Heating & Vent	4.2%
027	Transmission/Auto	2.4%
xxx	Other	15.4%

Composite View: Service Activity Distribution for Q2 2023

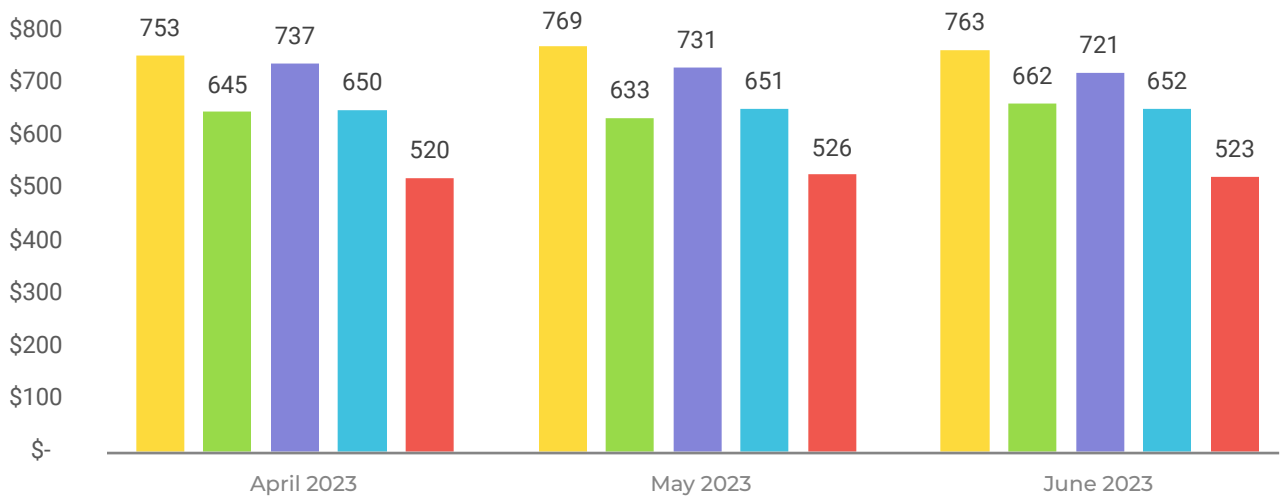


045	Powerplant	20.6%
043	Exhaust	12.9%
042	Cooling	6.1%
013	Brakes	8.5%
044	Fuel System	5.3%
002	Cab & Sheet Metal	9.5%
023	Clutch	2.1%
014	Frame	1.6%
001	A/C, Heating & Vent	6.6%
027	Transmission/Auto	1.3%
xxx	Other	25.5%

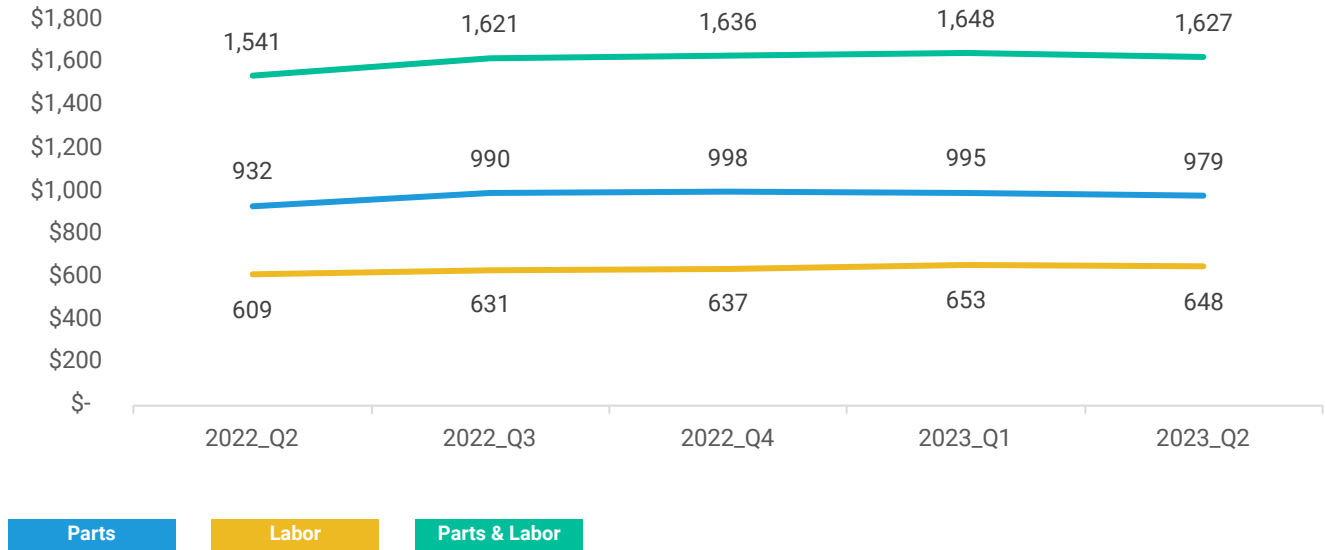
Regional Parts Costs



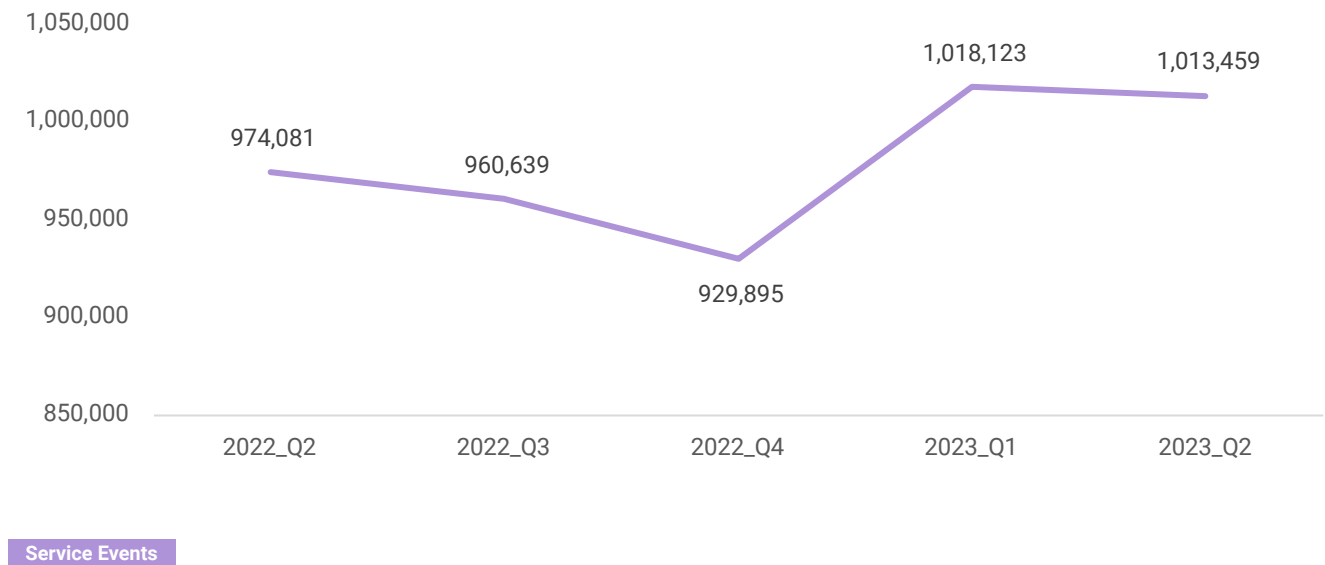
Regional Labor Costs



Quarterly Trends for Parts and Labor Costs



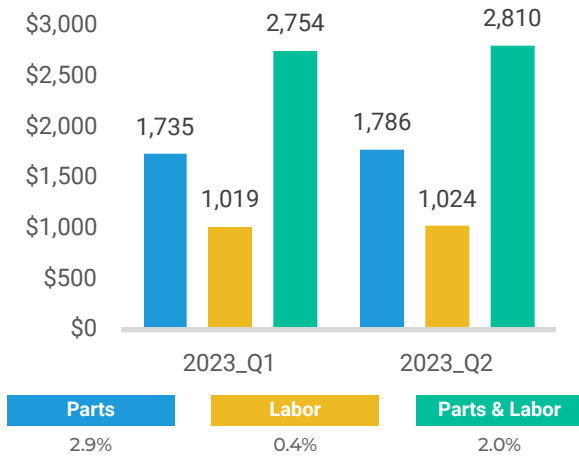
Quarterly Trends for Service Activity



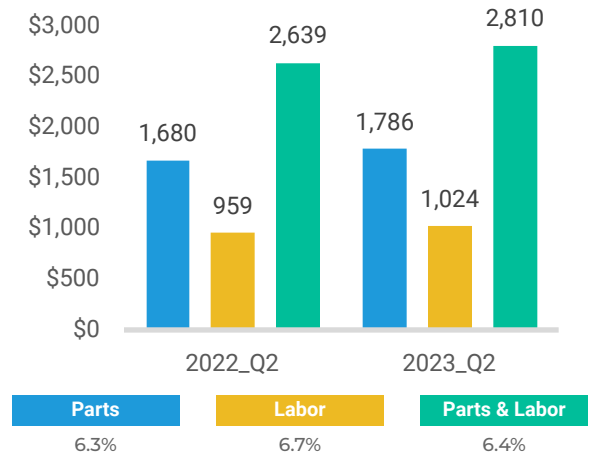


## Parts and Labor Costs

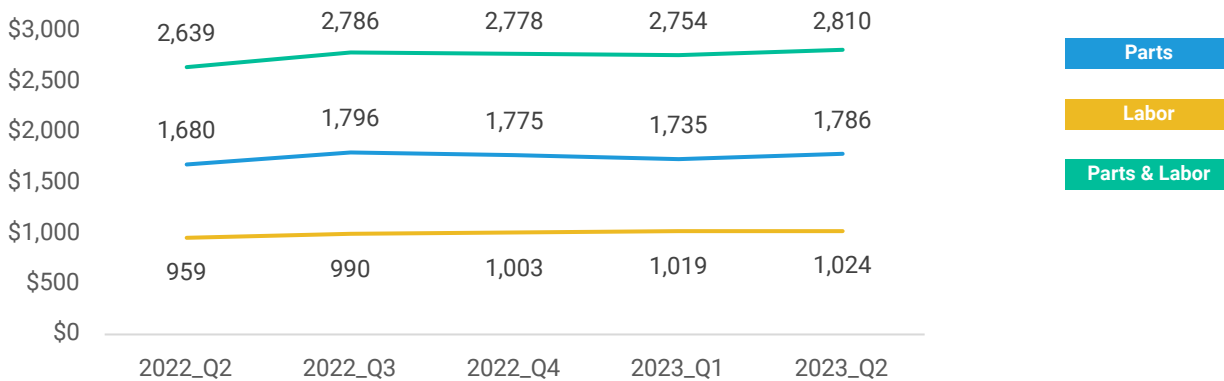
### Quarter over Quarter (QoQ)



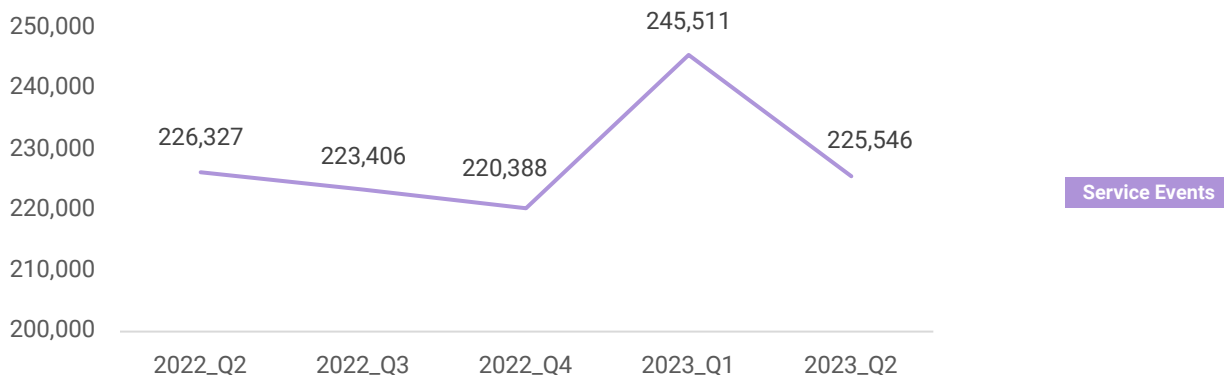
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

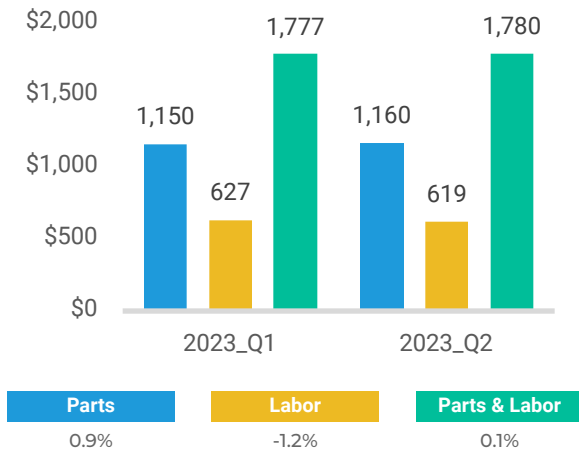


### Quarterly Trends for Service Activity

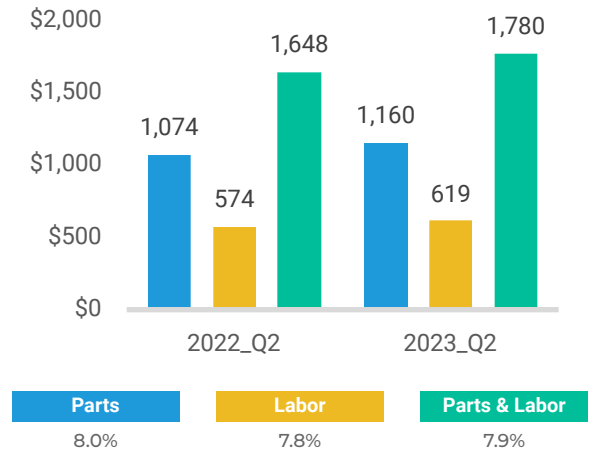


## Parts and Labor Costs

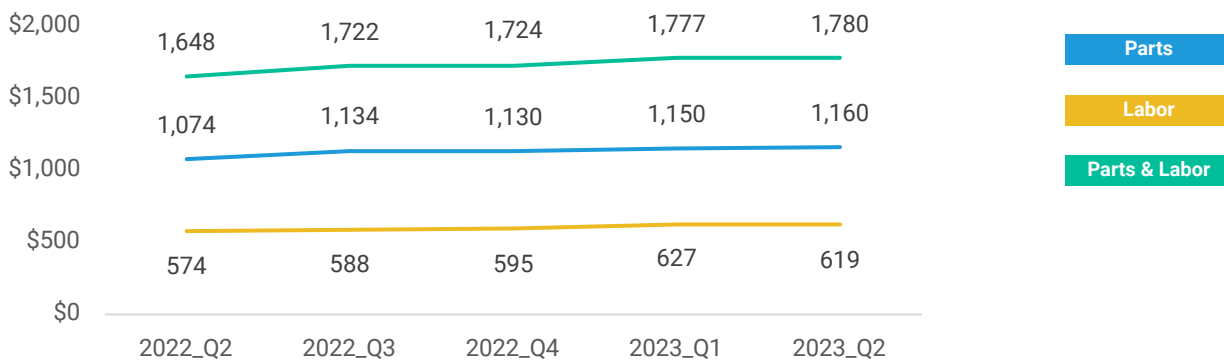
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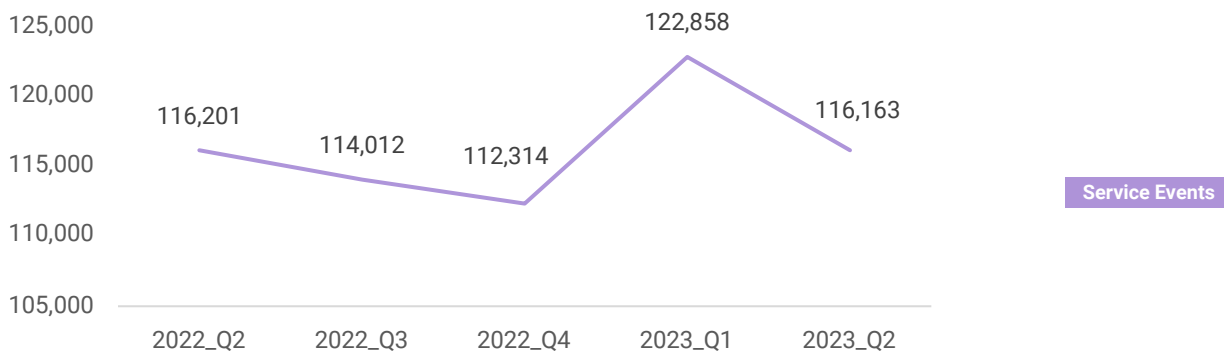
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### Quarterly Trends for Parts and Labor Costs

