INBOUND LOGISTICS

TRUCKING PERSPECTIVES 2007

AN IN-DEPTH LOOK AT MOTOR CARRIERS AND THEIR CUSTOMERS

Having options is always a good thing. And in today's domestic freight fray, over-the-road shippers, more than anyone else, understand the importance and value of building flexibility into their networks to accommodate expected and unexpected fluctuations in customer demand and carrier capacity. Given the past difficulties of finding space and managing freight costs, transport buyers rely on motor carriers and third-party intermediaries to extend operational flexibility beyond the loading dock.

A softening market, however, due to a downturn in the U.S. housing market and growing consumer pessimism has resulted in a surplus of equipment and capacity and decreasing consumer demand. And now, U.S. shippers are grateful for the opportunities and options they have available, as they become more judicious and strategic in selecting carriers and negotiating rates.

For the time being, this buyer's market is also forcing motor carriers to further accent their value and enhance their value proposition by investing in and developing innovative services and technologies to best serve both their core interests and customer demands.

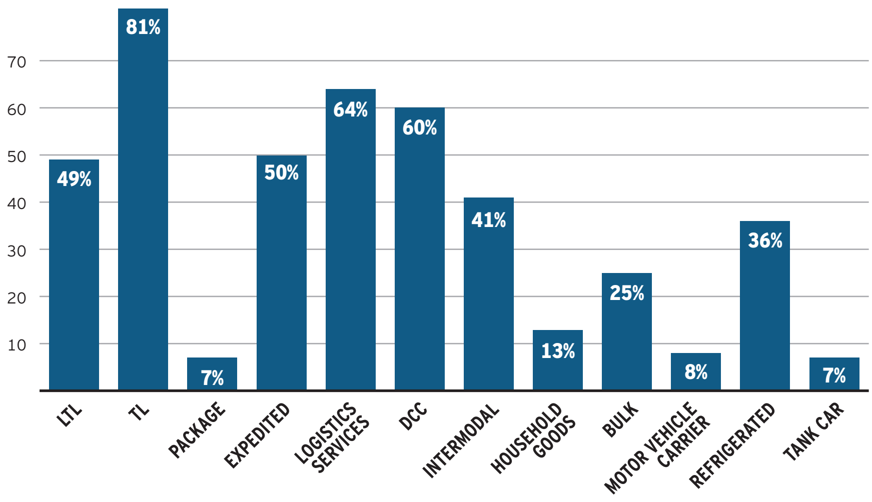
To give definition and shape to this shifting market, as well as a roadmap for where carriers are taking shippers and where shippers want to go, *Inbound Logistics*' presents a two-tiered approach: our Motor Freight Market Insight Survey (MIS) and our annual Top 100 Motor Carriers list. The Motor Freight MIS captures the perspective of both shippers and carrier interests.

First we polled motor freight carriers to see how they are expanding their service portfolios, geographical coverage, and IT capabilities to anticipate and meet the unique and diverse demands of their transportation customers.

Second, we canvassed the shipper community, asking them to identify and comment on the challenges they face in today's market, as well as the opportunities that have surfaced in a buyer's market and how they are harnessing their carrier and intermediary partnerships to drive transportation innovation and efficiency within their respective enterprises.

Complementing this end-to-end panorama of the U.S. domestic freight market is our annual Top 100 Motor Carriers list. This in-depth "who's who" database of U.S.

Figure 1. Truckers provide varied services



SOURCE: Inbound Logistics Motor Freight Market Insight Survey, 2007

over-the-road freight carriers presents a snapshot of the industry's leading players, as well as a benchmark for the services and capabilities transportation buyers need to consider when looking for new partners or evaluating current ones.

CARRIER PERSPECTIVES

Concurrent with last year's data, shippers continue to dictate how carriers go to market and expand existing service portfolios with innovative technologies, logistics capabilities, and new coverage areas. Unlike 2006, however, motor freight companies have considerably less leverage passing along fuel surcharges and other operating expenses to their customers.

As a result, over-the-road carriers have been looking to expand their businesses. Across the board, an overwhelming majority of trucking companies indicate they increased sales – 48 percent show an increase of five percent, and 26 percent show an increase of 10 percent. Freight carriers are expanding their sales initiatives by targeting new customers, with 70 percent indicating they grew their client roster by at least five percent *(see Figure 6, page 64)*.

What is striking, however, given the efforts carriers are making to sell their services to new customers, is how little they are recouping in terms of net profit. The costs of operating in a soft buyer's market, and increased competition among carriers, resulted in a considerable discrepancy on the balance sheets–only 16 percent of respondents indicate revenue surpassing five percent, and a whopping 63 percent report break-even numbers or profit loss.

Carriers cite myriad reasons for these increased operating expenses, with 74 percent indicating "rising driver-related costs," 79 percent saying "price pressure from customers/competition," 53 percent citing "rising fuel costs," 53 percent

Figure 2. How carriers communicate with drivers

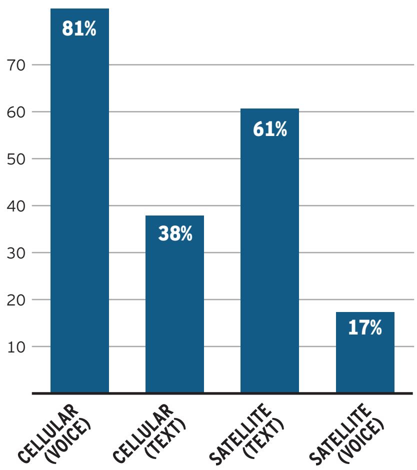
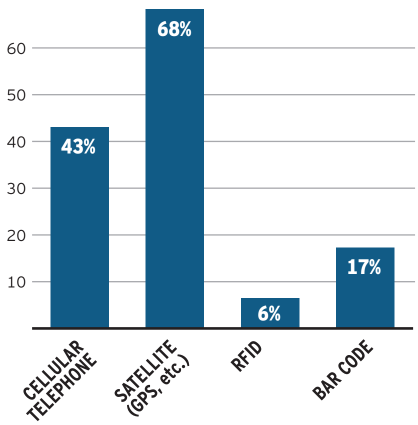


Figure 3. How carriers capture track and trace information



SOURCE: Inbound Logistics Motor Freight Market Insight Survey, 2007

noting "increasing insurance costs and liabilities," and 21 percent saying "new equipment mandates." That carriers face increased pressures from competitors is quite clear, but smaller players with less clout are finding the marketplace especially difficult to navigate.

