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Private Fleets Fill Gaps Left by Tight For-Hire Market

By Daniel P. Bearth
Senior Features Writer

Last year, Tennessee farmer Jimmy Joyner launched US BioTec to sell a line of environmentally friendly “biological chemicals” to farmers, nurseries and retail lawn and garden stores.

He also started a private fleet. Joyner set up TelStar Logistics, acquired some used refrigerated trailers and arranged for an owner-operator to haul the first load in April.

In a small way, Joyner’s decision to set up a transportation subsidiary for his fledgling business mirrors a larger trend among shippers throughout the country.

Rather than rely on outside freight carriers that have had difficulty expanding service because of a shortage of drivers, many shippers are using more of their own trucks to move goods and are taking advantage of strong demand to haul freight for other shippers as well.

Joyner, for example, said that in addition to the potential savings using his own equipment, he believes that US BioTec’s transportation unit “could become an exciting new revenue center for the company.”

“US BioTec can use the same trucks that haul our raw materials and finished products to haul agricultural products and produce from our biochemical clients’ fields to market,” he said.

To jump start his transportation venture, Joyner bought out Scorpion Logistics and used that refrigerated carrier’s for-hire authority and insurance to arrange for transportation and broker loads for other shippers. The goal, he said, is to have 40 trucks leased from owner-operators

and hauling freight by the end of this year.

Shipper-owned fleets account for nearly half of all truck freight in the United States and about one-in-three private carriers use for-hire authority to haul freight for other parties, according to Gary Petty, president of the National Private Truck Council, Alexandria, Va.

“We see more private fleets acquiring and using for-hire authority,” Petty said, adding that the additional revenue “offsets expenses and increases the [private carriers’] bottom line.”

Private carriers have, on average, 17% to 19% unused freight-hauling capacity, according to Petty. Most of the excess capacity is a result of not having compatible freight to put on trailers after making store deliveries or after carrying shipments on an expedited basis to customers.

“If [the percentage] is much higher,” Petty said, “then dedicated [contract carriage] becomes a more viable option” for the private fleet’s owner.

For-hire truckload carriers typically experience between 16% and 20% empty miles with longhaul carriers typically having less empty capacity than shorthaul carriers because trailers are loaded and unloaded less frequently, trucking industry officials said.

Now with driver shortages keeping a lid on expansion by for-hire carriers, private carriers are taking a look at not only adding equipment to their own fleets, but are actively soliciting freight from other shippers.

Amstan Logistics, a unit of American Standard, started out as a private fleet in the 1960s and now derives about 80% of its business from other shippers.

Gary Magin, Amstan’s general manager, said the initial purpose of the fleet was to meet the needs of American Standard, but “we soon recognized that other companies had similar unmet needs and we could use our fleet to assist these companies.”

The additional business enabled Amstan to develop into a full-service logistics company, Magin said.

“We use our [private] fleet to grow our logistics business,” Magin said in an interview with TRANSPORT TOPICS.

And like a lot of for-hire fleets, Amstan faces a shortage of qualified drivers. “Our fleet has actually dropped from 170 tractors to about 110,” Magin said. “We now emphasize our freight brokerage and intermodal services, which enables us to tap into a larger base of equipment.”

Paul Motylinski, director of transportation and distribution for Ace Hardware, Oak Brook, Ill., said for-hire freight hauling generates 23% of total revenue for the Ace private fleet, which delivers products to more than 4,700 U.S. and Canadian retail locations.

“We are able to take in revenue to help offset our delivery charges,” Motylinski said. “Every year we see more [external] non-delivery revenue. . . . If we make enough to pay all of the costs, delivery would essentially be free. That’s huge.”

Motylinski said Ace Hardware store owners currently pay about



Sysco Corp. tops the TT Private 100 list for the third straight year. A mobile kitchen in a trailer for disaster care the company developed, above, helps the Red Cross deliver assistance in San Antonio.

2.5% of sales for deliveries, which are weekly most of the year, except for twice a week during the peak summer selling season.

In addition to offsetting the cost of store delivery, Motylinski said he wants to control more of the freight coming into Ace’s 15 distribution centers and expand the use of cross-dock facilities to handle direct shipments from vendors for delivery to stores.

“We control about 65% of the inbound volume,” he said. “Our goal is 100%. Doing that requires a change in the way freight is paid from prepaid to collect.”

In other words, Motylinski said, if Ace pays the freight bill, the company can control whether the freight moves via the private fleet or outside carrier, potentially eliminating some empty backhauls or choosing more efficient routes to reduce empty miles.

Another hardware distributor, Orgill Worldwide Distribution & Retail Services, Memphis, Tenn., has focused its attention on improving delivery service to its customers in 63 countries by retaining two export consolidation firms — one in Jacksonville, Fla., and one in Los Angeles — to handle customs brokerage and arrange for ocean shipping while Orgill uses its five U.S. distribution centers to arrange shipments by store location.

“That’s where the logistics expertise comes into play,” said Jerry

Cardwell, vice president of sales development. “It’s merging and pulling together all of the orders to get the product to our customers’ place of business.”

The shift by private fleet managers into for-hire transportation and logistics services is likely to continue as long as freight rates remain relatively high, said Scott Moscrip, president of The Internet

Truckstop in Plymouth, Idaho, one of a number of electronic load boards that match freight with available truck capacity.

“As long as the rates justify it, these guys will continue to haul [freight],” Moscrip said. “When backhaul freight was paying \$1 a mile and the average length of haul

(See FLEETS, p. 26)

Top 10, Tractor Growth

1	Reyes Holdings	568
2	Wal-Mart Stores	453
3	CHS Inc.	385
4	C&S Wholesale Grocers	308
5	Pilgrim’s Pride Corp.	261
6	Tyson Foods	243
7	Albertson’s Inc.	195
8	Air Liquide America	167
9	Land O’ Lakes	127
10	H.E. Butt Grocery	120

Top 10, Trailer Growth

1	Wal-Mart Stores	6,500
2	C&S Wholesale Grocers	1,335
3	H.E. Butt Grocery	806
4	Supervalu Inc.	732
5	Pilgrim’s Pride Corp.	695
6	CHS Inc.	647
7	Shaw Industries	642
8	Rite Aid Corp.	611
9	Albertson’s Inc.	578
10	Reyes Holdings	577

Sources: Company reports and interviews.

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4 Operators of store delivery fleets struggle to maintain productivity in the wake of changes in the federal hours-of-service regulations for truck drivers.

7 Shipper-owned fleets grew over the past year, as consolidation and outsourcing continued to play a role in shaping the 2005 listing of the TRANSPORT TOPICS Top 100 private carriers in the United States and Canada.

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Acknowledgements and Sources

The 2005 TRANSPORT TOPICS Top 100 Private Carriers is a special project of Transport Topics Publishing Group. It features a list of the largest U.S. and Canadian shipper-owned carriers based on the number of heavy-duty tractors in each fleet. The data were taken from a number of sources, including interviews with company executives, the North American Truck Fleet Directory published by American Trucking Associations, and the Federal Motor Carrier Safety Administration.

Senior Features Writer Daniel P. Bearth was the project coordinator, assisted by Sam Antony and the National Private Truck Council.

Design is by Patrick Donlon, TTPG assistant director of art and production.

Carriers Use New Methods To Deal With HOS Rules

By Daniel P. Bearth
Senior Features Writer

Private carriers that specialize in store delivery are using new routing and packaging techniques to compensate for the

loss of driver productivity resulting from driver hours-of-service rules. The rules cut back on the amount of time commercial truck drivers can spend on duty.

Private fleet executives said the federal hours-of-service rules that took effect last year, but are still

under challenge, unfairly penalize drivers who spend much of their time doing non-driving tasks such as restocking store shelves or taking customer orders — standard fare for private fleet drivers. They also said it forces drivers to skip needed breaks, increasing the potential for fatigue on the road.

“In the past, if you got tired, you stopped,” said Richard Schweitzer, general counsel for the National Private Truck Council. “If you do that now, you can run out of time

and potentially violate the 14-hour rule.”

“There is no benefit from the hours-of-service rule for shorthaul operations,” said lobbyist Earl Eisenhart. He represents a coalition of industry groups supporting legislation that would allow drivers to take up to two hours off during the work day without exceeding the current 14-hour on-duty limit.

Regardless of the rule’s status, store delivery remains one of the core transportation functions

Top 5 Private Fleet Store Delivery Issues

- Driver productivity and compensation.
- Hours-of-service regulations.
- Delivery windows, receiving hours.
- Store-level information technology.
- Computerized routing.

Source: Survey of National Private Truck Council members

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that private carriers perform for shippers.

“We’ve looked for opportunities to outsource,” said Paul Motylinski, director of distribution and transportation for Ace Hardware Corp., “and we’ve concluded that [store distribution] is the type of business we need to be in.”

It is a view that is shared throughout the corporation, he said, as store owners see Ace’s drivers as their own employees and enjoy having a business relationship with them, Motylinski said.

“That’s the intangible . . . When you outsource, you don’t know who the driver will be.”

To minimize the effect of HOS rules, Motylinski said he asked Ace retailers to help reduce the time it



Motylinski

takes drivers to make deliveries. “I told them they can bear the cost, or work with us to reroute and reschedule,” he said.

Ace retailers “really rose to the occasion,” Motylinski said, giving his transportation managers leeway to schedule deliveries in more efficient ways.

“We always in the past let the retailer dictate to us when and where we make deliveries,” Motylinski said. “This gave us an opportunity to make some changes and it improved our delivery efficiency. Sales last year rose by an average of 4% to 6%, but we kept our mileage flat.”

Another way to expedite deliveries for Ace has been the use of stackable plastic containers that can be offloaded by forklift or lowered to the ground on a lift gate and kept locked on site.

