

THE PRIVATE FLEET MARKET

*Inside the NPTC 2023
Benchmarking Report*



The Private Fleet Market Defined

- Trucking accounts for 80% of the nation's freight bill.
- Trucking accounts for 78% of all freight transported in the U.S.
- Private fleets account for 1/2 of trucking's share
- 1.8 million motor carriers operating in the U.S. (44% private carriers)
- Parent company's primary business is non-trucking (manufacturing, distribution, supplier, retail & wholesale)



I've been in Transportation
since the 70's



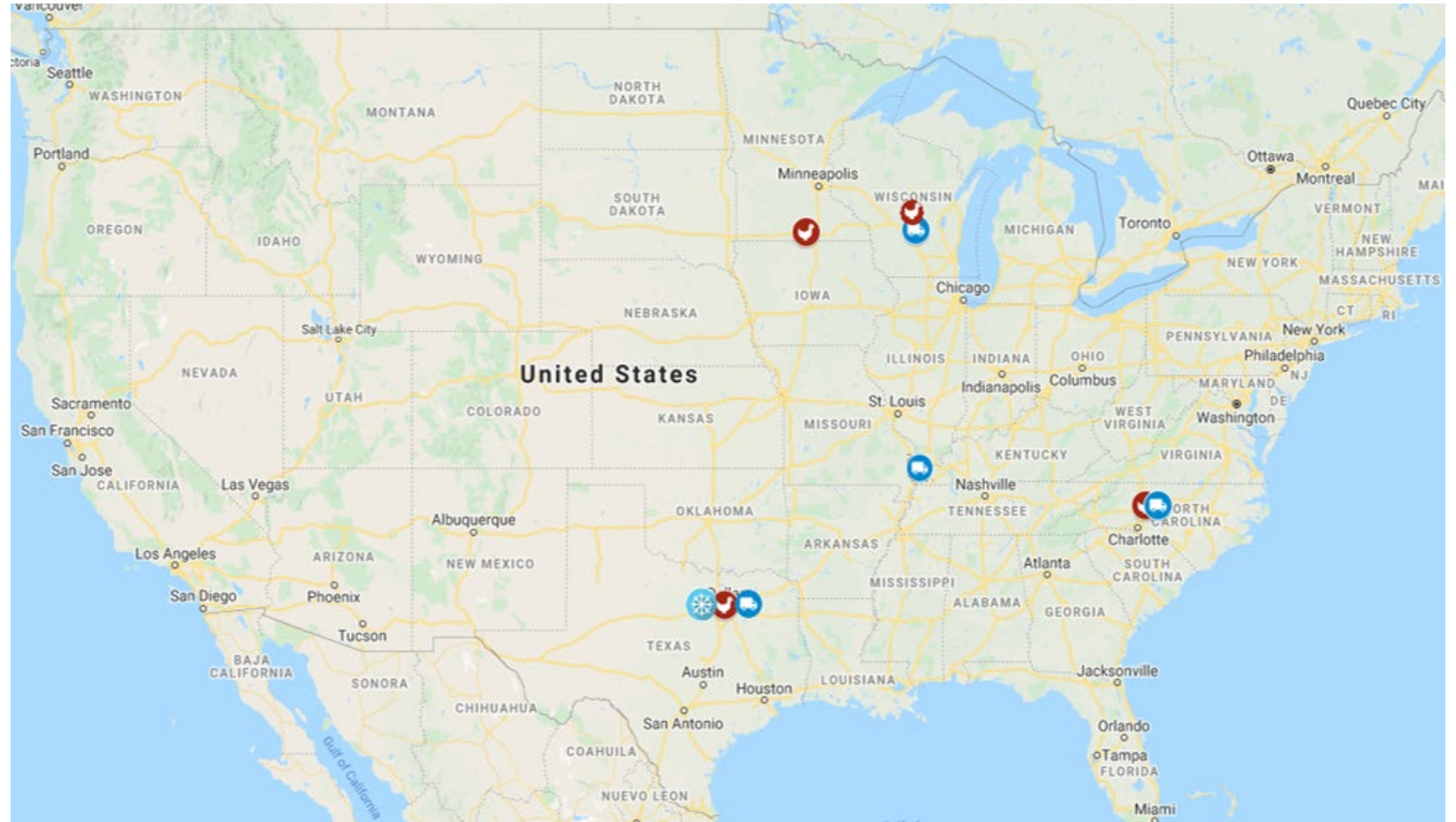
Who is Brakebush?

- Brakebush Brothers started with one truck!
- US Family owned & operated since 1925
- Value-added processor of great tasting chicken products.
- Offering 200 + different SKU's to Foodservice, Industrial and Chain customers around the World.



Location, Location.....

- Westfield WI is over 580,000 square feet of Fully Cooked, Par Frying and home to our corporate headquarters.
- Wells, MN is over 100,000 sq ft
- Irving, TX is over 142,000 sq ft
- Mocksville, NC 130,000 sq ft





The Brakebush Private Fleet

- 86 OTR Trucks (Operating Nationwide)
- 2 Local Trucks in NC
- 3 Local Trucks in TX –FSL
- 230 Reefer Trailers
- 7,064,699 Miles
- DH %--11.2%



Back to the Future

Return to Normal*

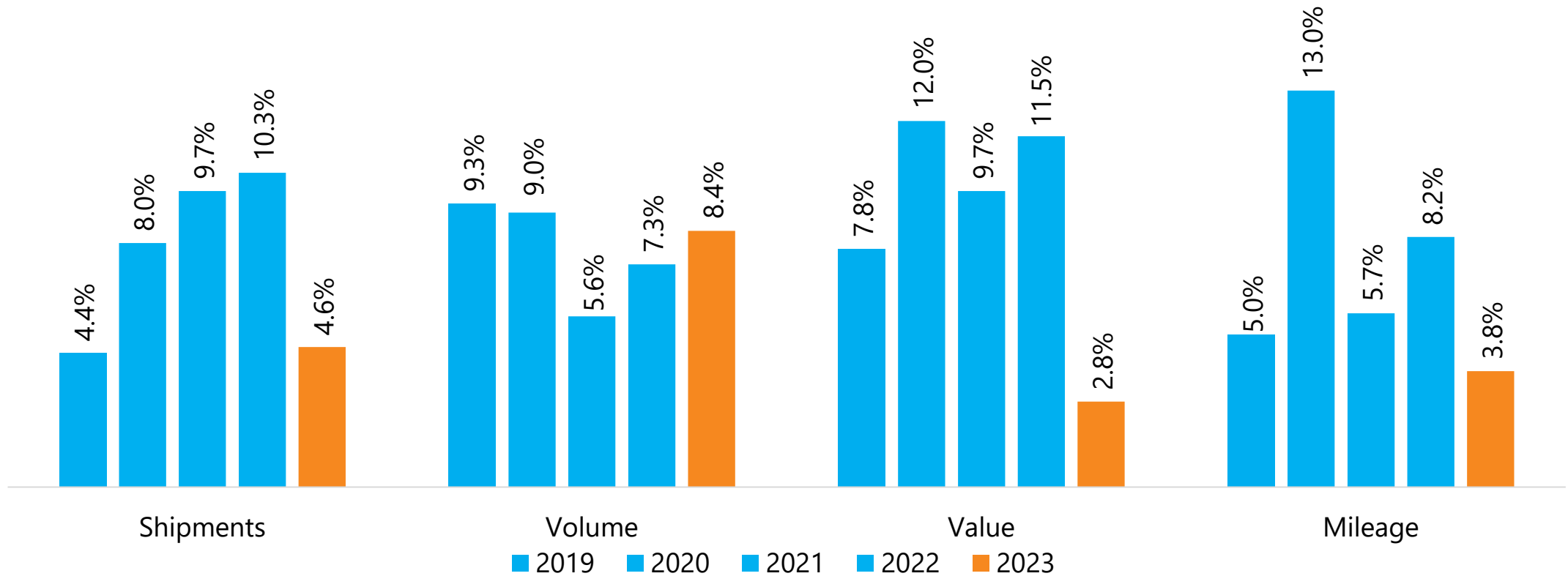
- *If elevated levels of service*

The private fleet provides companies with control over logistics costs and service, thus protecting the parent company from the volatility present in the for-hire side of the business.

The private fleet provides flexibility to enhance the control of the supply chain and satisfy customer demand — safely, efficiently, and cost-effectively.



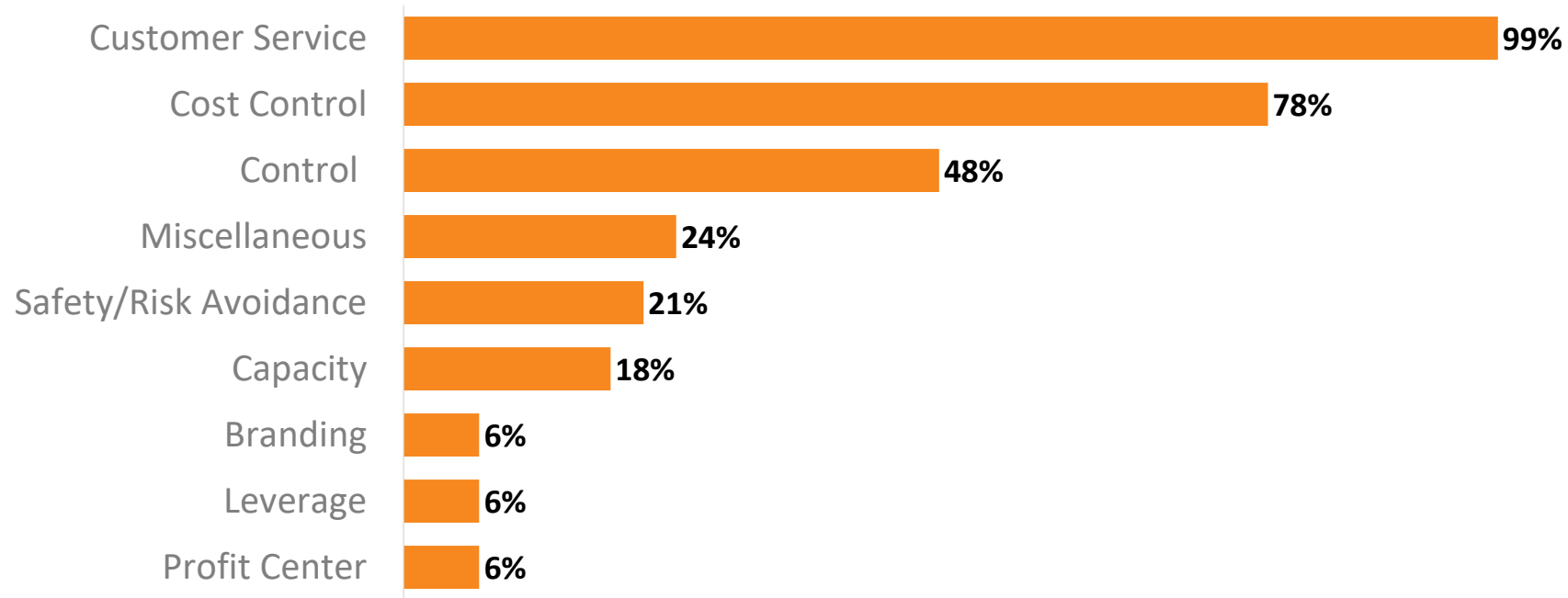
Private Fleet Performance



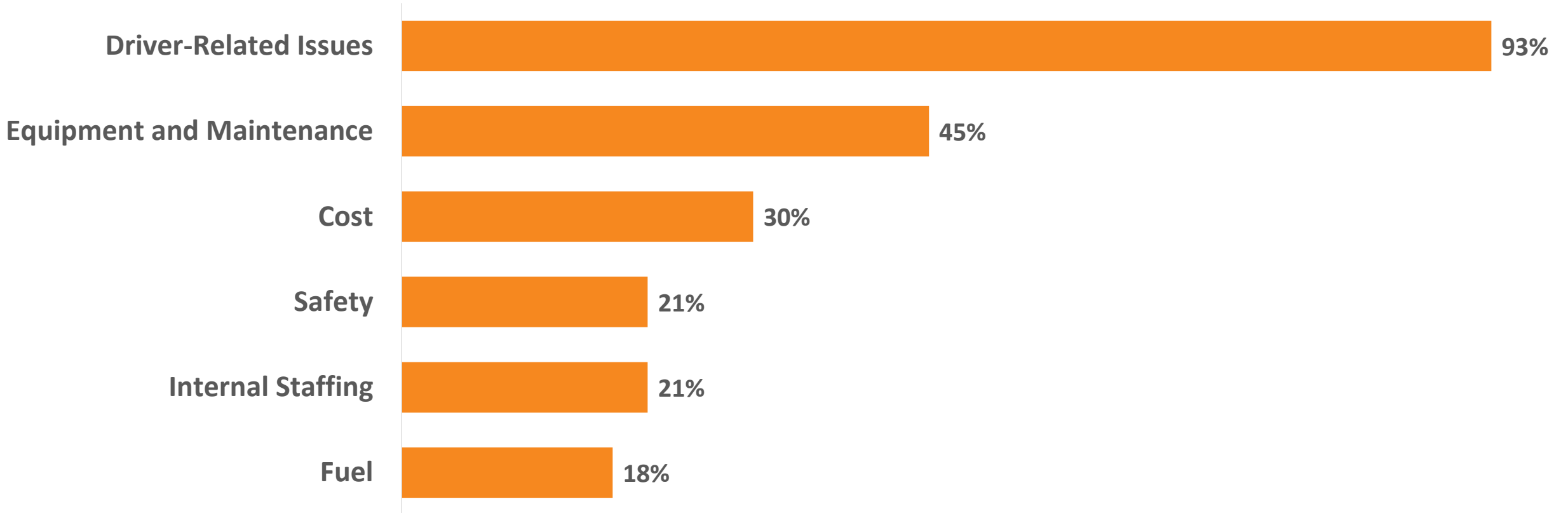
Positioning the Private Fleet for Success



