



ACT  **Research**

MARKET

AUGUST 22-24, 2023

COLUMBUS, IN

ITALS

*THE CURRENT & FUTURE
HEALTH OF THE INDUSTRY*

MARKET

AUGUST 22-24, 2023

COLUMBUS, IN

VITALS

THE CURRENT & FUTURE
HEALTH OF THE
INDUSTRY

MARKET VITALS: THE CURRENT & FUTURE HEALTH OF THE INDUSTRY

THE ACT RESEARCH TEAM WILL PROVIDE THE N.A. COMMERCIAL VEHICLE & TRANSPORTATION INDUSTRIES OUTLOOK FOR 2023-2028. IN ADDITION, WE WILL BE HOSTING INDUSTRY EXPERT GUESTS TO DISCUSS THE CURRENT AND FUTURE HEALTH OF THE INDUSTRY TO SUPPORT YOUR PLANNING AND BUDGETING.

AUGUST 22-24, 2023 || THE COMMONS || COLUMBUS, IN



CLICK BELOW FOR:

ABOUT
NEED TO KNOW
SPEAKERS
VENUE
SPONSORS
NETWORKING

AUGUST 22-24, 2023

THE COMMONS || COLUMBUS, IN



SPONSORS



Rental | Leasing | Logistics



MARKET VITALS: THE CURRENT & FUTURE HEALTH OF THE INDUSTRY
PRESENTATIONS & RECORDINGS

AVAILABLE SOON HERE

ACT RESEARCH CO. 4440 MIDDLE RD., COLUMBUS, IN 47203
P: 812.379.2085 || TRUCKS@ACTRESEARCH.NET || WWW.ACTRESEARCH.NET

GAIN STREET CRED GAIN GROUND

Running late can hurt your reputation. That's why Penske offers customized transportation and logistics solutions. Drawing from real-time data to optimize shipments, minimize disruptions and improve fleet efficiency.



Rental
Leasing
Logistics



WELCOME RECEPTION



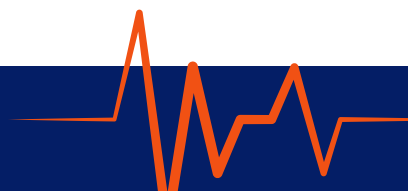
August 22, 2023 || 6:00 - 9:00 PM ET

For years, it has been a tradition at the ACT seminar to welcome our guests by organizing an evening of hor d'oeuvres and discussion on the first day of the event. We are delighted to continue this practice at Market Vitals: Seminar 69. The welcome reception will take place at The Commons, where our attendees can enjoy engaging conversations and a vibrant atmosphere. As always, ACT is proud to host this special occasion for our valued guests.

The reception will be held at The Commons, 300 Washington St., Columbus, IN 47201.



WELCOME RECEPTION SPONSORED BY:



POWERING TOMORROW. TODAY.



Dana diesel and electric drivetrains. The backbone of the transportation industry is built on the awareness that every movement and mile adds up to a more efficient road ahead. That's the power of Dana's 120 years of innovation, imagination, and progress. And we're just getting started.

120 years of imagination, innovation, and drivetrain transformation at work for a better world.

dana.com



© 2023 Dana Limited. All rights reserved.

TESTIMONIALS

WHAT ARE OTHERS SAYING ABOUT ACT RESEARCH SEMINARS?



Justin Walskey

SAF HOLLAND

"I was originally introduced to the ACT seminar as a professional development opportunity...[There's] so much value from the information presented to the people I got to meet and the friends in the industry I was able to develop over the years...I've made a case at my company to attend every event."



Robert Brown

SPARTAN RADAR

"It is a can't miss...An incredible group of people across the industry...A great lineup of speakers and panels...You get the quality and intimacy of the connections...."



Bob Kern

CUMMINS INC.

"The biggest thing [about the ACT seminar] is connecting with industry folks I work with."



