



Jordan Sarchet, Sr. Director of Operations

# DOMESTIC TRANSPORTATION LANDSCAPE



**Final Mile**



**Intermodal**



**360<sup>o</sup>**



**Dedicated**



**Truckload**



**Integrated**  
Capacity Solutions

A man wearing a yellow high-visibility safety vest over a dark polo shirt, blue jeans, and brown shoes is walking towards the camera. He is positioned in a narrow aisle between two large white semi-trailers. The trailers are parked on a concrete surface. In the background, there are some yellow signs and a green traffic light. The overall scene is brightly lit, suggesting a sunny day.

# Market Overview

## Capacity & Carrier

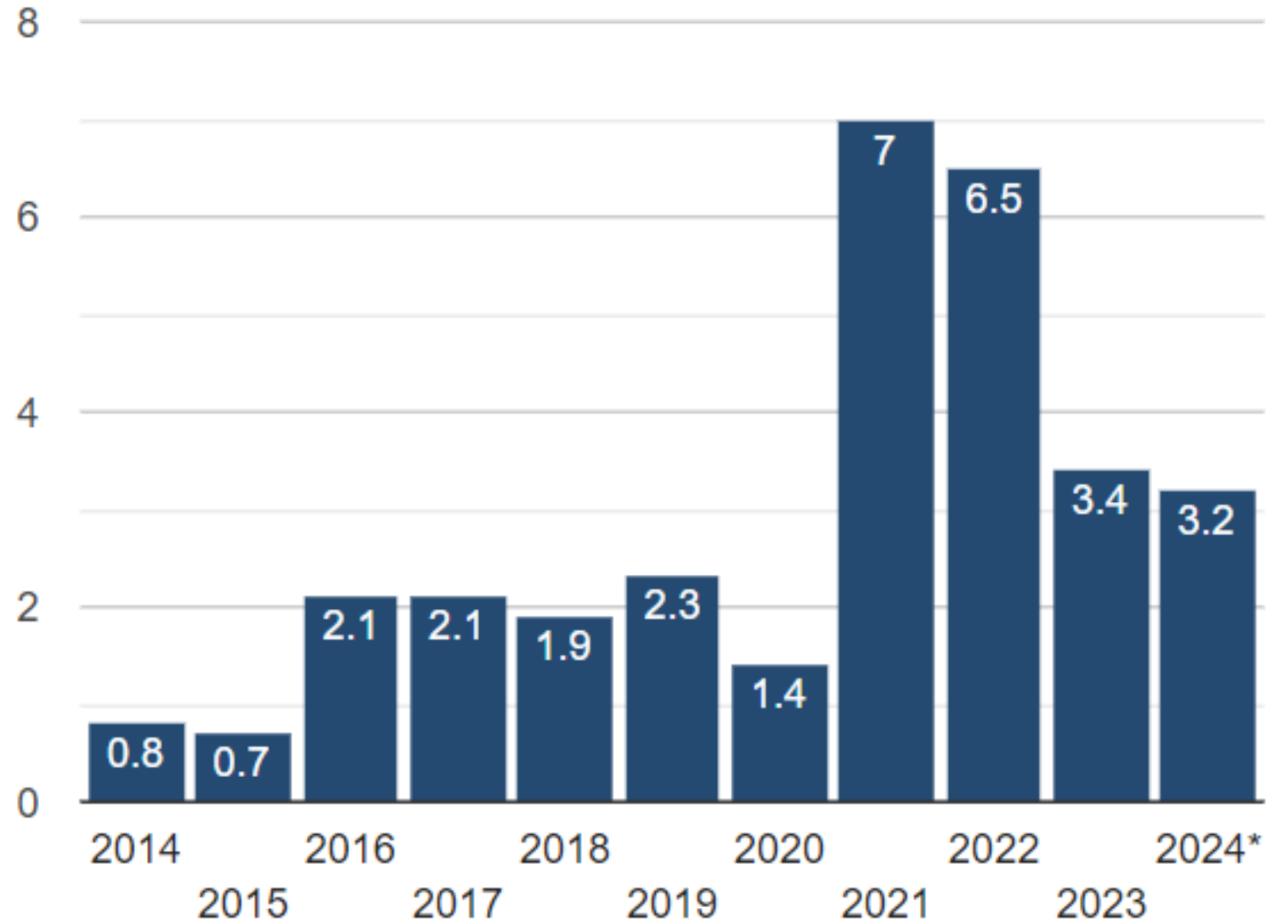
## Sustainability

## J.B. Hunt Headlines

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# INFLATION

Chart: United States Annual Inflation Rates (2014 to 2024)