Prior to introducing the 48-inch by 48-inch containers, average delivery time was 90 minutes. Now it is 25 minutes, Motylinski said.

The hours rules, which took effect in January 2004, limit commercial truck and bus drivers to no more than 14 consecutive hours on-duty — 11 hours of which can be driving — before taking at least 10 hours off.

Previously, drivers could work 15 nonconsecutive hours — 10 hours of which could be driving — before taking eight hours off.

(See HOS, p. 26)

GE Equipment Services
Trailer Fleet Services

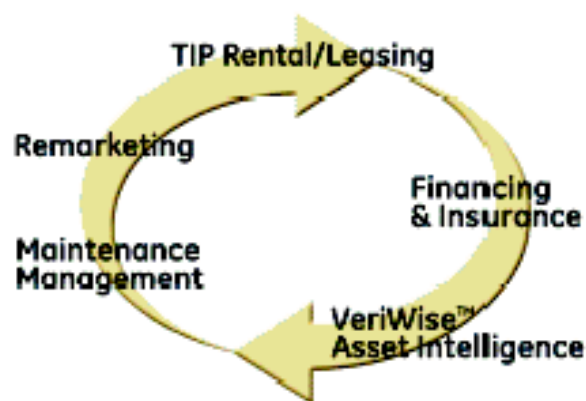
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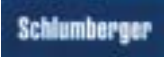




Trailer Fleet Services,
formerly known as



TRANSPORT TOPICS Top 100 Private Carriers

- 1 Sysco Corp.
- 2 Wal-Mart Stores
- 3 Ahold USA/USFoodservice
- 4 Tyson Foods
- 5 McLane Co.
- 6 Schlumberger Ltd.
- 7 BJ Services Co.
- 8 Kroger Co.
- 9 Pilgrim's Pride Corp.
- 10 Albertson's Inc.
- 11 Reyes Holdings LLC
- 12 Safeway Inc.
- 13 Halliburton Co.
- 14 Unisource Worldwide
- 15 Gordon Food Service
- 16 Frito-Lay North America
- 17 Nestlé USA
- 18 Shaw Industries
- 19 Milk Transport Services
- 20 Airgas Inc.
- 21 BlueLinx Corp.
- 22 Performance Food Group
- 23 International Paper Co.
- 24 C&S Wholesale Grocers
- 25 BOC Group
- 26 Darling International
- 27 Smithfield Foods
- 28 Delhaize America
- 29 CHS Inc.
- 30 Dot Foods
- 31 Prairie Farms
- 32 Praxair Inc.
- 33 Air Products and Chemicals
- 34 Univar USA
- 35 Kellogg Snacks Division
- 36 Supervalu Inc.
- 37 Publix Super Markets
- 38 Land O' Lakes
- 39 Gilster-Mary Lee Corp.
- 40 Walgreen Co.
- 41 Gold Kist
- 42 Weyerhaeuser Co.
- 43 Air Liquide America
- 44 Stock Building Supply/Ferguson Enterprises
- 45 H.E. Butt Grocery Co.
- 46 Leggett & Platt Inc.
- 47 Ashland Inc.
- 48 Foster Farms
- 49 Cardinal Health
- 50 Exxon Mobil Corp.
- 51 MBM Corp.
- 52 Ben E. Keith Co.
- 53 J.R. Simplot Co.
- 54 Sunoco Inc.
- 55 Ace Hardware Corp.
- 56 Unified Western Grocers
- 57 Advanced Drainage Systems
- 58 Ashley Furniture Industries
- 59 Rinker Materials Corp.
- 60 Archer Daniels Midland
- 61 Bridgestone Americas Holdings
- 62 Sentinel Transportation LLC
- 63 Army and Air Force Exchange Service
- 64 Rite Aid Corp.
- 65 Genuine Parts Co.
- 66 Flying J Inc.
- 67 Plains All American Pipeline LP
- 68 Sherwin-Williams Co.
- 69 True Value Co.
- 70 Kraft Foods
- 71 Vulcan Materials Co.
- 72 Tree of Life
- 73 Linde Gas LLC
- 74 Boise Cascade Holdings LLC
- 75 Carpenter Co.
- 76 AutoZone Inc.
- 77 Savage Cos.
- 78 Dunkin Brands Inc.
- 79 McKee Foods Corp.
- 80 Ryerson Tull Inc.
- 81 Sanderson Farms
- 82 Earle M. Jorgensen Co.
- 83 Hulcher Services
- 84 Emerson Electric Co.
- 85 Shamrock Foods
- 86 Toys "R" Us Inc.
- 87 Huttig Building Products
- 88 Perdue Farms
- 89 Georgia-Pacific Corp.
- 90 Food Services of America
- 91 Owens-Minor Inc.
- 92 Associated Wholesale Grocers
- 93 Reddy Ice
- 94 Austin Powder Co.
- 95 Batesville Casket Co.
- 96 Trinity Industries
- 97 Domino's Pizza
- 98 Andersen Corp.
- 99 Griffin Industries
- 100 Dawn Food Products

The 2005 Transport Topics

RANK 2005	RANK 2004	COMPANY	EQUIPMENT 2005	ANNUAL SALES
1	1	 Sysco Corp. Houston NYSE: SYY William Day, Vice President, Supply Chain Management Gary Cullen, Vice President, Distribution Services www.sysco.com	7,204 tractors 1,320 straight trucks 8,991 trailers	\$29.3 billion
2	2	 Wal-Mart Stores Bentonville, Ark. NYSE: WMT Rollin Ford, Executive Vice President of Logistics www.walmartstores.com	6,753 tractors 44,500 trailers	\$285.2 billion
3	3	 Ahold USA/USFoodservice Quincy, Mass., and Columbia, Md. (Royal Ahold NV, Netherlands) Jose Alvarez, Executive Vice President, Supply Chain/Retail www.aholdusa.com www.usfoodservice.com	6,111 tractors 968 straight trucks 9,194 trailers	\$46.2 billion
4	4	 Tyson Foods Springdale, Ark. NYSE: TSN Donnie Smith, Senior Vice President of Supply Chain Management www.tysonfoodsinc.com	2,689 tractors 118 straight trucks 5,148 trailers	\$26.4 billion
5	5	 McLane Co. Temple, Texas NYSE: BRK.A (Berkshire Hathaway) Robbie Wainwright, Vice President, Logistics and International www.mclaneco.com	2,000 tractors 2,950 trailers	\$23.3 billion
6	Not Ranked	 Schlumberger Ltd. Sugar Land, Texas NYSE: SLB www.slb.com	1,954 tractors 400 trailers	\$11.5 billion
7	Not Ranked	 BJ Services Co. Houston NYSE: BJS Charles Chapman, Fleet Manager www.bjservices.com	1,505 tractors 798 straight trucks 2,155 trailers	\$2.6 billion
8	6	 Kroger Co. Cincinnati NYSE: KR www.kroger.com	1,461 tractors and straight trucks	\$56.4 billion
9	12	 Pilgrim's Pride Corp. Pittsburg, Texas NYSE: PPC Barry Larson, Director of Transportation www.pilgrimspride.com	1,419 tractors 463 straight trucks 2,095 trailers	\$5.4 billion
10	11	 Albertson's Inc. Boise, Idaho NYSE: ABS Robert Dunst, Executive Vice President, Technology and Supply Chain www.albertsons.com	1,355 tractors 3,856 trailers	\$40 billion
11	19	Reyes Holdings LLC Rosemont, Ill. Don Van Witzenberg, Director of Fleet Operations www.reyesholdings.com	1,345 tractors 119 straight trucks 1,646 trailers	\$7 billion

100

Private Carriers

DESCRIPTION OF BUSINESS

Distributes fresh, frozen and specialty meats, seafood, poultry, fruits and vegetables, bakery products, canned and dry foods, paper and disposable products, sanitation items, dairy foods, beverages, kitchen and tabletop equipment, medical and surgical supplies and hotel operating supplies to more than 400,000 customers. The company operates 165 distribution facilities.

Sygma Network specializes in delivery of food and supplies to chain restaurants.

FreshPoint Inc. specializes in distributing fresh fruits and vegetables.

Operates 1,353 discount department stores, 1,713 Supercenters, 551 Sam's Clubs and 85 Neighborhood Markets in the U.S., plus 1,587 stores in the Americas, Europe and Asia.

Ahold USA operates approximately 800 supermarkets, including Stop & Shop Supermarket Co., Tops Markets, Giant Food (Carlisle, Pa.) and Giant Food (Maryland) — Bruno's Supermarkets and BI-LO LLC sold in February 2005.

USFoodservice distributes food service products to more than 250,000 customers, including restaurants, hotels, health care facilities, cafeterias and schools.

Peapod Inc. provides online grocery shopping and home delivery services.

Processes and markets beef, chicken, pork, refrigerated and frozen prepared foods and animal feeds worldwide. The company operates 128 processing plants, 11 cold storage warehouses and nine distribution centers, 35 feed mills, 68 hatcheries and 85 livestock farms.

PBX Inc. is a for-hire refrigerated truckload carrier.

McLane Grocery Distribution delivers food and groceries to convenience stores, drug stores, mass merchandisers, wholesale clubs and movie theaters through 19 distribution centers.

McLane Foodservice delivers food and service items to quick-service restaurant chains through 18 distribution centers.

Professional Datasolutions provides software and point-of-sale automation systems to convenience stores and vendors.

Salado Sales develops and distributes private label food products.

Vantix Logistics provides supply chain consulting and transportation management.

Provides oil and gas drilling services and project management services.

WesternGeco provides seismic testing services.

Provides oil and gas drilling and production services.