Smaller carriers and owner operators have traditionally had less leverage passing along fuel-related costs to their customers. In today's marketplace and unlike their customers, they have even fewer options.

When capacity was lean and truck rates were high, shippers invariably played the "partnership" card to facilitate and manage these difficulties. But now that capacity is flush, they are turning to the carriers that offer the lowest rates–which places additional pressures on smaller players without the critical mass and leverage of big carriers. As one trucking company executive commented: "Freight levels are the lowest we've seen in years. It's just not there."

While pricing has become increasingly important to savvy shippers, carriers are perhaps challenged even more with expanding their value proposition beyond the norm. For trucking companies that are specifically trying to keep current shipping clients happy, the need to grow and expand service offerings is obligatory.

To point, 81 percent of carriers polled provide truckload services, with nearly half offering LTL competencies as well *(see Figure 1, page 58)*. As the difficulties in managing end-to-end supply chains become more challenging to shippers, carriers are developing their capabilities beyond just transportation. Value-added offerings such as logistics services are increasingly important to logistics-savvy shippers and consignees, and carriers are meeting the challenge, with 64 percent reporting capabilities in this niche area.

The obstacles of operating in a global marketplace, specifically the demand placed on businesses in the last few years to find alternative strategies and means to deliver product reliably and economically, has forced motor freight companies to expand their service offerings in niche transport responsibilities as well. Shippers are turning to intermodal solutions, mixing rail, road, and water services where possible

to achieve better value. Carriers are responsive to these needs, with 41 percent providing intermodal capabilities.

One way carriers offset pricing pressure is to leverage their IT capabilities to enhance value for existing and prospective customers. Transportation buyers understand the pricing pressures trucking companies face with increased competition, but will still want more "bling for their buck."

And given the democratization of Internet technology, small and large carriers alike can leverage savvy investments in communication and data capture hardware and necessary back-end systems to interface with in-cab systems and create a better network for sharing and communicating real-time shipment data.

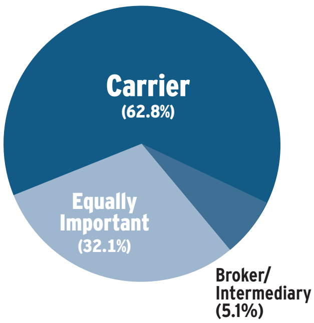
In terms of communicating with truck drivers, cell phones are all the rage with 81 percent of respondents reporting their use, while satellite text (61 percent), cellular text (38 percent), and satellite voice (17 percent) follow suit *(see Figure 2, page 60)*. For capturing data and tracking shipments, 68 percent of carriers report using satellite devices such as GPS units, while 43 percent rely on cellular phones, and 17 percent and 6 percent, respectively, leverage bar codes and RFID *(see Figure 3, page 60)*.

The growing acceptance and use of satellite-based technologies means carriers can convey mission-critical information to shippers and consignees from nearly anywhere in the United States. And transportation buyers are increasingly demanding carriers provide them with regular updates on shipment status, exceptions, and delivery confirmation–75 percent of carriers indicate sending e-mail alerts to identify freight status. This means that motor freight companies also need to have sufficient Web-based capabilities that allow customers easy access to important shipping information and resources.

According to our polling, 76 percent of carriers offer Web-based track and trace capabilities; more than half provide activity management reports and online claims filing; and 44 percent have pricing and routing information on their Web site.

Following on a trend seen elsewhere in the logistics and transportation sectors, carriers are still overwhelmingly wary about investing in RFID technology, with only 11 percent of respondents acknowledging support and competency at the SKU level, and 42 percent reporting that it was a future initiative. By contrast, 31 percent of carriers offer bar-code support, and another 31 percent indicate they intend to offer capabilities.

Figure 4.
Which is more important to you, your relationship with your carrier or with your broker/intermediary?



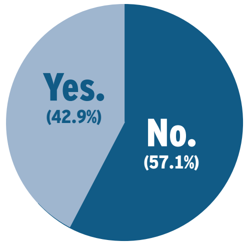
SOURCE: Inbound Logistics Motor Freight Market Insight Survey, 2007

If shippers continue to warm to RFID technology, which industry pundits have been speculating about for some time, carriers may be equally cautious about investing in an emerging technology and a potentially obsolete one.

Carriers ultimately go where their customers go, and as globalization continues to place additional pressures on inbound specifiers, U.S. consignees have increasingly looked north and south of the border for cheaper and more reliable options to move product inbound from Asia.

Figure 5.
Did you switch carriers recently?

SOURCE: Inbound Logistics Motor Freight Market Insight Survey, 2007



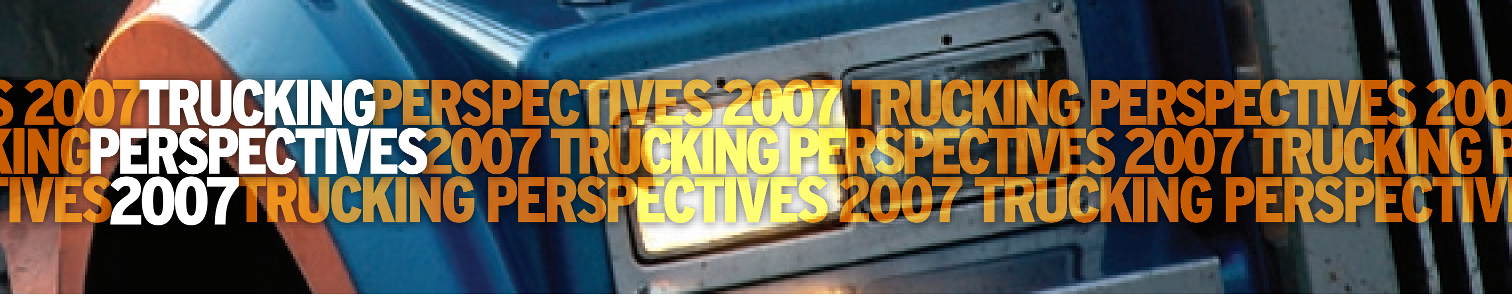
As a result, the importance of coordinating freight transportation between Canada, the United States, and Mexico has only increased. Among carriers surveyed, 32 percent operate throughout North America, with 35 percent serving the United States only, 25 percent targeting the United States and Canada only, and 1 percent offering service between the United States and Mexico only. Compared to past years, there appears to be more parity among carriers serving these niche geographic regions.