# 30 YEAR MORTGAGE

**FRED**  — 30-Year Fixed Rate Mortgage Average in the United States





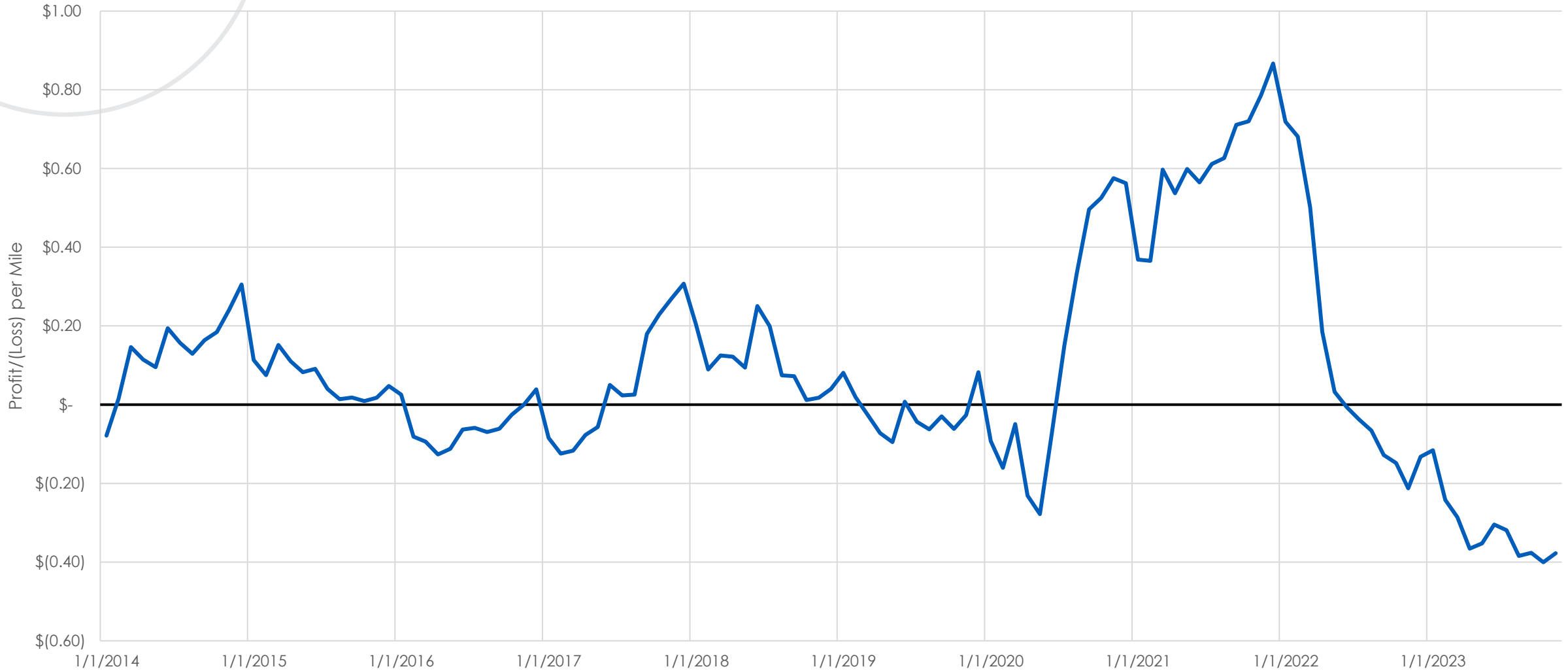
# FREIGHT SHIPPING

**Year over Year Shipments: -15.7%**

**Year over Year Spend: -13.5%**

**Year over Year West Region Spend: -7.4%**

# FREIGHT DEMAND CYCLE



# RUNAWAY VERDICTS

**Zoom Jury Awards \$411 Million Nuclear Verdict to Injured Motorcyclist — One of the Largest Virtual Verdicts to Date**

Jury hands down billion-dollar verdict in Florida against 2 trucking companies

**Nuclear verdict alert: More than \$16M awarded in Georgia court**

Company and insurer offer was \$2 million, but rejection led to a trial



# INDUSTRY HEADLINES



**Flexport** lays off 600 workers amid difficult freight market.

Texas-based flatbed carrier with 260 trucks shuts down, citing insurance costs.