Operates 2,524 supermarkets and department stores in 32 states under the Kroger, Ralphs Grocery, King Soopers, City Market, Dillon's, Smith's Food & Drug Stores, Fry's, Quality Food Centers, Baker's, Cala Foods/Bell Markets, Owen's, Jay C Food Stores, Hilander, Gerbes, Pay Less Super Markets, Food4Less, Foods Co. and Fred Meyer banners. The company operates 793 convenience stores under the Turkey Hill, KwikShop, Loaf N' Jug, QuickStop and Tom Thumb banners; 432 jewelry stores under the Fred Meyer, Littman and Barclay banners; 552 supermarket fuel centers and 42 food processing plants.

Processes and distributes chickens and turkeys under the Pilgrim's Pride and Wampler Foods brands to retail stores and restaurants through 17 distribution centers in the U.S. and 13 in Mexico. The company also operates 37 processing plants, plus feed mills, hatcheries and about 4,000 growout farms in the U.S. and Mexico.

Operates more than 2,500 food and drug stores under Albertsons, Albertsons-OSCO, Albertsons Sav-on, Jewel-OSCO, Acme, Grocery Warehouse, Sav-on Drugs, SavonHealth.com, OSCO Drug, Max Foods, Shaw's Supermarkets, Star Markets, Super Saver and Seessel's in 37 states with 22 distribution centers.

Reinhart Food Services distributes food and beverages, utensils, glassware, paper supplies, cleaning chemicals, dry groceries, deli and bakery goods to 25,000 food service customers in 27 states through 12 distribution centers (acquired January 2005).

Martin-Brower Co. distributes food and supplies to McDonald's restaurants in the U.S., Canada, Brazil, Central America and Puerto Rico.

Premium Distributors of Virginia, Chicago Beverage Systems and **Harbor Distributing** distribute beer to wholesalers.

Business Growth, Need for Capacity Reshape Private List

By Daniel P. Bearth
Senior Features Writer

Shipper-owned fleets grew in size and scope over the past year, but corporate consolidation and equipment outsourcing continued to play a role in shaping the 2005 TRANSPORT TOPICS 100 list of the largest U.S. and Canadian private carriers.

Food service supplier Sysco Corp. topped the list for the third consecutive year, followed by Wal-Mart Stores, which added more than 450 tractors and several thousand trailers in response to new store openings and increased sales.

Ahold USA remained at No. 3, with its combined grocery and food service fleet totaling 6,111 tractors. However, those numbers are likely to decline as several of Ahold's supermarket chains recently were sold and the company continues to turn over more of its transportation to subcontractors and dedicated contract carriers.

The TT 100

In February, supermarket retailer and wholesale food distributor Supervalu Inc., No. 36, took the extraordinary step of buying Total Logistic Control, an established provider of warehouse-based, third-party logistics services, to broaden its logistics expertise and cultivate nonfood customers for its distribution business.

Reyes Holdings, owner of fast food supplier Martin-Brower and a group of regional beer distributors, broadened its service portfolio by buying Reinhart Foodservice of LaCrosse, Wis. The addition of Reinhart nearly doubled the size of Reyes' tractor fleet and moved the company to No. 11 on the TT Private 100 from No. 68 a year ago.

In contrast, Milwaukee-based Roundy's Inc. decided to get out of wholesale food distribution, selling two distribution centers to Nash Finch Co. and shedding about \$1 billion in revenue. Roundy's now operates a group of about 125 supermarkets with a private fleet of 98 tractors, down from 278 in 2004.

Winn-Dixie Stores, No. 14 in 2004, dropped off the TT Private 100 as the Florida-based supermarket chain in June announced plans to close hundreds of stores as part of a financial restructuring.

Nonetheless, food service and wholesale/retail grocery fleets remain the biggest sector represented on the list at 25. Agricultural and food-processing fleets at 19 are now the second-largest category. Wholesale and retail distribution numbered 18; petroleum, chemical and gas companies, 17; manufacturers, 10; building materials and metal products, eight; paper and office products, four; and miscellaneous, three.











Several companies are listed for the first time, including Stock Building Supply, a company owned by British heating and plumbing distributor Wolseley, which also owns Virginia-based Ferguson Enterprises. It ranks No. 44, with 477 tractors, 3,082 straight trucks and 490 trailers.

Oilfield specialists Schlumberger Ltd. and BJ Services joined the Private 100 list's Top 10, at Nos. 6 and 7, respectively.

Information on the size of private carriers, for the most part, came directly from company management and was supplemented by data from the North American Truck Fleet Directory and the Department of Transportation.

Private carriers are ranked by the number of tractors they own or lease. This does not include tractors used by outside carriers that may provide dedicated or common carriage services.

The list excludes government, utility and vocational fleets, including beverage, farm and home fuel delivery fleets, because of their specialized use.

RANK 2005	RANK 2004	COMPANY	2005 EQUIPMENT	ANNUAL SALES	DESCRIPTION OF BUSINESS
12	7	 Safeway Inc. Pleasanton, Calif NYSE: SWY Tom Narkter, Vice President of Transportation <i>www.safeway.com</i>	1,225 tractors 4,000 trailers	\$35.8 billion	Operates around 1,800 supermarkets and drug stores in the U.S. and western Canada, including Genuardi's Family Markets, Vons Companies, Dominick's Finer Foods, Carr-Gottstein Foods and Randall's Food Markets. It also produces milk, bread, ice cream, cheese and meat products, soft drinks, fruit and vegetables and pet food at 22 processing plants in the U.S. and 12 in Canada. Safeway has 12 distribution centers in the U.S. and three in Canada. Casa Ley, S.A. de C.V. sells food and general merchandise in western Mexico (owns 49% interest). GroceryWorks.com provides Internet and home delivery service.
13	8	 Halliburton Co. Houston NYSE: HAL Randall Harris, Fleet Operations Manager <i>www.halliburton.com</i>	1,216 tractors 758 straight trucks 2,096 trailers	\$20.5 billion	Halliburton Energy Services provides pressure pumping, production enhancement and well drilling and completion services for the oil and gas industry, plus well logging and testing equipment. Kellogg Brown & Root designs and builds liquefied natural gas plants, refining and processing plants, production facilities and pipelines, plus engineering and construction services for governments and civil infrastructure customers.
14	10	 Unisource Worldwide Norcross, Ga. (Bain Capital/Georgia Pacific Corp.) Larry Ahlers, Vice President of Transportation <i>www.unisourcelink.com</i>	1,208 tractors 1,114 trailers	N/A	Distributes commercial printing and office paper products, packaging materials and facility maintenance supplies through more than 100 distribution centers.
15	32	 Gordon Food Service Grand Rapids, Mich. David Ponstein, Transportation Manager <i>www.gfs.com</i>	1,205 tractors 107 straight trucks 1,829 trailers	\$3.3 billion	Manufactures and distributes food and related supplies to 30,000 restaurants, schools and institutions in 10 states and throughout Canada. The company operates 100 Marketplace retail stores in the Midwest and Florida.
16	9	 Frito-Lay North America Plano, Texas NYSE: PEP (PepsiCo) Eric Woods, National Director of Fleet Operations <i>www.frito-lay.com</i>	1,035 tractors 4,001 trailers	\$9.6 billion	Manufactures, distributes and sells potato chips, pretzels, popcorn, cookies, onion rings, tortilla chips, cheese-flavored snacks, fruit and granola bars, rice cakes, corn chips, dips and salsa in the U.S. and Canada.
17	50	 Nestlé USA Glendale, Calif. OTC: NSRGY (Nestlé SA, Vevey, Switzerland) Diana Strawder, National Fleet Manager, Nestlé Waters <i>www.nestleusa.com</i>	1,006 tractors 4,096 straight trucks 2,531 trailers	\$12.4 billion	Manufactures and distributes food, beverage and pet care products, including Nestea, Taster's Choice, Carnation, Alpo, Friskies, Libby's and Stouffer's. Nestlé Waters North America distributes domestic and imported bottled water under a variety of names, including Perrier, Poland Spring and Deer Park. Dreyer's Grand Ice Cream makes and distributes ice cream and frozen treats.
18	15	 Shaw Industries Dalton, Ga. NYSE: BRK.A (Berkshire Hathaway) Greg Whisenant, Transportation Safety Manager <i>www.shawfloors.com</i>	926 tractors 47 straight trucks 3,717 trailers	\$4.7 billion	Manufactures carpets, rugs, hardwood, laminate and ceramic tile floors for residential and commercial purposes.
19	Not Ranked	 Milk Transport Services Cabool, Mo. (Dairy Farmers of America/CTL) Dave Shelton, General Manager <i>www.mtsmilk.com</i>	912 tractors 1,207 trailers	N/A	Hauls raw milk from farms to processing plants and cheese factories throughout the country.
20	Not Ranked	 Airgas Inc. Radnor, Pa. NYSE: ARG Tuffy Baum, National Fleet Manager <i>www.airgas.com</i>	911 tractors 2,203 straight trucks and vans 1,600 trailers	\$2.4 billion	Distributes industrial, medical and specialty gases, welding and related safety products. Company also manufactures nitrous oxide and CO ₂ and is a supplier of dry ice — packaged gas business of the BOC Group acquired in July 2004.
21	17	 BlueLinx Corp. (Cerberus Capital Management) Atlanta NYSE: BXC Chuck McElrea, Chief Executive Officer <i>www.bluelinxco.com</i>	867 tractors 30 straight trucks 1,243 trailers	\$3.7 billion	Distributes building products through more than 60 warehouses in the U.S.
22	38	 Performance Food Group Richmond, Va. Nasdaq: PFGC Dan Peckskamp, Director of Transportation <i>www.pfgc.com</i>	860 tractors 100 straight trucks	\$6.2 billion	Distributes food and food-related products to approximately 44,000 restaurants, hotels, cafeterias, schools and health care facilities.
23	Not Ranked	 International Paper Co. Stamford, Conn. <i>www.internationalpaper.com</i>	827 tractors 744 straight trucks 1,795 trailers	\$25.6 billion	Produces and distributes paper for office and commercial printing, packaging for food and beverages, lumber and plywood. The company operates 15 tree nurseries and 25 orchards and manages forests in the U.S. and Brazil. Arizona Chemical produces chemicals from pine trees for making adhesives and coatings, fragrances, household cleaners and rubber products. Xpedx Inc. distributes printing, packaging and graphic arts supplies in North America through 136 distribution centers and 148 retail stores in the U.S. and Mexico.