DAY 2 INDUSTRY SESSIONS

AUGUST 23, 2023 | THE COMMONS



7:30 AM

CONTINENTAL BREAKFAST & REGISTRATION

7:50 AM

WELCOME & OPENING COMMENTS

8:00 AM

ECONOMIC PANEL: NO-GO, SLOW-GO, OR GO-GO: BUSINESS CONDITIONS IN 2024 & BEYOND

Jim Meil
ACT Research,
Principal, Industry Analysis

Chris Kuehl
Armada Corporate Intelligence,
Managing Director

David Teolis
Former Deputy Chief Economist

Moderator: Kenny Vieth
ACT Research
President, Senior Analyst

Business enterprises have had to navigate two years of reefs, riptides, and rapids without being rocked by recession. Despite war, inflation, monetary policy rate hikes, and supply chain challenges, the economy has kept expanding, though sometimes at a plodding pace. Will 2024 see it continue on a subpar but stable path? Perhaps accelerate? Or finally dive into a downturn? ACT Market Vitals: The Current & Future Health of the Industry will kick off with three panelists who are not only veteran crystal ball gazers, but long-time advisers to C-suite decision makers at Fortune 500 companies. With their insights (and your questions) we are confident Seminar 69 will be off to a rockin' start.

9:15 AM

BREAK

9:30 AM

ELECTRIFICATION OF THE COMMERCIAL VEHICLE SEGMENT: TRENDS, TRIALS & TRIBULATIONS

Rick Dauch
Workhorse
CEO

There are many parts that make up an EV company's path to success. Drawing on his years of experience in leadership roles at companies such as Delphi Technologies, Accuride, American Axle, and Acument, Rick Dauch will outline the regulatory and competitive forces that have shaped decisions in his current role as CEO of Workhorse, and discuss how the company's current line of fully electric trucks is headed for the sweet spot in the commercial EV space.

10:15 AM

A LOOK AT OUR EVOLVING INDUSTRY, MEGA TRENDS, AND A FUTURE-FOCUSED CORPORATE CULTURE

Rick Mullinix
Great Dane Trailers
President and COO

Great Dane's company culture is adapting and responding to industry trends, new technology, and future challenges. How can we respond to the needs of our customers while preparing our workforce in a rapidly changing industry?

11:00 AM

FIRESIDE CHAT: MANAGING THROUGH THE FREIGHT CYCLE

John Diez
CFO
Ryder

Steve Tam
ACT Research
Vice President, Analyst

John Diez, CFO of Ryder System Inc, will share his thoughts on numerous industry issues, including the current market environment, its impact on the business, and how Ryder is helping its customers manage through down cycle. ACT's Steve Tam will join John in a fireside chat.

11:45 AM

JOINT Q&A

12:00 PM

LUNCH



DAY 2 INDUSTRY SESSIONS

AUGUST 23, 2023 | THE COMMONS



1:00 PM

Bill Van Amburg
Exec VP Emeritus/Strategic Advisor,
CALSTART Strategic Advisor, Zero
Emission Commercial Vehicles

Lydia Vieth
ACT Research
Research Analyst, Electrification & Autonomy

REGULATORY ROADMAP

The climate is changing and so are regulations. In this session, we will discuss the state of current and upcoming regulations from CARB and the EPA – everything from ZEV mandates and federal incentives to GHG and NOx emissions. How do these impact the trucking landscape? Where are the challenges? And where are the opportunities? Join us for a wide ranging discussion on how regulations are changing and challenging the industry."

1:45 PM

Jose Samperio
Cummins Inc.
Executive Director and General Manager,
North America On-Highway

THE ROAD AHEAD

It's undeniable that the move to lower emissions technologies is happening. Regulations, ESG goals, and investments in new technologies from OEMs and suppliers are indicators that the shift is progressing. We'll review key considerations for fleets when selecting lower emissions technologies as well as steps fleets can take to help further their goals on the road ahead.

2:30 PM

Wiley Deck
Plus
Vice President of Government Affairs and
Public Policy

Lydia Vieth
ACT Research
Research Analyst, Electrification & Autonomy

FIRESIDE CHAT: AUTONOMOUS DRIVING FOR COMMERCIAL VEHICLES

Wiley Deck, Vice President of Government Affairs & Public Policy at Plus and past Deputy Administrator FMCSA joins us in a fireside chat to share his knowledge on the past, present, and future for autonomous driving for commercial vehicles. ACT Research recently published an extensive report on autonomous commercial vehicles, DRIVING AUTOMATION: Commercial Transportation's Pursuit of Level 4 Autonomy, that forecasted adoption of driver out technologies from 2023 through 2040. Wiley and ACT's Lydia Vieth will discuss those findings along with more recent developments in the AV industry and inform audience participants on what to expect over the next few years, as well as into the next decade. Join us for what will definitely be a dynamic and informative session!