Of the surveyed carriers who serve the United States only, 58 percent offer truck services nationwide, while 29 percent and 13 percent provide regional and multi-regional coverage respectively. Seven percent report international coverage.

SHIPPER PERSPECTIVES

While transport buyers may have the flexibility of being more discrete in how they vet prospective carrier partners, they, too, face increasing pressures from shareholders and customers to grow market share and enhance service requirements. With consumer demand waning, shippers need to be even more adept at integrating domestic demand chains with offshore supply networks and finding carriers capable of going the last mile and the extra mile.

Over the past few years, increasing costs and lessening capacity demanded shippers work more collaboratively with their carriers. Transport buyers invariably had two options: either develop better working relationships with their



partner carriers, or find brokers capable of managing negotiations and arrangements on their behalf.

Perhaps resisting the urge to add another link in the domestic chain, shippers overwhelming value direct communication with truckers, with 63 percent of respondents reporting their relationships with carriers are most important, 32 percent indicating their relationships with broker/intermediaries and carriers are equal, and only five percent siding with brokers/intermediaries exclusively *(see Figure 4, page 62)*. Value-added services carriers offer also strengthened customer relationships.

THE VALUE OF RELATIONSHIPS

Still, even with a soft market, freight transport buyers find value in third-party relationships that many entered into when capacity and cost constraints began impeding their own ability to properly handle transportation management responsibilities in-house.

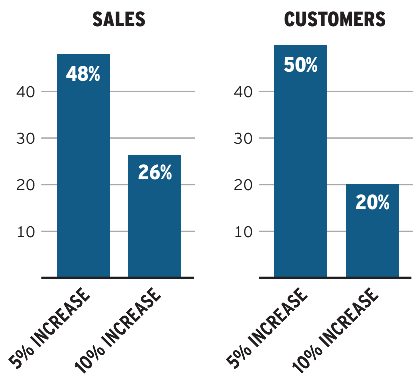
Seasonality and demand-driven dynamics inevitably require a benchmark to be effective and ensure that the customer is getting the appropriate value for level of service rendered. Smart shippers are bound to keep and maintain relationships with brokers and intermediaries even during flush times. There is similar efficacy, now that freight volumes have lessened, to leverage brokers to pick up backhaul capacity in markets where there is a considerable imbalance in inbound and outbound freight moves.

Carriers, in turn, are helping shippers maximize their networks by working more closely with them to share gains.

Clearly, carriers that are unable to live up to quality and service requirements are in a much more vulnerable position than just one year ago when customers had less leverage finding space.

To point, in 2006, less than 40 percent of shippers polled acknowledged switching carriers. This year, 43 percent reported changing carrier partners (*see Figure 5, page 62*).

Figure 6. Reported increases in sales and customers, 2006



SOURCE: Inbound Logistics Motor Freight Market Insight Survey, 2007

In a soft market, pricing can be a determinant, especially if a buyer is diligent in the rate negotiation process. Some of this discrepancy can be attributed simply to natural movement in a loose market. But carriers today are equally cognizant that any failure to meet agreed-upon shipment deadlines could also contribute to a lost contract. Among shippers that dropped carriers for new ones, 50 percent cited service issues, 40 percent indicated price considerations, and 10 percent went looking for more reliable capacity.

Shippers identified numerous reasons for switching carriers, including:

- Failure to live up to contract terms and insufficient supply.
- Inability to make pickups on a regular basis.
- Better capacity and pricing opportunities.
- Continuing need to improve core carrier group.

When asked what would be the "last straw" that would make them consider dropping a carrier, shippers were mixed in their responses. Among their reasons: multiple instances of service failures, overbooking capacity, "back selling" their customers, and damaged goods.

As these comments suggest, shippers by and large still value service and quality over cost because ensuring a product is always delivered on time is difficult to place a value on.

For some savvy shippers, now is also the time to reevaluate logistics and supply chain strategies, and leverage carrier partners and their capabilities to facilitate this. By example, a flush market presents an ideal context for shippers to master control of their inbound logistics processes, unbundle freight that vendors control, save money, create even more options, and ultimately harness greater control over transportation management processes.

THE TOP 100 MOTOR CARRIERS 2007 »

Our Top 100 Motor Carriers list is a good place to shift gears, slow down, and take account of the motor freight carriers paving the road for innovation and change within the trucking industry. *IL* editors pared down this year's roster by evaluating more than 200 surveys, as well as conducting personal interviews via phone and e-mail.

The Top 100 list presents a uniform guide that celebrates the diversity of the U.S. motor freight market, ranging from large LTL and TL carriers with global inroads to regional owner/operators that specialize in last-mile delivery.

Together, the Motor Freight Market Insight Survey and Top 100 Motor Carriers list present a holistic perspective of the trucking industry, from demand to supply, and all points in between.