It's over: **Convoy** shutting operations, no strategic white knight to the rescue.

Chicago-based **Coyote Logistics** cuts sales, operations jobs.

Digital brokerage **Uber Freight** slashes jobs.

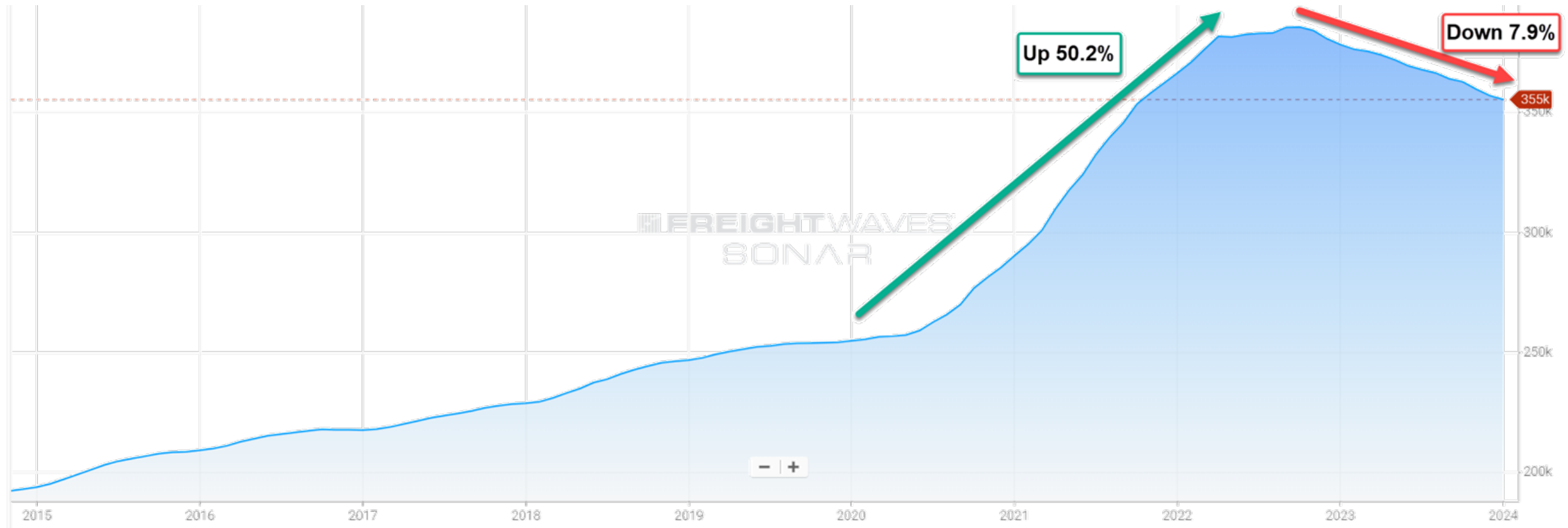
85-year-old Indiana trucking company files for Chapter 11.