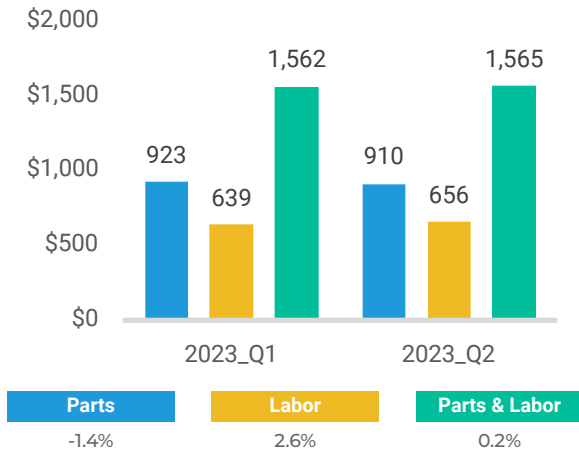


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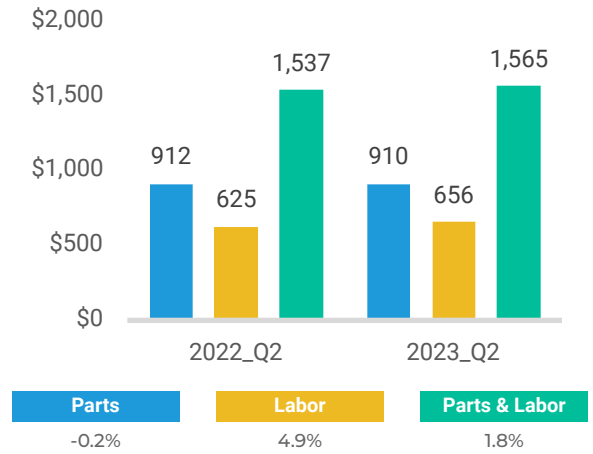


## Parts and Labor Costs

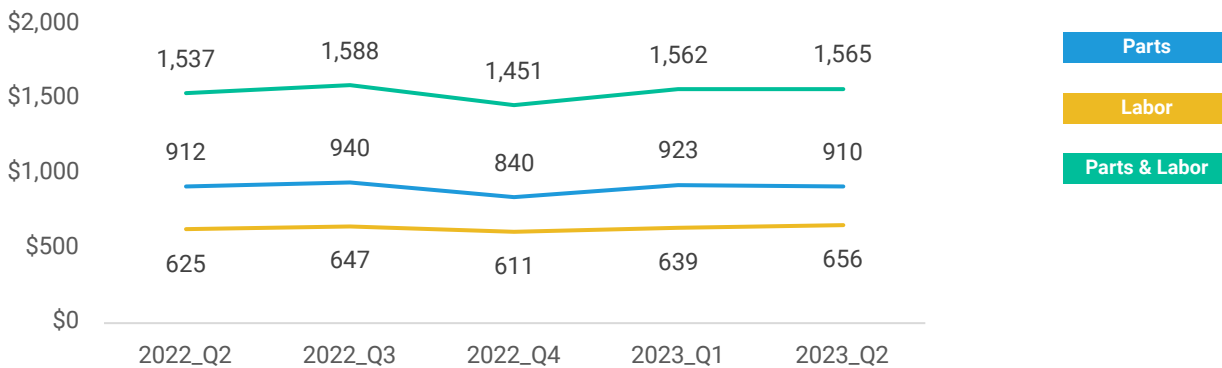
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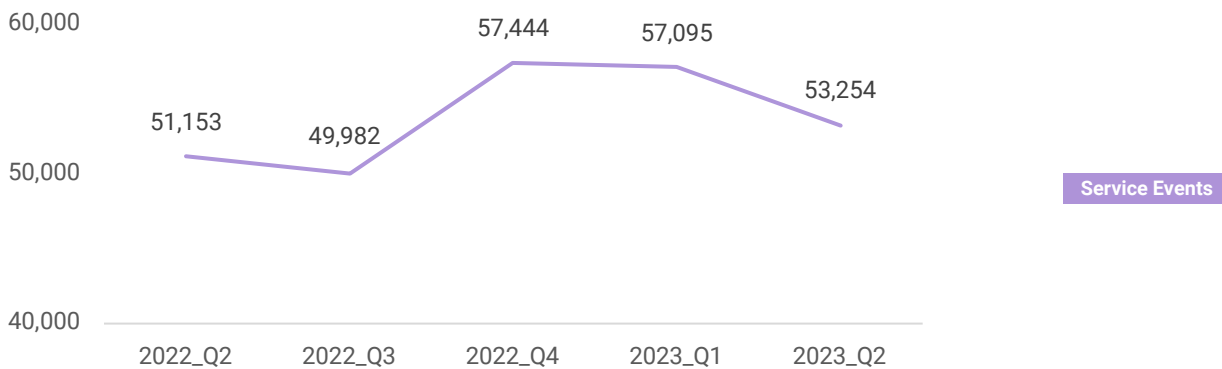
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### Quarterly Trends for Parts and Labor Costs

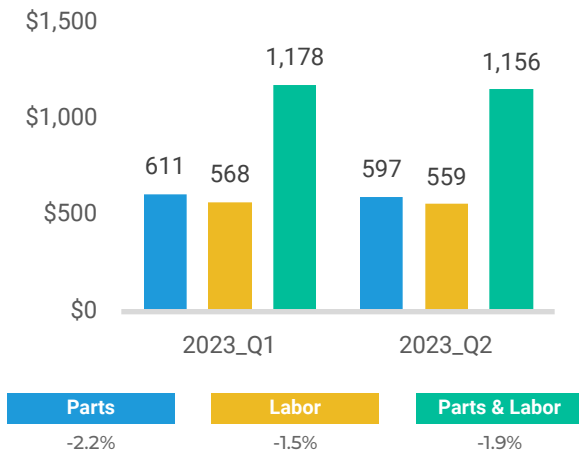


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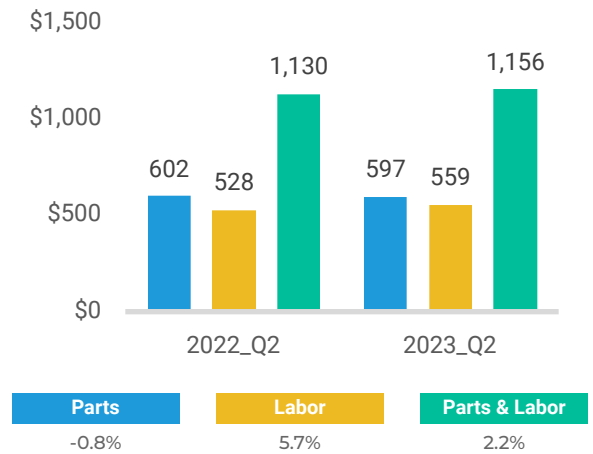


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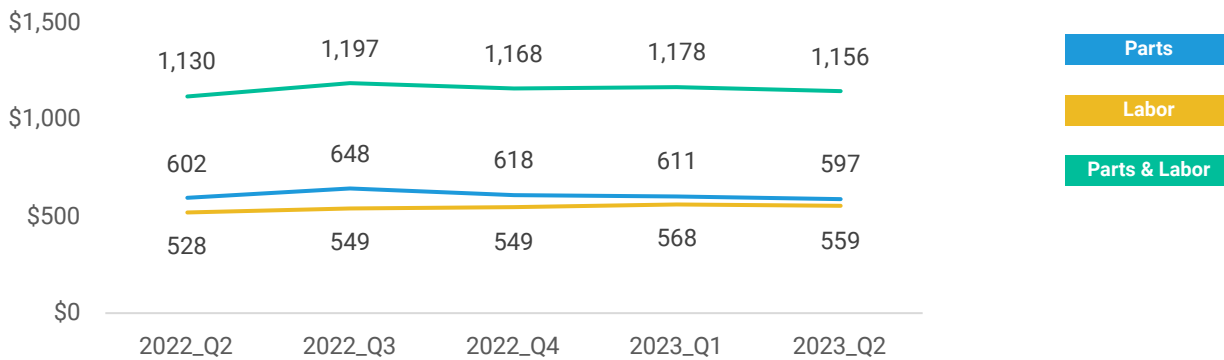
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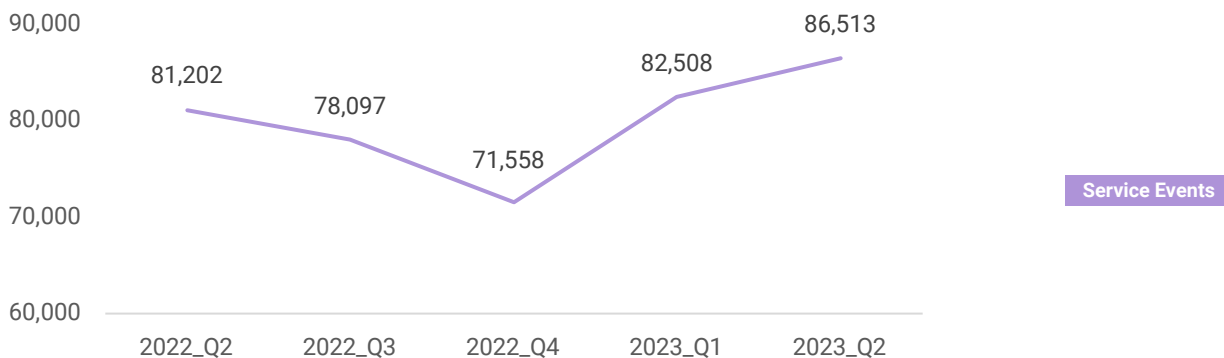
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### Quarterly Trends for Parts and Labor Costs

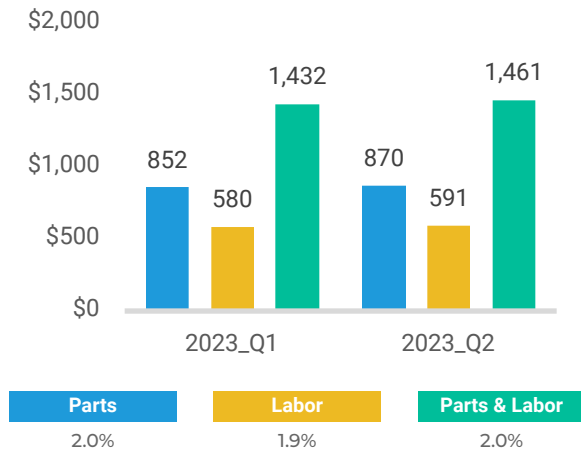


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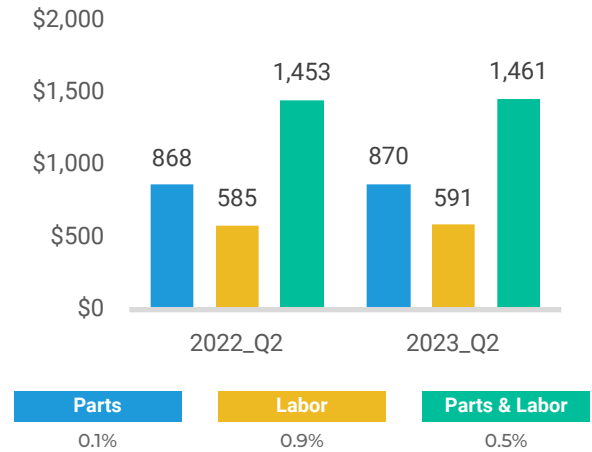


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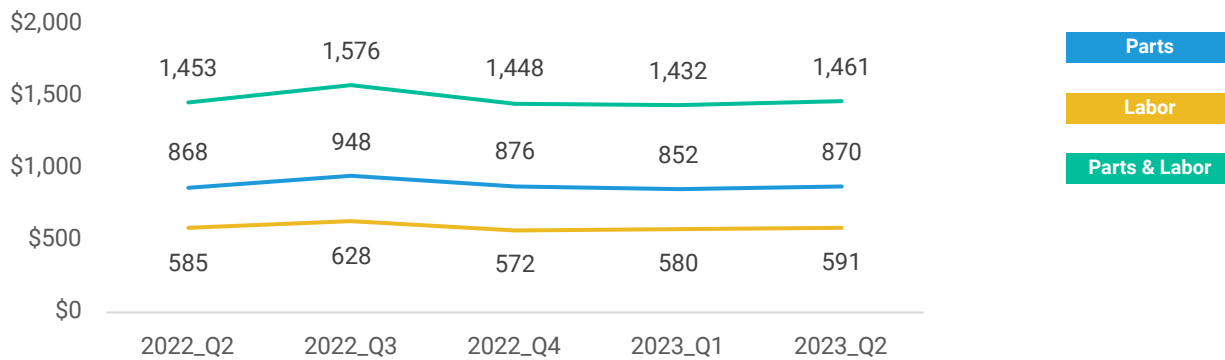
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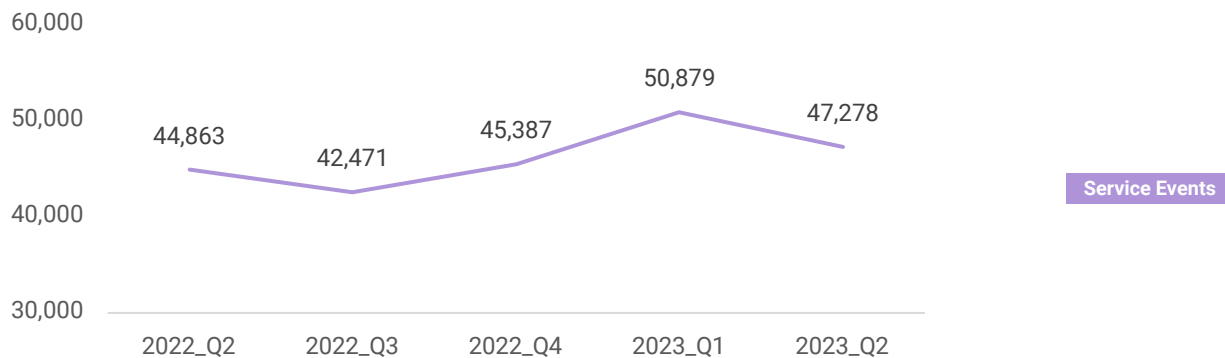
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