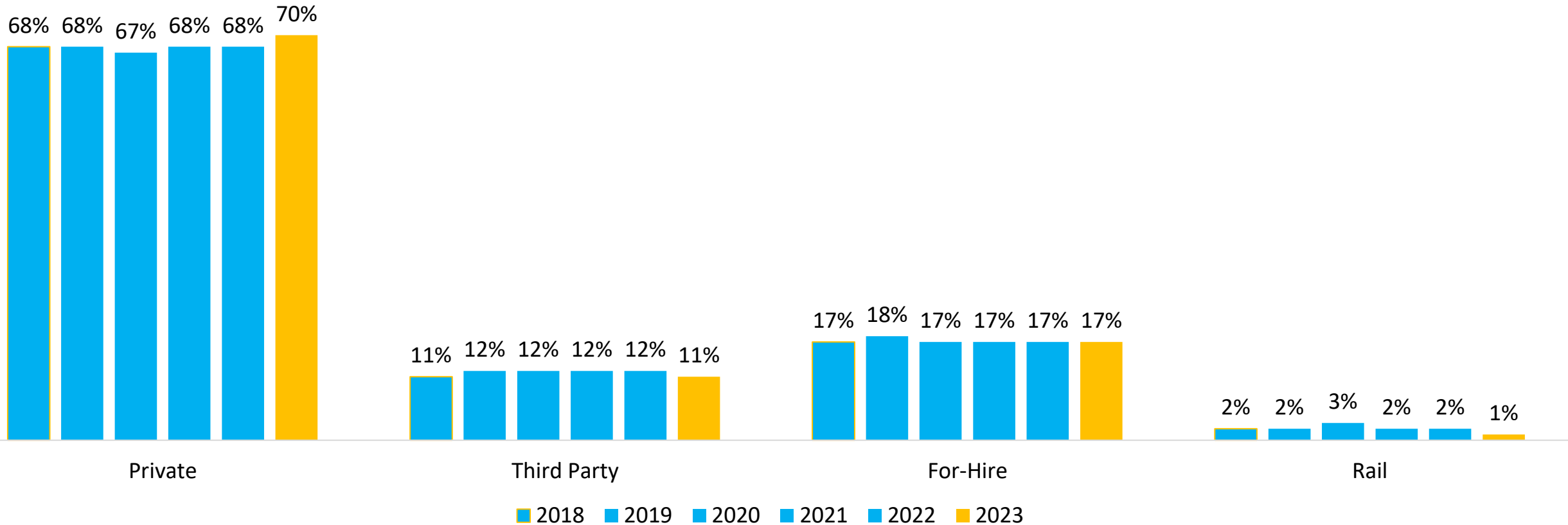
Why Private Fleets Exist



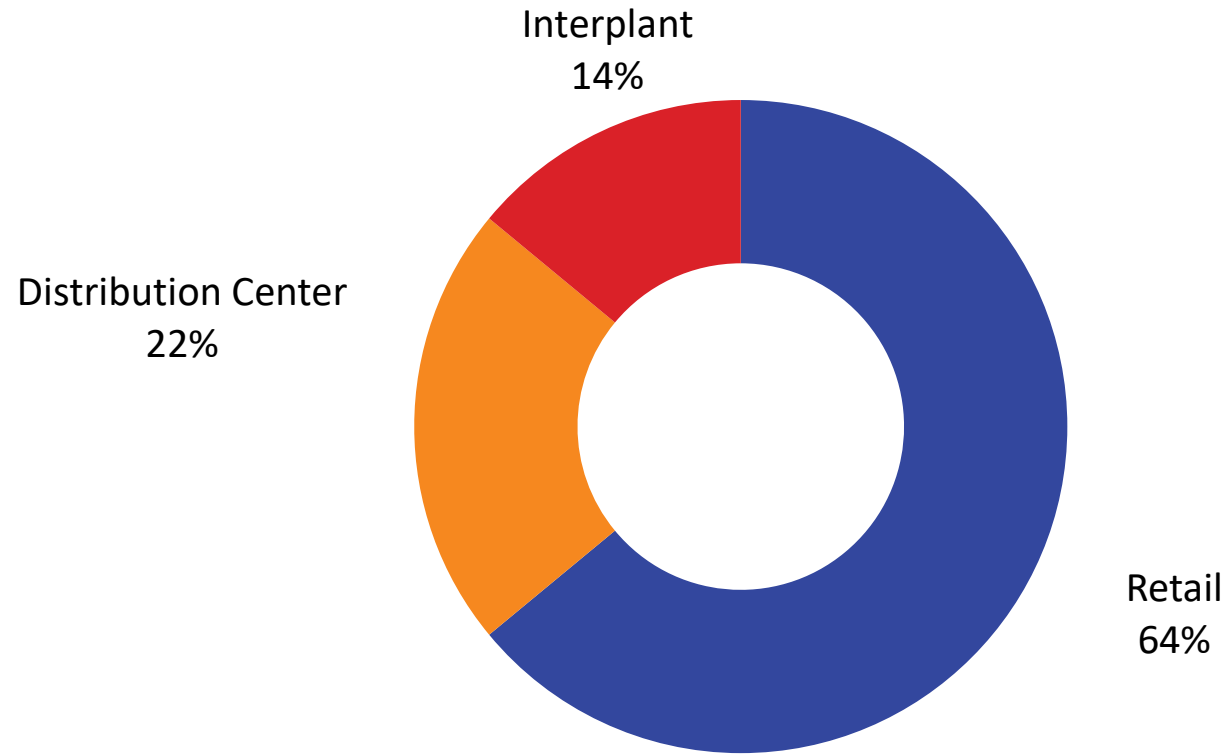
Top Challenges



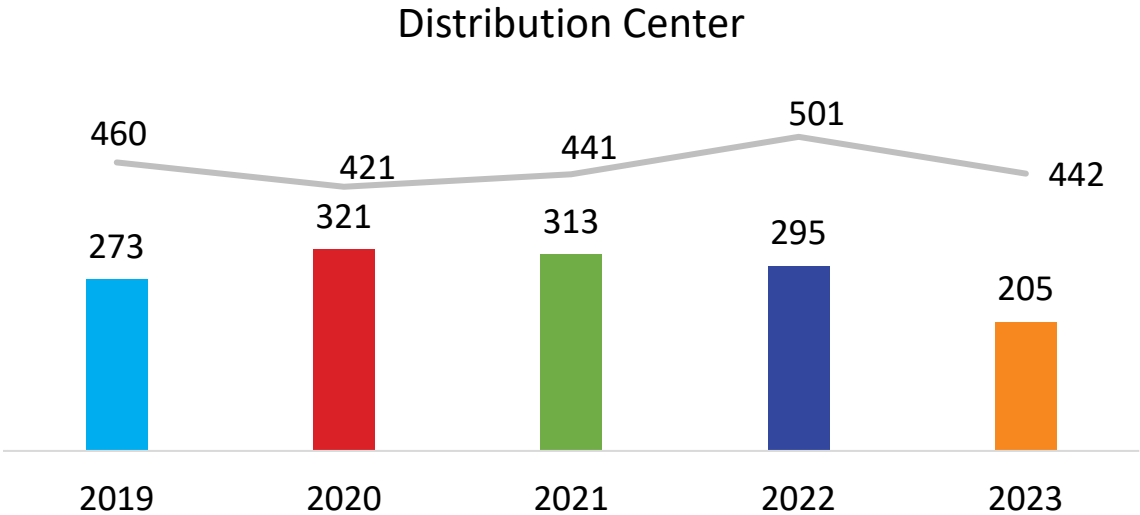
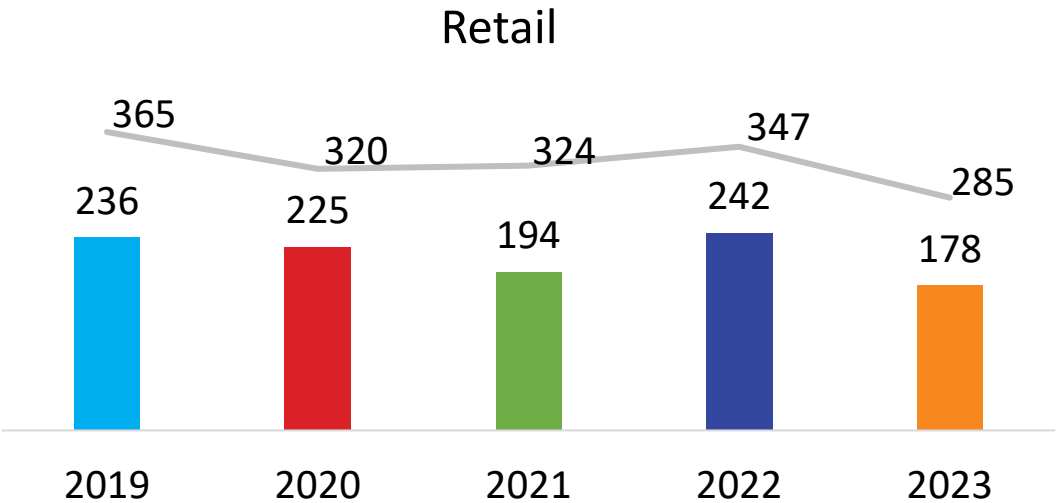
Outbound Transportation



