

COLLABORATE | INNOVATE | EXECUTE | GROW

Growth Trends

Only 10 percent of the North American trucking and logistics market is currently outsourced. However, there are an increasing range of challenges that are making it more difficult for companies to manage fleets and supply chains on their own.

- ✓ A shortage of qualified drivers and technicians
- ✓ Increasing cost and complexity to maintain new vehicle engine technology
- ✓ Additional compliance requirements related to new environmental and safety regulations
- ✓ Increased complexity of global supply chains including near-shoring trends
- ✓ Increased cost of fleet equipment

These trends, along with our proactive growth initiatives, position us to take

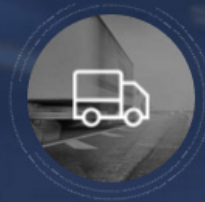
advantage of an environment that favors outsourcing and to convince more businesses to partner with Ryder.



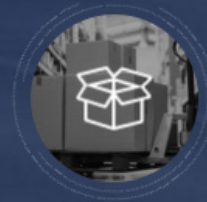
15K PREVENTIVE MAINTENANCE INSPECTIONS EACH DAY



TRUSTED PARTNER FOR 10 OF TOP 10 US FOOD & BEVERAGE COMPANIES



142K BORDER CROSSINGS ANNUALLY



1 MILLION FEET OF PACKAGING LINES

Operating Revenue ¹

FLEET MANAGEMENT SOLUTIONS



DEDICATED TRANSPORTATION SOLUTIONS



SUPPLY CHAIN SOLUTIONS



Progress On Our Growth Strategy

We're innovating with new products and collaborating across our business to help more companies realize the benefits of outsourcing. For example, we've seen great receptivity to our new Ryder On-Demand Maintenance offering from large fleets that hadn't worked with Ryder in the past. Our Total Cost of Ownership tool is helping more private fleets uncover the savings they can attain by working with Ryder. And we've made good progress cross-selling our more comprehensive Dedicated Transportation Solution to existing Ryder Fleet Management Solutions customers.

¹ Non-GAAP financial measure. For a reconciliation of these non-GAAP financial measures, [click here](#) to access our "Non-GAAP Reconciliation" presentation.