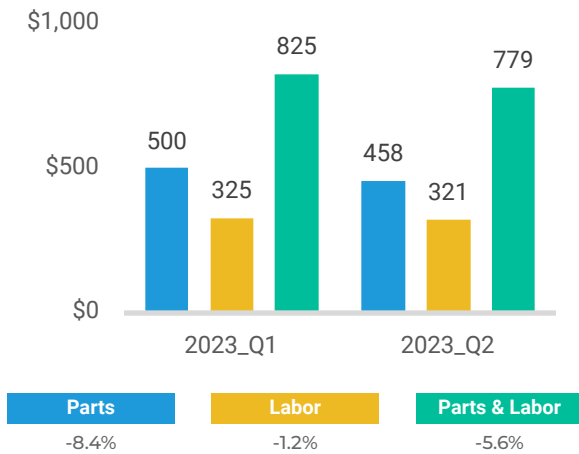


### Quarterly Trends for Service Activity

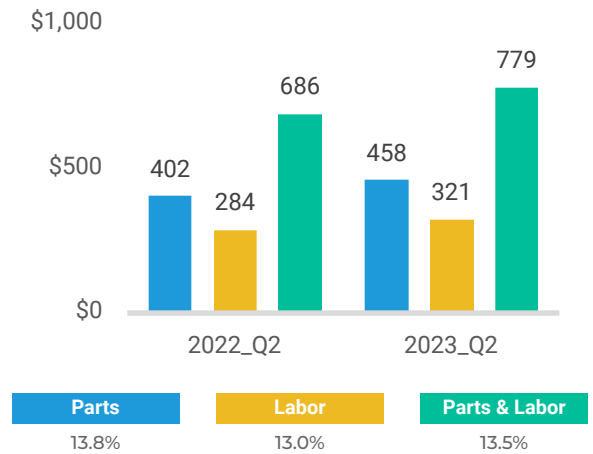


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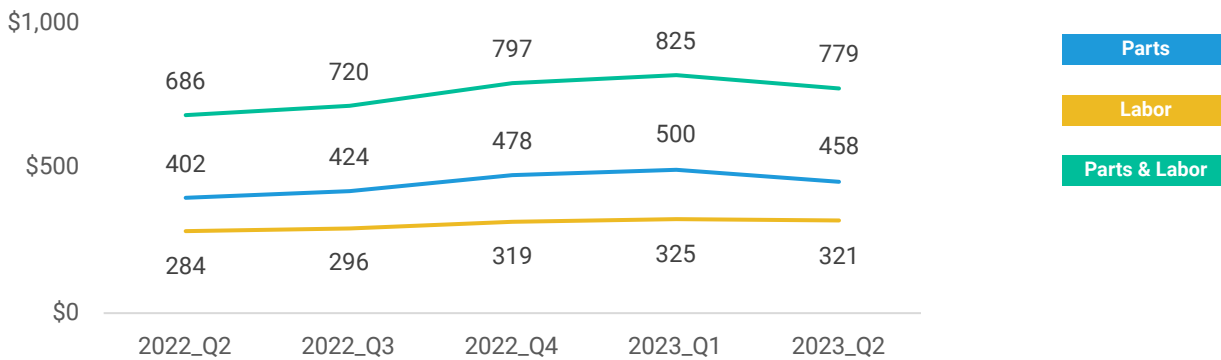
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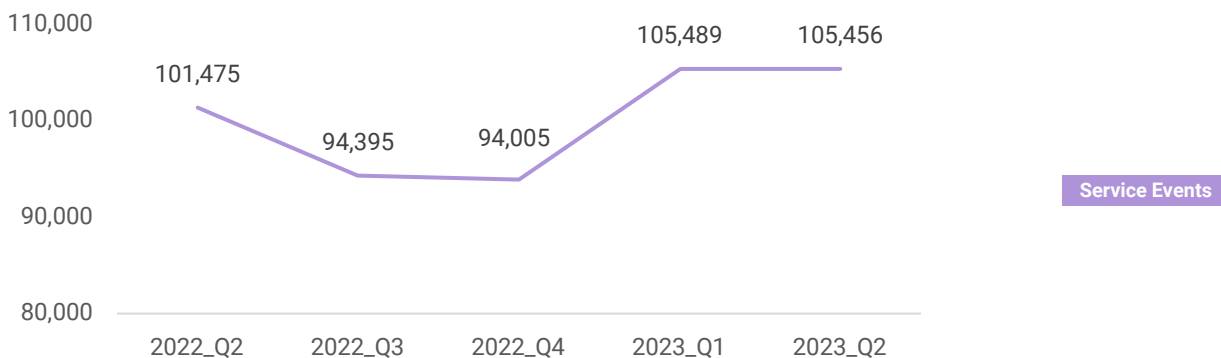
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### Quarterly Trends for Parts and Labor Costs

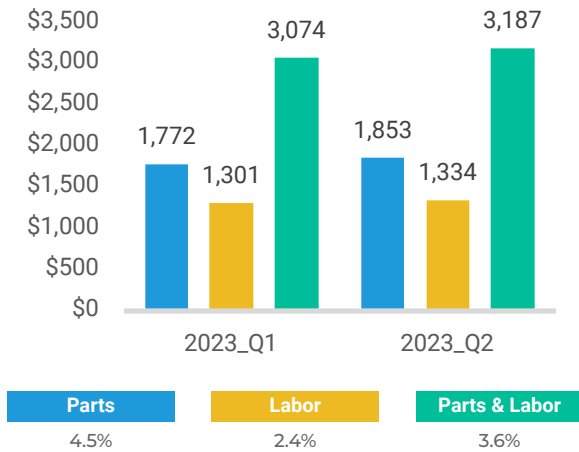


### Quarterly Trends for Service Activity

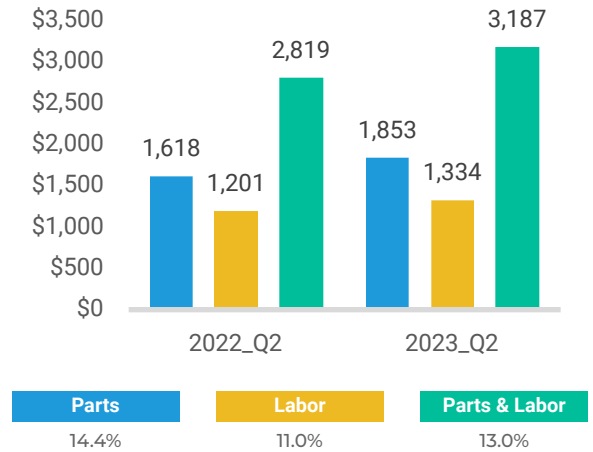


Parts and Labor Costs

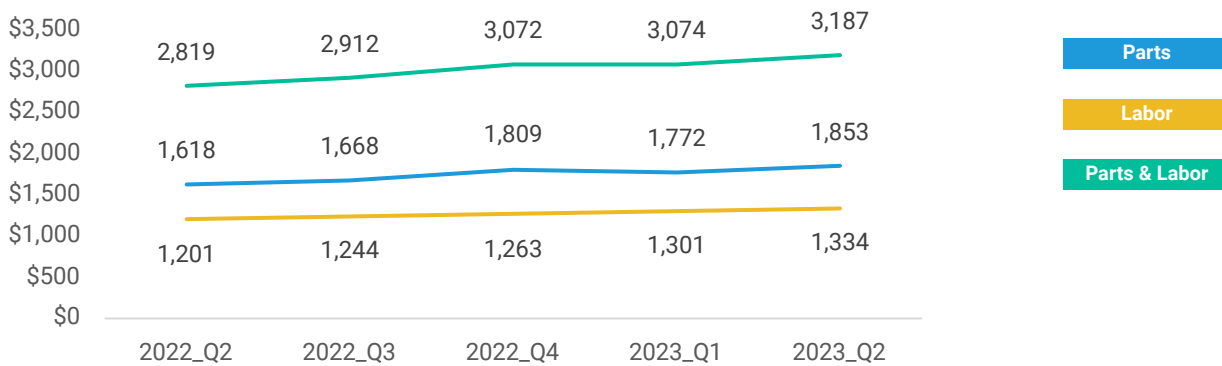
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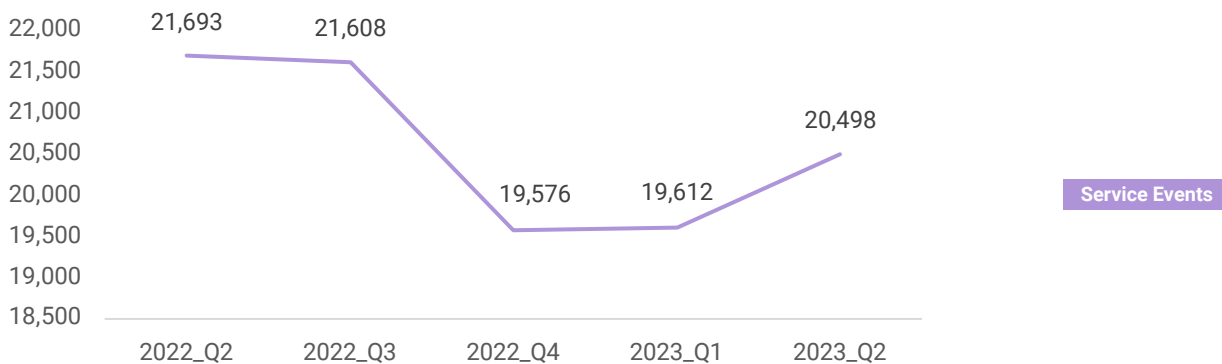
Year over Year (YoY)



Quarterly Trends for Parts and Labor Costs

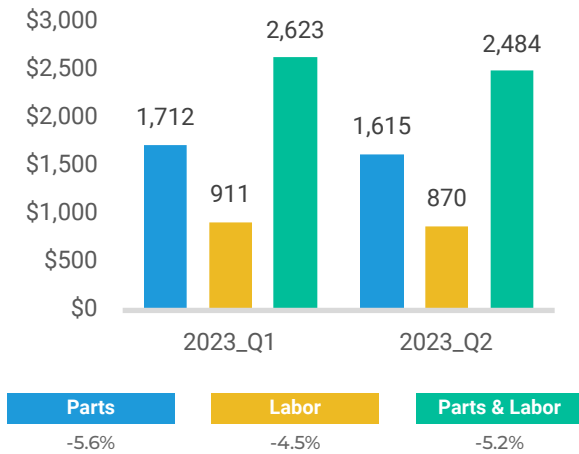


Quarterly Trends for Service Activity

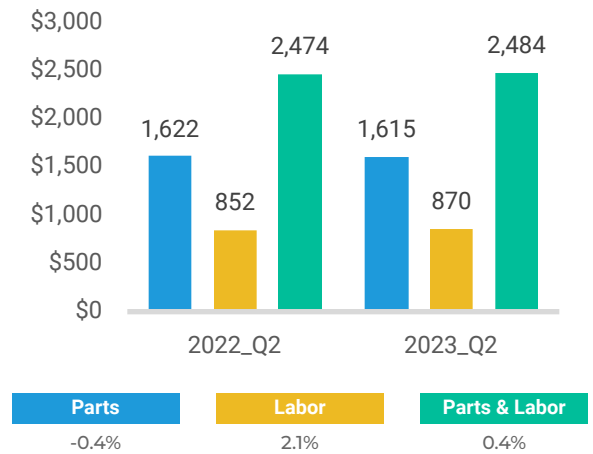


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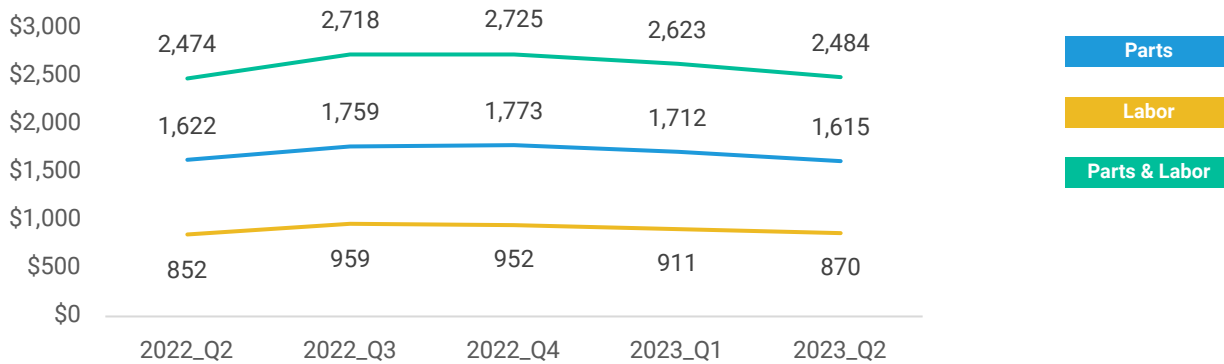
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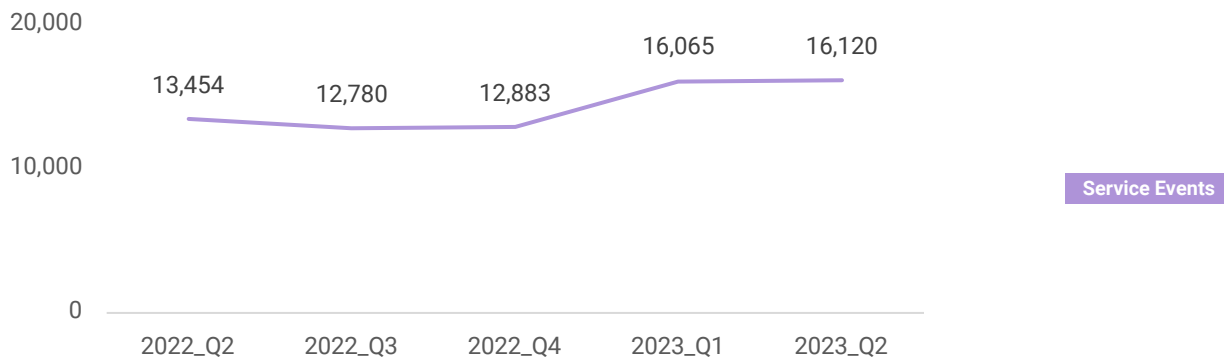
Year over Year (YoY)



Quarterly Trends for Parts and Labor Costs



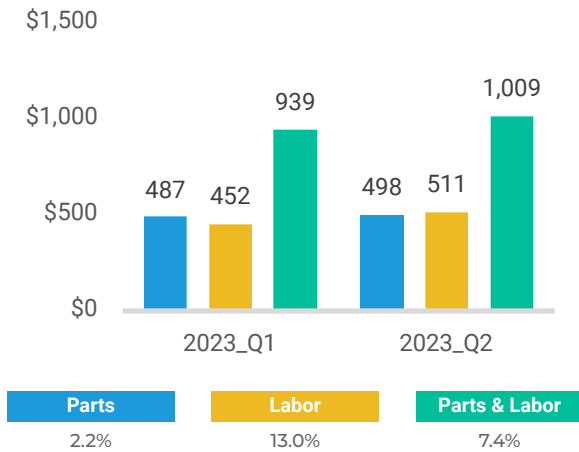
Quarterly Trends for Service Activity



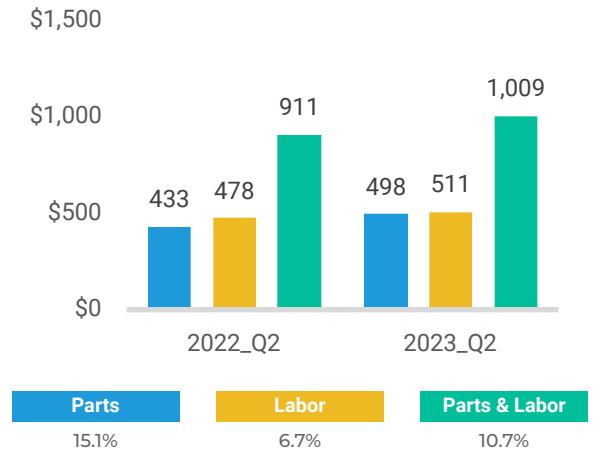


## Parts and Labor Costs

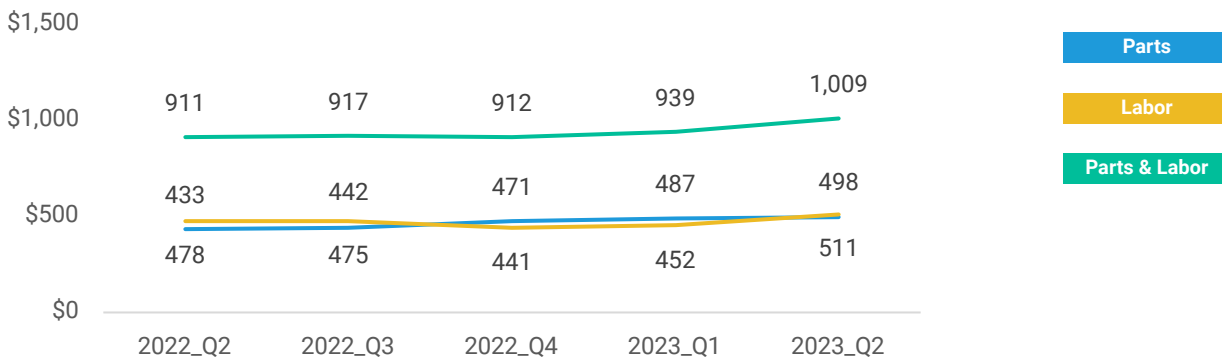
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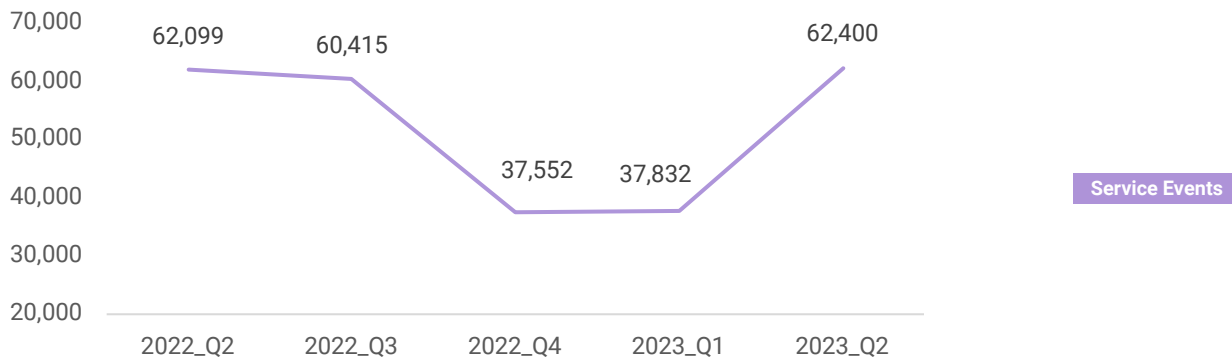
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