3:15 PM

BREAK

3:30 PM

Laura Perrotta
ATD
President

Jodie Teuton
Kenworth of Louisiana
Co-founder & Vice President

Maria Sherwood
Sherwood Trucks
Finance Manager & CIC

Moderator: Steve Tam
ACT Research
Vice President, Analyst

DEALER PANEL

More than three years have passed since the global pandemic began, but the commercial vehicle industry is still struggling to supply all the equipment its customers desire. During this portion of the seminar, we will explore how the environment has changed, what dealers have done to adapt, and what the customer experience looks like in the aftermath. We will also discuss longer-term, bigger picture lobbying and legislative efforts with the potential to make meaningful changes in our industry that are underway.

5:00 PM

WRAP UP



A GUIDE ON YOUR JOURNEY

Destination Zero™ is Cummins' strategy to go further, faster to reduce the greenhouse gas and air quality impacts of its products. Cummins' advances in engineering are developing tangible technology for the next generation of fleets. Our consultative approach first understands your goals, then helps you shape your plan to achieve them.

Cummins.com



**FOR
A WORLD
THAT'S
ALWAYS ON™**

NETWORKING DINNER

MARKET

THE CURRENT & FUTURE
HEALTH OF THE INDUSTRY

AUGUST 23, 2023

6:00 - 9:00 PM

**THE ACT OFFICE - 4440 MIDDLE RD.,
COLUMBUS, IN 47203**

Come and join us for a delightful networking dinner, which has always been a highlight of the seminar. The event promises to offer savory food, beer, spirit, and abundant opportunities to connect, network, and mingle with your fellow seminar attendees. This tradition was first started by Ken Vieth at his farm more than 30 years ago, and over the years, we've enjoyed Hoosier hospitality at various venues such as the "Farm," Kenny Vieth's "Barn," and ACT's "Garage" and "Lodge."

After a long and fruitful day of learning, come and unwind with us at the ACT networking dinner to relax and reconnect with others.

During the dinner, you'll have the opportunity to get up and personal with Workhorse vehicles. Workhorse will showcase their W750 and W56 models, while allowing you to take a ride in Workhorse's W56.

Casual attire is welcome, and we look forward to seeing you there!



WORKHORSE™



NETWORKING DINNER SPONSORED BY:



DAY 3 INDUSTRY SESSIONS

AUGUST 24, 2023 | THE COMMONS



7:30 AM

CONTINENTAL BREAKFAST

7:50 AM

WELCOME & OPENING COMMENTS

8:00 AM

Tom Moore
NPTC
Executive Vice President

Michael Schwersenska, CTP
Brakebush Transportation, Inc.
General Manager

THE PRIVATE FLEET MARKET

Representing 50% of the trucking industry, private fleets provide companies with control over the supply chain and satisfies customer demand — safely, efficiently, and cost-effectively. Despite facing numerous challenges, the private fleet model continues to make sense. Come learn more about this vital segment as two of its leaders share insights about the attributes and challenges.

8:45 AM

Steve Tam
ACT Research
Vice President, Analyst

USED TRUCK: A MARKET IN FLUX

Demand is soft, inventory abounds, and values are still falling from record highs. Yet, there is still a lot to like about the used truck market. In this presentation, we will examine where the market is headed, when it will inflect, and our expectations for values.

9:30 AM

Amit Prasad
Nolan Transportation Group
Chief Data Science Officer

Tim Denoyer
ACT Research
Vice President, Senior Analyst

A TURNING POINT IN THE FREIGHT CYCLE

The bottoming process has been dragging on for a while now. We'll explore the critical questions regarding how quickly capacity will leave the trucking industry and freight demand will recover. Tim is honored to have a brilliant expert joining the presentation to provide a perspective from the logistics industry. Amit Prasad of Nolan Transportation, a large, privately held freight broker, will share his insights and expectations for the freight cycle. Key topics will include how industry capacity is evolving in terms of drivers, equipment, for-hire fleets, owner-operators, and private fleets, and we'll address what it means for freight rates and equipment demand.