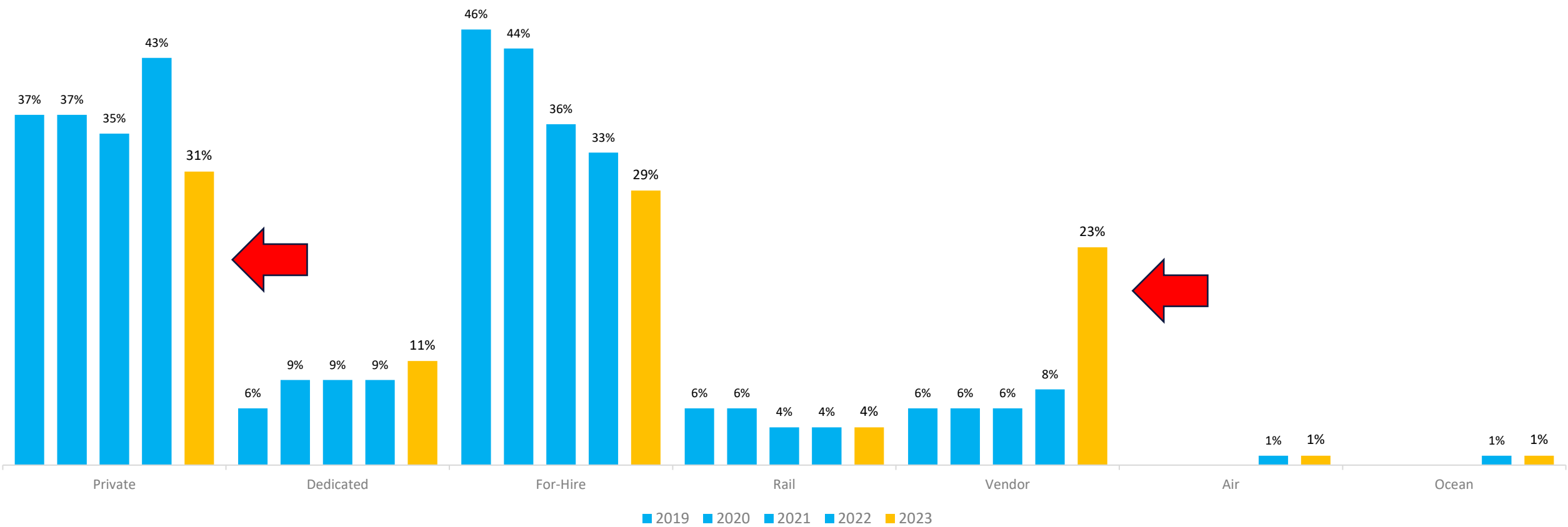
Private Fleet Outbound Movements



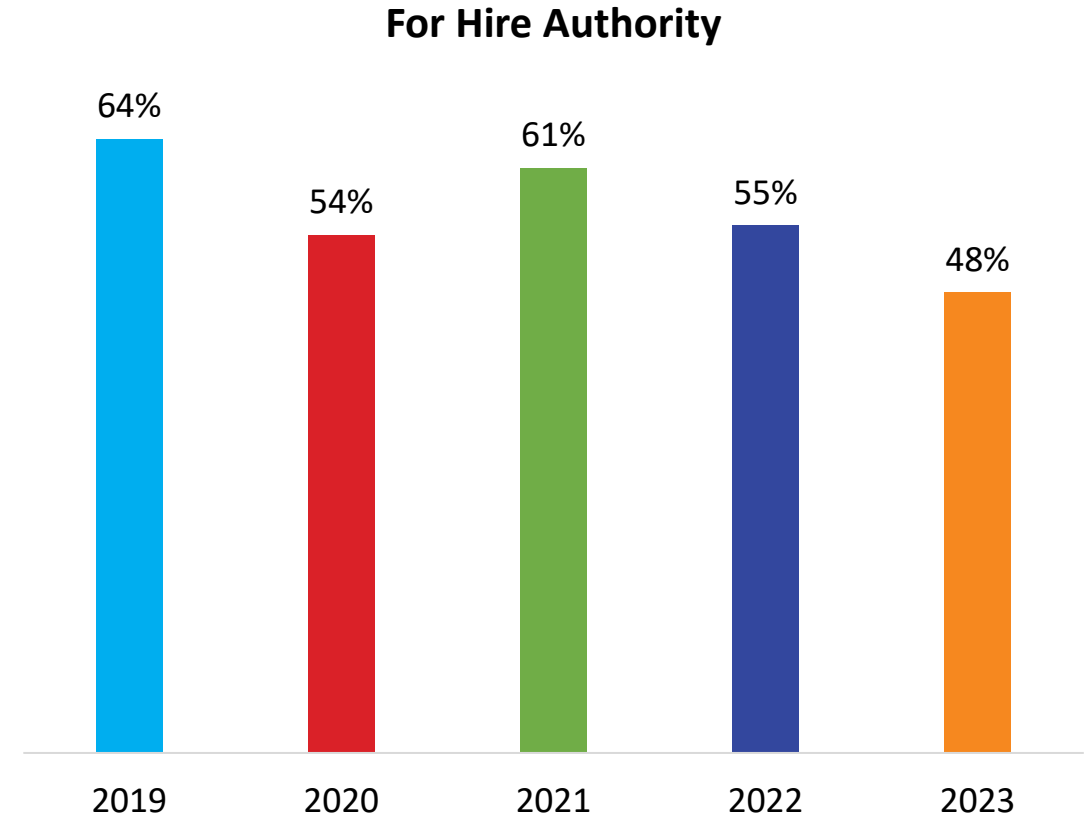
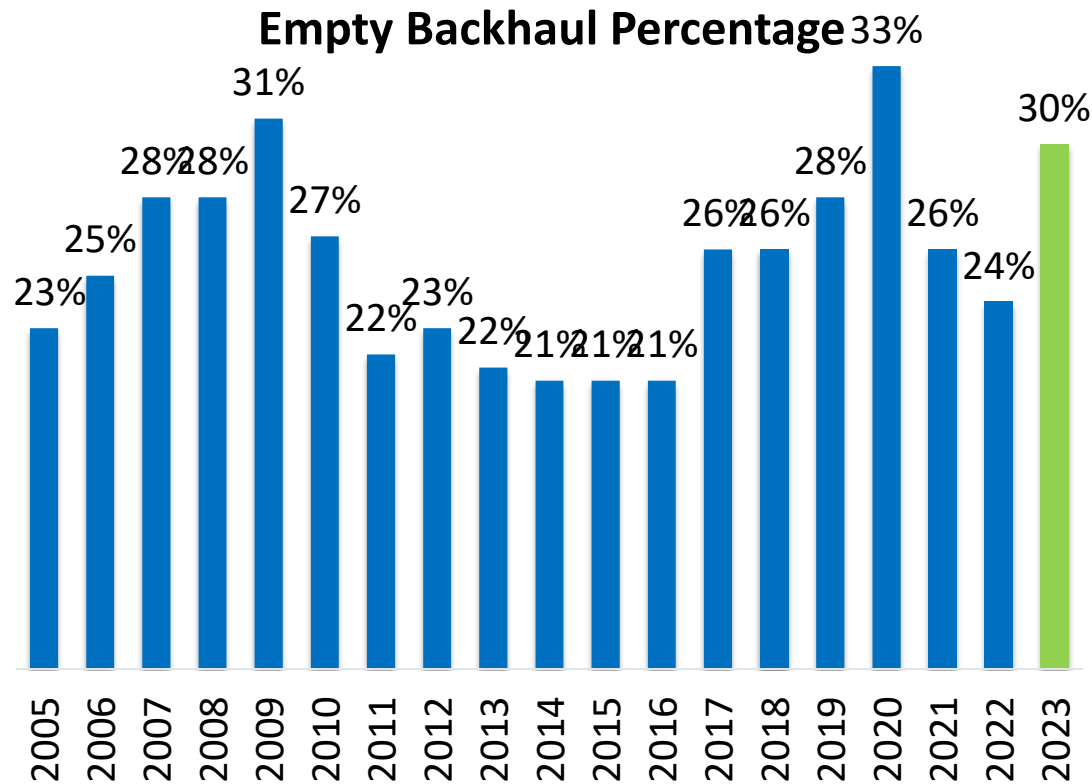
Length of Haul Characteristics



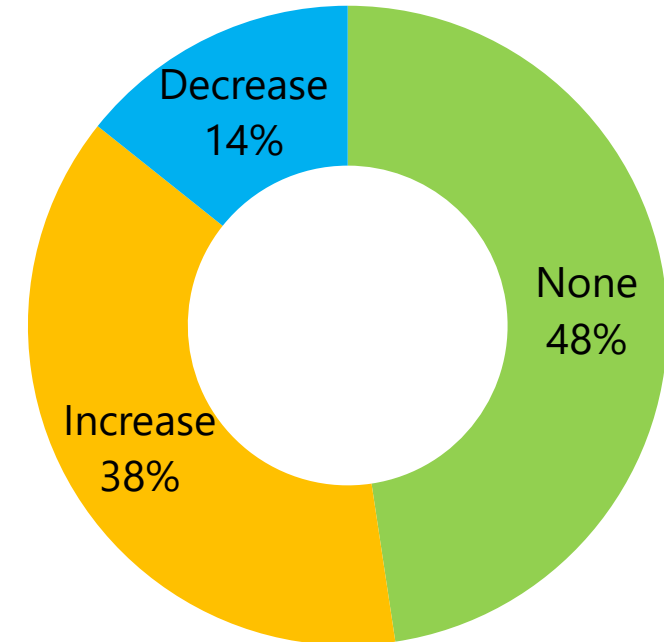
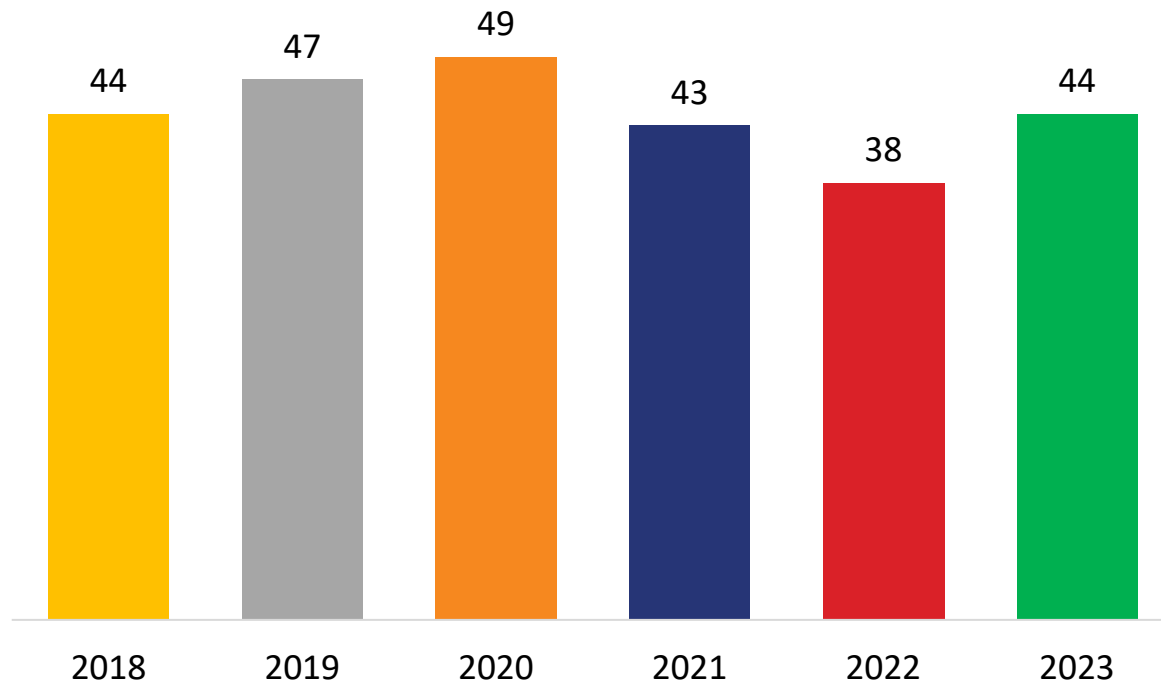
Inbound Freight Movements