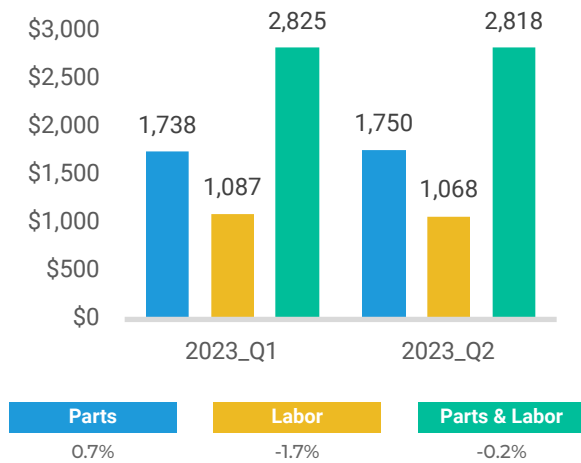


### Quarterly Trends for Service Activity

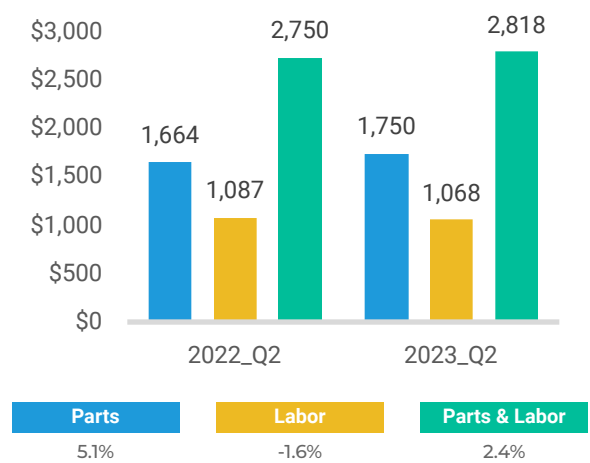


## Parts and Labor Costs

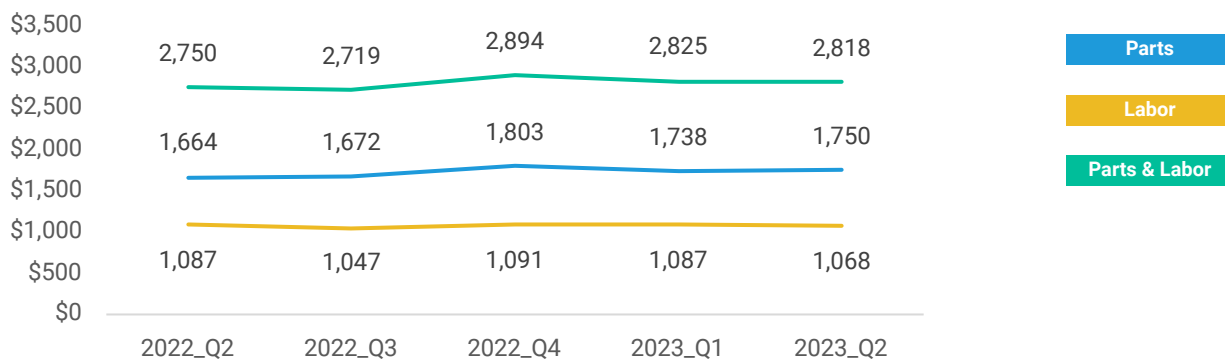
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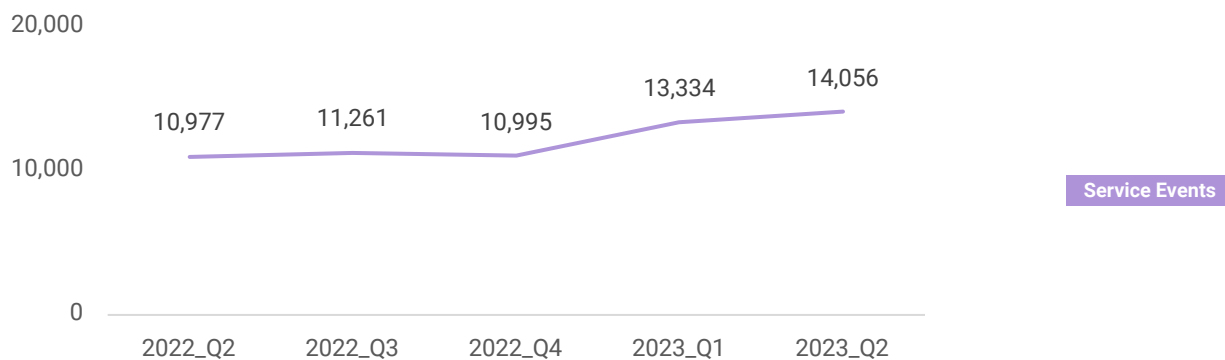
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs



### Quarterly Trends for Service Activity



## Overview

This supplement adds parts and labor costs for an additional 15 system-level VMRS systems to the 10 presented in the main section of this report – for a total of 25 VMRS codes. Overall, this report covers 96% of total parts and labor costs and 97% of total service activity from the 300,000+ service and maintenance events managed each month on the Decisiv SRM platform in North America.

### Average Costs and Service Activity by VMRS System Code for Q2 2023

Code	System	Parts	Labor	Parts and Labor	Service Events
016	Suspension	\$574	\$561	\$1,134	26,557
034	Lighting	\$269	\$310	\$580	49,160
015	Steering	\$501	\$440	\$940	38,335
032	Cranking	\$482	\$348	\$830	28,038
026	Trans/Manual	\$2,152	\$1,244	\$3,396	5,162
024	Drive Shafts	\$484	\$400	\$884	18,024
003	Instruments	\$853	\$592	\$1,445	24,796
051	Accessories	\$676	\$556	\$1,232	12,926
056	Power Take Off	\$809	\$699	\$1,507	8,713
018	Wheels, Rims, Hubs	\$279	\$470	\$749	9,228
047	Filter Kits	\$383	\$238	\$621	13,906
022	Axle Driven/Rear	\$888	\$692	\$1,580	3,271
031	Charging	\$440	\$378	\$817	5,976
017	Tires	\$772	\$328	\$1,100	18,894
004	Aerodynamic Devices	\$825	\$624	\$1,449	3,189

Composite View: Service Cost Distribution for Q2 2023

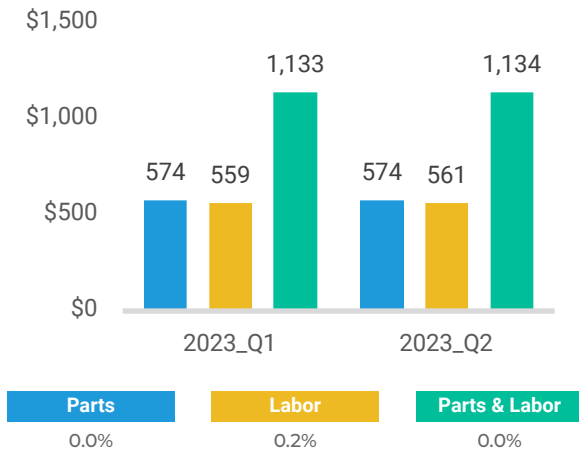
<b>016</b>	Suspension	2.3%	<b>018</b>	Wheels, Rims, Hubs	0.6%
<b>034</b>	Lighting	1.8%	<b>047</b>	Filter Kits	0.5%
<b>015</b>	Steering	1.8%	<b>022</b>	Axle Driven/Rear	0.4%
<b>032</b>	Cranking	1.5%	<b>031</b>	Charging	0.3%
<b>026</b>	Trans/Manual	1.2%	<b>017</b>	Tires	0.4%
<b>024</b>	Drive Shafts	0.9%	<b>004</b>	Aerodynamic Devices	0.3%
<b>003</b>	Instruments	0.8%	<b>xxx</b>	Other	1.5%
<b>051</b>	Accessories	0.5%			
<b>056</b>	Power Take Off	0.6%			

Composite View: Service Activity Distribution for Q2 2023

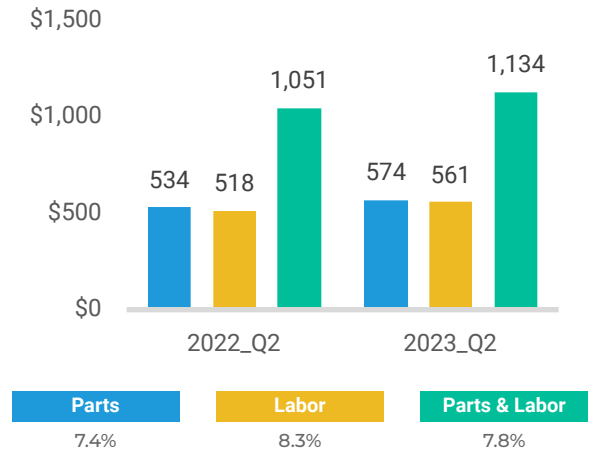
<b>016</b>	Suspension	3.3%	<b>018</b>	Wheels, Rims, Hubs	1.3%
<b>034</b>	Lighting	4.9%	<b>047</b>	Filter Kits	1.2%
<b>015</b>	Steering	3.1%	<b>022</b>	Axle Driven/Rear	0.4%
<b>032</b>	Cranking	2.9%	<b>031</b>	Charging	0.6%
<b>026</b>	Trans/Manual	0.6%	<b>017</b>	Tires	0.5%
<b>024</b>	Drive Shafts	1.6%	<b>004</b>	Aerodynamic Devices	0.3%
<b>003</b>	Instruments	0.9%	<b>xxx</b>	Other	2.6%
<b>051</b>	Accessories	0.7%			
<b>056</b>	Power Take Off	0.6%			

## Parts and Labor Costs

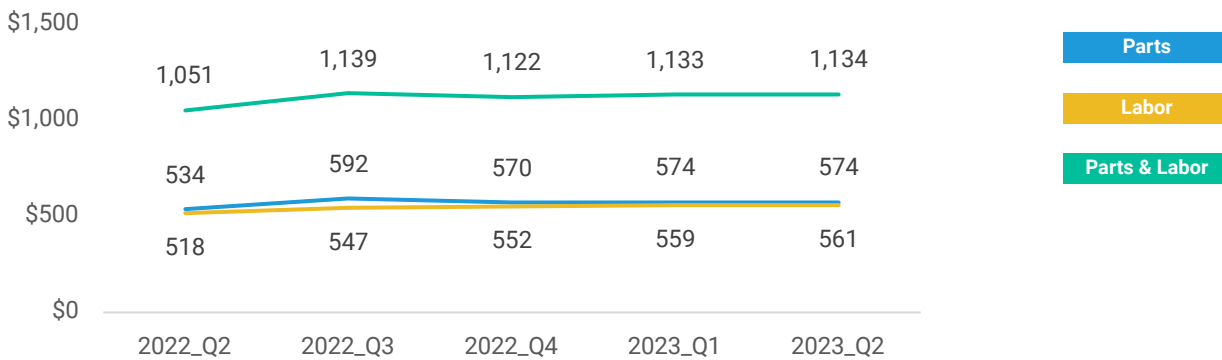
### Quarter over Quarter (QoQ)



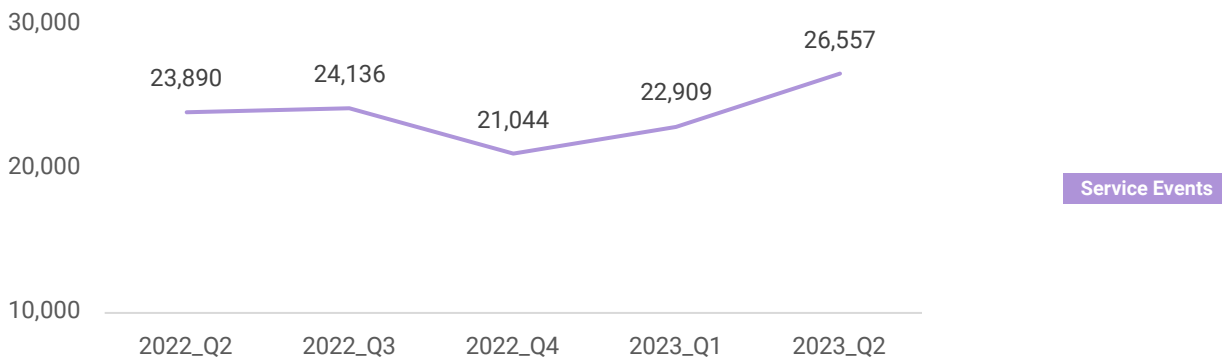
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

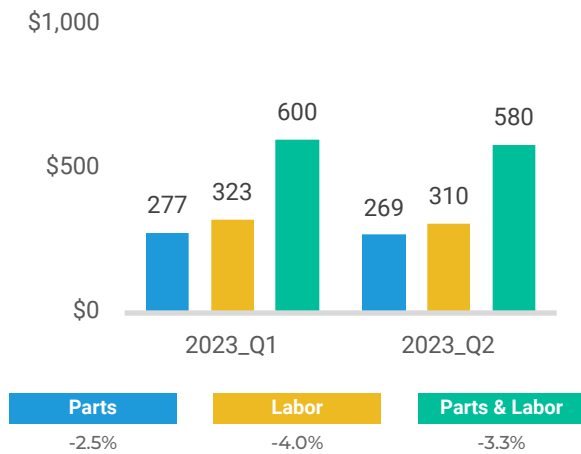


### Quarterly Trends for Service Activity

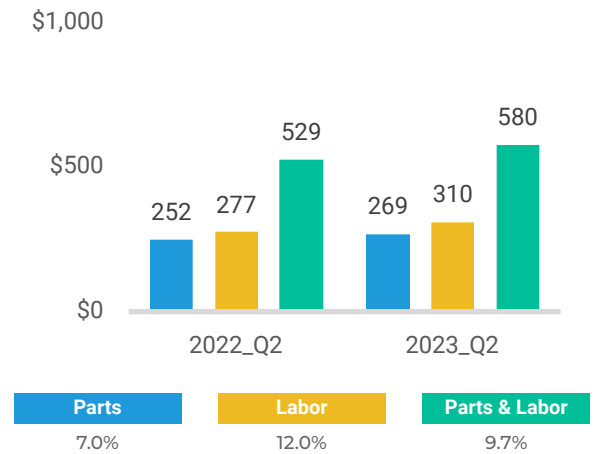


## Parts and Labor Costs

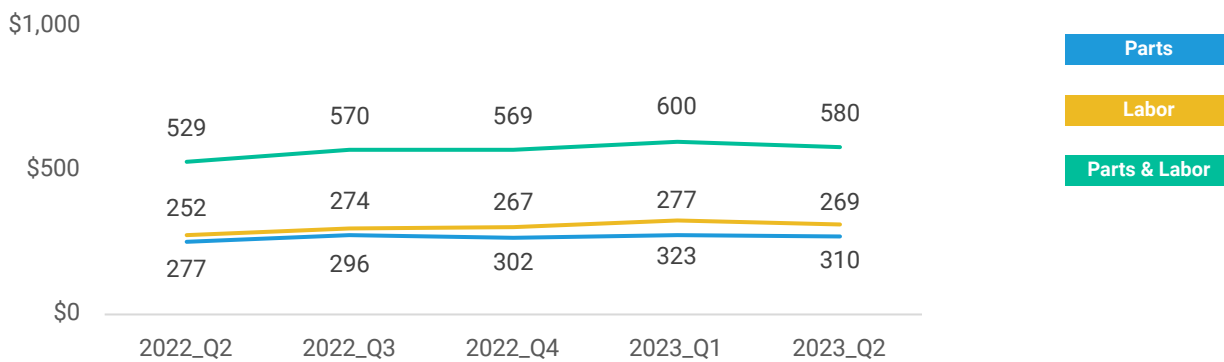
### Quarter over Quarter (QoQ)