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RANK 2005	RANK 2004	COMPANY	2005 EQUIPMENT	ANNUAL SALES	DESCRIPTION OF BUSINESS
24	42	 C&S Wholesale Grocers Keene, N.H. <i>www.cswg.com</i>	758 tractors 42 straight trucks 3,535 trailers	\$13.6 billion	Distributes food and dry goods to about 4,000 supermarkets and grocery stores, mass marketers and wholesale clubs in the U.S. through 42 distribution facilities in 10 states.
25	16	 BOC Group Murray Hill, N.J. NYSE: BOX (The BOC Group PLC, London) Michael Gentile, Vice President of Distribution and Logistics <i>www.boc.com</i>	750 tractors 100 straight trucks 1,200 trailers	\$1.5 billion	Distributes industrial and specialty gases in bulk and in cylinders throughout North America.
26	20	 Darling International Irving, Texas AMEX: DAR Rodney Baldwin, Fleet Operations Manager <i>www.darlingii.com</i>	709 tractors 798 straight trucks 2,260 trailers	\$320.2 million	Collects and recycles animal by-products and used cooking grease from approximately 80,000 restaurants, butcher shops, grocery stores and meat and poultry processors in the U.S. Products are sold for livestock feed, pet food and ingredients in soap, rubber and chemical products.
27	18	 Smithfield Foods Smithfield, Va. NYSE: SFD Jerry Shelton, General Manager, Transportation <i>www.smithfieldfoods.com</i>	702 tractors 193 straight trucks 1,703 trailers	\$9.3 billion	Produces and markets pork and beef products in the U.S. and more than 25 other countries under the Smithfield Packing Co., Farmland Foods, John Morrell & Co., Packerland Holdings, Gwaltney of Smithfield, Moyer Packing Co., Smithfield Deli Group, Patrick Cudahy, North Side Foods, Cumberland Gap Provision, Quik-to-Fix, Krakus Foods International, Stefano Foods and Smithfield RMH Foods names. Smithfield Foodservice Group markets Gwaltney and Smithfield Packing products. Murphy Brown LLC raises hogs in the U.S., Mexico, Brazil and Poland.
28	13	 Delhaize America Salisbury, N.C. NYSE: DEG (Delhaize Group) Dennis McCoy, Vice President of Distribution <i>www.delhaizegroup.com</i>	692 tractors 1,887 trailers	\$15.8 billion	Operates 1,523 supermarkets in 16 states under the Food Lion, Hannaford Bros., Sweetbay Supermarket, Harveys, Kash n' Karry and Bloom stores names (Victory Super Markets acquired September 2004).
29	67	 CHS Inc. Nasdaq: CHSCP Inver Grove Heights, Minn. Kelly Morrow, Director, CHS Transportation <i>www.chsinc.com</i>	687 tractors 2,240 straight trucks 1,556 trailers	\$10.9 billion	Operates petroleum refineries and pipelines and supplies propane, fertilizer and crop protection products, markets grain and processes soybeans for use in food and animal feed, produces flour for pasta and bread and makes tortillas, margarine, salad dressings, sauces and vegetable oils. CHS operates 15 transportation fleet service centers. The company is a 50/50 partner with Land O'Lakes Inc. in agricultural chemical producer Agrilance LLC.
30	36	 Dot Foods Mt. Sterling, Ill. John Tracy, President <i>www.dotfoods.com</i>	608 tractors 2 straight trucks 850 trailers	N/A	Distributes groceries, flatware and janitorial supplies from manufacturers to food processors and food service distributors — Chicago Sweetners Inc. acquired July 2005.
31	24	 Prairie Farms Carlinville, Ill. Jay Naples, Corporate Fleet Manager <i>www.prairiefarms.com</i>	600 tractors 1,000 straight trucks 1,800 trailers	N/A	Produces and distributes dairy and non-dairy products for about 800 member dairies and is managing partner for four joint venture dairy cooperatives: Hiland Dairy Foods, Roberts Dairy, Muller Pinehurst Dairy and Ideal American. Ice Cream Specialties manufactures and distributes frozen ice cream bars and sandwiches. PFD Supply distributes food and paper products to fast food outlets.
32	30	 Praxair Inc. Danbury, Conn. NYSE: PX John Mitchell, National Manager of Distribution <i>www.praxair.com</i>	600 tractors 900 trailers	\$6.6 billion	Supplies atmospheric, process and specialty gases, metal and ceramic coatings and related services and technologies to food and beverage, healthcare, semiconductor, petrochemical and metal fabrication industries.
33	26	 Air Products & Chemicals Allentown, Pa. NYSE: APD W.K. Bender, North American Fleet Operations Manager <i>www.airproducts.com</i>	585 tractors 72 straight trucks 1,845 trailers	\$7.4 billion	Produces and distributes industrial gases and chemicals for a variety of industries, including electronics and chemical processing.
34	25	 Univar USA Kirkland, Wash. (Univar NV, Netherlands) Ed Higbee, National Fleet Manager <i>www.univarusa.com</i>	578 tractors 1,152 trailers	\$2.4 billion	Provides distribution services to chemical, coatings, electronics, food and pharmaceutical, forest products, mining, oil and gas, textiles and waste management industries.
35	22	 Kellogg Snacks Division Battle Creek, Mich. NYSE: K (Kellogg Co.) Dennis Soch, Fleet Operations Manager <i>www.keebler.com</i>	572 tractors 167 straight trucks 766 trailers	N/A	Produces and distributes cookie and cracker products through its Keebler and Sunshine labels.

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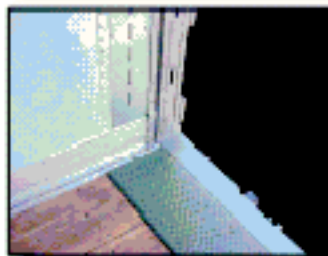
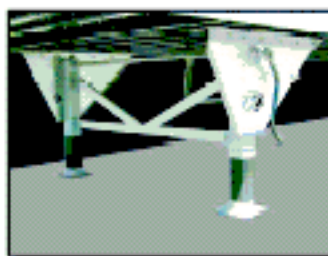
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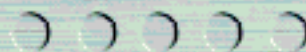
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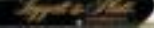