TOP 100 MOTOR CARRIERS 2007

*CLAIMS RATIO Net claims payout divided by total revenue
*FLEET SIZE Tractors only, does not include trailers
DNR Did Not Report

PRIMARY TYPES OF SERVICE

COMPANY NAME / WEB ADDRESS	PHONE	OPERATING AREA(S)	LTL	Truckload	Package	Expedited	Logistics Services	DCC	Intermodal	Household Goods	Bulk	Motor Vehicle Carrier	Refrigerated	Tank Car	White Glove	Final Mile
A. Duie Pyle www.pyleco.com	800-523-5020	US/Canada only	●	●		●	●									
AAA Cooper www.aaacooper.com	334-671-3153	US only	●					●								
ABF Freight System www.abf.com	479-785-8700	North America	●	●		●	●		●	●	●		●	●	●	●
Advantage Transportation www.backhauler.com	800-964-1209	North America	●	●		●	●	●	●		●	●	●			
Alvan Motor Freight www.alvanmotor.com	800-632-4172	US/Canada only	●													
Anderson Trucking Service www.ats-inc.com	800-328-2307	North America		●		●	●	●								
Arnold www.arnoldtrans.com	800-285-1810	US only		●												
Arrow Trucking Co. www.arrowtrucking.com	800-759-2009	North America		●		●	●	●		●	●					
Averitt Express www.averittexpress.com	800-283-7488	North America	●	●	●	●	●	●	●				●			
Barr-Nunn Transportation www.barr-nunn.com	515-371-2252	US only		●		●		●								
Bison Transport www.bisontransport.com	800-GOBISON	North America		●	●	●	●	●	●	●	●	●	●			
Boyd Bros Transportation www.boydbros.com	800-633-1502	US/Mexico only		●		●	●	●								
Bulkmatic Transport Co. www.bulkmatic.com	219-972-7630	North America									●					
Cardinal Logistics www.cardlog.com	704-786-6125	US/Canada only					●	●								●
Cargo Transporters www.cgor.com	828-459-3206	US only		●												
Carlile www.carlile.biz	253-874-2633	US/Canada only	●	●	●	●	●	●	●	●	●	●	●	●		
Celadon Trucking Services www.celadontrucking.com	800-CELADON	North America		●			●	●								
Central States Trucking Co. www.cstruck.com	630-595-9876	US only				●	●	●	●							
Challenger Motor Freight www.challenger.com	800-265-6358	North America	●	●		●	●	●	●				●			
Con-way Freight www.con-way.com/freight	734-769-0203	North America	●					●								

COMPANY NAME	SPECIALIZATION	OPERATING RATIO	CLAIMS RATIO*	ON-TIME DELIVERY	FLEET SIZE*	NUMBER OF TERMINALS	UNION STATUS	PUBLIC OR PRIVATE
A. Duie Pyle	Industrial & chemical	DNR	.34%	99.2%	635	14	N	PRIV
AAA Cooper	Regional LTL	94.3%	.61%	97.0%	2,200	81	N	PUB
ABF Freight System	National & international transportation solutions	92.5%	.93%	DNR	4,000+	290	U	PUB
Advantage Transportation	Third-party logistics	DNR	2%	98.6%	DNR	27	N	PRIV
Alvan Motor Freight	Industrial & commercial	99.0%	.26%	98.8%	375	14	U	PRIV
Anderson Trucking Service	Dry van, pad wrap, flatbed, furniture consolidation	92.0%	DNR	DNR	1,200	8	N	PRIV
Arnold	Regional & dedicated TL services	DNR	.01%	98.0%	1,550	6	N	PUB
Arrow Trucking Co.	Oilfield and oilfield-related products	97.0%	DNR	DNR	1,400	6	N	PRIV
Averitt Express	All markets	DNR	DNR	DNR	4,300	100	N	PRIV
Barr-Nunn Transportation	Dry van freight - consumer products, building materials	91.0%	DNR	99.0%	680	3	N	PRIV
Bison Transport	Paper, refrigerated & dry goods	94.0%	.38%	96.0%	900	5	N	PRIV
Boyd Bros Transportation	Steel, building materials, cable, pipe, tubing, lumber	93.0%	.80%	99.5%	1,006	6	N	PRIV
Bulkmatic Transport Co.	Rail-to-truck transfer	95.4%	1%	95.0%	473	42	N	PRIV
Cardinal Logistics	Dedicated, warehousing, technology, logistics mgmt.	94.0%	.30%	99.5%	1,802	124	N	PRIV
Cargo Transporters	Dry van	98.0%	DNR	98.0%	450	1	N	PRIV
Carlile	Transportation	95.0%	<0.5%	95.0%	200+	10	N	PRIV
Celadon Trucking Services	Transportation to/from Mexico	92.0%	DNR	98.0%	2,900	15	N	PUB
Central States Trucking Co.	FAK	DNR	DNR	96.0%	200	2	N	PRIV
Challenger Motor Freight	Consumer goods, auto parts, food & beverage, hazmat	DNR	.92%	98.5%	1,500	6	N	PRIV
Con-way Freight	DNR	95.0%	.97%	98.0%	7,786	460	N	PUB

TECHNOLOGY SERVICES

COMPANY NAME	Driver Communication: Cellular Voice	Cellular Text	Satellite Voice	Satellite Text	Visibility Capture: Cell Phone	Satellite	Bar Codes	RFID	Online / Web Services: Web Track/Trace	E-mail Alerts	Web Pricing/Routing	Logistics Web Tools	SKU/Pallet Bar Codes
A. Duie Pyle			●	●		●			●	●	●	●	
AAA Cooper	●	●							●	●	●	●	
ABF Freight System									●	●	●	●	
Advantage Transportation	●	●		●	●	●			●	●	●	●	
Alvan Motor Freight	●	●					●		●	●	●	●	●
Anderson Trucking Service				●		●			●	●	●	●	
Arnold	●			●		●			●				
Arrow Trucking Co.	●			●		●			●	●	●		
Averitt Express				●		●	●		●	●	●	●	
Barr-Nunn Transportation	●			●		●			●	●			
Bison Transport				●		●	●	●	●		●	●	●
Boyd Bros Transportation	●			●		●			●	●		●	
Bulkmatic Transport Co.				●		●				●			
Cardinal Logistics	●	●	●	●	●	●	●		●	●		●	●
Cargo Transporters				●		●			●	●			
Carlile	●	●	●	●	●	●	●		●	●	●	●	●
Celadon Trucking Services	●			●		●			●			●	●
Central States Trucking Co.	●	●								●			
Challenger Motor Freight				●		●			●	●	●	●	●
Con-way Freight	●			●			●		●	●	●	●	

Information supplied by trucking companies. Where data was not provided, historical and web site information was used.