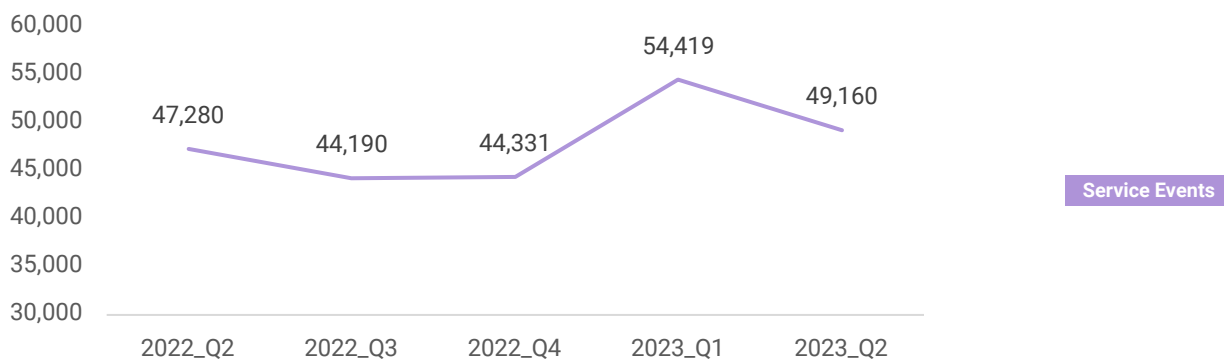
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

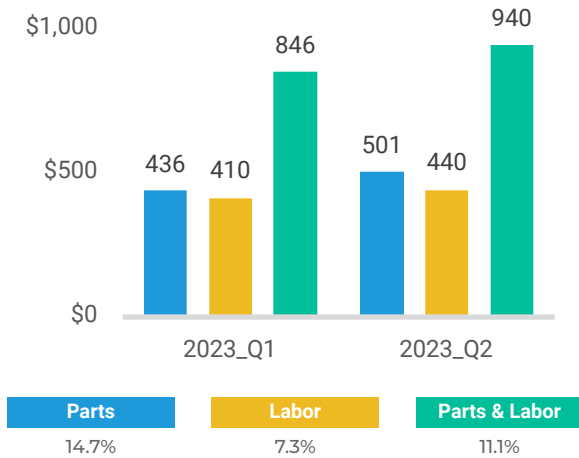


### Quarterly Trends for Service Activity

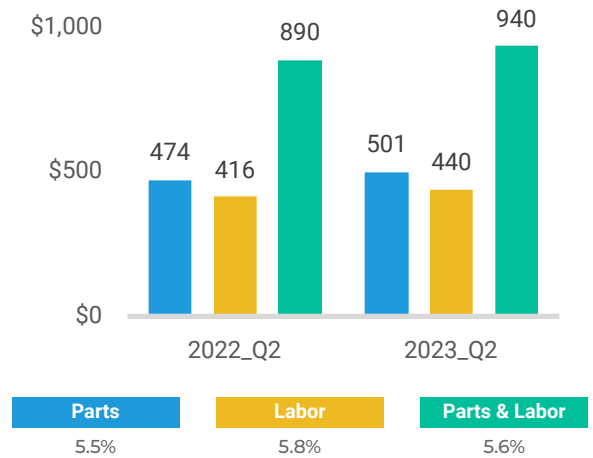


## Parts and Labor Costs

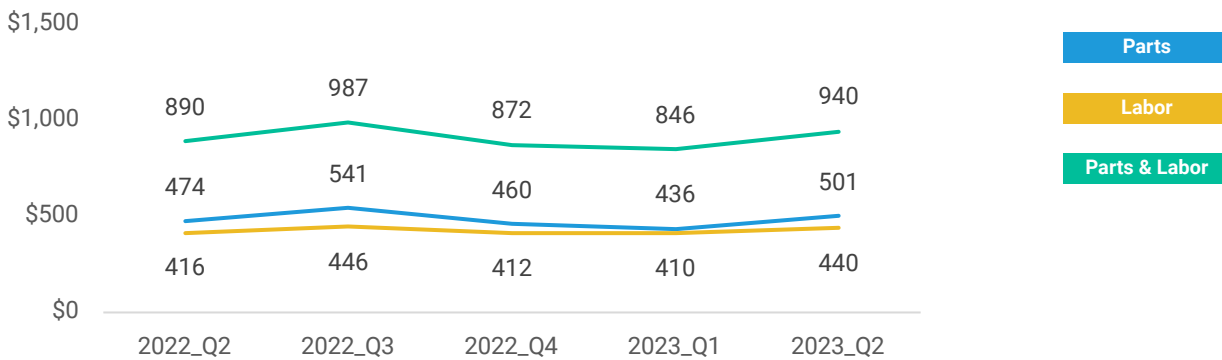
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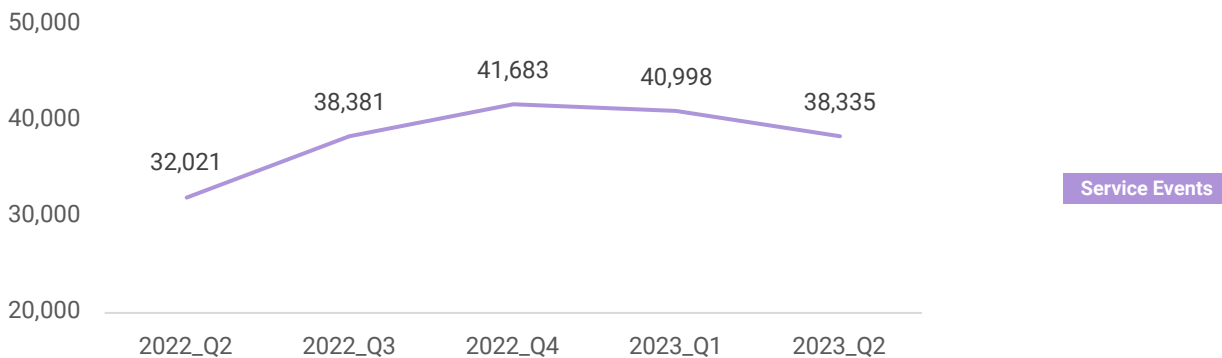
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

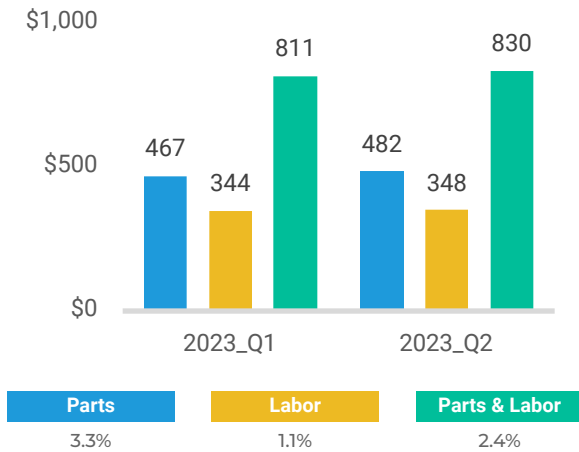


### Quarterly Trends for Service Activity

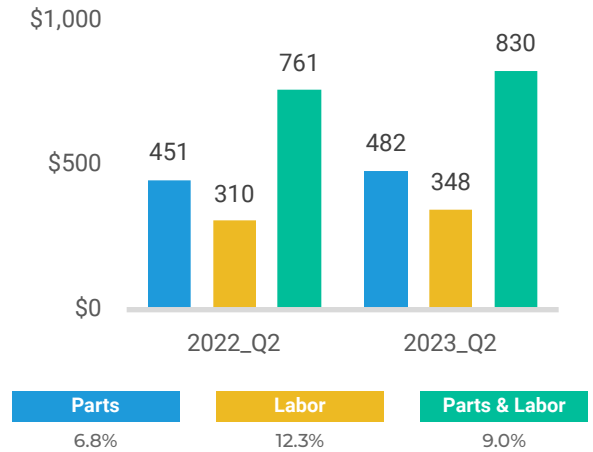


## Parts and Labor Costs

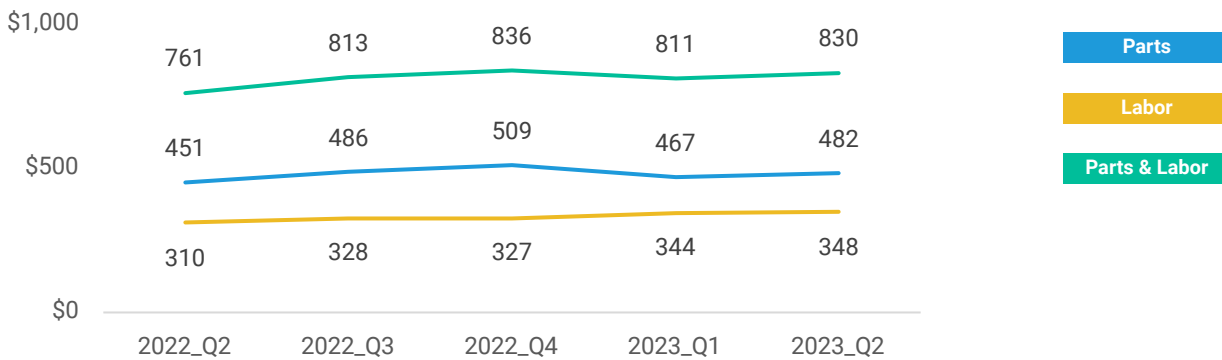
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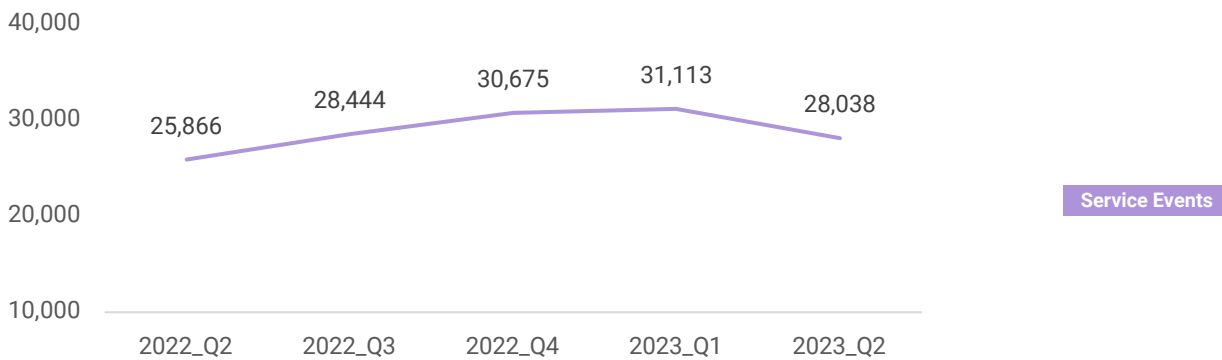
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs



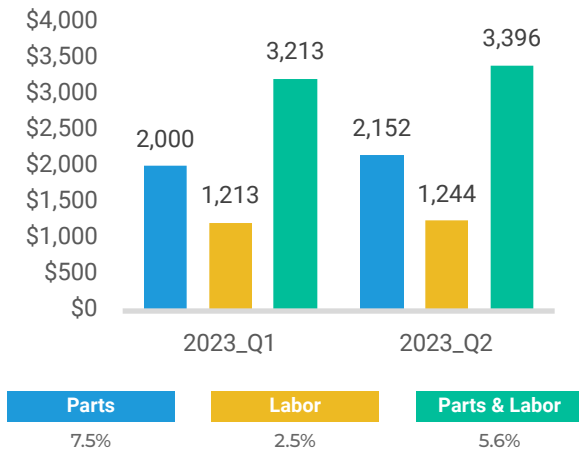
### Quarterly Trends for Service Activity



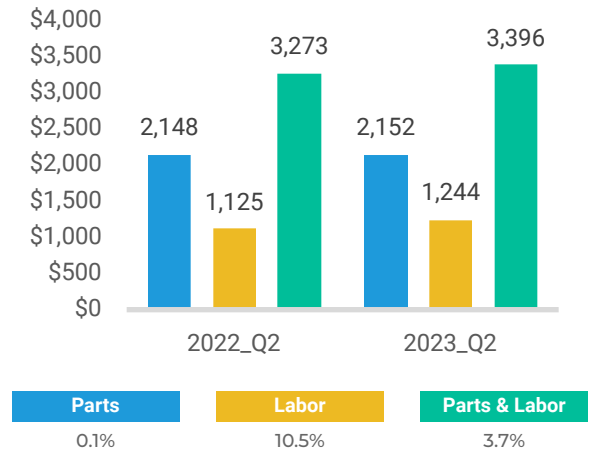


## Parts and Labor Costs

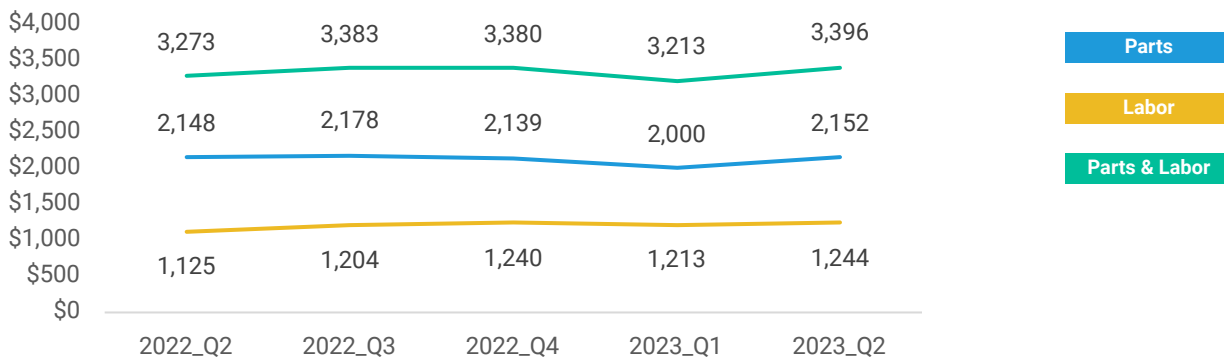
### Quarter over Quarter (QoQ)



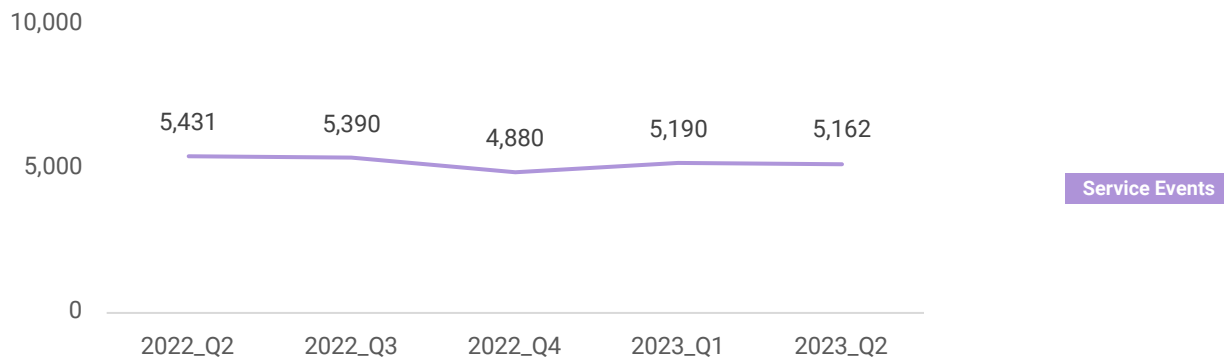
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