10:15 AM

BREAK

MARKET VITALS SPONSORED BY:



Rental | Leasing | Logistics



NATIONAL TRAILER DEALERS ASSOCIATION



MITSUBISHI HC CAPITAL
AMERICA



DAY 3 INDUSTRY SESSIONS

AUGUST 24, 2023 | THE COMMONS



10:30 AM

Kenny Vieth
ACT Research
President & Senior Analyst

Jennifer McNealy
ACT Research
Director, CV Market Research Publications

CLASS 8 & TRAILERS: MARKET UPDATES & FORECASTS

Supply-chain constraints – Which are done and which ones still linger?

Pent-up demand – How long will it last and why?

Regulatory calendar – How do regulations impact demand?

Join us for a discussion about these and other questions that are shaping our view of the Class 8 and US trailer markets, as the cycle unfolds and we switch from the rearview mirror to the windshield ahead.

11:45 AM

Steve Tam
ACT Research
Vice President, Analyst

MEDIUM DUTY: WAITING PATIENTLY

Thanks to outsized customer demand, production and sales of medium duty vehicles are expected to hold up well in 2023. However, customers are still waiting patiently for the units they have on order. As demand is sated and regulations look, the future will be in a state of flux for the remainder of the forecast horizon. In this session, we will review the dynamics that are behind buyer's frustrations and discuss the impacts on the fleet.

12:30 PM

WRAP UP



Phone: (810) 229-5960

Toll-free: (800) 800-4552

Email: registration@ntda.org

Web: www.ntda.org

33rd Annual NTDA Convention

Oct. 4-6, 2023

JW MARRIOTT MARCO ISLAND BEACH RESORT
MARCO ISLAND, FL

REGISTER TODAY
ONLINE AT WWW.NTDA.ORG



REGISTER ONLINE AT WWW.NTDA.ORG

NETWORKING LUNCH



August 24, 2023 || 12:45 PM ET

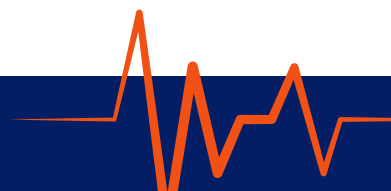
Stick around! On the last day of the event, our guests will be treated to a lunch hosted by ACT Research. Location: Luciana's Mexican Restaurant & Cantina, 310 Washington St., Columbus, IN 47201.

This will be an excellent opportunity to reflect on the invaluable insights gained during the seminar and exchange your final learnings with your peers.

During this time you'll have the opportunity to experience The Accelera by Cummins battery electrified truck. It is a fully electric class 6 pickup and delivery vehicle demo unit with a PowerDrive™ 6000. This vehicle is a demonstration truck created from Accelera PowerDrive 7000 production hardware. The production PowerDrive 7000 all-electric drivetrain system is commercially available for school bus and medium duty truck applications.



NETWORKING LUNCH SPONSORED BY:



Your commercial
financing experts.

We can do it all.
Every truck.
Every trailer.

Put our decades of lending experience
to work for you.



SEMINAR ATTENDEE LIST



MARKET

ITALS

THE CURRENT & FUTURE
HEALTH OF THE INDUSTRY

Cliff	Abbott	Correspondent
Ted	Amirault	Director - Commercial Vehicle Sales
Thomas	Amlie	Project Manager
Irina	Baciu	Salesforce Business Analyst
Behnam	Bahrami	Global SBP Director
Hugo	Beltran	CEO
Aki	Bentley	Business Development Director
Julian	Bideau	Operations Manager
Ann	Brodette	Senior VP of Sales
Gwen	Brown	President
Daniel	Castro	Director-Product Development
Ritika	Chhabra	Market Intelligence Manager
John	Choi	Market Analyst
Suzanne	Claypoole	Director - Digital Experience Planning & Administration
Whitney	Cockrell	Capacity Forecasting Analyst
Piyali	Cole	Director-Product Development
Darian	Collier	Data Management Specialist
Steve	Conrad	Manager of Customer Success and Training
Rachel	Coogan	Sr. Market Research Analyst
Anshuman	DasGupta	Demand Planning Manager
Margie	Dasovich	Research Manager and Analyst
Rick	Dauch	CEO
Andres	Davila	Sr. OEM Operations and Customer Service Manager
Wiley	Deck	VP of Government Affairs and Public Policy
Tim	Denoyer	Vice President and Senior Analyst
Jeff	DeWilde	Market Intelligence
John	Diez	EVP & CFO
Aditya	Dixit	President - International Marketing & Sales
Beatriz	Duquesne	VP, Pricing
Jim	Eaton	Director, OE Business Development
Tim	Eimmermann	Market Insights Leader
David	Fast	Director of Transportation
Zoltan	Ferencz	Director Remarketing Sales
Drew	Franzen	VP Transportation
Fred	Freers	Market Insights
Seth	Gatto	Manager of Market Intelligence
John	Gleason	Director of Transportation Sales
Mark	Hall	General Manager - Trailers
Chris	Hammond	EVP Sales
Rob	Henson	Sr. BI & Market Analyst
Carl	Hill	President
Vicki	Hill	Vice President
Brandy	Horne	Data Science
Daisuke	Hosokawa	Vice President
Laura	Jaquins	Credit Manager
Shannon	Jolgren	Manager Market Planning
Brian	Jung	Director
Jeff	Kauffman	Partner