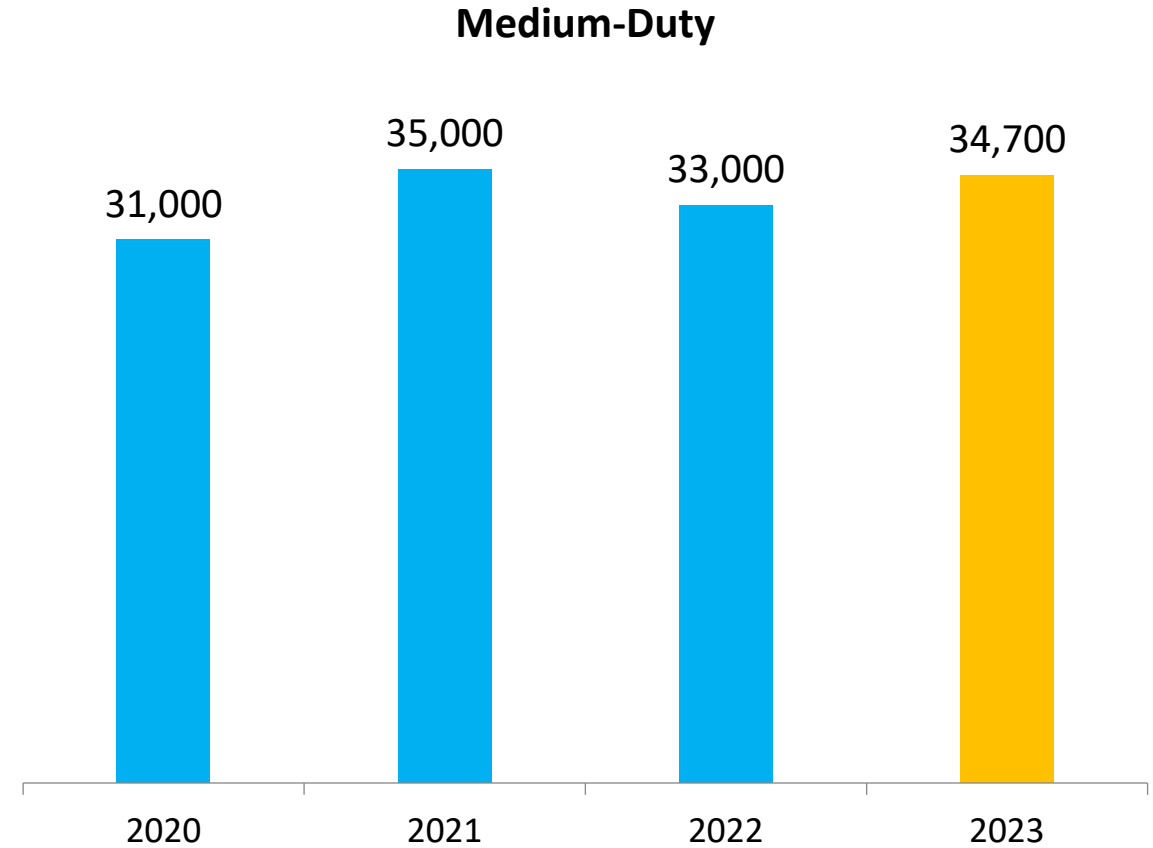
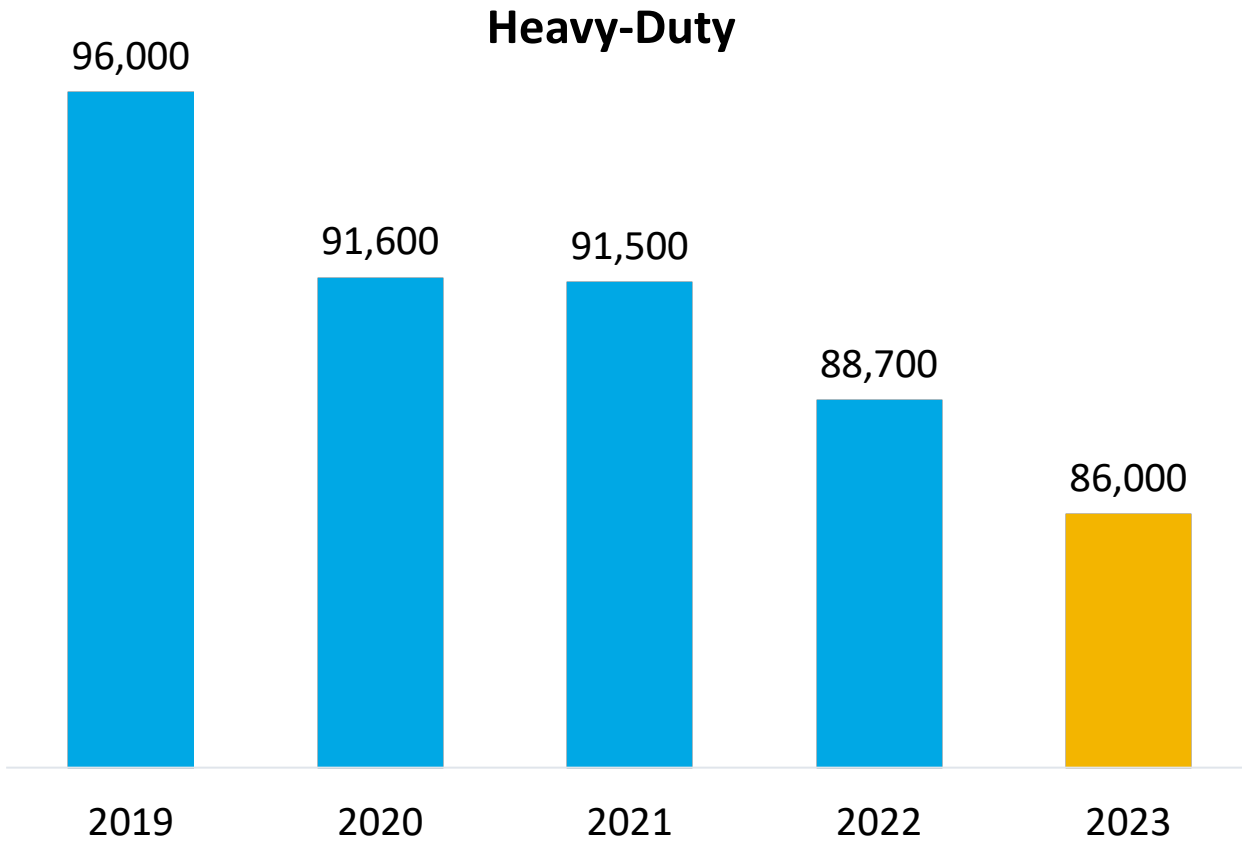
Empty Backhaul Percentage



Multiple Locations



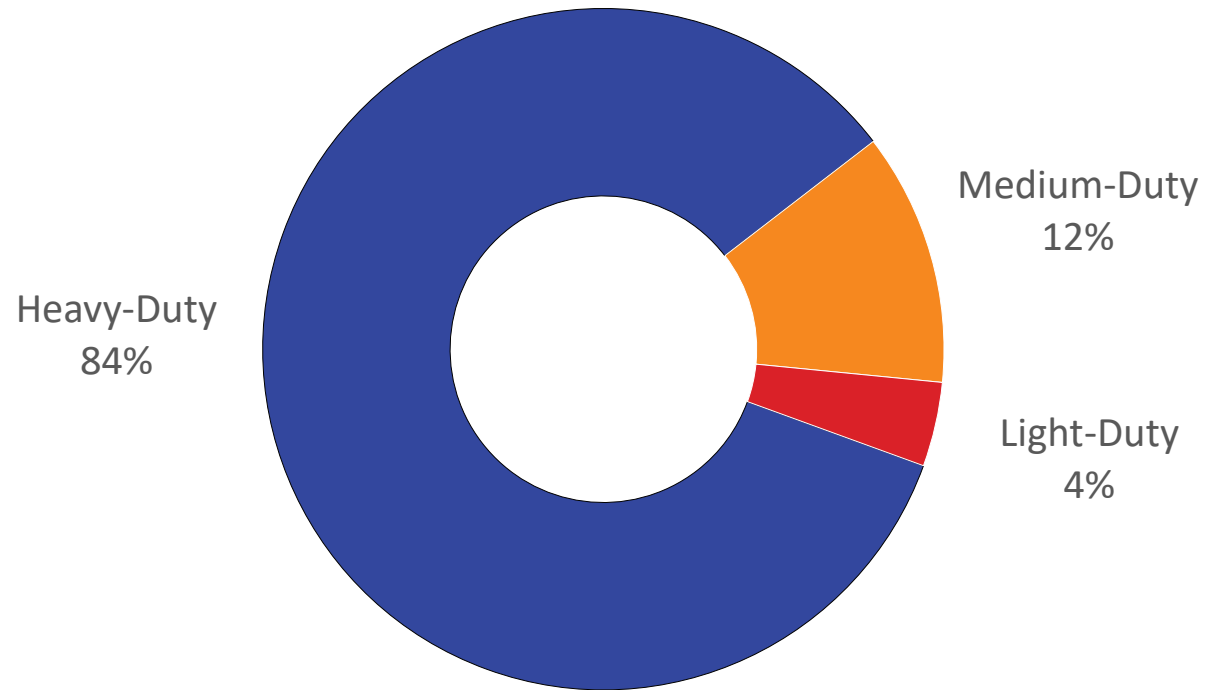
Annual Mileage



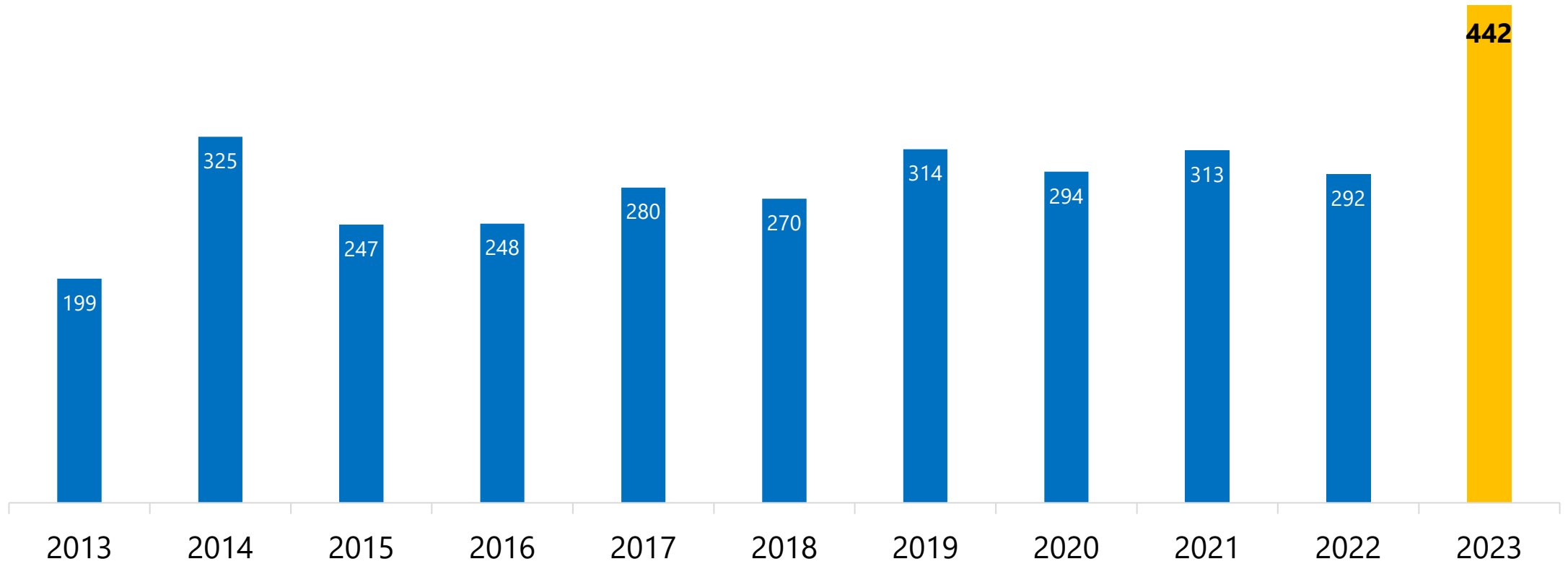
Building the Private Fleet: Equipment Considerations



