



# ACT's 46th Seminar

March 19-21, 2012

## NA Commercial Vehicle & Transportation Industries

### Seminar #46 will provide:

- Economic and industry analysis
- Forecasts of equipment capacity and needs, freight direction, and other drivers of change
- Presentations by leaders in trucking, manufacturing, finance and government, as well as ACT analysts



- Plus...A trip to the Mid-America Truck Show to visit the truck and trailer OEMs

Review & Outlook  
2012-2016

Special Market & Product  
Focus: Looking Globally with an  
added China Perspective

Understanding where North  
American trucking fits into  
today's and tomorrow's  
domestic and global logistic  
needs.

# ACT's 46th Seminar

NA COMMERCIAL VEHICLE & TRANSPORTATION INDUSTRIES

REVIEW & OUTLOOK: 2012-2016

Special Market & Product Focus:

Looking Globally with an added China Perspective



March 19-21, 2012

Holiday Inn Conference Center, Columbus, IN

## AGENDA AT A GLANCE

*Monday, March 19*

- **2:00 p.m. Registration Opens**
- **6:30 & 7:00 p.m. Discussion Dinners**
- **2:00-11:00 p.m. Hospitality Suite Open**

*Tuesday, March 20*

- **6:30 a.m. Registration Opens**
- **6:30 a.m. Breakfast Buffet, Crystal Ballroom A**
- **7:45 a.m. Opening Comments**
- **Morning Session Includes**
  - **National Economics**
  - **Global Economics**
  - **CV in China**
  - **Light & MD CV NA**
- **12:15 p.m. Lunch in the Pool Area**
- **Afternoon Session Includes**
  - **NA CV Economics**
  - **Used Trucks**
  - **Transportation Corner**
- **5:30-11:00 p.m. Hospitality Suite Open**
- **6:00-9:00 p.m. Dinner at the BARN, Bus Transportation provided**

*Wednesday, March 21*

- **6:30 a.m. Breakfast Buffet, Crystal Ballroom A**
- **8:00 a.m. Seminar Sessions Include**
  - **Class 8 CV Markets in NA**
  - **A Supplier's Perspective**
  - **US Trailer Market/Forecast**
- **11:30 a.m. Seminar Closes**
- **11:45 a.m. Lunch for those not going to MATS**
- **Noon Bus Departs for OEM Visits at MATS**
- **5:30 p.m. Leave MATS for Columbus**
- **6:00-11:00 p.m. Hospitality Suite Open**

## What will Seminar #46 provide?

- Economic and industry analysis
- Forecasts of equipment capacity and needs, freight direction, and other drivers of change
- Presentations by leaders in trucking, manufacturing, finance and government, as well as ACT analysts

## What about the economy?

Since the economy is ultimately the driver of freight, ACT spends considerable time and effort identifying and understanding the economic variables driving change. The ACT forecasts attempt to define when, why and how they will likely change.

## Who should attend?

Attendees come from varied backgrounds and positions, but they all have one thing in common: A need to understand where the economy and commercial vehicle industries are headed and why.

Attendees are from:

- Vehicle and component manufacturers
- Trucking and railroads
- Banking
- Investment houses
- Extensive supporting industry services

## What's new this seminar?

*Selected members of the media are being invited to attend.* ACT will work with those press personnel who attend to make sure that any communication is objective and accurate.

## MATS Visit – OEM Products

ACT will once again host a trip to the Mid-America Truck Show to visit the truck and trailer OEMs, see their products, and ask questions of specially provided OEM staff. ACT's trip provides unique pre-show access as the MATS doesn't officially open until Thursday morning.

## DAY ONE SEMINAR EVENTS

Monday evening, March 19, 2012



**Registration** in the Hospitality Suite from 2:00 – 11:00 p.m. at the Holiday Inn AV Room.

2:00 p.m.	Registration in Hospitality Suite Opens	Holiday Inn AV Room
	Dinner Discussion Groups (for those who arrive early) Meet in the Holiday Inn AV Room 30 minutes prior to carpool to restaurants	
6:30 p.m., Group 1	Kenny Vieth Class 8 Trucks	Bistro 310
6:30 p.m., Group 2	Steve Tam The Lighter Side: Classes 4-7 and Used Vehicles	The Fork at 532
6:30 p.m., Group 3	Frank Maly What's Happening in the U.S. Trailer Industry?	Smith's Row
7:00 p.m., Group 4	Sam Kahan All Things Economic	Smith's Row
7:00 p.m., Group 5	Ron Sucik Rail/Intermodal Changes and Ability to Grow	Tre Bicchierri
6:30 p.m., Group 6	Ken Vieth Strategic Planning & Special Projects: ACT's Involvement	Flatrock River Cabin