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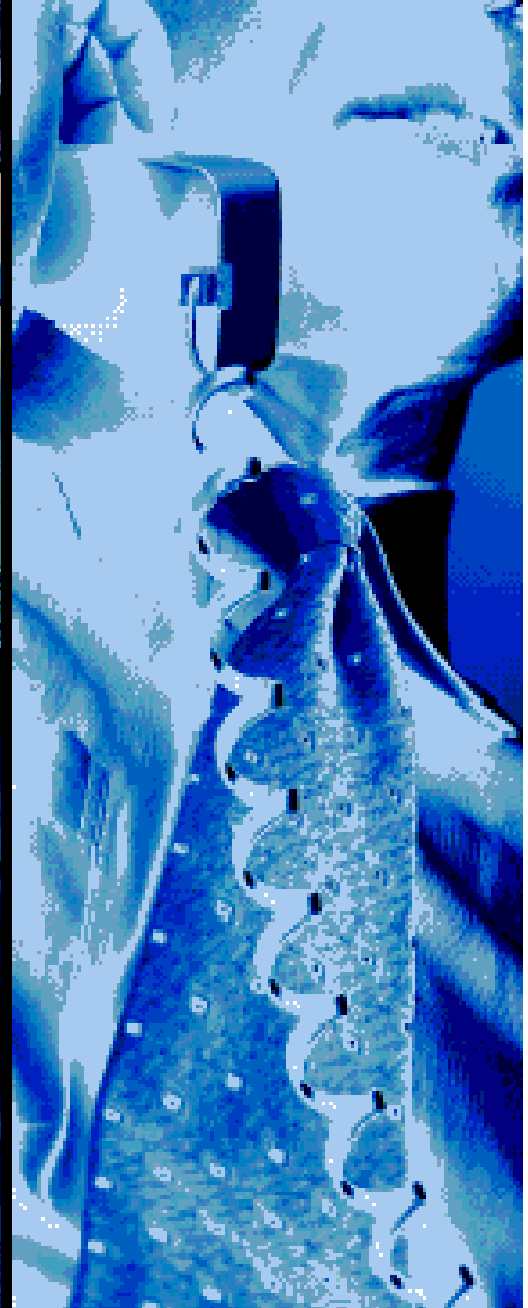
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RANK 2005	RANK 2004	COMPANY	2005 EQUIPMENT	ANNUAL SALES	DESCRIPTION OF BUSINESS
36 	21	Supervalu Inc. Eden Prairie, Minn. NYSE: SVU Gregory Heying, Senior Vice President of Distribution Marty Thompson, Director, Supply Chain <i>www.supervalu.com</i>	571 tractors 2,582 trailers	\$19.5 billion	Operates 1,550 stores in nearly 40 states under the Save-A-Lot name and 293 stores under the Bigg's, Club Foods, Farm Fresh, Hornbacher's, Scott's Food & Pharmacy, Shop 'n Save and Shoppers Food Warehouse names and provides food distribution services for 2,300 independent grocery stores through 24 distribution centers in 48 states. Advantage Logistics and Total Logistics Control provides supply chain consulting, transportation management and warehousing.
37 	Not Ranked	Publix Super Markets Lakeland, Fla. <i>www.publix.com</i>	567 tractors 1,636 trailers	\$18.7 billion	Operates 850 supermarkets and convenience stores in Florida, Alabama, Georgia, South Carolina and Tennessee.
38 	44	Land O'Lakes Inc. Arden Hills, Minn. Roger Nordvedt, Transportation Manager <i>www.landolakesinc.com</i>	557 tractors 566 straight trucks 1,380 trailers	\$7.7 billion	Manufactures and distributes milk, butter and cheese to farm cooperatives, supermarkets and food service companies throughout the U.S. and 50 other countries. Land O'Lakes Purina Feed makes feed for livestock. Moark LLC engages in egg production. Agriliance Inc. makes crop nutrients, crop protection products, seed and technical services to farmers and ranchers.
39 	29	Gilster-Mary Lee Corp. Chester, Ill. Michael Welge, Executive Vice President <i>www.gilstermarylee.com</i>	555 tractors 1,583 trailers	\$615 million	Manufactures and distributes more than 500 private-label products, including cereal, cake, cocoa, dinners, drink mixes, pasta and popcorn to grocery stores and food wholesalers. The company operates 14 production facilities.
40 	Not Ranked	Walgreen Co. Deerfield, Ill. NYSE: WAG Thomas Stedman Sr., Director of Corporate Transportation <i>www.walgreens.com</i>	550 tractors 3 straight trucks 1,100 trailers	\$37.5 billion	Operates 4,582 drugstores and pharmacies in 45 states and Puerto Rico. Walgreen Co.'s private fleet distributes goods to stores from 12 distribution centers.
41 	35	Gold Kist Atlanta Vic Vickers, Fleet Manager <i>www.goldkist.com</i>	540 tractors 98 straight trucks 720 trailers	\$2.3 billion	Produces and distributes chicken products to retail, institutional and fast-food customers.
42 	28	Weyerhaeuser Co. Tacoma, Wash. NYSE: WY Peter Sherland, Vice President, Transportation <i>www.weyerhaeuser.com</i>	522 tractors 526 straight trucks 1,699 trailers	\$22.7 billion	Grows and harvests timber; manufactures, distributes and sells building materials, pulp, paper and packaging materials. Weyerhaeuser Real Estate Co. builds and finances homes through Winchester Homes in Maryland and Virginia, Pardee Homes in Southern California, Trendmaker Homes in Texas and Quadrant Corp. in Washington. Westwood Shipping Lines operates as an ocean freight carrier.
43 	55	Air Liquide America Houston OTC: AIQUY (L'Air Liquide SA, Paris) Rick Pedersen, Director of Bulk Distribution and Logistics <i>www.us.airliquide.com</i>	519 tractors 88 straight trucks 1,462 trailers	N/A	Supplies industrial and medical gases and related services to the steel, oil refining, chemistry, glass, electronics, paper, metallurgy, food processing, health care and aerospace industries.
44 	Not Ranked	Stock Building Supply/Ferguson Enterprises Raleigh, N.C., and Newport News, Va. (Wolseley PLC, Theale, England) Joe Appelman, Senior Vice President of Logistics <i>www.stockbuildingsupply.com</i> <i>www.ferguson.com</i>	477 tractors 3,052 straight trucks 490 trailers	\$3.6 billion	Stock Building Supply provides lumber, plywood, sheetrock, tools and trusses to building contractors through 240 locations in 28 states. Ferguson Enterprises distributes plumbing supplies, building materials and heating and air conditioning products through nine distribution centers to about 1,074 locations in 49 states, the District of Columbia, Canada, Puerto Rico and Mexico.
45 	54	H.E. Butt Grocery Co. San Antonio Sam Medrano, Director, Transportation <i>www.heb.com</i>	475 tractors 2,000 trailers	N/A	Operates more than 300 grocery stores in Texas, Louisiana and Mexico under the H-E-B and Central Market names. The company also processes meat, dairy products, bread and tortillas.
46 	23	Leggett & Platt Inc. Carthage, Mo. NYSE: LEG Maik Breckwoldt, Vice President of Transportation <i>www.leggett.com</i>	471 tractors 1,719 trailers	\$5.1 billion	Manufactures components for residential furniture and bedding, retail store fixtures and displays, office furniture, die-castings, steel tubing and wire, automotive seat support and lumbar systems and bedding industry machinery.
47 	49	Ashland Inc. Covington, Ky. NYSE: ASH Hank Waters, President, Ashland Distribution <i>www.ashland.com</i>	450 tractors 750 trailers	\$8.3 billion	Ashland Paving and Construction operates 93 aggregate production facilities, 36 quarry locations, 31 ready-mix concrete plants and 226 hot-mix asphalt plants in 14 Southern and Midwestern states. Ashland Distribution buys chemicals and plastics and blends and repackages them for distribution in Europe and North America. Ashland Specialty Chemical makes chemicals for water treatment, building and construction, graphic arts and printing, marine, metal casting, packaging, power generation, pulp and paper and transportation. Valvoline operates 300 company-owned and 400 franchised oil-change outlets and markets Valvoline motor oil and Zerex antifreeze.



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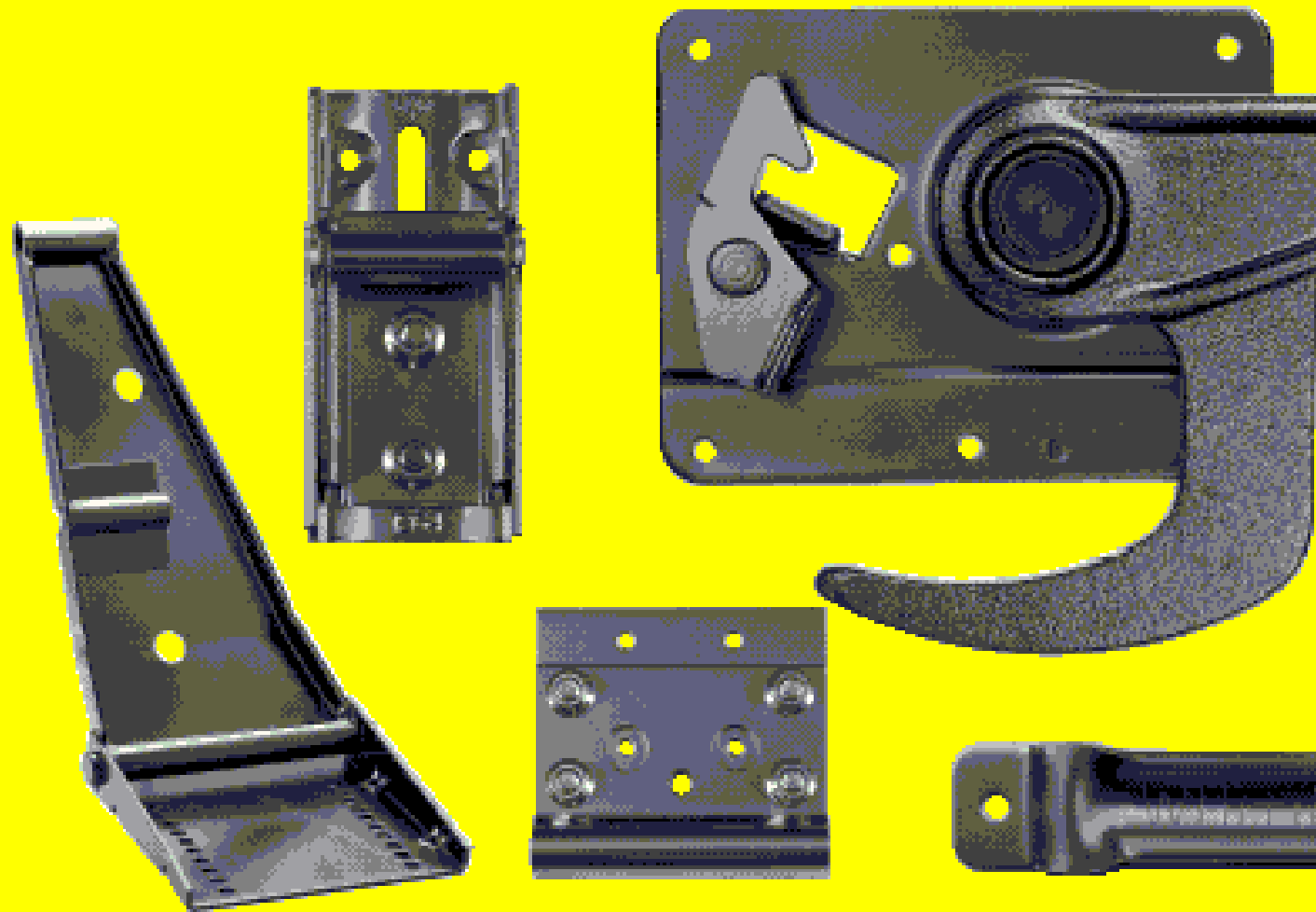