Fleet Composition



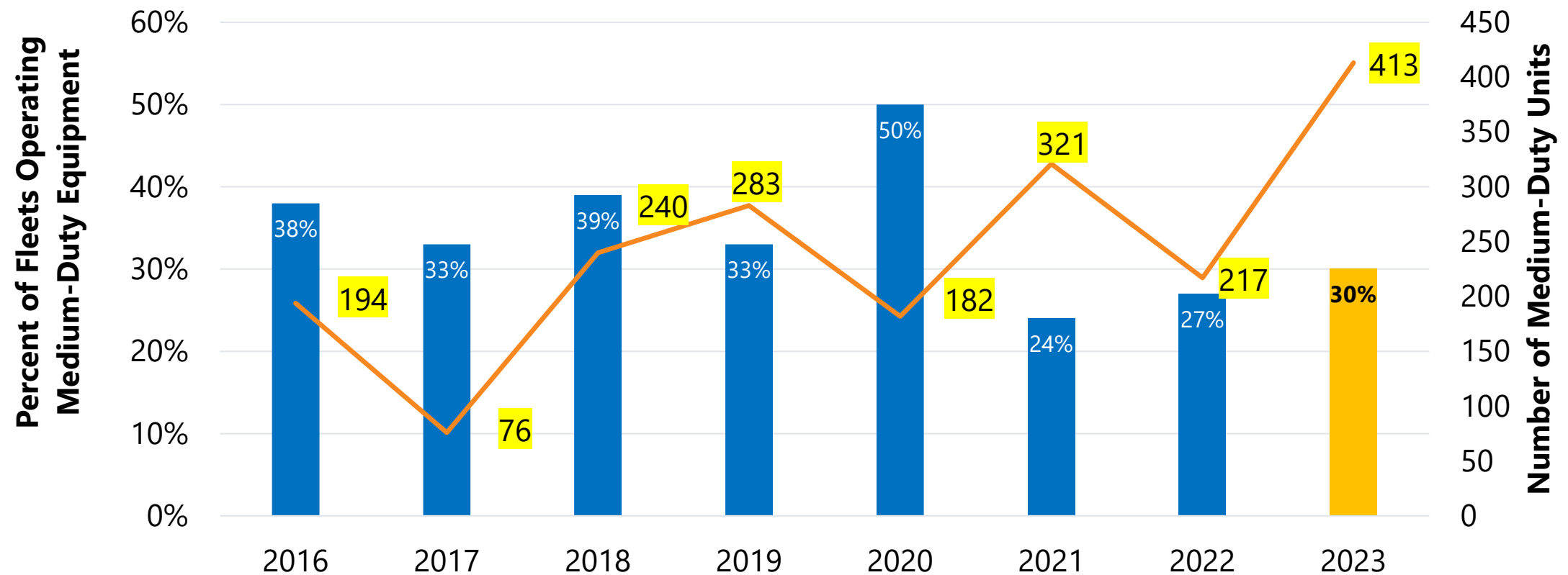
Heavy-Duty Fleet Size



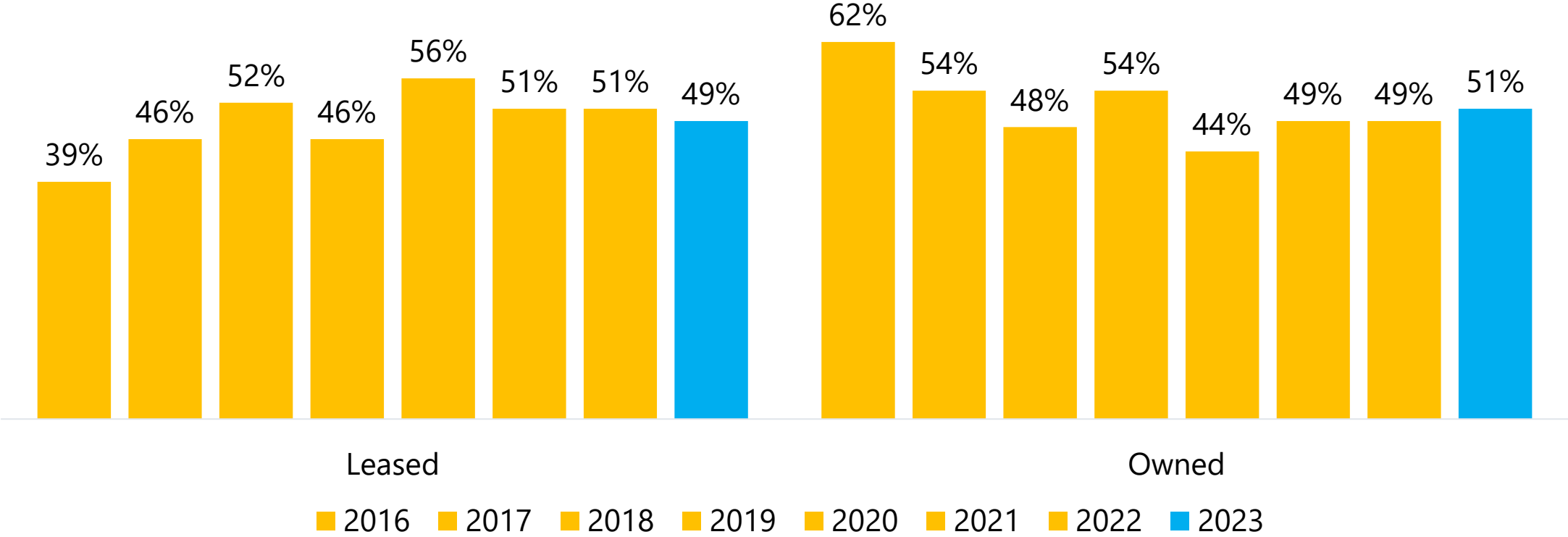
2023

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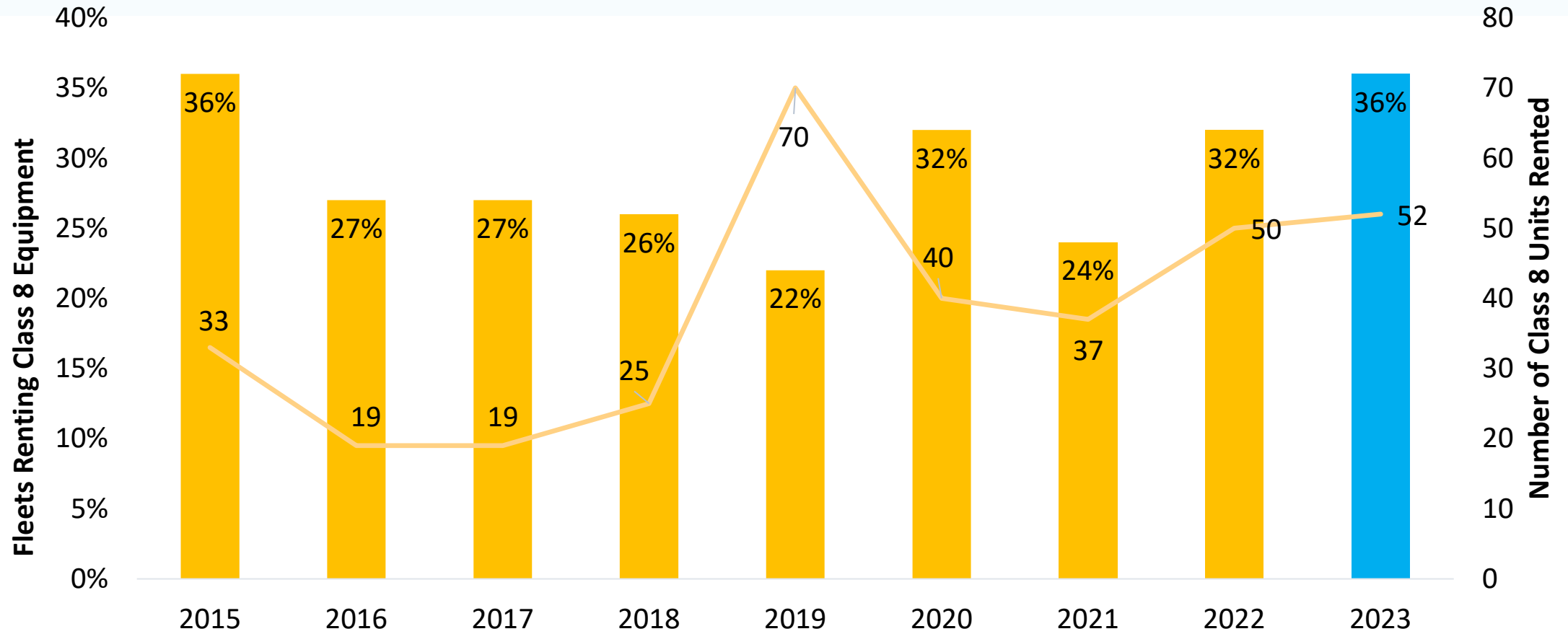
Medium-Duty Units



Lease vs. Buy: HD Population



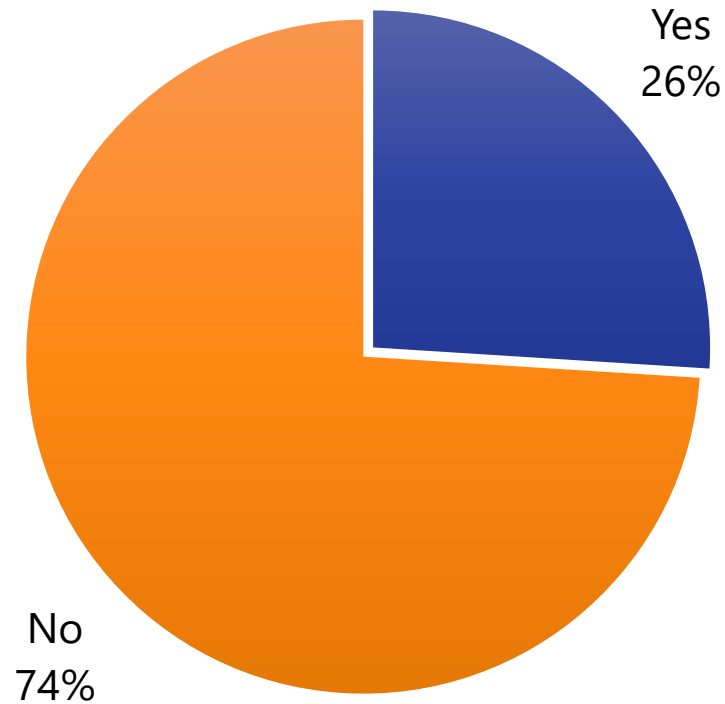
Rental Activity



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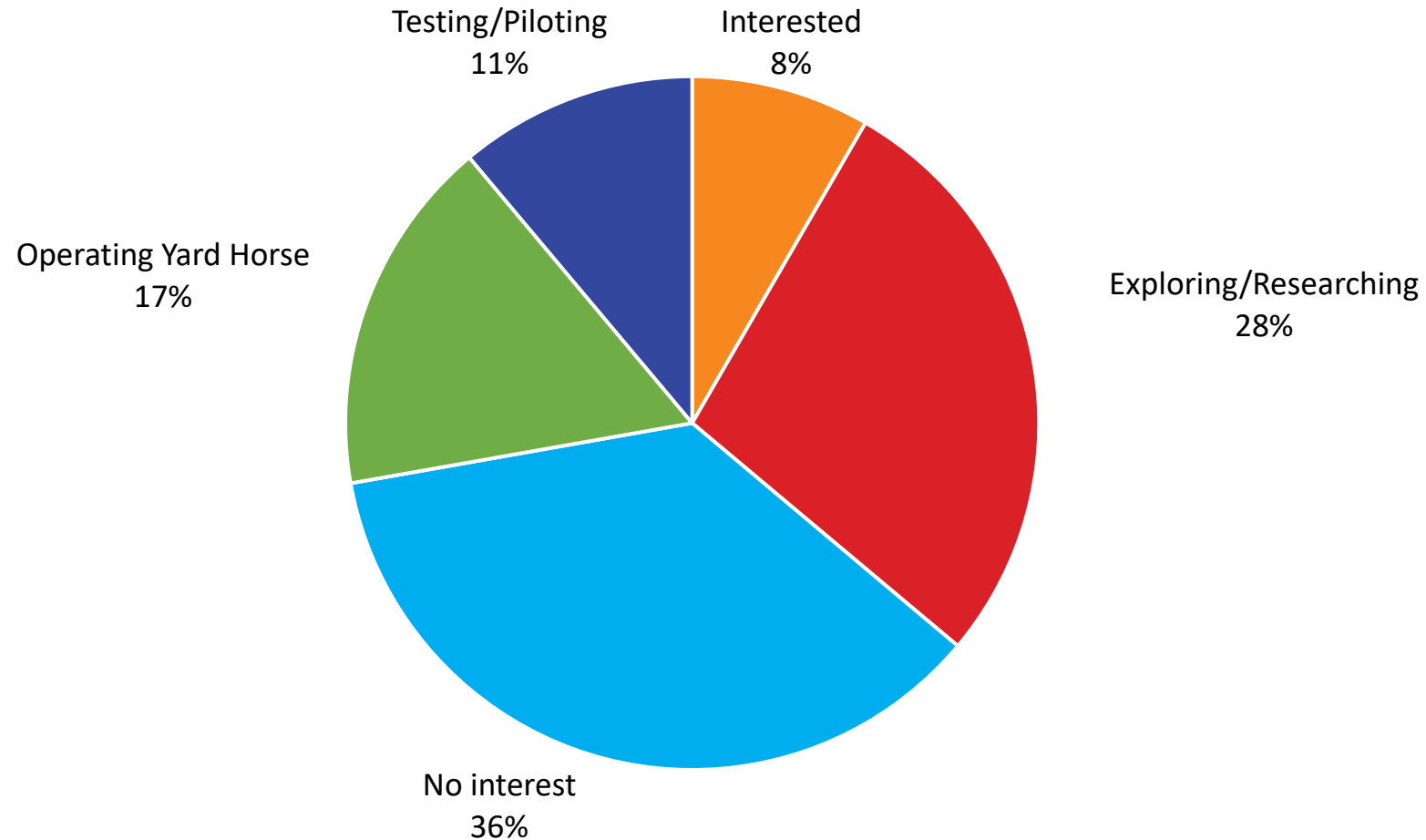
Purchase Used Equipment



