Enterprise Solutions

**Intermodal**
Best-in-class service and fuel efficiency with the largest private container fleet and most extensive rail network in North America.

**Dedicated**
Partnering with companies of all industries to provide custom-fit fleet solutions that guarantee optimal efficiency and safety, all supported by a team of logistics experts.

**Truckload**
Backed by logistics experts, an industry-leading safety record, well-trained driver core and exceptional service, we optimize and bring scaleable service to our customers’ operations.

**Final Mile**
Managing one of the largest cross dock networks in the United States, we offer specialized delivery and installation solutions.

**Refrigerated**
A wide array of temperature-controlled solutions, from truck-trailer to intermodal container, all tailored to your specific needs.

**Flatbed**
Comprehensive flatbed services that ensure capacity and a safe delivery while driving down cost and increasing efficiency.

**LTL**
Highly customized Less than Truckload solutions of all sizes with our proven consolidation and distribution expertise.

**Single Source**
Utilize our many enterprise services in a single, integrated management system. Put control of the entire supply chain at your fingertips.
Supply Chain Landscape

- Record increase in capacity demands on dwindling supply
- Supply is constrained by demographics and regulations
- Regional supply is seasonally inelastic
- Mode optimization is increasing and competitive
- Shippers are focused on budgets, risks, bottlenecks & tradeoffs
Market Challenges

- Drivers retiring, recruitment deficit and focus on retention
- Government regulations are evolving: CSA, Map21, HOS, CARB
- Risk mitigation from company liability, compliance and capacity
- Equipment age, higher cost basis and availability of capital
- Cost of fuel and the challenge of forecasting budgets
The industry needs to find roughly 96,000 new drivers annually to keep pace with demand. If freight demand grows as it is projected to, the driver shortage could balloon to nearly 240,000, according to ATA data.

Source: ATA
The Market Demand Index (MDI) measures incremental transportation services demand compared to the incremental supply. When a given reading is above a prior years' level, it means there is even more freight demand relative to available capacity.
Consumer Demand

2014 Holiday Conclusions of e-Commerce

- Brick-and-mortar retail sales were down 11%
- Online retail sales were up 21%
- UPS: 45% of its deliveries are tied to e-commerce, and this is expected to be 50% in less than two years

E-Commerce: % of Retail Sales

Sources: Thom Albrecht, CFA BB&T Capi tal Markets Presentation; US Census Bureau for e-Commerce figures; UPS comment from company press release.
Commerce Demand Forecast

- Emphasis on user experience and customer service
- Mobile no longer just an option - integrated set of experiences
- Social media becoming more influential – peer and herd influence
- Same day delivery or faster – gap abandonment opportunities
- Thinning distinction between eCommerce and brick-and-mortar