

# ACT SEMINAR 62



## SEMINAR 62 AGENDA IS CURRENTLY IN DEVELOPMENT.

PLEASE REVIEW SEMINAR 61 AGENDA  
BELOW FOR MORE INFORMATION  
AND INSIGHTS INTO THE EVENT.

COLUMBUS, IN  
FEBRUARY 11-13, 2020

# ACT SEMINAR 61



## TOMORROW'S TECHNICAL CHALLENGES VS. TODAY'S MARKET: CLASSES 4-8 COMMERCIAL VEHICLES



COLUMBUS, IN  
AUGUST 12-14, 2019

# SEMINAR 61

NA COMMERCIAL VEHICLE & TRANSPORTATION  
INDUSTRIES OUTLOOK: 2019-2024

August 12 -14, 2019  
The Commons  
Columbus, IN

**TOMORROW'S TECHINICAL CHALLENGES VS. TODAY'S MARKET:  
CLASSES 4-8 COMMERCIAL VEHICLES**

## **GLOBAL MARKET WORKSHOP**

MONDAY, AUGUST 12 -\$750

1 - 4:30PM PM || ACT RESEARCH LODGE  
LUNCH PROVIDED @ 12:30PM

### FEATURING:

KENNY VIETH, BOB PERKINS, ACT RESEARCH  
ZITA ZIGAN, DIRECTOR, GLOBAL CV FORECASTING, LMC AUTOMOTIVE  
DAVID TEOLIS, AST. DIRECTOR, INTERNATIONAL ECONOMICS, GENERAL MOTORS CO.  
IVAN IAZDI, MARKET INTELLIGENCE DIRECTOR - CUMMINS INC.

To afford an opportunity for a deeper dive into commercial vehicle activity around the world, ACT Research will be offering a Global CV Market Workshop ahead of our US/NA focused Seminar #61. The focus will be primarily on India, China, South America, and Europe.

Economist David Teolis from General Motors Co., will kick off the proceedings. David's global forecasting responsibilities at GM will serve as an excellent starting point from which to view the world's major commercial vehicle markets. Zita Zigan will focus her remarks on Europe, and the implications of Brexit, before landing in Brazil. Ivan Iazdi from Cummins has been invited to share his views of the world's next big market, India. For context on potential, China and India have comparably sized populations, if not economies. China is doing 1m HD vehicles/year these days. The day's proceedings will conclude with ACT staff, led by Bob Perkins, discussing China, and wrestling with the question, Is a 1m HD vehicle per year market sustainable?



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## NA COMMERCIAL VEHICLE & TRANSPORTATION INDUSTRIES OUTLOOK: 2019-2024

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### TOMORROW'S TECHINICAL CHALLENGES VS. TODAY'S MARKET: CLASSES 4-8 COMMERCIAL VEHICLES

#### DAY 1 - MONDAY, AUGUST 12, 2019

**REGISTRATION @ THE COMMONS || 2:00-9:00PM**

**HOSPITALITY: LUCIANA'S MEXICAN RESTRAURANT || 2:00 - 9:00PM**

**DISCUSSION DINNERS: MEET IN THE COMMONS LOBBY 30 MINUTES PRIOR TO DINNER START TIME.**

1. <b>FULL</b> - Class 8 Truck and Tractors	6:30 PM	The Barn	Kenny Vieth Ian McGriff
2. Classes 4-8 Used Trucks	6:15 PM	Luciana's Mexican	Steve Tam Margie Dasovich
3. Trailer Industry	6:30 PM	Thai Connection	Frank Maly
4. US/NA Economies	6:00 PM	4S Bistro	Sam Kahan
5. China CV Industry	6:15 PM	E-Sushi	Bob Perkins Jennifer McNealy
6. <b>FULL</b> - Networking: Let's Get Acquainted	6:15 PM	Joe Willy's Burger Bar	Debby Steinbarger
7. Update on Engine Trends and ACT's Calculator	6:30 PM	ZwanzigZ Pizza	Tom Rhein & Mike Eaves (Rhein Associates) Ken Vieth Brian Armstrong
8. Freight Rates and Volume Forecasting	6:30 PM	Upland Brewery	Tim Denoyer
9. Emerging Technologies	6:15 PM	4S Bistro	Funmi Ige-Wright Jim Meil



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**DAY 2 - TUESDAY, AUGUST 13, 2019**