The Trucker Media Group
Waupaca Foundry, Inc.
Barksdale Inc.
Mitsubishi HC Capital America
Cummins Inc.
Genesis Capital Finance
Cummins Inc.
Continental Tire Americas, LLC
Mitsubishi HC Capital America
National Trailer Dealers Association
Penske Truck Leasing
Great Dane
Dana
Penske Transportation Solutions
Hendrickson
Penske Truck Leasing
ACT Research Co.
Workhorse Group
BorgWarner
Cummins, Inc.
ACT Research Co.
Workhorse
SISAMEX
Plus
ACT Research Co.
SAF-Holland
Ryder Systems, Inc.
Steel Strips Wheels Limited
Ryder System, Inc.
Netradyne
Thermo King
Gruma Corporation
Volvo
Crane Composites
Cummins
Volvo Group Trucks North America
OMCO Roll Forming Plus
Stoops Freightliner - Quality Trailer, Inc.
Great Dane
Continental Tire Americas, LLC
Hill Manufacturing Inc.
Hill Manufacturing Inc.
DTNA
NGK Automotive Ceramics USA Inc.
Genesis Capital Finance
TTX Company
Hyundai Translead
Vertical Research Partners

SEMINAR ATTENDEE LIST



Robert	Kern	Market Insights Manager
Colleen	Kiefer	Marketing Manager
Don	Kim	Sr. Manager
Matthew	Krasney	Vice President-New Product Development & Strategy
Paul	Kretikos	Sales
Chris	Kuehl	Managing Director
Akshay	Labhsetwar	Sales Director
Kat	Laker	Director, Regulatory Compliance
Paul	Larson	Account Manager
Lesley	Lopez	Director of Marketing
Ian	MacDonald	VP Sales, Americas
Kirk	Mann	Executive Vice President and Head of Business
Maggie	Marrick	Senior Market Intelligence Analyst
Kaylee	May	Development and Communications Manager
Tom	McDonald	Product Marketing
Ian	McGriff	VP of Marketing, Business Development
Jennifer	McNealy	Director, CV Market Research & Publications
José	Medina	Director Compras y Cadena de Suministros
Jim	Meil	Principal, Industry Analysis
Erin	Mohney	NA Market Intel Mgr.
Tom	Moore	Executive VP
Rick	Mullinix	President and COO
Mary	Murphy	Director of FP&A
Christopher	Newman	Business Intelligence Analyst
Armando	Nieves	Radio Frequency Engineer
Joe	Owen	President
Matthew	Palay	Associate
Chris	Papa	Sales Director
Jeff	Parrish	Sr. Product Manager
Laura	Perrotta	President
Muzammil	Poonawala	Assistant General Manager - Marketing and Sales
Amit	Prasad	Chief Data Science Officer
Pamela	Riley	Manager of Customer Insights
Ann	Rundle	Vice President, Electrification & Autonomy
Mike	Rutherford	Vice President of Used Trucks
José	Samperio	Vice President and GM, North America On-Highway
Ricardo	Sanchez	Transportation Manager
Dave	Sandei	Director
Bardia	Sareh	Sales & Business Development Manager
Rick	Schmitgen	Market Research Manager
Bailey	Schnur	Publications & Office Coordinator
Michael	Schwarsenski	General Manager
Adam	Seiden	Director
Maria	Sherwood	VP
Tim	Spilka	Director of Corporate Forecasting
Debby	Steinbarger	Officer Manager
Nathan	Streeter	CCO
Steve	Tam	Vice President, Analyst