TOP 100 MOTOR CARRIERS 2007

PRIMARY TYPES OF SERVICE

COMPANY NAME / WEB ADDRESS	PHONE	OPERATING AREA(S)	LTL	Truckload	Package	Expedited	Logistics Services	DCC	Intermodal	Household Goods	Bulk	Motor Vehicle Carrier	Refrigerated	Tank Car	White Glove	Final Mile
Covenant Transport Group www.covenanttransport.com	800-974-8332	US only		●		●	●	●					●			
CR England www.crengland.com	801-972-2712	US only	●	●					●				●			
Crete Carrier Corporation www.cretecarrier.com	800-998-8000	North America	●										●			
CRST International www.crst.com	800-204-9607	North America				●	●	●								
Daily Express www.dailyexp.com	800-733-2459	US/Canada only					●									
Dart Transit www.dart.net	800-366-9000	US only				●	●	●	●							
Daylight Transport www.dylt.com	800-468-9999	North America	●			●	●									
Dayton Freight Lines www.daytonfreight.com	937-415-1715	US/Canada only	●			●	●									
Epes Carriers www.epescarriers.com	336-665-1553	US only	●	●		●	●	●					●			
Estes Express Lines www.estes-express.com	804-353-1900	International	●			●	●	●	●						●	●
Evans Network of Companies www.evansdelivery.com	570-385-9048	US only				●	●	●	●				●			
FedEx Custom Critical customcritical.fedex.com	800-762-3787	US/Canada only				●							●		●	
FedEx Freight www.fedex.com	866-393-4585	International	●			●	●					●				
FedEx Ground www.fedex.com	800-GO-FEDEX	North America			●											
FFE Transportation Services www.ffeinc.com	800-569-9200	North America	●	●			●	●	●				●			
FLS Transportation Services www.flstransport.com	800-739-0939	US/Canada only	●			●	●		●				●			
FST Logistics www.fstlogistics.com	614-529-7900	US only	●			●	●	●					●		●	
Gainey Corporation www.gaineycorp.com	800-859-4072	US/Canada only				●		●			●		●			
Givens Transportation www.givens.com	800-446-8195	US only	●			●	●	●	●							
Gordon Trucking www.gordontrucking.com	800-426-8486	US/Canada only				●	●	●	●	●			●			

***CLAIMS RATIO** Net claims payout divided by total revenue
***FLEET SIZE** Tractors only, does not include trailers
DNR Did Not Report

COMPANY NAME	SPECIALIZATION	OPERATING RATIO	CLAIMS RATIO*	ON-TIME DELIVERY	FLEET SIZE*	NUMBER OF TERMINALS	UNION STATUS	PUBLIC OR PRIVATE
Covenant Transport Group	Food & beverage, paper & packaging, manufacturing	98.3%	.18%	97.0%	3,675	11	N	PUB
CR England	Refrigerated truckload shipments	DNR	DNR	DNR	2,600	6	N	PRIV
Crete Carrier Corporation	Dry van freight services	93.3%	DNR	DNR	3,900	22	N	PRIV
CRST International	Expedited, steel, brokerage	DNR	.45%	98.0%	3,333	17	N	PRIV
Daily Express	Construction, energy, farm	92.5%	1.4%	98.5%	350	11	N	PRIV
Dart Transit	General commodities, retail, personal products	95.7%	1.7%	98.5%	2,800	5	N	PRIV
Daylight Transport	Consumer electronics	91.8%	.01%	97.6%	DNR	3	N	PRIV
Dayton Freight Lines	General commodities	89.6%	.40%	98.5%	900	40	N	PRIV
Epes Carriers	Truckload	94.4%	DNR	DNR	1,200	10	N	PRIV
Estes Express Lines	All services	DNR	DNR	97.6%	6,329	186	N	PRIV
Evans Network of Companies	Containerized freight	DNR	DNR	98.5%	1,350	65	N	PRIV
FedEx Custom Critical	Expedited, general commodities, hazmat	DNR	DNR	98.0%	1,400	DNR	N	PUB
FedEx Freight	LTL	DNR	DNR	DNR	14,000	470	N	PUB
FedEx Ground	Small package	85.5%	DNR	DNR	2,800	500	N	PUB
FFE Transportation Services	Refrigerated	94.2%	.20%	97.0%	1,600	21	N	PUB
FLS Transportation Services	Retail, paper, steel, auto, CPG	DNR	.01%	99.2%	385	17	N	PRIV
FST Logistics	Pharmaceuticals, retail, foodstuffs	93.6%	.30%	97.4%	105	4	N	PRIV
Gainey Corporation	Blanket wrap, dry van, flatbed, refrigerated	93.6%	.001%	97.8%	2,200	12	N	PRIV
Givens Transportation	Mass merchandising, automotive	DNR	.60%	99.1%	DNR	3	N	PRIV
Gordon Trucking	Consumer goods, paper, building materials	DNR	.10%	96.0%	1,400	7	N	PRIV

TECHNOLOGY SERVICES

COMPANY NAME	DRIVER COMMUNICATION: CELLULAR Voice	CELLULAR Text	SATELLITE Voice	SATELLITE Text	VISIBILITY CAPTURE: Cell Phone	Satellite	Bar Codes	RFID	ONLINE / WEB SERVICES: Web Track/Trace	E-mail Alerts	Web Pricing/Routing	Logistics Web Tools	SKU/Pallet Bar Codes
Covenant Transport Group	●	●		●		●			●	●			
CR England	●			●	●	●			●	●	●	●	
Crete Carrier Corporation									●		●		
CRST International	●	●	●	●		●			●	●		●	
Daily Express	●	●			●				●				
Dart Transit	●			●		●			●	●	●	●	
Daylight Transport	●	●		●	●	●	●		●	●	●	●	●
Dayton Freight Lines	●	●	●	●	●	●	●		●	●	●	●	
Epes Carriers				●					●				
Estes Express Lines	●				●		●		●	●	●	●	●
Evans Network of Companies	●												
FedEx Custom Critical	●	●		●		●			●	●	●	●	
FedEx Freight	●	●							●	●	●	●	●
FedEx Ground									●	●	●		
FFE Transportation Services	●	●		●		●			●	●	●	●	
FLS Transportation Services	●	●		●	●	●		●	●	●	●	●	●
FST Logistics	●	●		●		●			●	●	●	●	●
Gainey Corporation				●		●			●	●		●	
Givens Transportation	●			●						●		●	●
Gordon Trucking	●			●		●			●	●			

Information supplied by trucking companies. Where data was not provided, historical and web site information was used.