## Special Thanks To



Dinner at the Barn Sponsor

## DAY TWO SEMINAR EVENTS

Tuesday, March 20, 2012



**Registration** takes place on day two outside the Crystal Ballroom.

**Events** will take place in Crystal Ballroom B, C, & D unless otherwise indicated.

6:30 a.m.	<b>Registration opens</b> outside <b>Crystal Ballroom</b> , the location of the meeting	
6:30 a.m.	<b>Breakfast Buffet</b>	Crystal Ballroom A
7:45 – 8:00 a.m.	<b>Welcome to ACT Seminar #46</b> Opening Comments	<ul style="list-style-type: none"> <li>Ken Vieth Senior Partner &amp; General Mgr ACT Research Co., LLC</li> </ul>
8:00 – 8:45 a.m.	<b>Economics of the Nation</b> The U.S. Economy: On-the-mend leading to new highs or on a path to the next downturn? How do domestic and European politics fit into the equation? What will be the primary driver of demand in 2012 and beyond? *FRB: Federal Reserve Bank	<ul style="list-style-type: none"> <li>Sam Kahan, Senior Economist ACT Research Co., LLC Retired Chicago FRB*</li> </ul>
8:45 – 9:30 a.m.	<b>Looking at the CV Industry Globally</b> LMC Automotive is ACT's partner in the publication of the GCVF (Global Commercial Vehicle Forecast)	<ul style="list-style-type: none"> <li>Pete Kelly Managing Director LMC Automotive, London</li> </ul>
9:30 – 9:45 a.m.	<b>Refreshment Break</b> Meet an attendee and make a long-term contact	
9:45 – 10:40 a.m.	<b>China's CV Industry: A Chinese OEM's Perspective</b> The long-term vision of Chinese OEMs is global. What does that mean for U.S., European, and other equipment suppliers and OEMs regarding time frames and products? From a market volume perspective, the Chinese CV industry is now the biggest in the world.	<ul style="list-style-type: none"> <li>Guest Speaker TBA</li> </ul>
10:40 – 12:15 p.m.	<b>Light &amp; Medium Duty CV Markets in North America</b> An overview of current market activity and analysis of key consumer and business economic variables, as well as their impact on light and medium vehicle demand.  *NTEA: National Truck Equipment Association – The Association for the Work Truck Industry	<ul style="list-style-type: none"> <li>Kristen Santos Mgr, Mrkt Planning &amp; Analysis Daimler Trucks North America</li> <li>Todd Hooper Dir, Marketing Operations Daimler Trucks North America</li> <li>Stephen Latin-Kasper Market Data &amp; Research Dir NTEA*</li> <li>Steve Tam VP-Commercial Vehicle Sector ACT Research Co., LLC</li> </ul>
12:15 – 1:30 p.m.	<b>Lunch</b>	Garden/Pool Area

# DAY TWO SEMINAR EVENTS CONTINUED

Tuesday, March 20, 2012



<p><b>1:30 – 2:30 p.m.</b></p>	<p><b>Perspectives on the Economy and the Transportation Marketplace</b></p> <p>Eaton’s Chief Economist will offer insights into global economic factors – is there a recession waiting in the wings for Europe (or elsewhere) and if so, what is the timing and what are the consequences? Have the U.S. and NAFTA avoided a double dip, and can they continue on that path? China soft landing – yes or no? Are U.S. credit conditions, industry tracking capacity, and fleet age helping us to take some guesses out of 2012 and 2013 equipment production and sales?</p>	<ul style="list-style-type: none"> <li>• Jim Meil VP and Chief Economist Eaton Corporation</li> </ul>
<p><b>2:30 – 3:15 p.m.</b></p>	<p><b>Used Trucks with a Class 8 Emphasis</b></p> <p>A summary of the monthly market activity, along with an in-depth analysis that peels back several layers of data to reveal some interesting dynamics in the used truck market.</p>	<ul style="list-style-type: none"> <li>• Steve Tam, ACT Research</li> </ul>
<p><b>3:15 – 3:30 p.m.</b></p>	<p><b>Refreshments</b></p> <p>Meet a seminar attendee</p>	
<p><b>3:30 – 5:00 p.m.</b></p>	<p><b>Transportation Corner</b></p> <p>An overview of the current issues and trends that may be affecting the movement of trade goods into and throughout North America along with comments reflective of how freight forwarders view the intermodal marketplace. You will also hear information about Haz-Mat movements, bio-fuels and what is being done by the larger fleets to further meet the upcoming regulations encouraging “Go Green” efficiencies. This will include comments from the latest Council of Freight Efficiencies study.</p> <p>*NACFE: North American Council for Freight Efficiency</p>	<ul style="list-style-type: none"> <li>• Charles (Shorty) Whittington President, Grammer Industries Former Chairman ATA</li> <li>• Michael Roeth Sr. Technology Advisor, ACT Executive Director NACFE*</li> <li>• Ron Sucik Sr. Industrial Advisor ACT Research Co., LLC</li> <li>• Q &amp; A with participants Ken Vieth, ACT Research Moderator</li> </ul>
<p><b>5:00 – 5:15 p.m.</b></p>	<p><b>Wrap-up and What’s Ahead</b></p>	
<p><b>6:00 – 9:00 p.m.</b></p>	<p><b>Dinner</b> at the BARN with a touch of Hoosier Hospitality. Dinner will be served in a unique, refurbished BARN that is next to the home of Kenny and Cheryl Vieth. Come for dinner, refreshments and music provided by DAN and LINDA MUSTARD. Black Angus steaks, Indiana pork ribs, shrimp, various cheeses, and many specialty foods will be served. COME HUNGRY, meet a friend, and bring a coat, just in case.</p> <p><b>Bus Departures from Holiday Inn: 5:45, 6:30 &amp; 7:00 p.m.</b></p> <p><b>Returns to Holiday Inn: 7:00, 8:15 &amp; 9:00 p.m.</b></p>	
<p><b>5:30 – 11:00 p.m.</b></p>	<p><b>Hospitality Suite</b></p>	<p>Holiday Inn AV Room</p>