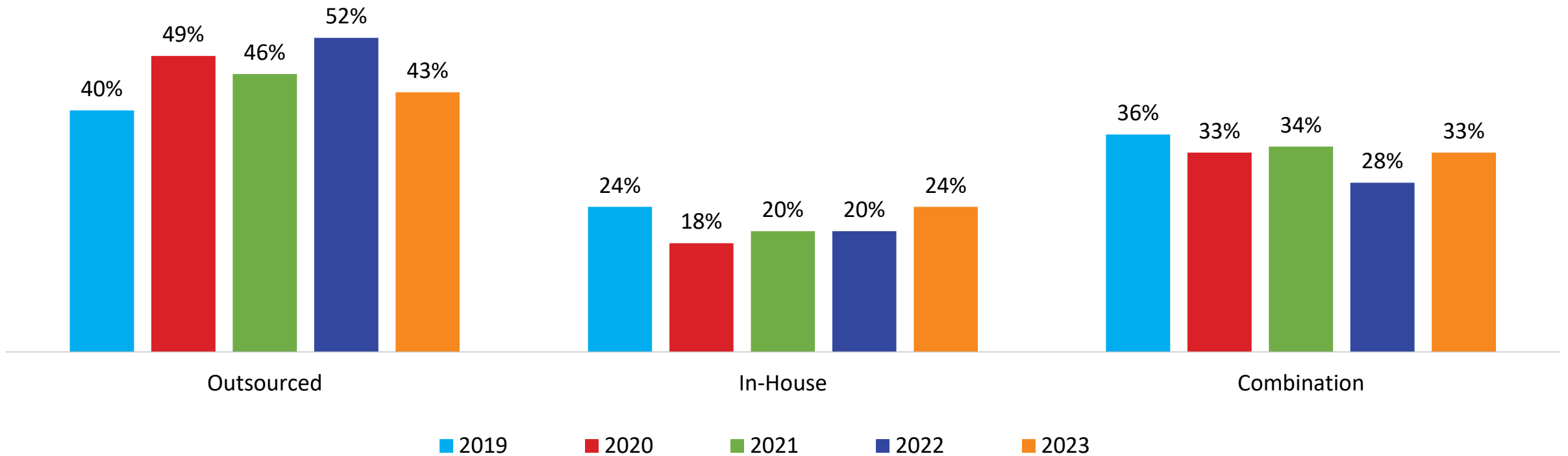
Diesel Dominates Power

- Average MPG = 7.39 MPG
- Alternative power plants comprise a small but growing portion of the overall market
- 17% report that a portion of their fleet is powered by a fuel source other than diesel (more than double year-over-year)
- 4.7% of all Class 8 vehicles are alternatively powered (1.7% last year)
- 14% of Medium-Duty fleets indicate use of such alternatives
- 11% of all Medium-Duty equipment is alternatively powered

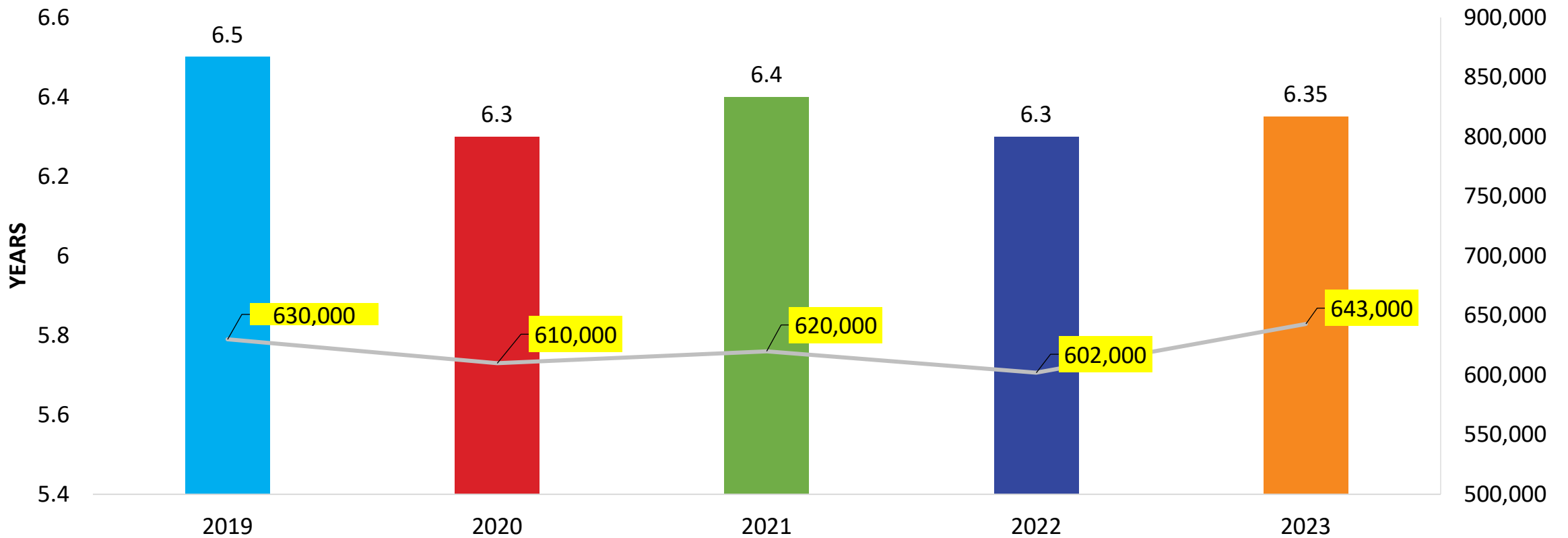
Interest in Electric Vehicles



Where Is Maintenance Conducted?