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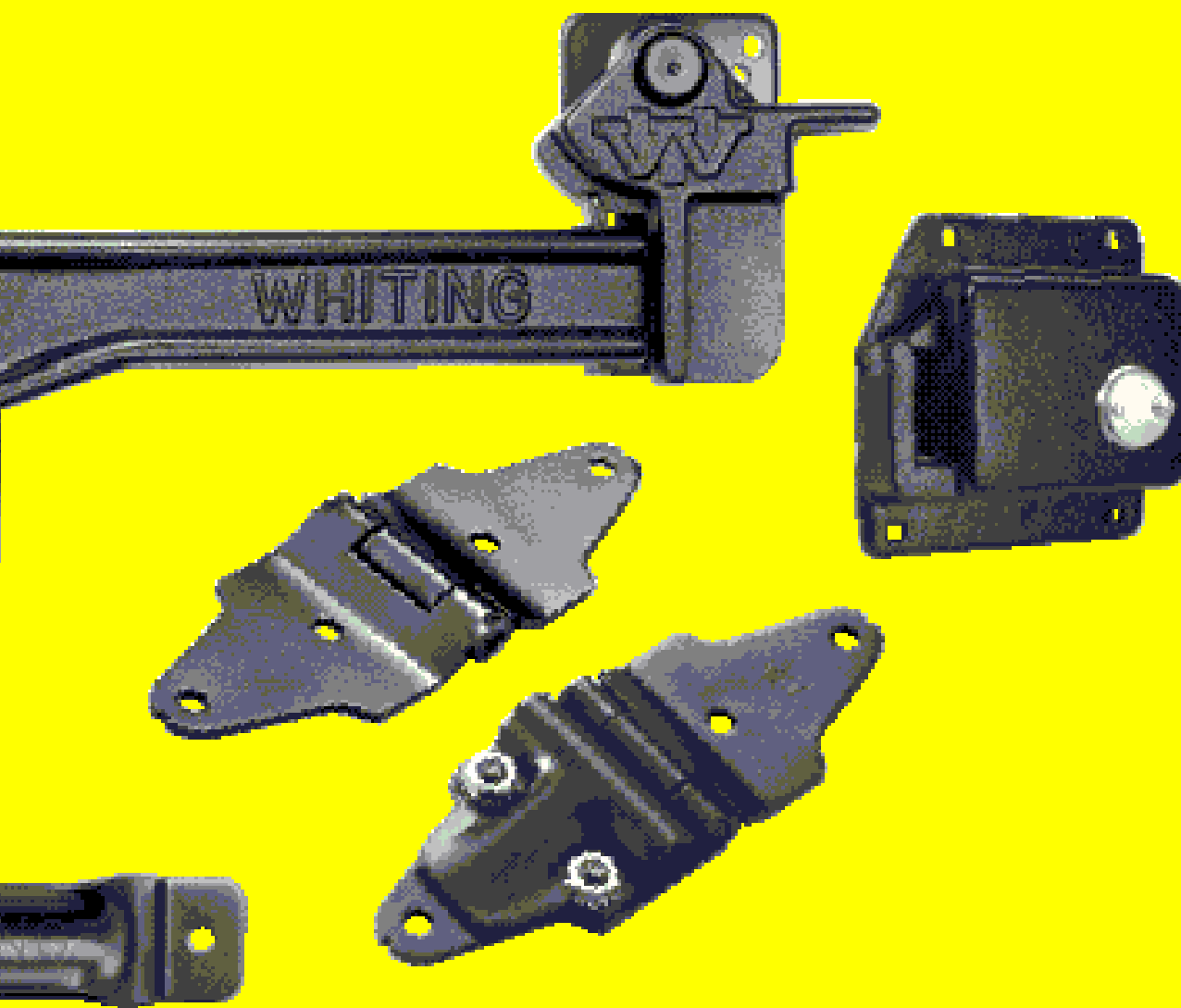
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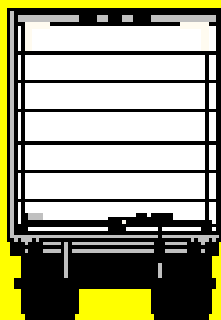
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RANK 2005	RANK 2004	COMPANY	2005 EQUIPMENT	ANNUAL SALES	DESCRIPTION OF BUSINESS
48	41	 Foster Farms Livingston, Calif. Mike Hoyt, Vice President of Services www.fosterfarms.com	450 tractors 25 straight trucks 750 trailers	\$1.7 billion	Processes and distributes chicken and turkey products.
49	46	 CardinalHealth Dublin, Ohio NYSE: CAH Kris Peterinelli, Private Fleet Manager www.cardinal.com	450 tractors 287 straight trucks 656 trailers	\$65 billion	Manufactures and distributes medical, surgical, laboratory products as well as pharmaceuticals to 6,000 U.S. health care locations.
50	43	 Exxon Mobil Corp. Irving, Texas NYSE: XOM Bob Manchester, U.S. Fleet Manager www.exxon.mobil.com	439 tractors 246 straight trucks 423 trailers	\$264 billion	Engages in oil and gas exploration, production, supply, transportation and marketing worldwide. The company operates 45 refineries in 25 countries and supplies gasoline and other petroleum products to about 42,000 service stations in more than 100 countries. The company also manufactures petrochemicals, packaging films and specialty chemicals.
51	39	MBM Corp. Rocky Mount, N.C. <i>no Web site</i>	428 tractors and straight trucks	\$4.7 billion	Delivers food to national restaurant chains, including Arby's, Burger King, Captain D's, Chick-fil-A, Red Lobster, Olive Garden and Bahama Breeze. The company operates 30 U.S. distribution centers.
52	Not Ranked	 Ben E. Keith Co. Fort Worth, Texas Daniel Murrell, Fleet Operations Manager www.benekeith.com	426 tractors 492 trailers	\$1.5 billion	Delivers food, paper goods, equipment and supplies to restaurants, hospitals, schools and other institutional businesses through six distribution centers in eight states. Ben E. Keith Beers distributes beer for Anheuser-Busch to 56 counties in Texas through eight distribution centers.
53	45	 J.R. Simplot Co. Boise, Idaho Bill Moad, Fleet Operations Manager www.simplot.com	425 tractors 7 straight trucks 650 trailers	\$3.1 billion	Manufactures fertilizer and animal feed, veterinary products and grass seed, processes fruits and vegetables, especially potatoes, and supplies industrial chemicals, irrigation products and silica.
54	47	 Sunoco Inc. Philadelphia NYSE: SUN Deborah Fretz, President, Sunoco Logistics www.sunocoinc.com	411 tractors 113 straight trucks 272 trailers	\$23.2 billion	Refines and markets gasoline and petroleum products through 4,800 retail outlets and manufactures and sells products used in the production of fibers, plastics, film and resins, plus high-quality coke for use in the steel industry.
55	53	 Ace Hardware Corp. Oak Brook, Ill. Paul Motylinski, Director, Distribution and Transportation www.acehardware.com	392 tractors 1,200 trailers 400 cars and vans	\$3.3 billion	Distributes hardware and related products to approximately 4,700 member stores through 15 distribution centers and seven crossdock facilities.
56	Not Ranked	 Unified Western Grocers Commerce, Calif. Rod Van Bebber, Senior Vice President, Distribution www.uwgrocers.com	385 tractors 1,096 trailers	\$3 billion	Distributes groceries, ice cream, baked goods and general merchandise and provides merchandising support to about 4,000 independent retailers in nine Western states and several countries in the South Pacific.
57	63	 Advanced Drainage Systems Hilliard, Ohio www.ads-pipe.com	385 tractors 81 straight trucks 573 trailers	N/A	Manufactures polyethylene pipe for agricultural, waste management, mining, timber, residential and commercial construction, and highway drainage markets.
58	34	 Ashley Furniture Industries Arcadia, Wis. Larry Corey, Director of Transportation www.ashleyfurniture.com	380 tractors 580 trailers	\$1.7 billion	Manufactures and distributes furniture and bedding and operates nearly 100 Ashley HomeStores. Ashley Distribution Services operates as a for-hire truckload carrier.
59	51	 Rinker Materials Corp. West Palm Beach, Fla. (Rinker Group Ltd., Australia) Jim Jenkins, Manager, Rinker Transport www.rinkermaterials.com	375 tractors 146 trailers	\$2.9 billion	Produces and distributes construction materials, such as ready-mix concrete, cement, drywall and concrete blocks. New Line Transport provides private and for-hire trucking services.
60	33	 Archer Daniels Midland Decatur, Ill. NYSE: ADM Craig Huss, Vice President, Transportation www.admworld.com	373 tractors 898 trailers	\$36.2 billion	Processes soybeans, corn, wheat and cocoa into soy meal and oil, ethanol, high-fructose corn syrup and flour at more than 250 processing plants worldwide. ADM Trucking transports agricultural commodities and products. American River Transportation Co. transports agricultural commodities by barge. ADM Shipping transports agricultural products by rail.
61	73	 Bridgestone Americas Holding Nashville, Tenn. (Bridgestone Corp., Tokyo) Ron Tartt, General Manager, Private Fleet www.bridgestone-firestone.com	372 tractors 4 straight trucks 715 trailers	\$9.2 billion	Bridgestone Firestone North American Tire manufactures Bridgestone, Firestone, Dayton and private-brand tires for cars, trucks, motorcycles, tractors and earthmoving equipment. BFS Retail & Commercial Operations operates more than 2,200 U.S. and Canadian consumer and commercial tire and vehicle service centers. BFS Diversified Products manufactures roofing membranes and rubber liners, tire cord and rubber-coated industrial fabrics, polymers and synthetic rubber, latex and natural rubber, air springs and height-control systems. Bridgestone Metalpha manufactures steel cords.