TOP 100 MOTOR CARRIERS 2007

PRIMARY TYPES OF SERVICE

COMPANY NAME / WEB ADDRESS	PHONE	OPERATING AREA(S)	LTL	Truckload	Package	Expedited	Logistics Services	DCC	Intermodal	Household Goods	Bulk	Motor Vehicle Carrier	Refrigerated	Tank Car	White Glove	Final Mile	SPECIALIZATION
Groendyke Transport www.groendyke.com	800-843-2103	North America									●						Petroleum, chemicals, acids
Heartland Express www.heartlandexpress.com	800-451-4621	US only		●													Consumer goods, retail, food, paper/plastic
Highland Transport www.highlandtransport.com	905-513-2014	US/Canada only						●	●								General freight, automotive, beverages, chemicals
Interstate Distributor Co. www.intd.com	800-426-8560	North America		●		●	●	●	●				●				Specialized services
J.B. Hunt Transport Services www.jbhunt.com	800-643-3622	North America						●	●							●	Retail, food & beverage, building materials
Jevic Transportation www.jevic.com	888-GOJEVIC	US/Canada only	●			●											Manufacturing, chemical/ hazmat, retail, trade show
KLLM Transport Services www.kllm.com	800-925-5556	North America		●			●	●					●				Perishables, low-altitude routing
Knight Transportation www.knighttrans.com	602-269-2000	US only					●	●					●				General commodities
Landstar www.landstar.com	800-872-9400	North America	●			●	●	●	●		●	●	●				Manufacturing, retail, distributors/wholesale
Lily Transportation www.lily.com	800-248-5459	US only					●	●									Leasing, equipment rental
Lynden Transport www.lyndentransport.com	206-575-9575	US/Canada only	●						●				●				Retail, oil field, building materials
Marten Transport www.marten.com	800-395-3000	US/Canada only				●	●	●	●			●	●				Food & beverage, pharmaceutical
May Trucking Co. www.maytrucking.com	800-547-9169	US only		●				●					●				High-cube dry vans, refrigerated fleets
Mayflower Transit www.mayflower.com	800-283-5732	International	●			●	●			●					●		Pad wrap, high-value, trade show/exhibit, artwork
Megatrux Transportation www.megatrux.com	909-652-5035	North America	●			●		●	●								General commodities
Melton Truck Lines www.meltontruck.com	918-234-8000	North America		●													Steel, HVAC, building materials
Mercer Transportation www.mercer-trans.com	800-626-5375	US/Canada only		●													Building materials, metal products, machinery
Milan Express www.milanexpress.com	731-686-7428	US/Canada only	●			●		●									General LTL
Miller Transporters www.millert.com	601-922-8331	US/Canada only									●						Bulk
National Retail Systems www.nrsonline.com	877-345-4NRS	International	●				●	●	●	●						●	Retail

*CLAIMS RATIO Net claims payout divided by total revenue
*FLEET SIZE Tractors only, does not include trailers
DNR Did Not Report

TECHNOLOGY SERVICES

COMPANY NAME	OPERATING RATIO	CLAIMS RATIO*	ON-TIME DELIVERY	FLEET SIZE*	NUMBER OF TERMINALS	UNION STATUS	PUBLIC OR PRIVATE	Driver Communication: Cellular Voice	Driver Communication: Cellular Text	Driver Communication: Satellite Voice	Driver Communication: Satellite Text	Visibility Capture: Cell Phone	Visibility Capture: Satellite	Visibility Capture: Bar Codes	Visibility Capture: RFID	Online / Web Services: Web Track/Trace	Online / Web Services: E-mail Alerts	Online / Web Services: Web Pricing/Routing	Online / Web Services: Logistics Web Tools	Online / Web Services: SKU/Pallet Bar Codes
Groendyke Transport	DNR	DNR	99.8%	982	34	N	PRIV				●		●							
Heartland Express	78.2%	.003%	98.5%	DNR	11	N	PUB	●			●						●			
Highland Transport	DNR	DNR	98.0%	600	5	Both	PRIV	●	●	●	●	●	●			●	●	●	●	
Interstate Distributor Co.	DNR	DNR	DNR	2,500	10	N	PRIV				●		●				●			
J.B. Hunt Transport Services	88.8%	.32%	99.0%	12,000	21	N	PUB	●			●		●			●	●	●	●	●
Jevic Transportation	DNR	.005%	98.0%	1,200	11	N	PRIV	●	●		●	●	●			●	●	●	●	●
KLLM Transport Services	DNR	DNR	98.0%	1,800	7	N	PRIV									●		●		
Knight Transportation	79.0%	DNR	98.3%	3,661	35	N	PUB				●		●			●	●			
Landstar	92.4%	DNR	DNR	9,205	DNR	N	PUB	●	●		●	●	●			●				
Lily Transportation	DNR	DNR	DNR	DNR	DNR	N	PRIV	●	●								●			
Lynden Transport	DNR	<.01%	85.0%	150	21	Both	PRIV	●	●					●		●	●		●	●
Marten Transport	92.1%	.60%	98.0%	2,552	5	N	PUB	●			●		●			●	●		●	
May Trucking Co.	DNR	1.25%	98.0%	925	6	Both	PRIV				●		●			●	●		●	
Mayflower Transit	92.2%	.29%	99.9%	DNR	417	Both	PRIV	●	●	●	●		●			●	●		●	
Megatrux Transportation	90.0%	1%	99.0%	225	8	N	PRIV	●	●	●	●	●	●	●	●	●	●	●	●	●
Melton Truck Lines	DNR	.001%	98.0%	1,000	6	N	PRIV	●			●		●			●	●			
Mercer Transportation	93.4%	.004%	98.1%	2,012	85	N	PRIV	●	●								●			
Milan Express	97.5%	1.25%	97.8%	1,200	37	N	PRIV	●					●			●		●	●	
Miller Transporters	98.3%	.01%	99.1%	410	17	Both	PRIV				●		●			●	●			
National Retail Systems	DNR	.50%	99.0%	2,200	31	Both	PRIV	●	●	●	●	●	●	●		●	●		●	●