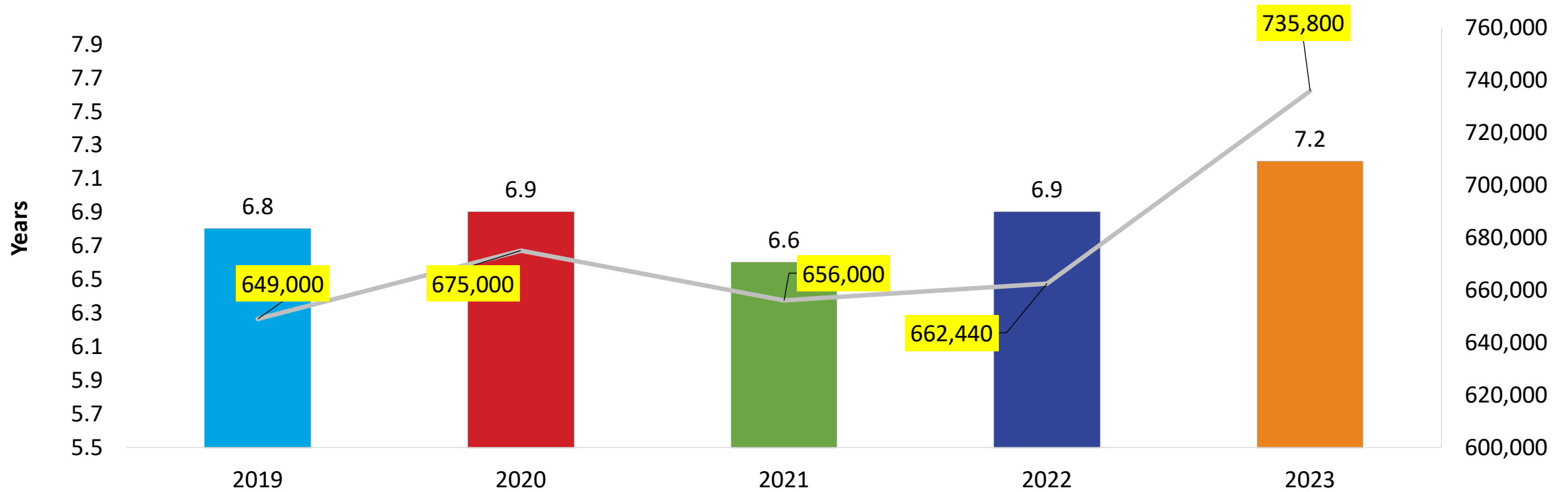


Class 8 Trade Cycles

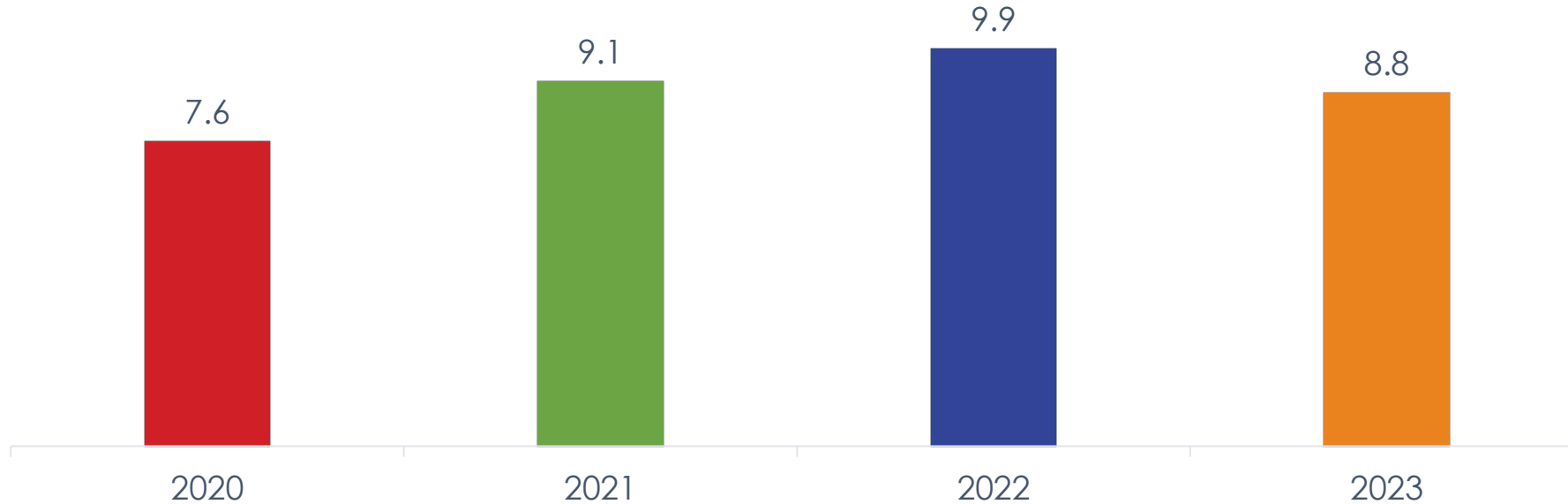


Class 8 Trade Cycles

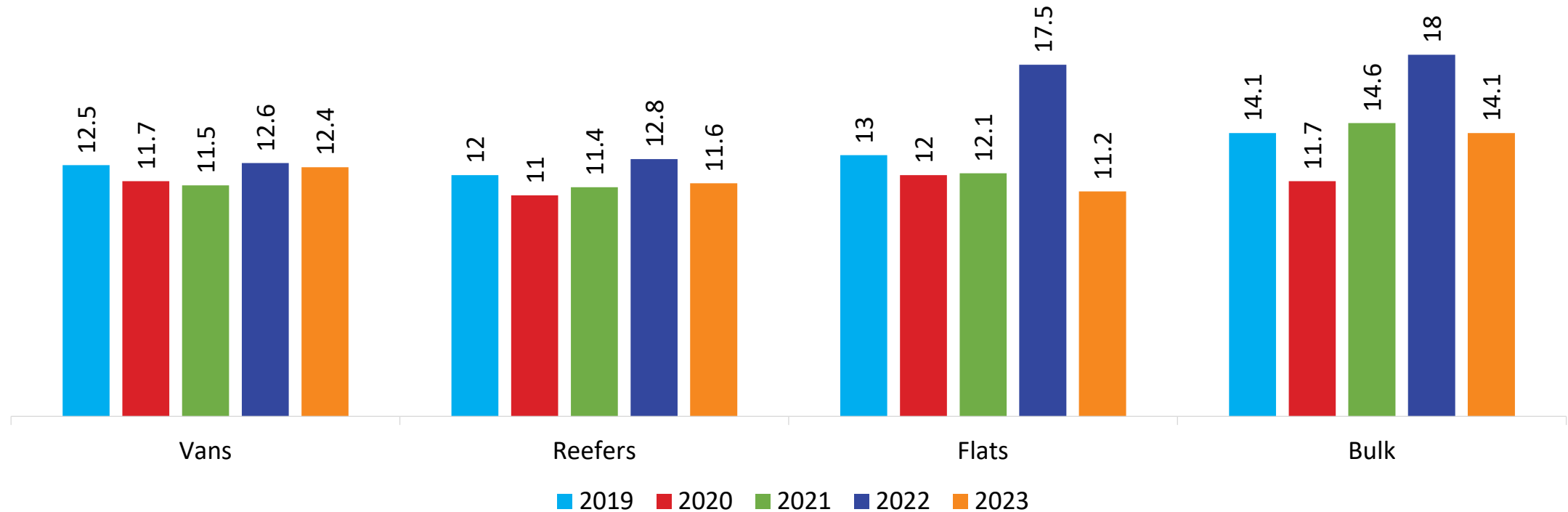
Leasing Removed



Medium-Duty Trade Cycles



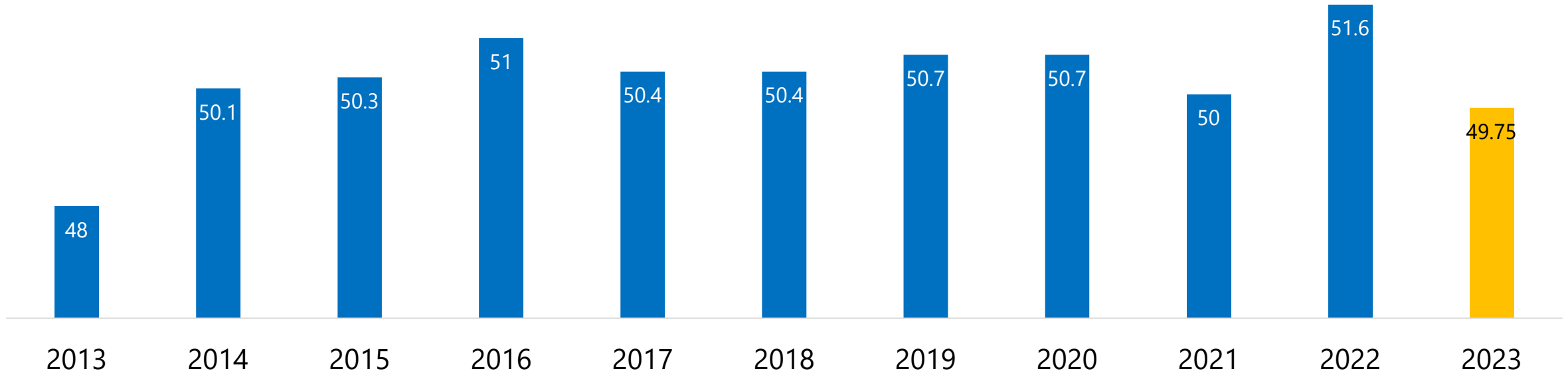
Trailer Trade Cycles



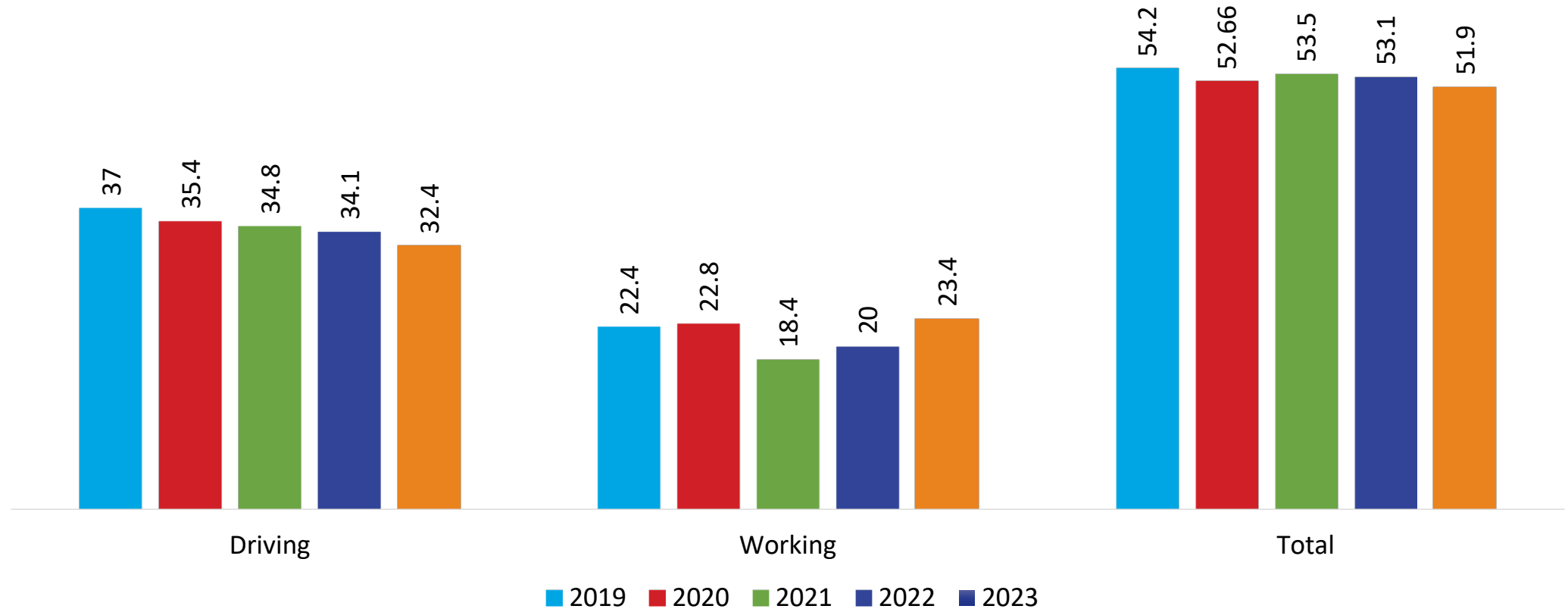
Staffing the Private Fleet



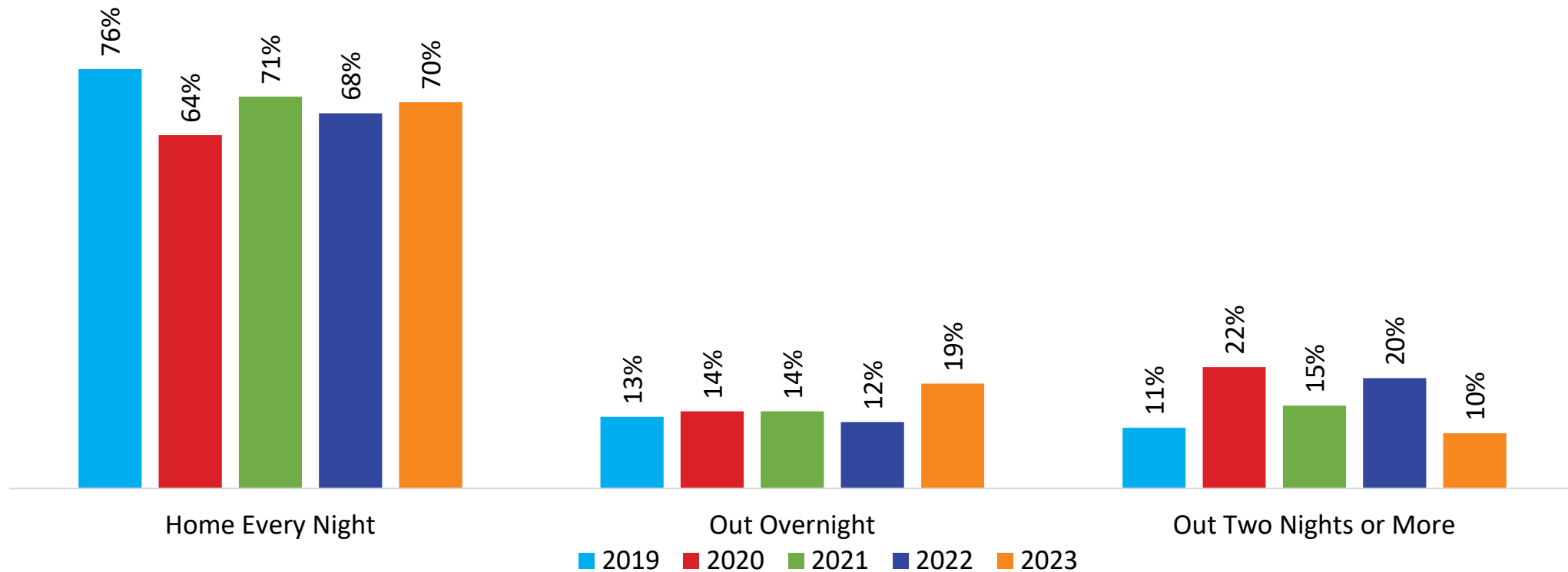
The Aging Driver Workforce



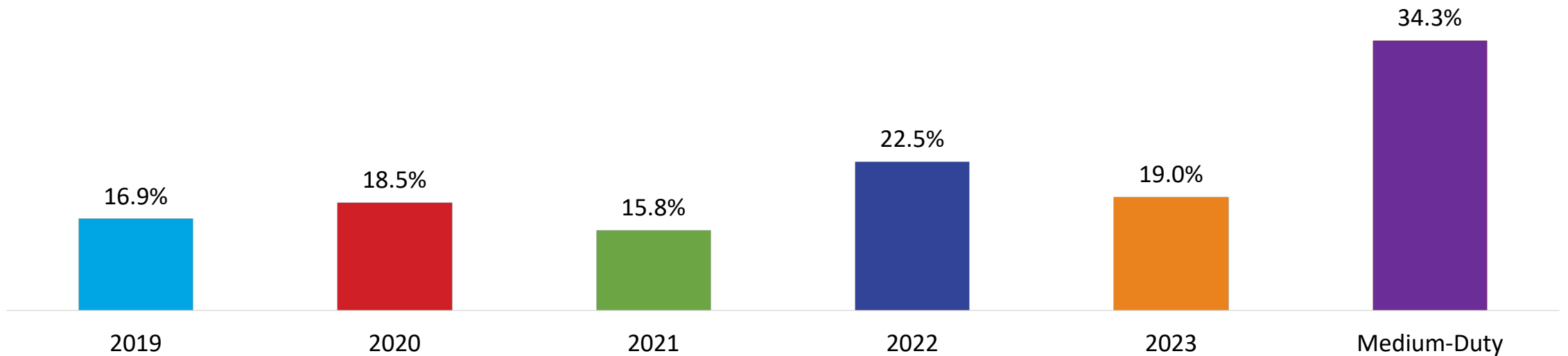
The Typical Driver's Work Week



Home Time



Driver Turnover



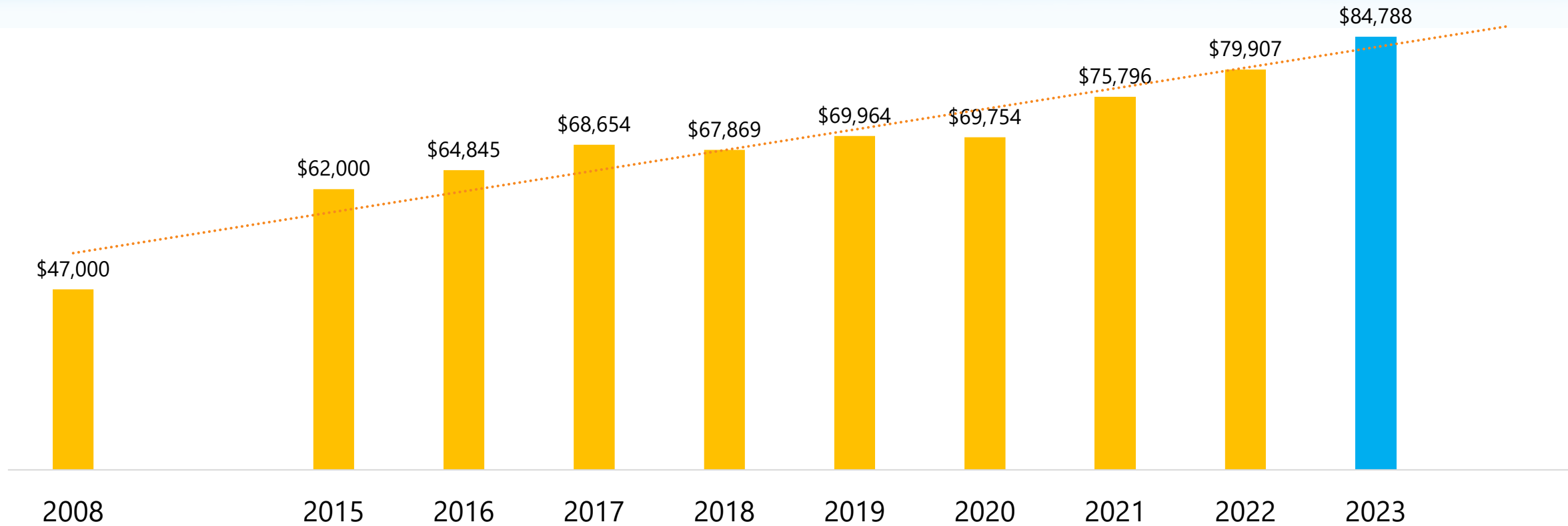
3.3% of fleet equipment sits idle due to lack of drivers in a typical month