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RANK 2005	RANK 2004	COMPANY	2005 EQUIPMENT	ANNUAL SALES	DESCRIPTION OF BUSINESS
62	Not Ranked	Sentinel Transportation LLC Wilmington, Del. Ralph Benson, President <i>no Web site</i>	370 tractors 18 straight trucks 1,620 trucks	N/A	Provides freight transportation services to petrochemical manufacturers DuPont and ConocoPhillips.
63	52	 Army & Air Force Exchange Service Dallas (Department of Defense) George Carpenter, Director of Fleet Operations <i>www.aafes.com</i>	368 tractors 19 straight trucks 1,158 trailers	\$7.9 billion	Operates more than 12,000 post and base exchanges in the United States and 35 other countries with retail merchandise, fast-food outlets, movie theaters, beauty shops and gas stations.
64	68	 Rite Aid Corp. Camp Hill, Pa. NYSE: RAD Wilson Lester Jr., Senior Vice President of Supply Chain <i>www.riteaid.com</i>	360 tractors 1,100 trailers	\$16.8 billion	Operates 3,350 drug stores in 28 states and the District of Columbia.
65	64	 Genuine Parts Co. Atlanta NYSE: GPC Larry Prince, Chairman and CEO <i>www.genpt.com</i>	358 tractors 446 straight trucks 901 trailers	\$9.1 billion	Automotive Parts Group distributes auto parts to 6,000 company-owned and independent NAPA Auto Parts stores through 58 North American distribution centers. Motion Industries distributes industrial replacement parts to automotive, chemical, food and beverage, wood and lumber, iron, oil, pulp and paper, steel and textile industries through nine distribution centers. S.P. Richards Co. distributes business products, office furniture, computer equipment, cleaning supplies and safety items to office products resellers through 44 distribution centers. EIS Inc. manufactures and supplies electronic and electrical apparatus to electronics manufacturers and repair shops through 34 warehouses.
66	66	 Flying J Inc. Ogden, Utah Zane Atkinson, General Manager <i>www.flyingj.com</i>	357 tractors 28 straight trucks 559 trailers	\$7.3 billion	Engages in exploration, production, refining, transportation and marketing of petroleum products. The company operates 170 travel plazas and fuel stops in 44 states and Canada and provides financial services, insurance, communications services, freight information exchange, truck fleet sales and other services.
67	Not Ranked	 Plains All American Pipeline LP Houston <i>www.paalp.com</i>	344 tractors 344 trailers	N/A	Distributes crude oil and liquefied petroleum gas with pipelines, trucks and barges.
68	61	 Sherwin-Williams Co. Cleveland NYSE: SHW Rick Ashton, Director of Traffic and Transportation <i>www.sherwin-williams.com</i>	330 tractors 1,021 trailers	\$6.1 billion	Manufactures paint, finishes, coatings and varnishes under the Dutch Boy, Red Devil, Martin-Senour, Krylon, Sherwin-Williams and Minwax names. The company also operates more than 2,650 retail paint stores in North America. Contract Transportation Systems operates as a for-hire and private carrier.
69	60	 True Value Co. Chicago Rich Buchanan, Director, Outbound Transportation <i>www.truevaluecompany.com</i>	325 tractors 1,125 trailers	\$2 billion	Distributes hardware, garden and nursery products, provides rental services and manufactures and sells paint and applicators to approximately 6,100 independent stores through 12 distribution centers.
70	62	 Kraft Foods Northfield, Ill. NYSE: KFT Philip Carlson, Senior Director, Transportation <i>www.kraft.com</i>	320 tractors 2,423 straight trucks 1,000 trailers	\$32.2 billion	Manufactures and sells Kraft cheese, Jacobs and Maxwell House coffee, Nabisco cookies and crackers, Philadelphia cream cheese, Oscar Mayer meats, Post cereals and Milka chocolates in the United States and more than 150 countries.
71	72	 Vulcan Materials Co. Birmingham, Ala. NYSE: VMC <i>www.vulcanmaterials.com</i>	317 tractors 121 straight trucks 381 trailers	\$2.2 billion	Produces crushed stone, sand and gravel for construction projects and road building — assets of New West Materials Co. acquired in March.
72	86	 Tree of Life St. Augustine, Fla. (Koninklijke Wessanen, Netherlands) Chris Sieburg, Vice President, Corporate Transportation <i>www.treeoflife.com</i>	291 tractors 144 trucks 364 trailers	N/A	Distributes natural foods and supplements to more than 20,000 U.S. and Canadian retail stores through 16 distribution facilities.
73	Not Ranked	 Linde Gas LLC Cleveland (Linde Group, Wiesbaden, Germany) Guy Dalton, Fleet Safety and Compliance Manager <i>www.linde-gas.com</i>	290 tractors 330 straight trucks 445 trailers	N/A	Produces and distributes gases for industrial, medical, environmental and research and development activities.
74	37	 Boise Cascade Holdings LLC Boise, Idaho (Madison Dearborn Partners) Roger Olds, General Manager, Trucking <i>www.bc.com</i>	283 tractors 658 trailers	\$5.7 billion	Manufactures and distributes lumber, plywood, particle board, office paper and imaging products, containerboard and corrugated boxes, newsprint and pulp. The company operates 30 U.S. wholesale building material distribution centers. BCT Inc. operates as a for-hire carrier providing flatbed and dry van truckload, heavy specialized and wood chip hauling services.



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RANK 2005	RANK 2004	COMPANY	2005 EQUIPMENT	ANNUAL SALES	DESCRIPTION OF BUSINESS
75	71	 Carpenter Co. Richmond, Va. Douglas Young, Director of Transportation www.carpenter.com	275 tractors 50 straight trucks 1,125 trailers	\$1.2 billion	Manufactures and distributes polyurethane foam and polyester fiber used by automotive, bedding, floor covering and furniture industries. The company also makes air filter media, polystyrene building materials and consumer fiber products.
76	70	 AutoZone Inc. Memphis, Tenn. NYSE: AZO Richard McDuffie, Vice President Transportation www.autozone.com	274 tractors 491 trailers	\$5.6 billion	Sells auto and light-truck parts, chemicals and accessories through 3,505 U.S. stores and 73 stores in Mexico. The company also sells automotive diagnostic and repair software.
77	58	 Savage Cos. Salt Lake City Allen Alexander, President www.savagecompanies.com	273 tractors 4 straight trucks 624 trailers	N/A	Develops and operates materials management, transportation and related systems for mining, energy and utility companies. Savage Services Corp. operates as a for-hire carrier.
78	Not Ranked	 Dunkin' Brands Inc. Canton, Mass. (Pernod Ricard S.A., Paris) www.dunkinbrands.com	270 tractors and straight trucks	\$4.1 billion	Dunkin' Brands operates and franchises more than 12,000 quick-service eateries, including Dunkin' Donuts, Baskin-Robbins ice cream and Togo's sandwich shops.
79	65	 McKee Foods Corp. Collegedale, Tenn. Chris McKee, President, Transportation www.mckeefoods.com	266 tractors 24 straight trucks 471 trailers	\$1 billion	Manufactures and distributes snack cakes and granola cereal products to independent distributors from three production facilities.
80	82	 Ryerson Tull Inc. Chicago www.ryersontull.com	265 tractors 56 straight trucks 265 trailers	\$3.3 billion	Distributes and processes metals for customers in transportation, building and construction, machinery and equipment and general manufacturing industries — Integris Metals acquired in January.
81	75	 Sanderson Farms Laurel, Miss. Nasdaq: SAFM Joe Stianche, Fleet Manager www.sandersonfarms.com	251 tractors 24 straight trucks 320 trailers	\$1.1 billion	Produces, processes and sells fresh and frozen chickens and prepared food items to retailers, distributors and fast-food operators. The company operates five hatcheries, four feed mills and six processing plants.
82	83	 Earle M. Jorgensen Co. Lynwood, Calif. Brian Yamaguchi, Manager of Transportation and Logistics www.emjmetals.com	251 tractors 232 trailers	\$1.6 billion	Distributes metal products through 35 service and processing centers.
83	76	 Hulcher Services Denton, Texas Lawrence Hartung, Director of Transportation www.hulcher.com	250 tractors 14 straight trucks 250 trailers	N/A	Provides emergency response to incidents involving hazardous materials, train derailments and other emergency situations.
84	77	 Emerson Electric Co. Bridgeton, Mo. NYSE: EMR Don Hollenkamp, Vice President, Logistics www.emersontransportation.com	244 tractors 925 trailers	\$15.6 billion	Sells industrial automation systems, electronics and telecommunications, power management and heating, ventilating, air conditioning, and refrigeration products with 245 manufacturing locations in more than 150 countries. Emerson Transportation operates as a private and contract carrier.
85	Not Ranked	 Shamrock Foods Phoenix www.shamrockfoods.com	244 tractors 64 straight trucks 279 trailers	\$1.4 billion	Distributes food and dairy products to supermarkets, convenience stores, restaurants and institutional customers in 10 states in the West and Southwest.
86	81	 Toys "R" Us Inc. Paramus, N.J. (Kohlberg, Kravis & Roberts Co.) Larry Monaghan, Director of Fleet Operations www.tru.com	235 tractors 2,400 trailers	\$11.6 billion	Operates about 1,500 stores worldwide selling toys, games, sporting goods, baby products, children's apparel and juvenile furniture under the Toys "R" Us, Geoffrey's Toys "R" Us, Babies "R" Us and Toysrus.com names.
87	87	 Huttig Building Products Chesterfield, Mo. NYSE: HBP Don Black, Director of Transportation www.huttig.com	231 tractors 137 straight trucks 427 trailers	\$938 million	Distributes building products, mill work and wood products used in new residential construction and in home improvement remodeling and repair work through nearly 50 distribution centers.
88	91	 Perdue Farms Salisbury, Md. Larry Brown, Director of Logistics www.perdue.com	230 tractors 700 trailers	\$2.8 billion	Produces and markets chicken and turkey food products for retail, deli and food service customers nationwide and frozen products worldwide. The company also operates soybean crushing plants, protein conversion plants, ingredient blending operations, edible oil refineries and grain export and storage facilities. Perdue Transportation delivers fresh poultry to stores and transports soybean oil and meal products.