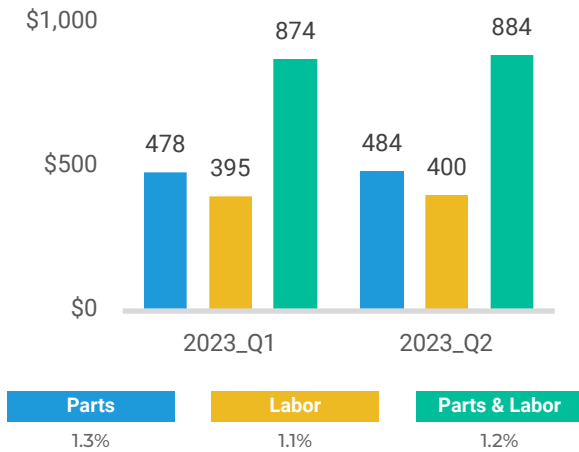


### Quarterly Trends for Service Activity

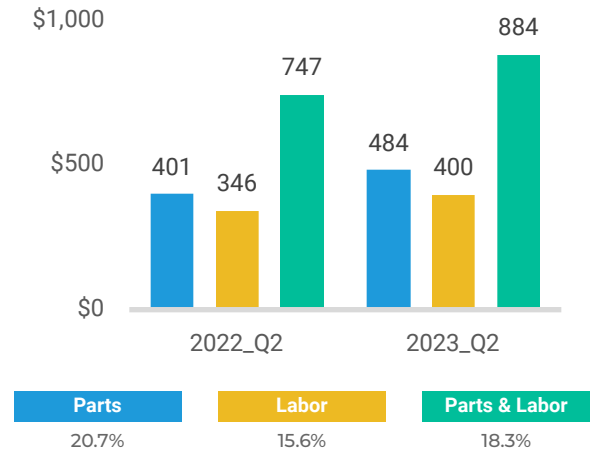


## Parts and Labor Costs

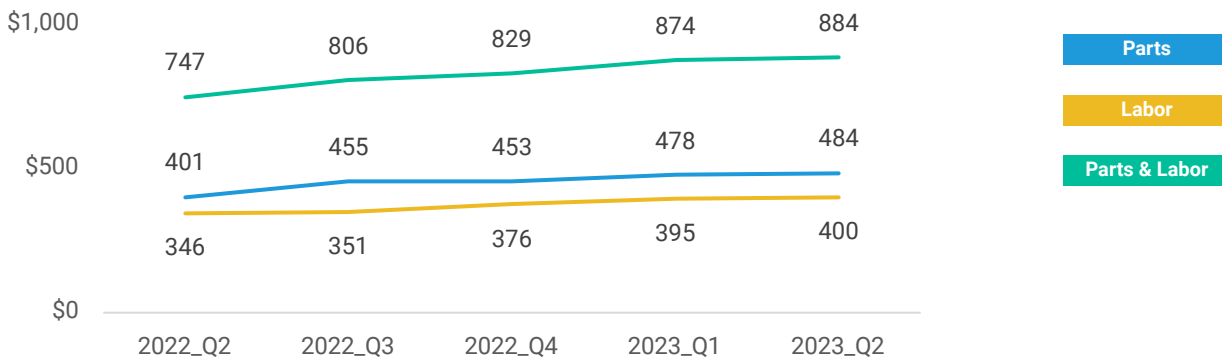
### Quarter over Quarter (QoQ)



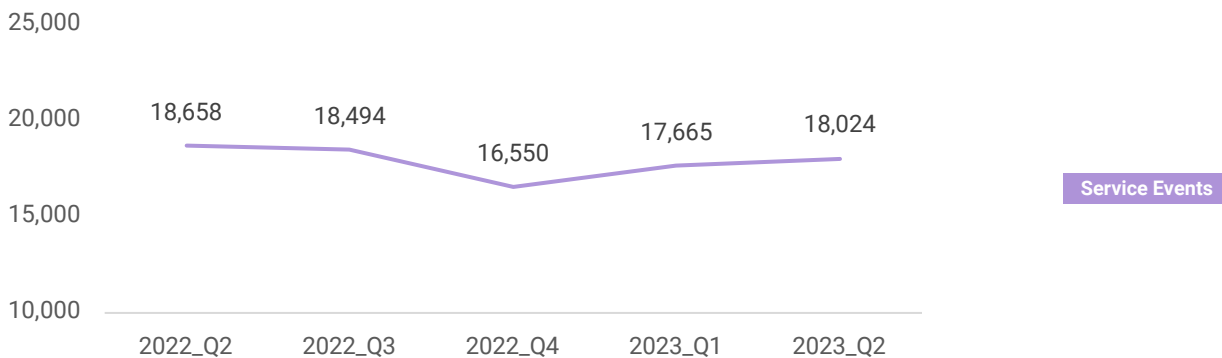
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

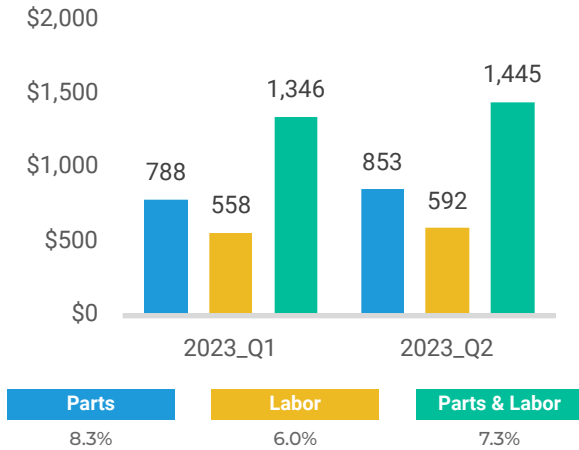


### Quarterly Trends for Service Activity

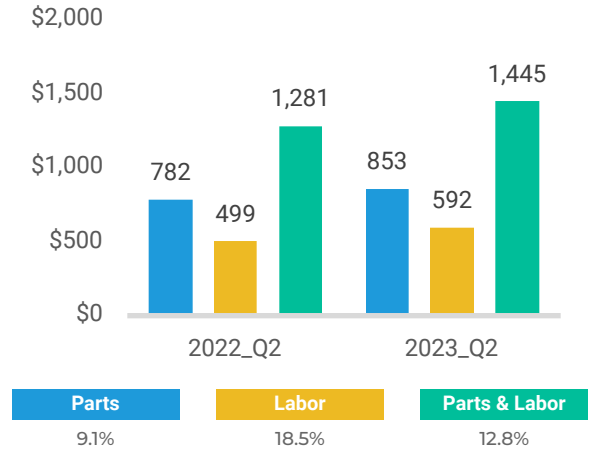


Parts and Labor Costs

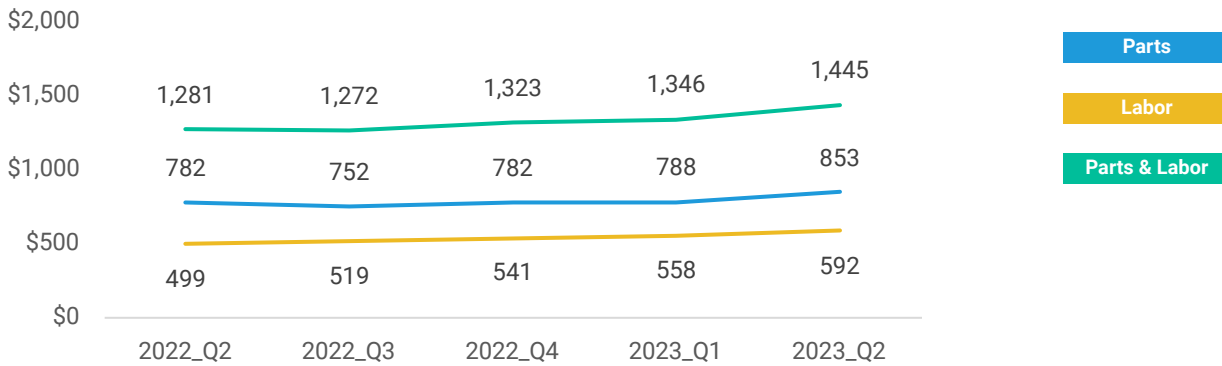
Quarter over Quarter (QoQ)



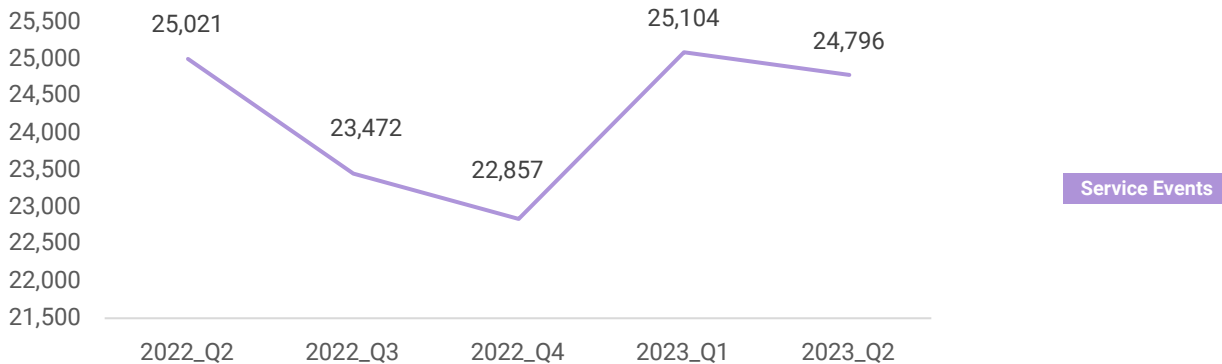
Year over Year (YoY)



Quarterly Trends for Parts and Labor Costs

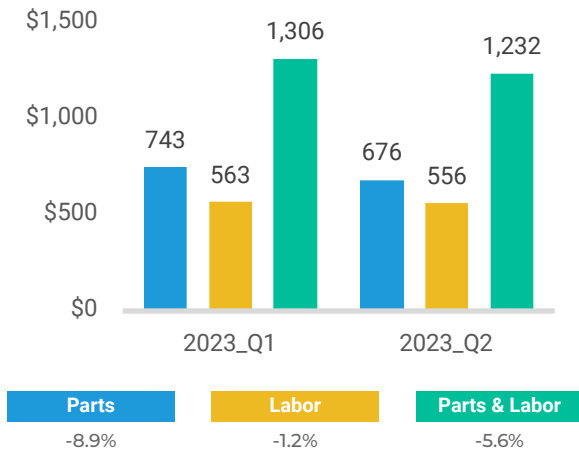


Quarterly Trends for Service Activity

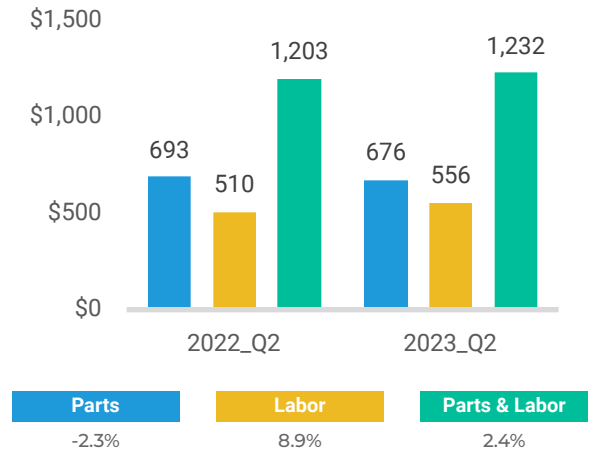


## Parts and Labor Costs

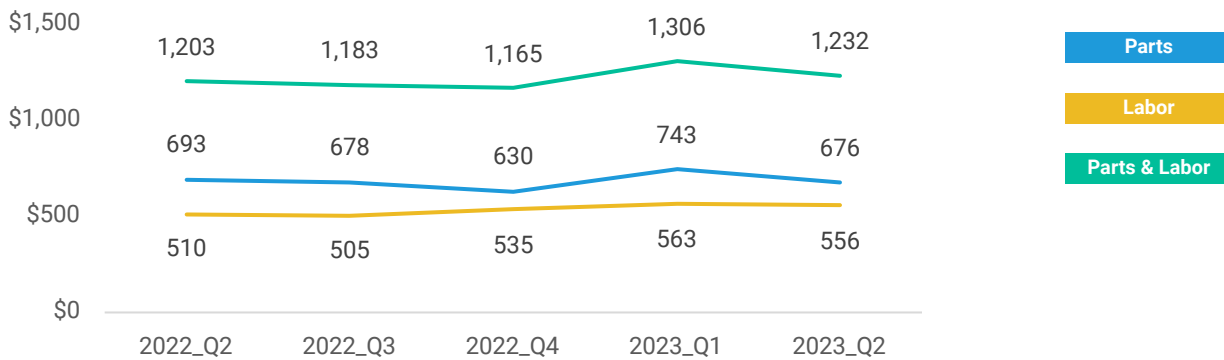
### Quarter over Quarter (QoQ)



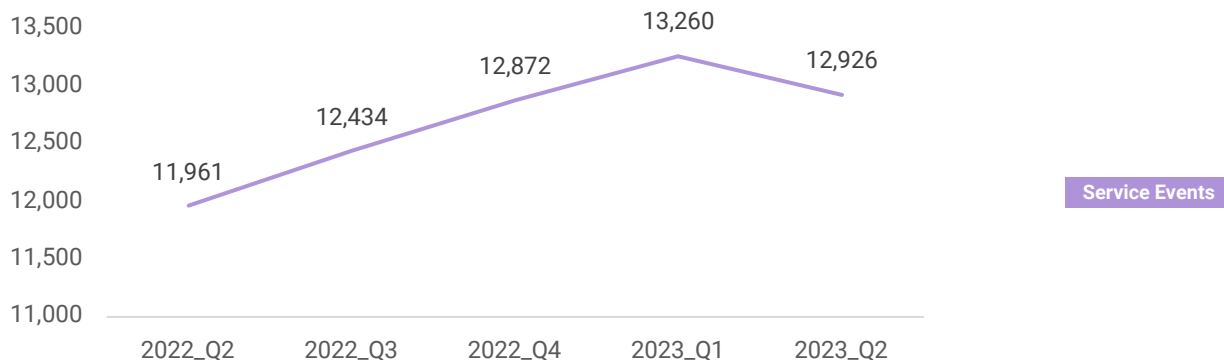
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

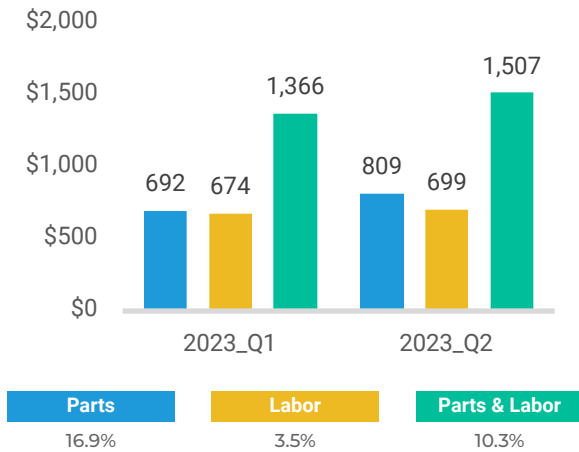


### Quarterly Trends for Service Activity

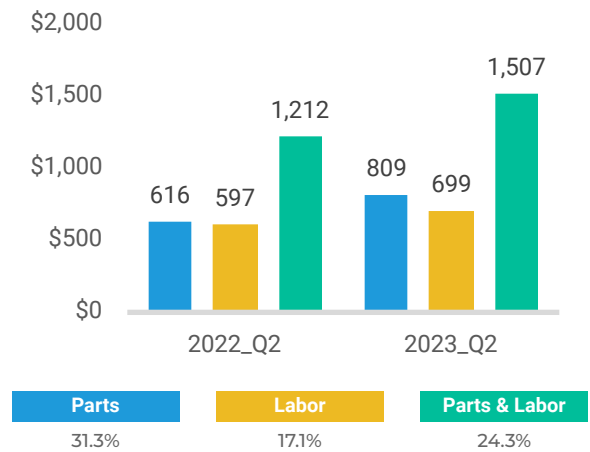


## Parts and Labor Costs

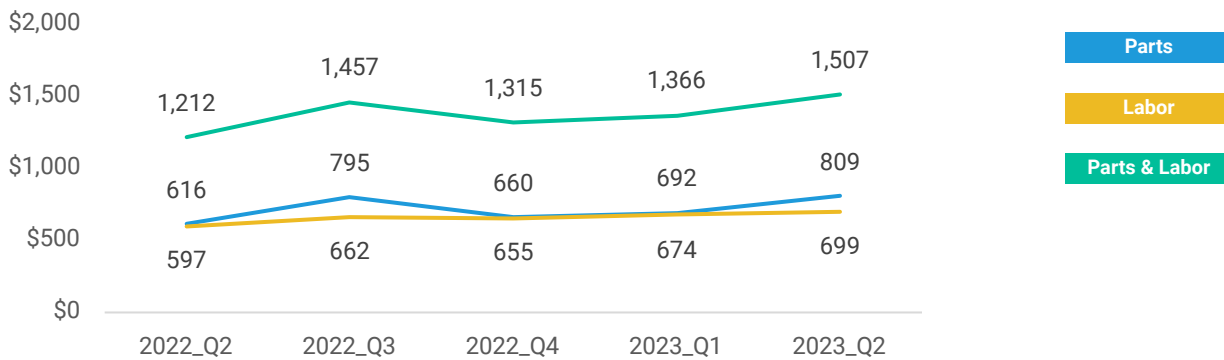
### Quarter over Quarter (QoQ)