Cummins Inc.
 ACT Research Co.
 Hyundai Translead
 Penske Truck Leasing
 Curtiss Wright
 Armada Corporate Intelligence
 Bharat Forge America
 Allison Inc.
 Metal Technologies, Inc.
 Mitsubishi HC Capital America
 Hexagon Agility
 Mitsubishi HC Capital America
 Goodyear
 Greater Indiana Clean Cities, Inc.
 Workhorse
 ACT Research Co.
 ACT Research Co.
 Sisamex S.A. DE C.V
 ACT Research Co.
 Eaton Cummins Automated Transmission Technology
 National Private Truck Council
 Great Dane
 ATC Transportation
 Cummins
 Armando Nieves
 TODCO
 Barclays
 Axalta
 DANA Incorporated
 American Truck Dealers
 Steel Strips Wheels Limited
 Nolan Transportation Group
 Penske Truck Leasing Co., L.P.
 ACT Research Co.
 M&K Truck Centers
 Cummins Inc.
 Mission Foods
 Ryerson
 Thyssenkrupp Forged Technologies
 Peterbilt Motor
 ACT Research Co.
 Brakebush Transportation
 Barclays
 Sherwood Freightliner & Western Star Inc.
 Clarience Technologies
 ACT Research Co.
 Compass Holding
 ACT Research Co.

SEMINAR ATTENDEE LIST

ACT  **Research**

MARKET
VITALS
THE CURRENT & FUTURE
HEALTH OF THE INDUSTRY

David	Teolis	Former Deputy Chief Economist	General Motors Company
Jodie	Teuton	Dealer Principal	Kenworth of Louisiana
Kevin	Trapp	Global Road Category Manager	Eaton
Jeff	Trent	Director, Marketing	MAHLE
Maira	Trimble	Senior Economist	Eaton
Uma	Vajapeyazula	Market Strategy Director	Cummins Inc.
Bill	Van Amburg	Strategic Advisor, Zero Emission Commercial Vehicles	Strategic Advisory, CALSTART Emeritus
Jerry	Vest III	Director Market Planning	TTX Company
Kenny	Vieth	President & Senior Analyst	ACT Research Co.
Lydia	Vieth	Research Analyst, Electrification & Autonomy	ACT Research Co.
Carter	Vieth	Research Associate	ACT Research Co.
Justin	Walskey	Pricing and Forecasting Manager	SAF Holland
Amanda	Williams	Account Manager	ACT Research Co.
Heather	Wilson	Chief Commercial Officer	BMO
Ryan	Winship	Senior Manager Pricing Strategy & Operations	Great Dane
Jim	Woods	Regional Sales Manager	OMCO Roll Forming
Xinyu	Zheng	Market Intelligence Analyst	ZF Group
Michael	Zimm	Analyst	BMO

SAVE THE DATE

MARKET
SEMINAR 70
VITALS
COLUMBUS, IN
FEBRUARY 20-22, 2024

REGISTER

Register for our next seminar. Click [HERE](#) to register for Market Vitals: Seminar 70 on February 20-22, 2024.

THE ANSWERS TO THE **QUESTIONS**

YOUR COMPETITION IS ASKING

DECARBONIZATION →

AUTONOMOUS →

USED TRUCK PRICES →

AUGUST 22-24, 2023
THE COMMONS || COLUMBUS, IN



DO YOU WANT TO BE A PART OF A FUTURE SEMINAR?

SPEAK

Do you want to speak at one of ACT's seminars? Learn more about becoming a speaker at one of our upcoming seminars, [here](#).

SPONSOR

Ready to get in front of industry leaders by supporting the business that supports your planning? Sponsorship opportunities are still available. Email Colleen Kiefer, ckiefer@actresearch.net to learn more.

RIDE ALONG

Host a Ride Along at our next seminar! Prominently display your vehicle during the event and host a Ride Along during the networking dinner. Email Ian McGriff, imcgriff@actresearch.net to host your Ride Along.

REGISTER

Register for our next seminar. Click [HERE](#) to register for Market Vitals: Seminar 70 on February 20-22, 2024.

MARKET VITALS SPONSORED BY:



Rental | Leasing | Logistics



THANK YOU FOR YOUR EXPERTISE AND SUPPORT!



YOUR
LOGO
HERE!

Sponsorship & Speaking Opportunities

Available for Seminar 70 & 71

Contact Ian McGriff, imcgriff@actresearch.net