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TOP 100 MOTOR CARRIERS 2007

*CLAIMS RATIO Net claims payout divided by total revenue
*FLEET SIZE Tractors only, does not include trailers
DNR Did Not Report

COMPANY NAME / WEB ADDRESS	PHONE	OPERATING AREA(S)	PRIMARY TYPES OF SERVICE: LTL	Truckload	Package	Expedited	Logistics Services	DCC	Intermodal	Household Goods	Bulk	Motor Vehicle Carrier	Refrigerated	Tank Car	White Glove	Final Mile	SPECIALIZATION	OPERATING RATIO	CLAIMS RATIO*	ON-TIME DELIVERY	FLEET SIZE*	NUMBER OF TERMINALS	UNION STATUS	PUBLIC OR PRIVATE	TECHNOLOGY SERVICES: DRIVER COMMUNICATION: CELLULAR: Voice	CELLULAR: Text	SATELLITE: Voice	SATELLITE: Text	VISIBILITY CAPTURE: Cell Phone	Satellite	Bar Codes	RFID	ONLINE / WEB SERVICES: Web Track/Trace	E-mail Alerts	Web Pricing/Routing	Logistics Web Tools	SKU/Pallet Bar Codes
New Century Transportation www.nctrans.com	609-265-1110	US/Canada only	●			●		●					●				Chemicals, foodstuffs, consumer commodities	92.5%	.26%	98.0%	1,200	3	N	PRIV	●			●		●			●	●	●	●	
New Penn www.newpenn.com	800-285-5000	US/Canada only	●			●											Industrial, retail, hazmat, freezables	94.2%	DNR	DNR	1,000	25	U	PUB	●	●			●		●		●	●	●	●	
NFI National Freight www.nfiindustries.com	800-922-5088	US/Canada only					●	●	●				●				Food & beverage, retail	DNR	.001%	98.2%	2,762	30	N	PRIV	●		●	●		●			●	●			●
Oak Harbor Freight Lines www.oakh.com	253-288-8300	US only	●														General commodities	98.0%	.90%	97.9%	550	33	Both	PRIV				●		●			●	●	●	●	●
Old Dominion Freight Line www.odfl.com	800-235-5569	North America	●	●		●	●		●			●					LTL	90.3%	1%	97.8%	4,527	178	N	PUB							●	●	●	●	●	●	●
Panther Expedited Services www.pantherexpedite.com	800-685-0657	North America				●							●				Expedited & elite services	94.0%	1%	98.9%	500	DNR	N	PRIV	●					●			●		●	●	●
Paschall Truck Lines www.ptl-inc.com	800-626-3374	US/Mexico only		●			●										Dry van	95.3%	0.10%	96.2%	1,390	6	N	PRIV				●		●			●	●			
Penske Logistics www.penskelogistics.com	800-221-3040	International	●				●	●	●	●	●	●	●		●	●	Auto, chemical, pharma/ healthcare, electronics	DNR	DNR	DNR	2,200	DNR	Both	PRIV	●	●	●	●	●	●			●	●	●	●	●
Pitt Ohio Express www.pittohio.com	412-232-3015	US only	●			●											Wholesale non-durable goods, general commodities	94.5%	.64%	98.0%	679	21	N	PRIV	●	●				●			●	●	●	●	●
Prime Inc. www.primeinc.com	800-848-4560	North America		●		●	●	●			●		●	●			Refrigerated, flatbed, tanker	88.6%	1%	98.7%	2,427	3	N	PRIV	●			●	●	●			●				
Quality Distribution www.qualitydistribution.com	800-282-2031	North America									●						Liquid & dry bulk	93.8%	.80%	98.0%	3,500	160	Both	PUB	●	●		●	●	●			●	●	●	●	
R&L Carriers www.gorlc.com	800-543-5589	North America	●			●	●										Hazmat, express jet	DNR	DNR	DNR	13,000	DNR	N	PRIV	●	●			●	●			●	●	●		
Roadway www.roadway.com	800-257-2837	North America	●			●	●						●		●	●	Manufacturing, retail, government, exhibit/trade show	DNR	DNR	DNR	8,500	340	U	PUB	●	●		●	●				●	●	●	●	
Roehl Transport www.roehl.net	800-826-8367	US/Canada only											●				Building, metal & paper products, retail	92.8%	.01%	98.4%	1,850	10	N	PRIV				●		●			●	●			
Ruan www.ruan.com	866-RUAN-NOW	North America					●	●			●		●				Retail, manufacturing, food & grocery, metals	DNR	DNR	99.4%	3,984	150	Both	PRIV	●	●		●	●	●			●	●		●	●
Ryder www.ryder.com	888-887-9337	North America	●		●	●	●	●	●	●	●		●			●	3PL and supply chain management	DNR	DNR	DNR	56,100	821	Both	PUB	●	●	●	●	●	●			●	●		●	●
Saia www.saia.com	800-765-7242	US only	●			●											General commodities	95.9%	.40%	96.0%	3,392	151	N	PUB	●	●			●		●		●	●	●	●	●
Schneider National www.schneider.com	800-558-6767	North America				●	●	●	●		●		●				Retail, manufacturing, bulk specialty chemicals	DNR	DNR	97.0%	15,500	15	Both	PRIV				●	●	●			●	●	●	●	●
Shevell Group www.shevellgroup.com	908-965-0100	US/Canada only	●			●	●	●									Retail, electronics, manufacturing, chemicals	DNR	.09%	98.0%	3,040	34	Both	PRIV	●	●		●		●			●	●	●	●	●
Southeastern Freight Lines www.sefl.com	800-637-7335	US only	●			●											General commodities	91.0%	.77%	98.6%	2,400	74	N	PRIV				●		●			●	●	●	●	●