Average Cost of Turnover = \$9,748



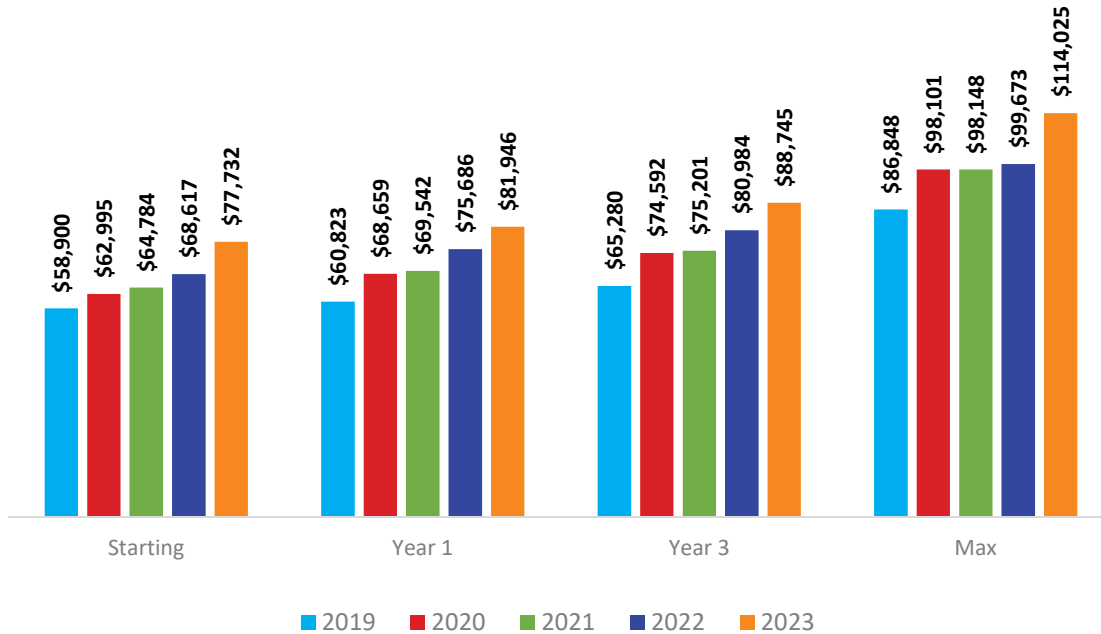
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Average Driver Compensation

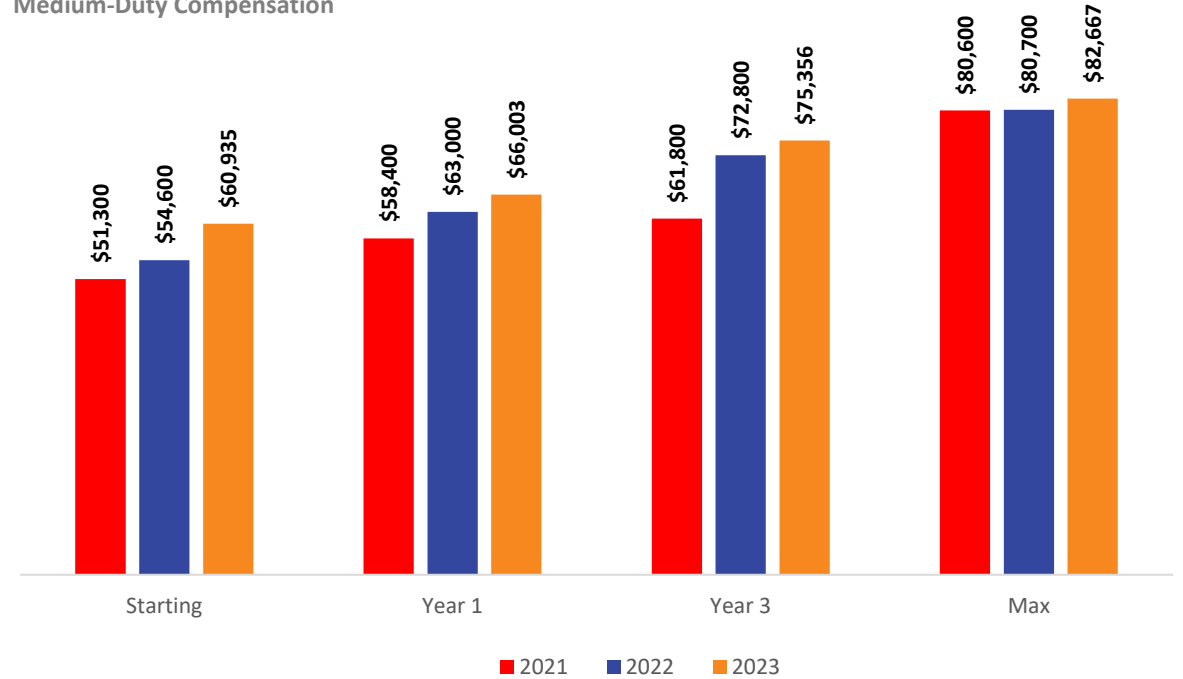


Compensation Levels

Heavy-Duty Driver Compensation



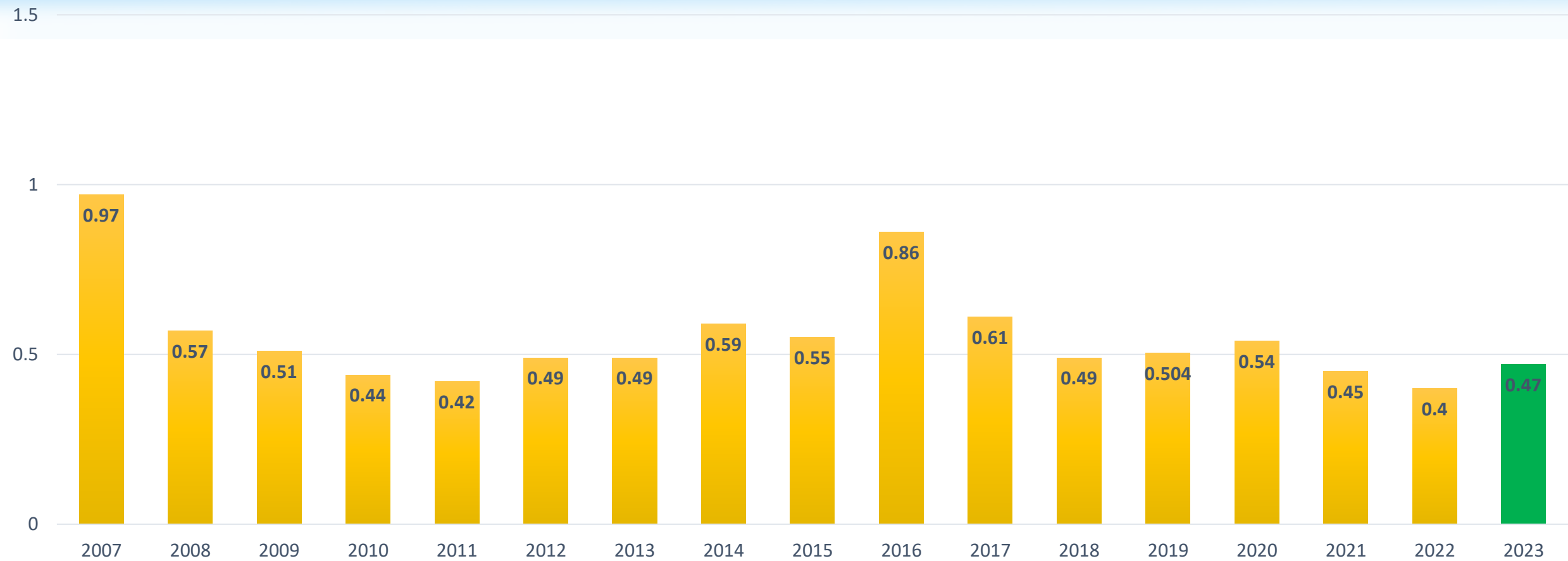
Medium-Duty Compensation



Safety Performance

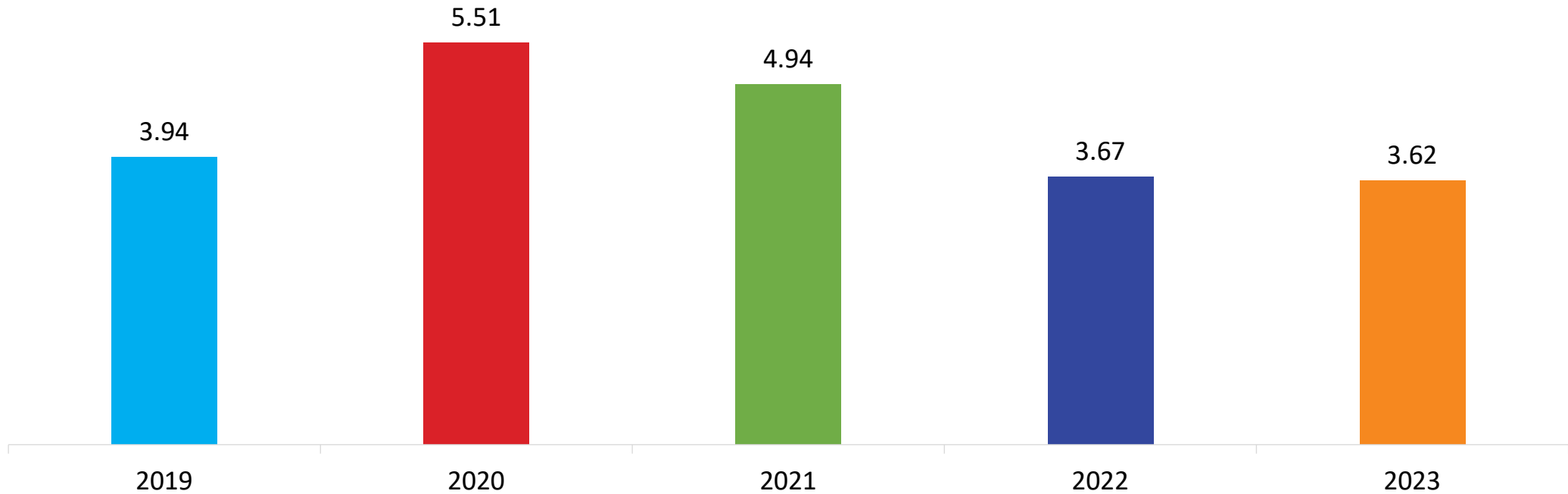


DOT Recordable Accidents



Lost Time Injury Rate

The number of lost time injuries occurring per 200,000 hours worked



Active Safety Technologies