# DAY THREE SEMINAR EVENTS

Wednesday, March 21, 2012



6:30 a.m.	<b>Breakfast Buffet</b>	Crystal Ballroom A
8:00 – 9:15 a.m.	<b>Class 8 CV Markets in North America</b> The path to continued Class 8 prosperity is clear: The fleet is old, there is freight to haul, truckers are making money, asset values are rising, and credit is available. How bad does the economy have to be to derail an otherwise positive story?	<ul style="list-style-type: none"> <li>• Kenny Vieth President &amp; Sr. Analyst ACT Research Co., LLC</li> </ul>
9:15 – 9:30 a.m.	<b>Refreshments</b>	
9:30 – 10:00 a.m.	<b>A Supplier's Perspective of the CV Industry</b> Perspective on how Dana, a global leader in the supply of driveline products, views the CV industry past, present and future.	<ul style="list-style-type: none"> <li>• Robert Goldston Dir Business Dev-Spec'lty Mkts DANA-CV Systems</li> </ul>
10:00 – 11:15a.m.	<b>US Trailer Market and Forecasts</b> Now that we've moved up the recovery cycle, will component supplies allow further significant growth or have we reached a plateau? How much higher can specialty trailers go?	<ul style="list-style-type: none"> <li>• Frank Maly Director of CV Transportation ACT Research Co., LLC</li> <li>• Bill Harris Dir Govt Sales &amp; Business Dev Heil Trailer International</li> </ul>
11:15 – 11:30 a.m.	<b>Wrap-up</b>	<ul style="list-style-type: none"> <li>• Ken Vieth, ACT Research</li> </ul>
11:45 a.m.	<b>T.G.I.O. (Thank Goodness It's Over) Lunch</b> Select from an open menu and let ACT pay!	Holiday Inn Dining Room
	<b>OR</b>	
12:00 p.m. Depart 9:30 p.m. Return (+/- 30 minutes)	<b>MATS TRIP</b> <b>Depart for MATS and tour of the OEMs on Press Day with special permission from the OEMs and MATS management</b> Arrive 1:30 p.m. at Mid America Truck Show. ACT Seminar #46 MATS attendees will have the opportunity to learn about what the Class 8 truck and trailer OEMs are building and selling for 2012. The 25-minute visits will start at 2:00 p.m. and conclude no later than 5:30 p.m. OEMs include: <ul style="list-style-type: none"> <li>• Kenworth Truck Co.</li> <li>• Peterbilt Motors Co.</li> <li>• Mack Trucks Inc.</li> <li>• Great Dane Trailers</li> <li>• Utility Trailer Manufacturing Co.</li> <li>• Navistar Inc.</li> <li>• Volvo Trucks North America</li> </ul> <p>Boxed lunches, refreshments, and dinner are planned for those on the trip.</p>	
6:00 – 11:00 p.m.	<b>Hospitality Suite Open</b>	Holiday Inn AV Room

Hotel reservations should be made directly with the Holiday Inn.

Phone: 800-465-4329 or 812-372-1541, Fax: 812-378-9049, Group code: AR3

**Thanks for coming. See you at our next seminar: September 11-13, 2012**