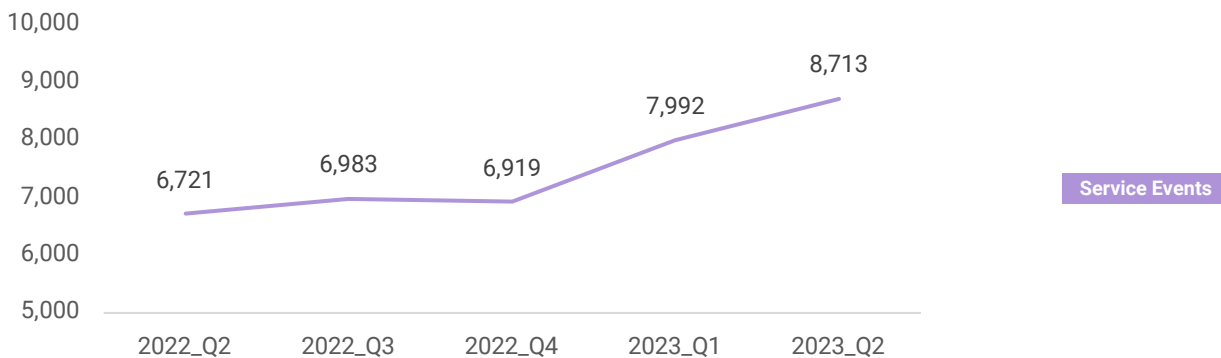
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

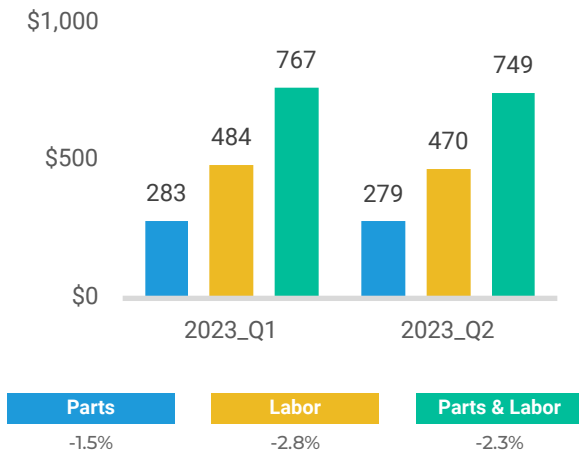


### Quarterly Trends for Service Activity

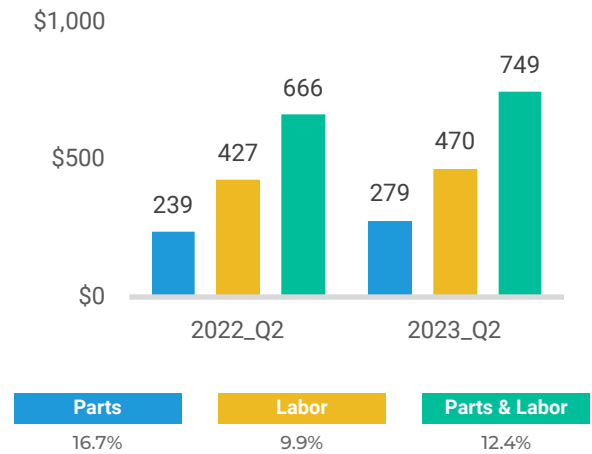


## Parts and Labor Costs

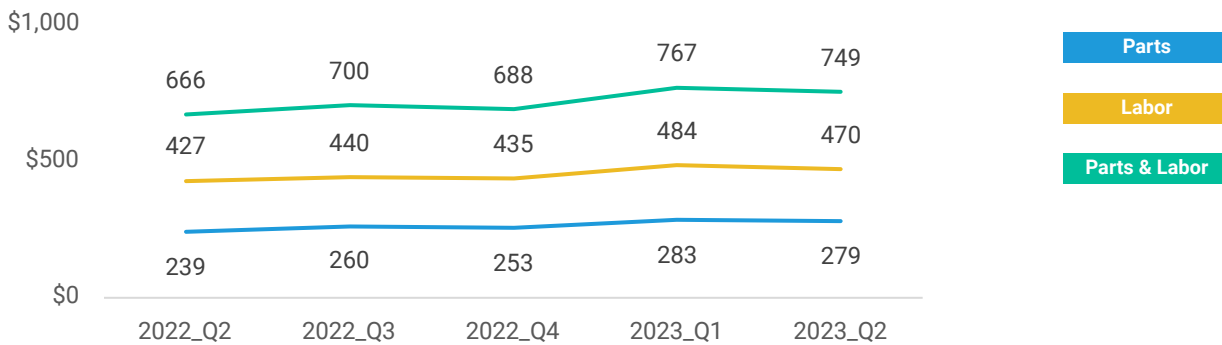
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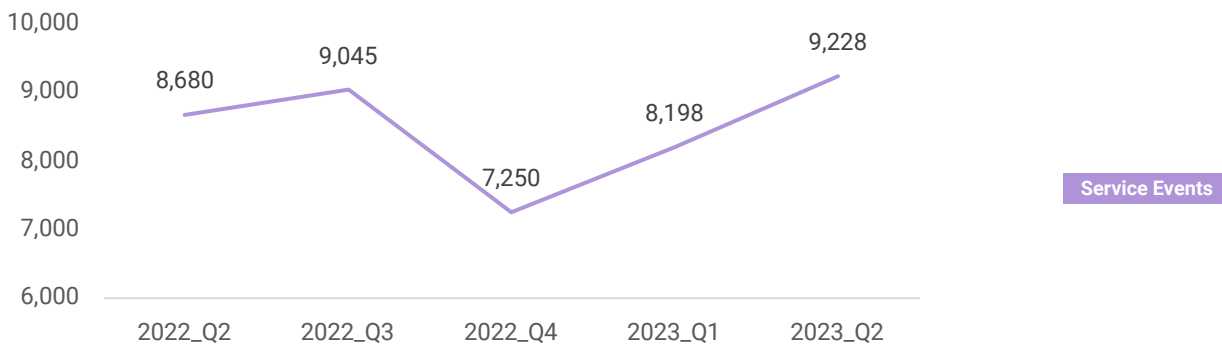
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

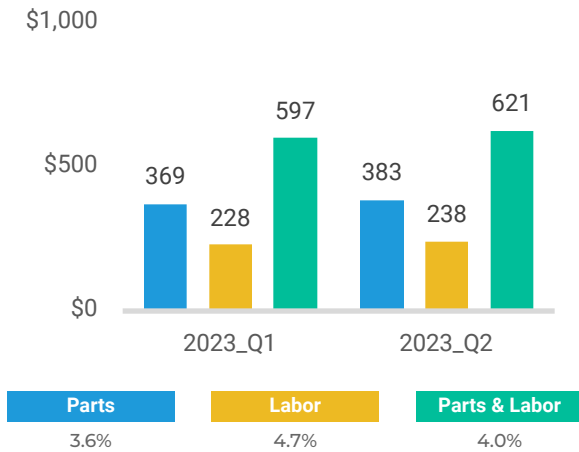


### Quarterly Trends for Service Activity

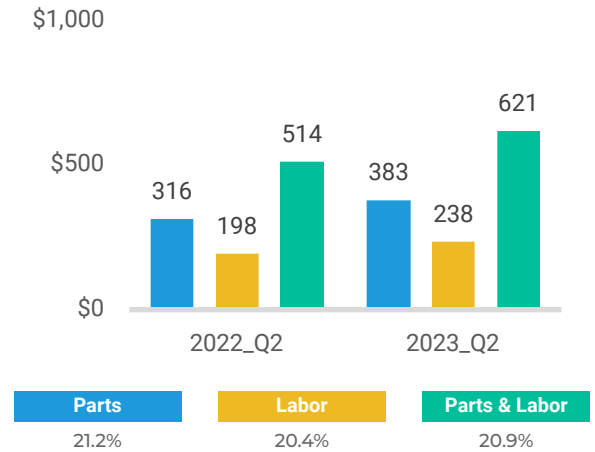


## Parts and Labor Costs

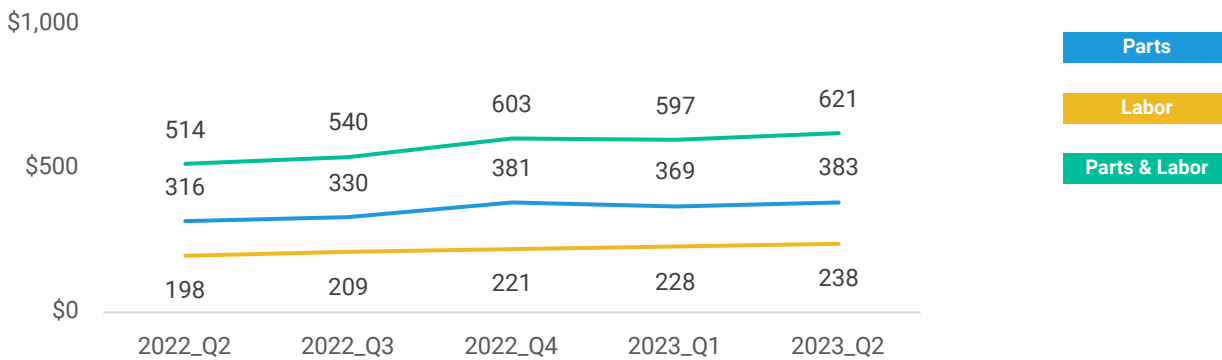
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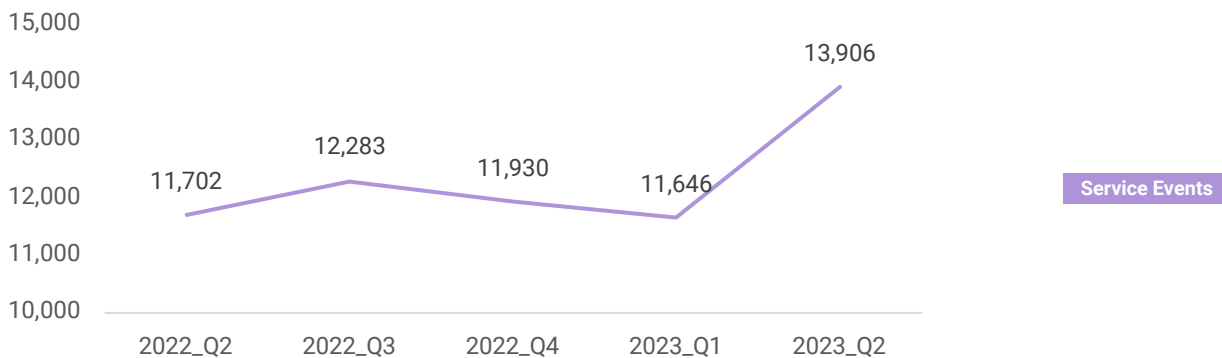
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

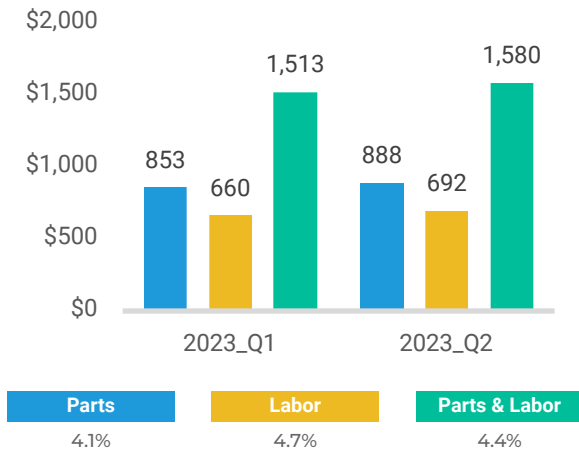


### Quarterly Trends for Service Activity

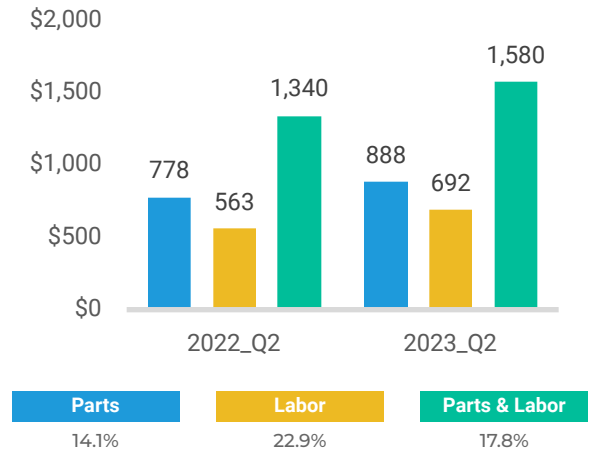


## Parts and Labor Costs

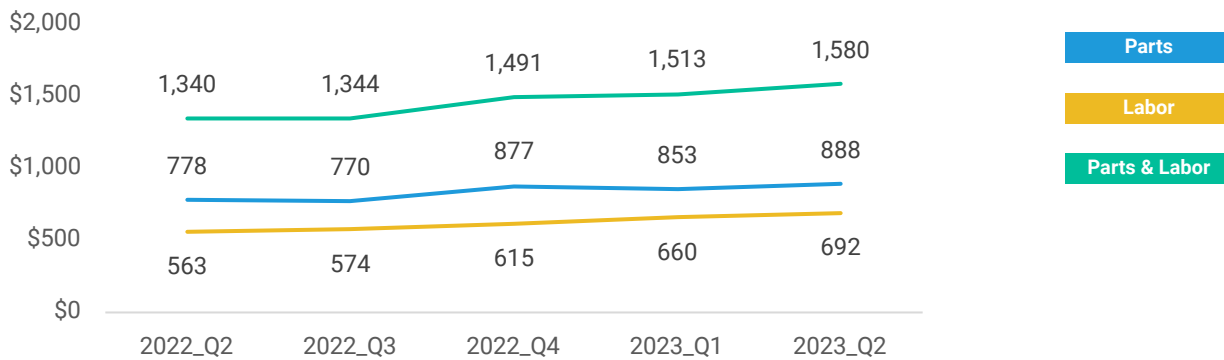
### Quarter over Quarter (QoQ)



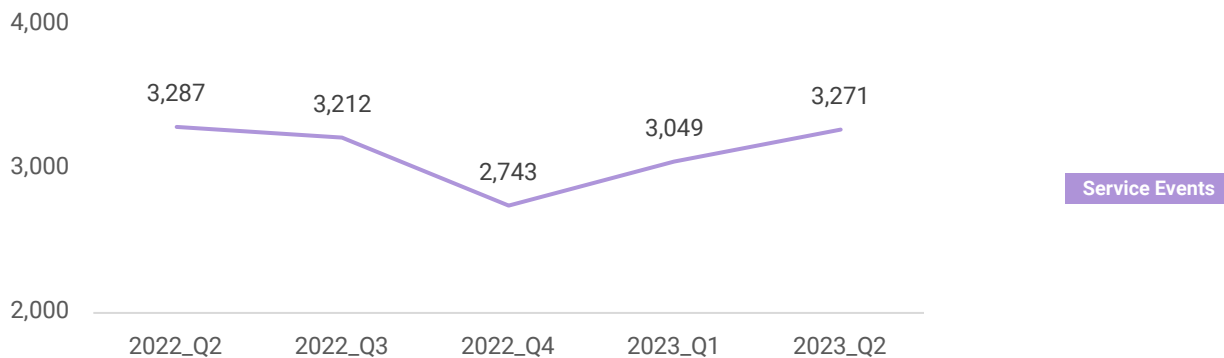
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs



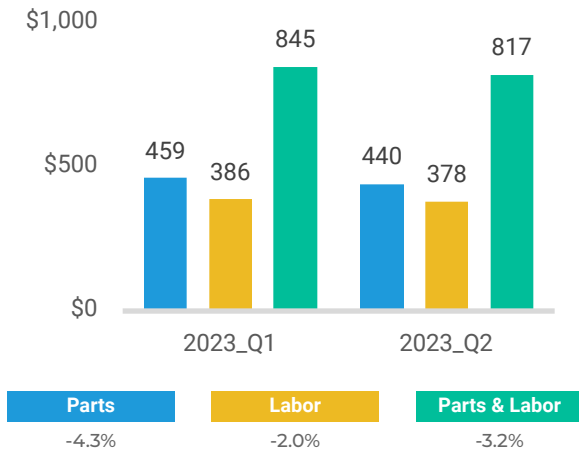
### Quarterly Trends for Service Activity