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TOP 100 MOTOR CARRIERS 2007

*CLAIMS RATIO	Net claims payout divided by total revenue
*FLEET SIZE	Tractors only, does not include trailers
DNR	Did Not Report

PRIMARY TYPES OF SERVICE

COMPANY NAME / WEB ADDRESS	PHONE	OPERATING AREA(S)	LTL	Truckload	Package	Expedited	Logistics Services	DCC	Intermodal	Household Goods	Bulk	Motor Vehicle Carrier	Refrigerated	Tank Car	White Glove	Final Mile	SPECIALIZATION	OPERATING RATIO	CLAIMS RATIO*	ON-TIME DELIVERY	FLEET SIZE*	NUMBER OF TERMINALS	UNION STATUS	PUBLIC OR PRIVATE
Standard Forwarding www.standardforwarding.com	800-447-2012	US only	●														Manufacturing	96.6%	.03%	99.0%	350	15	U	PRIV
Stevens Transport www.stevenstransport.com	972-216-9000	North America		●									●				Irregular route refrigerated TL	DNR	DNR	DNR	2,100	14	N	PRIV
Superior Bulk Logistics www.superiorbulklogistics.com	800-654-7707	North America					●	●	●		●						Chemicals, food grade bulk commodities	DNR	DNR	98.4%	1,200	52	Both	PRIV
Swift Transportation www.swifttrans.com	602-269-9700	North America		●			●	●	●				●				Truckload	90.7%	.50%	97.5%	18,044	35	N	PUB
Transport Corp. of America www.transportamerica.com	651-686-2500	North America				●	●	●	●	●	●		●				Grocery products, home/ office furniture & supplies	96.2%	.01%	98.4%	1,421	12	N	PRIV
Trimac Transportation www.trimac.com	800-877-9374	North America									●						Chemicals, industrial gases, cement, sand, coal	94.6%	.10%	98.9%	3,800	110	Both	PRIV
U.S. Xpress www.usxpress.com	423-510-3000	North America	●			●	●	●	●								TL, time-definite delivery, FAK	95.5%	.09%	98.0%	7,698	12	N	PUB
United Van Lines www.unitedvanlines.com	800-283-5749	International	●		●	●	●	●	●	●	●	●	●		●	●	Household goods, high-value, trade show	DNR	DNR	99.8%	DNR	450	Both	PRIV
Universal Truckload Services www.goutsi.com	586-920-0154	North America					●	●	●				●				Steel, machinery, furniture, auto parts	DNR	DNR	DNR	4,000	764	N	PUB
UPS Freight www.upsfreight.com	800-333-7400	North America	●			●	●	●	●								General commodities	DNR	1.50%	97.0%	6,211	204	Both	PRIV
USA Truck www.usa-truck.com	800-USA-TRUCK	North America		●			●										Truckload	DNR	DNR	DNR	2,400	7	N	PUB
USF Glen Moore www.usfglenmoore.com	800-848-9695	North America				●		●									General, industrial, hazmat	94.2%	DNR	DNR	850	2	N	PUB
USF Holland www.usfholland.com	800-456-6322	US/Canada only	●			●											Industrial, retail, hazmat, freezables	94.2%	DNR	DNR	5,400	80	U	PUB
USF Reddaway www.usfreddaway.com	800-395-7360	North America	●			●											Industrial, retail, hazmat, freezables	94.2%	DNR	DNR	2,200	91	Both	PUB
Vitran Corporation www.vitran.com	416-798-4965	US/Canada only	●			●	●		●				●				LTL, logistics	94.7%	DNR	97.7%	2,292	127	N	PUB
Ward Trucking www.wardtrucking.com	800-458-3625	US only	●				●	●									All	95.0%	.50%	98.0%	600	22	N	PRIV
Werner Enterprises www.werner.com	402-895-6640	North America				●	●	●	●				●				General commodities	89.7%	<1%	99.0%	9,000	12	N	PUB
Willis Shaw Logistics www.willisshaw.com	479-248-7261	US only					●	●					●				Refrigerated, frozen food	DNR	.19%	97.2%	710	4	N	PRIV
Wilson Trucking www.wilsontrucking.com	540-949-3200	US only	●			●		●	●								General commodities	DNR	.68%	99.3%	1,100	43	N	PRIV
Yellow Transportation www.myyellow.com	800-610-6500	North America	●			●	●						●		●	●	Manufacturing, retail, government, chemical/hazmat	DNR	DNR	DNR	9,000	336	U	PUB

TECHNOLOGY SERVICES

COMPANY NAME	DRIVER COMMUNICATION: CELLULAR Voice	CELLULAR Text	SATELLITE Voice	SATELLITE Text	VISIBILITY CAPTURE: Cell Phone	Satellite	Bar Codes	RFID	ONLINE / WEB SERVICES: Web Track/Trace	E-mail Alerts	Web Pricing/Routing	Logistics Web Tools	SKU/Pallet Bar Codes
Standard Forwarding	●				●				●	●	●	●	●
Stevens Transport			●	●		●				●	●		
Superior Bulk Logistics	●			●		●			●				
Swift Transportation				●		●			●	●			●
Transport Corp. of America	●			●		●			●	●		●	
Trimac Transportation	●	●	●	●									
U.S. Xpress	●			●		●			●	●	●	●	●
United Van Lines	●			●		●			●			●	
Universal Truckload Services	●		●	●	●	●						●	
UPS Freight	●								●	●	●	●	
USA Truck			●	●		●			●	●	●	●	
USF Glen Moore	●	●			●	●			●	●		●	
USF Holland	●	●			●		●		●	●	●	●	
USF Reddaway	●	●			●		●		●	●	●	●	
Vitran Corporation	●	●			●		●	●	●	●	●	●	●
Ward Trucking	●	●	●	●	●	●			●	●	●	●	●
Werner Enterprises	●		●	●		●			●	●	●	●	●
Willis Shaw Logistics				●						●			
Wilson Trucking	●				●		●		●	●	●	●	
Yellow Transportation	●	●		●	●				●	●	●	●	

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