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RANK 2005	RANK 2004	COMPANY	2005 EQUIPMENT	ANNUAL SALES	DESCRIPTION OF BUSINESS
89	48	 Georgia-Pacific Corp. Atlanta NYSE: GP Robert Pugh, Vice President, Logistics and Transportation <i>www.gp.com</i>	219 tractors 85 straight trucks 564 trailers	\$19.7 billion	Manufactures and distributes bathroom tissue, disposable paper cups and plates, paper towels, container board and packaging, plywood, lumber, gypsum wallboard, particleboard, bleached pulp and paper, adhesives and chemicals.
90	40	 Food Services of America Seattle (Services Group of America) Thomas Stewart, Chairman and CEO <i>www.fsafood.com</i>	219 tractors 212 straight trucks 251 trailers	N/A	Distributes food and business supplies to restaurants, hospitals and schools in 15 Western and Midwestern states through distribution centers in Alaska, Idaho, Montana, Nebraska, North Dakota, Oregon and Washington.
91	88	 Owens-Minor Inc. Richmond, Va. NYSE: OMI Thomas Consedine, Director of Transportation and Logistics <i>www.owens-minor.com</i>	217 tractors 66 straight trucks 220 trailers	\$4.5 billion	Distributes medical and surgical supplies to about 4,000 health care providers from more than 40 distribution centers.
92	90	 Associated Wholesale Grocers Kansas City, Kan. Bill Tandy, Director of Transportation <i>www.awginc.com</i>	205 tractors 450 trailers	\$4.6 billion	Distributes grocery products and provides merchandising support services to more than 1,300 member-owned stores in 21 states under the Country Mart, Price Chopper/Price Mart, Cash Saver, Sun Fresh, Thriftway and Apple Market names.
93	Not Ranked	 Reddy Ice Dallas (Trimaran Capital Partners/Bear Stearns Merchant Banking) Lee Hatch, Fleet Manager <i>www.reddyice.com</i>	202 tractors 493 straight trucks 564 trailers	\$286 million	Produces and distributes packaged ice to retail, commercial and industrial users in Southern states and the District of Columbia. The company also provides refrigerated warehousing and bottled water.
94	Not Ranked	 Austin Powder Co. Cleveland <i>www.austinpowder.com</i>	201 tractors 675 straight trucks 1,414 trailers	N/A	Produces commercial explosives for construction, mining, quarrying and seismic exploration.
95	99	 Batesville Casket Co. Batesville, Ind. NYSE: HB (Hillenbrand Industries) Chris Ruberg, Vice President Logistics <i>www.batesville.com</i>	200 tractors 400 straight trucks 550 trailers	N/A	Produces caskets, cremation products and funeral service support programs. Batesville Logistics provides for-hire trucking services.
96	74	 Trinity Industries Dallas NYSE: TRN Don Graham, President, Trinity Industries Transportation <i>www.trinitytrucking.com</i>	200 tractors 500 trailers	\$2.2 billion	Manufactures rail cars, inland barges, structural steel beams and construction materials, pipe fittings, highway guardrails and containers for storing and transporting liquefied petroleum gas and fertilizer.
97	89	 Domino's Pizza Ann Arbor, Mich. NYSE: DPZ Robert Bredlow, National Transportation Director <i>www.dominos.com</i>	198 tractors 1 straight truck 221 trailers	\$1.4 billion	Provides pizza delivery service to more than 4,800 U.S. locations and 2,950 locations in more than 50 other countries through 18 distribution centers.
98	92	 Andersen Corp. Bayport, Minn. Rita Knoll, Corporate Fleet and Safety Manager <i>www.andersencorp.com</i>	196 tractors 134 straight trucks 467 trailers	\$2 billion	Manufactures and distributes wood windows and doors from 32 plants in 30 states to more than 1,400 dealers.
99	96	 Griffin Industries Cold Springs, Ky. Don Kist, Fleet Manager <i>www.griffinind.com</i>	195 tractors 275 straight trucks 1,495 trailers	\$200 million	Collects and recycles animal processing byproducts and used cooking oil for use in animal feeds, fertilizer, tanned leather, industrial oils and fats and biodiesel fuel.
100	93	 Dawn Food Products Jackson, Mich. Anthony Benjamin, Transportation Manager <i>www.dawnfoods.com</i>	193 tractors 17 straight trucks 191 trailers	N/A	Provides pre-baked and fully baked goods and merchandising support services to food service companies, bakeries, restaurants, retail stores and supermarkets in the United States and 13 other countries. Dawn operates 14 manufacturing facilities and 19 distribution centers in North America.

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Private Carriers Meet Demand in Tight Market

(Continued from p. 3)

for private carriers being about 500 miles, it was questionable whether it was worth tying up a truck all day to pick up \$500 worth of freight. Now that freight is paying \$2 to \$2.50 a mile, these guys are saying, 'Wow, we can make money. It's worth the headaches.'

Moscip said he expects to see more long-term cooperation between shippers to fill their empty trailers, but he doesn't expect the added capacity to have a significant effect on the market if demand continues to grow.

"If more capacity comes back into the market, I'm not even sure rates

are going to drop," he said.

At Batesville Logistics, a unit of Batesville Casket, Batesville, Ind., backhaul manager Bob Wernke said outside freight hauling has increased 5% to 10% over the past year, in part, because the company is using more standard 53-foot van trailers in place of specialized 28-foot pup trailers to haul its products.

"We're trying to offset the high cost of fuel," Wernke said in explaining the desire to handle more backhaul freight. Outside freight already brings in about 40% of total revenue for Batesville Logistics, he said.

At the NPTC annual conference earlier this year, Petty said three

out of four members of the council's Heavy-Duty Division reported they would grow their fleets in the next three years.

"We're seeing companies use multiple transportation options, depending upon the nature of the products being shipped, customer requirements and the distance of the shipments," he said.

The shift is being driven, in part, by market conditions. A shortage of drivers has forced some for-hire carriers to limit fleet expansion and shift capacity to shorthaul from longhaul lanes.

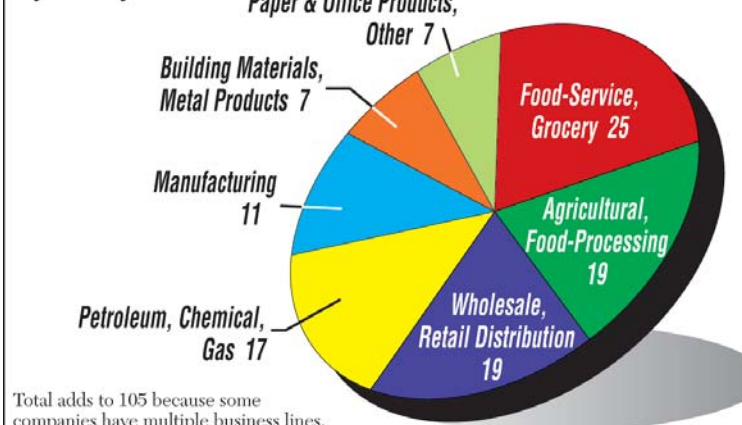
One large national retailer with significant seasonal peaks in demand, for instance, has found the cost of for-hire trucking ser-



Wal-Mart Stores

Wal-Mart led the TT Private 100 in growth of its trailer fleet, adding 6,500 vans and 453 tractors in 2004.

2005 Transport Topics Top 100 Private Carriers By Industry Sector



Total adds to 105 because some companies have multiple business lines.

Source: Company reports and interviews

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vice in some markets has doubled in the past year, Petty said.

For others, surge capacity is not available "at any price," he said.

In addition, big shippers, such as discounter Wal-Mart Stores and drugstore chain Walgreen Co., are expanding simply to keep up with store growth.

"We open a store every 19 hours on average," said Thomas Stedman

Sr., director of corporate transportation for Walgreen, Deerfield, Ill. "We will open about 400 stores this year."

Walgreen operated about 550 tractors in 2004 to deliver goods from distribution centers to stores. That compares with 495 in the prior year. Each distribution center serves about 500 to 600 stores, Stedman said.



Ace Hardware works with retailers to help reduce the time it takes for its drivers to make deliveries.

Ace Hardware Corp.

HOS Rules a Challenge

(Continued from p. 4)

Thomas Stedman Sr., vice president of transportation for drug retailer Walgreen Co., said he has also had success in mitigating the effect of the hours-of-service change by working with store personnel to keep stock rooms clean and scheduling workers to help unload trucks.

"We've manipulated some routes. We moved some drivers closer to markets," Stedman said. "The hours-of-service rules have cost us in some regards, but it hasn't hit us in the pocketbook like we thought it would."

Still, Stedman and other private

fleet managers would like to see changes in the regulations allowing drivers to stay on duty longer if they take breaks during the day.

To help fleets tackle some of the issues related to driver hours of service and share ideas for improving store delivery performance, NPTC earlier this year formed a Direct Store Delivery Committee.

The committee is headed by Lee Falk, a transportation executive with Dean Foods, and includes representatives from Bridgestone/Firestone, ConAgra Foods, Frito-Lay, General Mills, Harris Teeter, Kraft Foods, Schwan Food Co. and Wal-Mart Stores.

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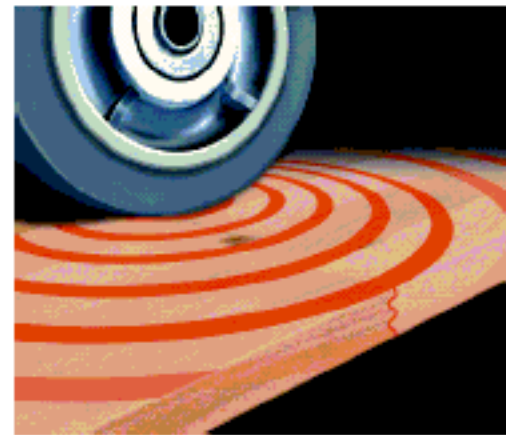
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