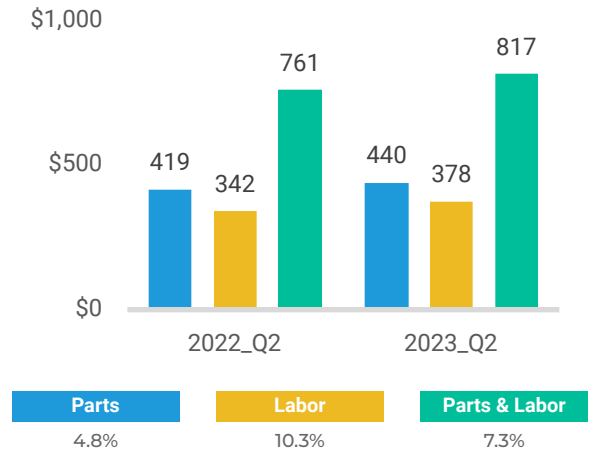


## Parts and Labor Costs

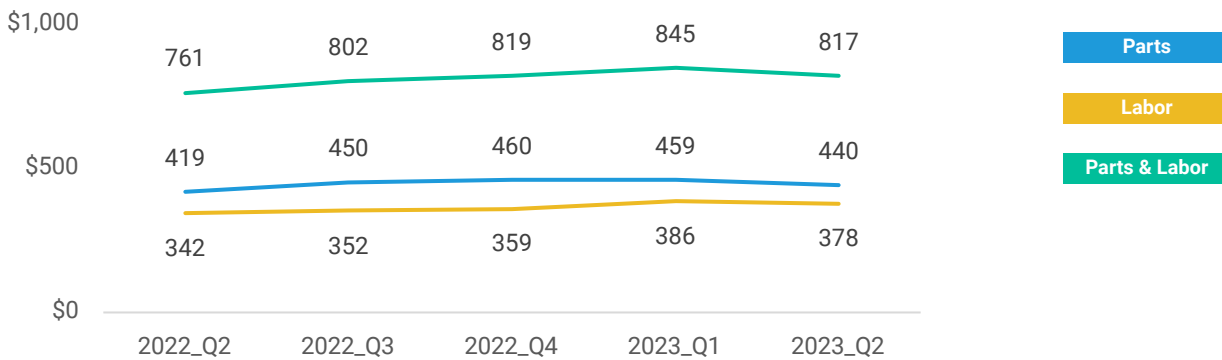
### Quarter over Quarter (QoQ)



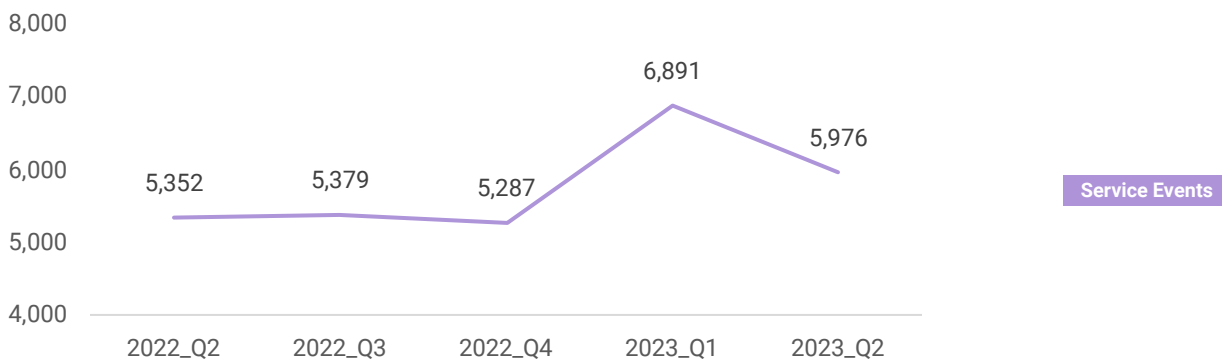
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

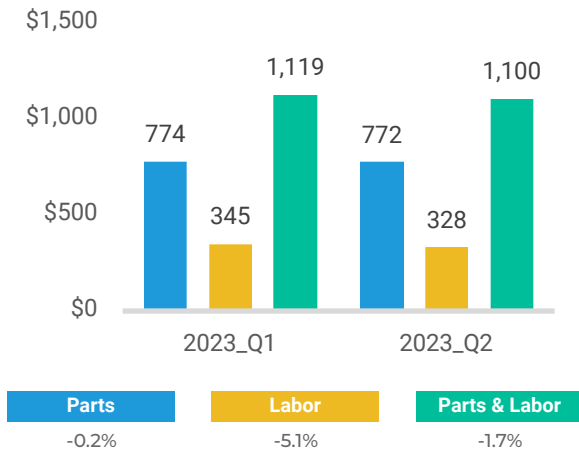


### Quarterly Trends for Service Activity

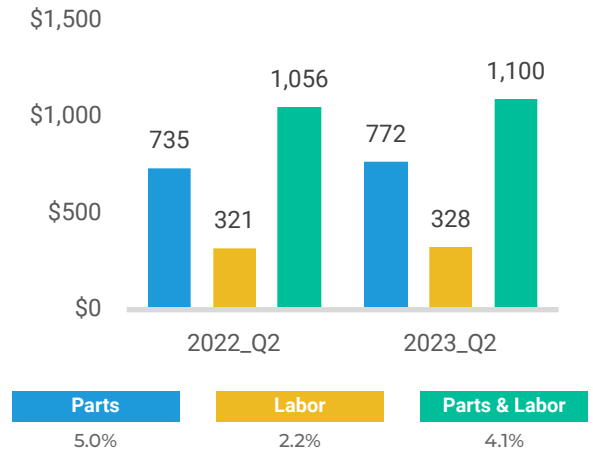


## Parts and Labor Costs

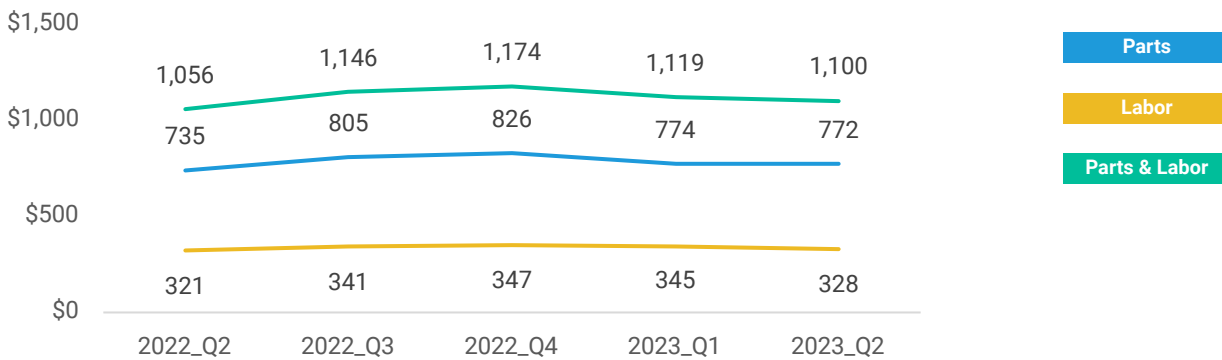
### Quarter over Quarter (QoQ)



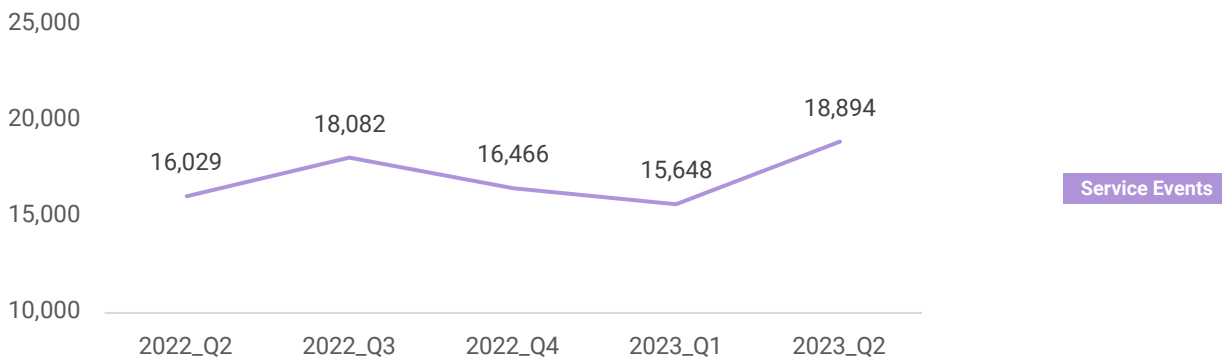
### Year over Year (YoY)



### Quarterly Trends for Parts and Labor Costs

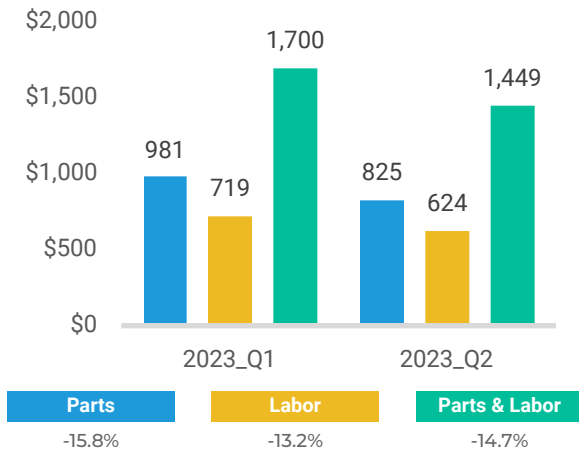


### Quarterly Trends for Service Activity

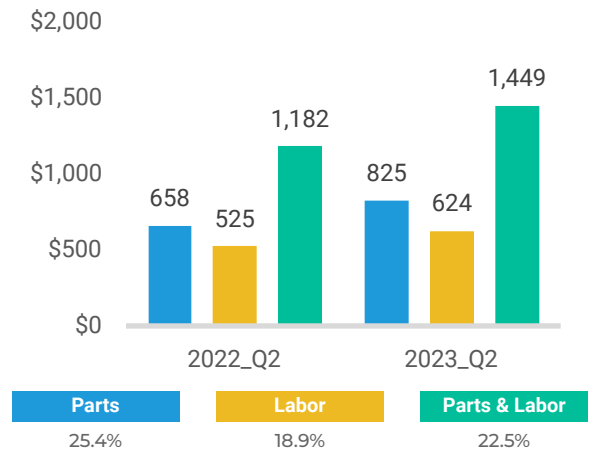


## Parts and Labor Costs

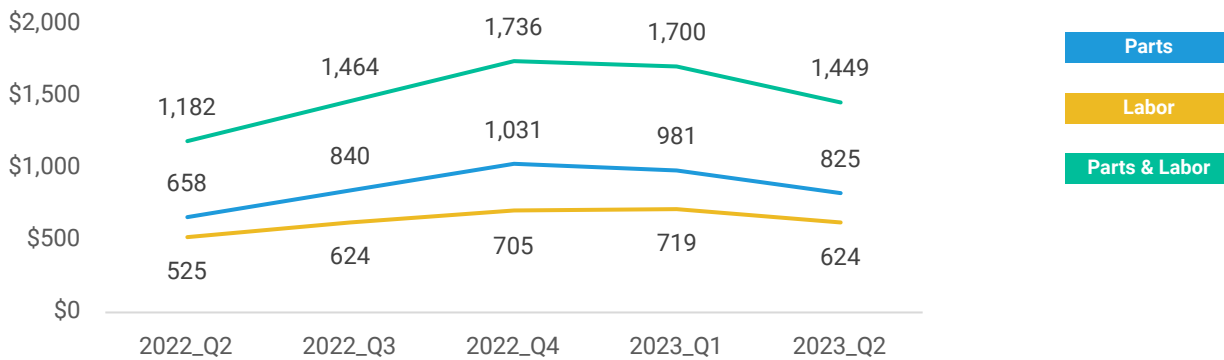
### Quarter over Quarter (QoQ)



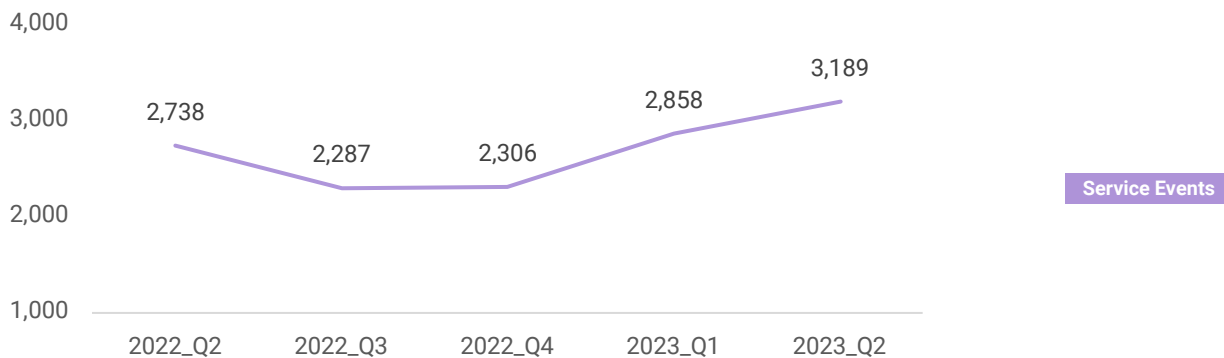
### Year over Year (YoY)

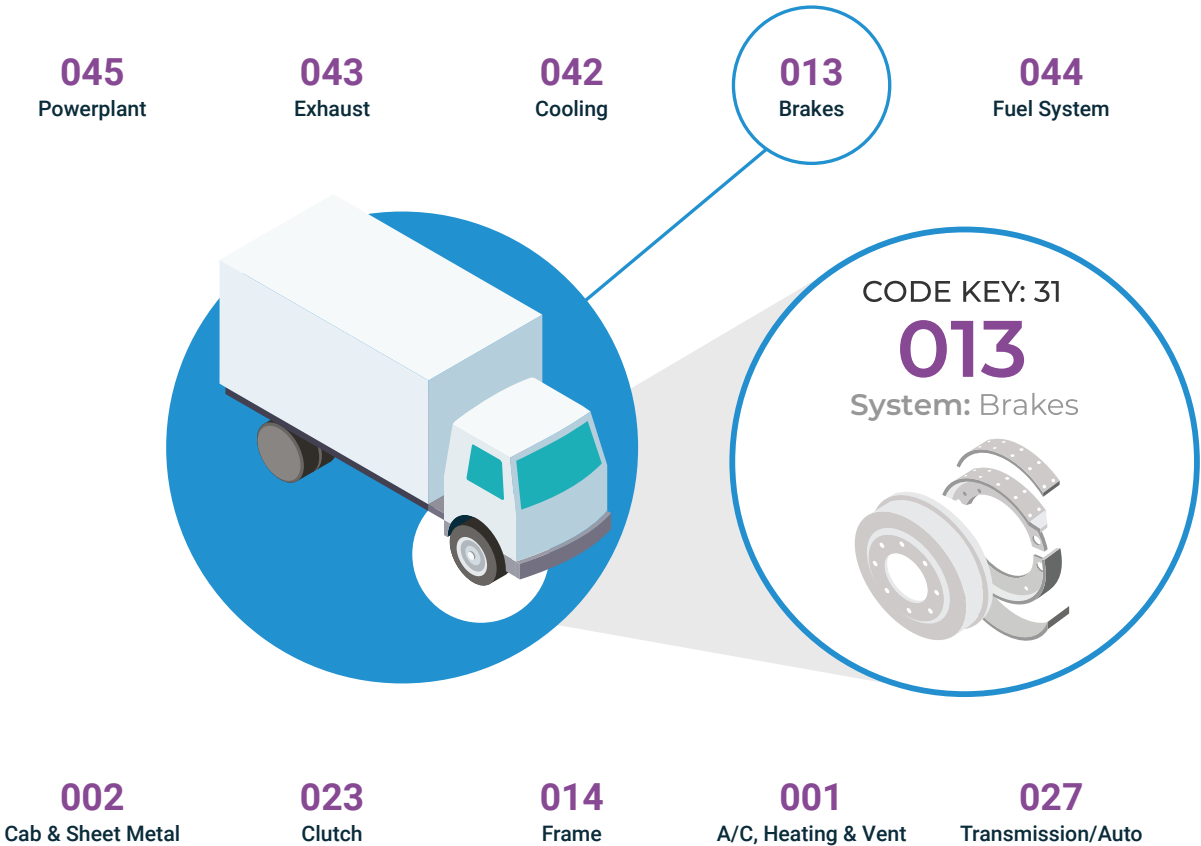


### Quarterly Trends for Parts and Labor Costs



### Quarterly Trends for Service Activity





### Research Methodology

We currently capture parts and labor information on more than 70,000 weekly repair events and therefore have unique insight and the ability to quantify and dynamically report on changes in parts and labor costs. We are the authoritative source for service repair data, able to generate detailed analysis of service repairs at the operation level including the associated VMRS Group Level and System.

For more information on Decisiv industry research, visit [decisivmarketplace.com](https://decisivmarketplace.com)