

## Summary

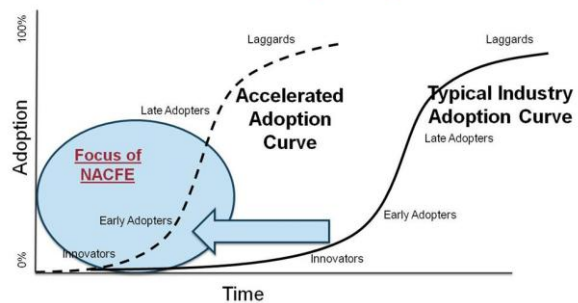
This project will offer the industry a benchmark study of eight of the largest, more innovative fleets with respect to the use of products and practices to support high levels of fuel efficiency. The scope includes tractors and trailers in regional and long haul. Fleets in the study include CR England, Challenger Motor Freight, Con-way Truckload, Frito Lay, Gordon Trucking, Ryder, Schneider and Werner, representing 75,000 tractors and 130,000 trailers. It will provide a detailed report to each participating fleet comparing themselves to the other seven, confidential, fleets. An aggregated report will also be offered for sale to other fleets and suppliers and involved in improving the freight efficiency of North American goods movement.



## Why this Study Now?

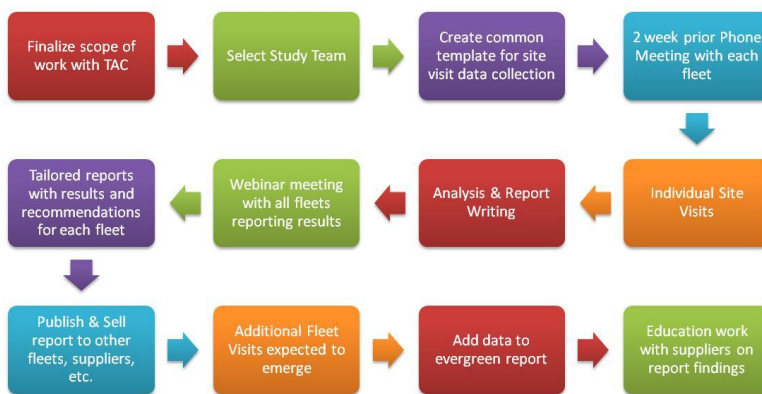
The North American Council for Freight Efficiency (“NACFE”) is a nonprofit organization dedicated to doubling the freight efficiency of NA goods movement. The NACFE operates in order to provide an independent, unbiased research organization for the transformation of the transportation industry. The NACFE was created to bring solutions to the freight industry, needed to radically increase related fuel efficiency. Success for the NACFE is that it provides a place for significant sharing of proven products and practices and to remove those that are not promoting the efficient movement of goods. Success will be measured in the accelerated adoption of technologies and practices that promote freight efficiency (shown here). This study will highlight the success achieved by the more innovative fleets and give them an opportunity to share this information to encourage quicker adoption rates. Information concerning the NACFE’s actions can be found at [www.nacfe.org](http://www.nacfe.org).

### NACFE will Accelerate Innovation and Early Adoption



## Scope of the Project

The primary deliverable of the project will be a report comparing the results of a deep dive investigation with these major North American fleets concerning their adoption of various products and practices for fuel efficiency. This report will identify benchmark competencies of the eight companies in many different subject areas. The timeline of the project is shown here where the fleet visits were completed by October 1<sup>st</sup> and the report available in early 2012.



## Study Report

The value of the study will be to highlight those successful applications of new products and practices that are providing fuel savings in real application. The matrix below describes the approach to the primary report document. For example, a green circle indicates that the adoption of the product was highly successful and 100% of the fleet is to be outfitted with it, yellow shows some success and complete adoption is under study and red means the product or practice was not successful for the return on investment. An open circle would signify that the fleet has not yet tried the idea.

Initiatives / Fleets	A	B	C	D	E	F	G	H
Tires	●	●	●	○	●	●	●	○
Tractor Aerodynamics	For illustration – Not actual data							
Trailer Aerodynamics								
Engines								
6x2 axles								
Driver education								
Routing software								
Etc.								

**Legend**

- Either @ 100% adoption or will be in <2yrs.
- Considering 100%, ramping gradually
- Have not tried the product or practice
- Tested it and will not adopt

The study will share the best practices in each area and offer why the implementation was successful and how one could be sure not to have any adverse consequences when implementing it. The study will also offer insights for others who might be considering adopting some of these products and practices and give suppliers an understanding on how to best develop more successful products.

The NACFE team will create individual reports and a presentation for each participating fleet for them to fully understand how their approaches compare to the other fleets in the study. Also, a final report meeting will be held via the web where the results will be shared with the participating fleets. Finally, the report, an on-line course sharing the findings and a live webinar with the study team will be offered by the NACFE for sale, as a package, to the industry. Additional fleets will be offered the opportunity to participate in this effort during 2012 and we are considering duplicating this work in other market segments. We are also planning Supplier Product Introduction Workshops given the findings of this study.

## Summary

The fleets participating in this study have been those who have demonstrated an early adoption of these technologies and practices. Their involvement will quicken the overall industry learning curve for these concepts and accelerating their adoption. The increased sales volume of these features will deliver increased reliability and quality with lower cost. The successful concepts will attract more suppliers to develop products that will encourage competition for the higher scale.

The timing for the study report out is to have delivered all eight individualized reports to the fleets in mid-December and the industry report will be available in mid February 2012. We, at the NACFE are excited to lead this effort and fully believe that this analysis and report will be instrumental to the understanding of the adoption of these technologies and accelerate their use in North American goods movement.



Michael Roeth, Executive Director, NACFE



Michael O'Connell, National Senior Director Fleet Capability, Frito Lay and 2012 NACFE Board Chairman