**FourKites** confirms 15% cut in global workforce, dismisses key executive.

**CH Robinson** cut it's personnel expenses by 21.5% YOY to lower Q3 expenses

**Coyote Logistics** announces more layoffs.

# TRUCKING AUTHORITIES

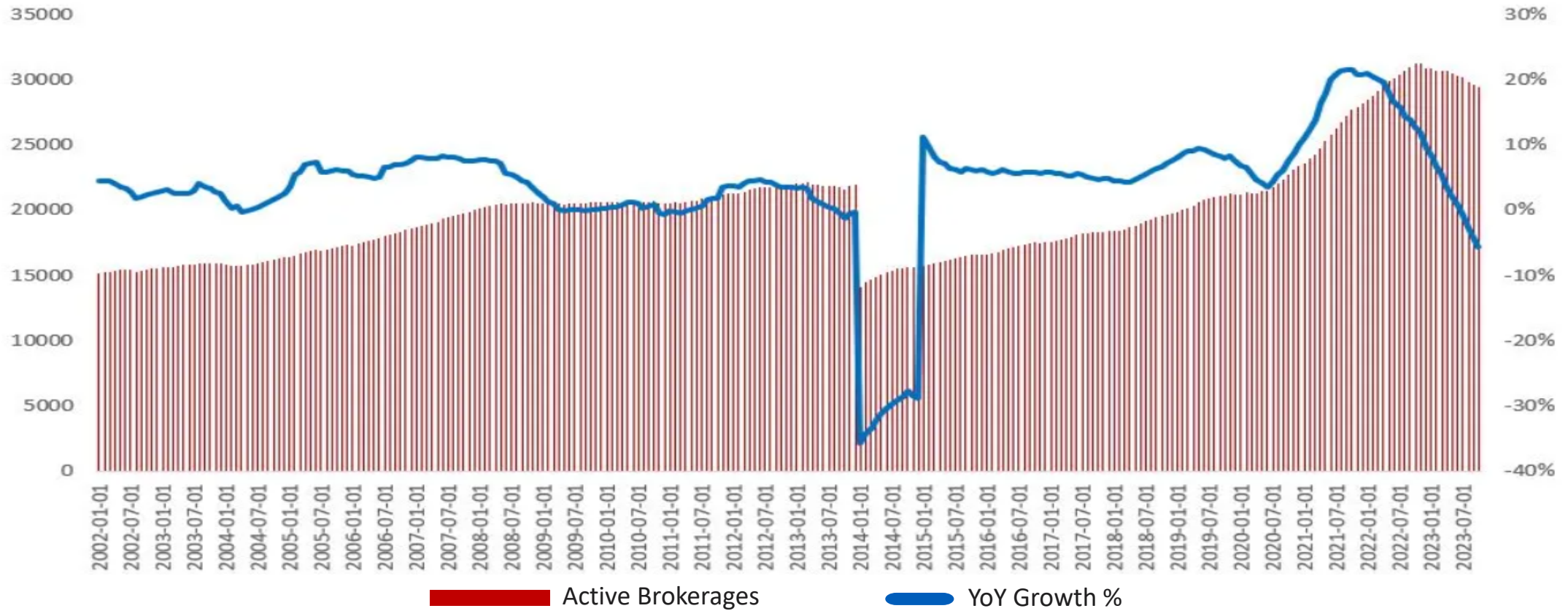


FREIGHTWAVES  
SONAR

- | +

# ACTIVE BROKERAGE

## FMCSA Count of Active Freight Brokerages as of 10/1/2023



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J.B. Hunt Business

# SUSTAINABILITY

Championing **intermodal conversion** with the largest company-owned fleet in North America

Working toward our **ambitious goal** to reduce carbon emission intensity 32% by 2034 (2019 baseline)

Testing and placing orders for **zero emission vehicles**

Exploring and incorporating **biogenic fuel** in our operations

Maintaining a modern fleet for **increased MPG** and the latest in emission reduction technologies

**Expert engineering teams** that help optimize shipping to minimize total miles, maximize payload, and reduce carbon emissions per shipment

**Investing in technology** to increase visibility and efficiency, like our solar project and eliminating empty miles with J.B. Hunt 360<sup>®</sup> platform

Supporting **sustainable supply chains** with tools like CLEAN Transport<sup>®</sup> carbon-neutral shipping, CLEAN Carbon Calculator, and Carbon Diet

# 10 national, company-wide awards

America's Greatest  
Workplaces for Parents and  
Families 2023

America's Greatest  
Workplaces for  
Job Starters

America's Greatest  
Workplaces

Military Friendly Employer

Top Companies for  
Women to Work in  
Transportation

Forbes The Best Employers  
for Women

World's Most  
Admired Companies

America's Greatest  
Workplaces 2023  
for Women

America's Greatest  
Workplaces 2023  
for Diversity

America's Best Large  
Employers

~13,000 360box<sup>®</sup> trailers



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# New service offerings: Quantum and Mexico service



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# Acquisition of BNSF Logistics Brokerage



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# Acquisition of BNSF Logistics Brokerage



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# Walmart Intermodal Partnership

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# THANK YOU



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