**REGISTRATION @ THE COMMONS || 6:30AM**

CONTINENTAL BREAKFAST PROVIDED || 6:30AM

7:45 - 8:00 AM	WELCOME MESSAGE	IAN MCGRUFF ACT RESEARCH Director of Marketing
8:00 - 9:30 AM	<p>U.S. ECONOMIC PANEL : 2019-2020</p> <p>Is the economy about to change direction? Views on 2019 and beyond...Tariffs are threatening the post-WWII trade order, there are clear signs that the global economy is slowing, U.S. manufacturing is in the doldrums, and a hotly contested 2020 U.S. Presidential race is in full swing. The yield curve is essentially flat, and could possibly invert in the weeks ahead, a traditional warning sign. Do these pose a threat to continued business cycle expansion. or will the expansion motor keep running? Look to our panel of experts for insights.</p> <p>Moderator - Jim Meil</p>	<p>SAM KAHAN ACT RESEARCH Chief Economist Retired-Fed Reserve Bank Chicago</p> <p>MARK VITNER WELLS FARGO SECURITIES Managing Director, Senior Economist</p> <p>JIM MEIL ACT RESEARCH Principal, Industry Analysis</p>
9:30 - 9:45 AM	BREAK	
9:45 - 10:30 AM	<p>OEM PERSPECTIVE - TECHNOLOGY'S IMPACT</p> <p><i>An OEM's view of the impact of emerging technologies on tomorrow's commercial vehicles.</i></p>	BRIAN COTA DAIMLER TRUCKS NORTH AMERICA LLC Vice President of Sales National Accounts
10:30 - 11:45 AM	<p>CLASS 8 REVIEW AND FORECAST</p> <p><i>Is the inflection point close, or is it different this time? In 2000, Alan Greenspan famously said, "the law of supply and demand has not been repealed." Truckers are currently testing Greenspan's hypothesis as new vehicle capacity continues to pour into a moribund freight market, thereby increasing marketplace disequilibrium. The evidence on the demand side of the equation is pretty clear: nearly all freight metrics have been flat to down since the end of 2018. At the same time, truckers are continuing to add to the supply of trucks in the market. The intersection of these two trends has been a sharp decline in freight rates, which ultimately impact carrier profitability.</i></p>	<p>KENNY VIETH ACT RESEARCH President, Sr. Analyst</p> <p>TIM DENOYER ACT RESEARCH VP, Sr. Analyst</p>
11:45 - NOON	<p>ECONOMIC SURVEY RESULTS</p> <p><i>Where do ACT subscribers and seminar attendees see the economy heading in the next two years? How does that compare to ACT's expectations? Survey results revealed.</i></p>	JENNIFER MCNEALY ACT RESEARCH Sr. Research Manager
12: 00 - 1:00 PM	LUNCH	



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1:00 - 1:30 PM	<p>NPTC BENCHMARKING SURVEY RESULTS</p> <p>NPTC produces an annual Benchmarking survey to benefit it's private fleet member base. Tom Moore, will provide insight into the survey results and their impact on the commercial vehicle markets.</p>	<p>TOM MOORE NPTC Vice President</p>
1:30 - 2:15 PM	<p>USED TRUCK MARKET REVIEW</p> <p>Join us to learn what used truck volumes and values are doing and where they are expected to head. We will also hear an insider's view the dynamics that are currently impacting the used truck market.</p>	<p>STEVE TAM ACT RESEARCH Vice President</p> <p>JEREMI GUDITIS PACCAR INC. Used-Truck Sales</p>
2:15 - 3:15 PM	<p>EMERGING TECHNOLOGIES</p> <p><i>If the headlines are to be believed, electric vehicles, autonomous vehicles, and autonomous-electric vehicles are poised to take over transportation as we know it. Given enough time and money, the headlines could inevitably be correct. Where does the current state of technology stand, which represents a revolution in transportation and its many participants. What hurdles need to be overcome to bring the timeline from the future to the present?</i></p>	<p>DAN WILLIAMS ZF Director of Engineering</p> <p>VIVIAN SUN TU SIMPLE Head of Business Development and Marketing</p>
3:15 - 3:30 PM	BREAK	
3:30 - 4:30 PM	<p>U.S. TRAILER MARKET</p> <p><i>How has the early record-setting 2018/19 order season impacted OEM production plans and fleet investment strategies? Are component supply issues continuing to generate red-tags and impacting efficiency at the OEMs? Hear OEM and supplier viewpoints on the current market and the industry's outlook.</i></p>	<p>FRANK MALY ACT RESEARCH Director CV Transportation and Analysis</p> <p>JEFF SIMS TTMA President</p>
4:30 - 5:00 PM	<p>N.A. MEDIUM DUTY VEHICLE MARKET</p> <p><i>The MD market is poised for its 10<sup>th</sup> consecutive year of expansion. However, clouds loom on the horizon. Join us as we examine the segments that comprise the MD market and what lies ahead.</i></p>	<p>STEVE TAM ACT RESEARCH Vice President</p>



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**DAY 2 - TUESDAY, AUGUST 13, 2019**

**6:00 - 9:00 PM - DINNER @ ACT'S "LODGE"**

ACT's dinner is always a highlight of the the seminar. Join us this evening for savory food, live music, beer, and lots of opportunities to connect, network and enjoy your fellow seminar attendees. Ken Vieth began this tradition at his farm 30 years ago. Over the years, we've enjoyed Hoosier Hospitality at the "Farm," at Kenny Vieth's "Barn" and at ACT's "Garage." Dinner is now being served at ACT'S newest office location, "The Lodge," at 4440 Middle Road. Come for a homemade dinner, a variety of refreshments and music provided by Dan and Linda Mustard. Angus steaks, Indiana pork ribs, shrimp, international cheeses, and many specialty foods will be served. Looking forward to having you join us!



## Need a Ride?

We've arranged for buses to transport those from Hotel Indigo and the Holiday Inn.

**Bus Departures from Indigo @ 5:30, 6:00 and 6:30 PM**

**Bus Returns to Indigo @ 8:15, 8:45, 9:15 PM**

**Bus Departures from Holiday Inn @ 5:45, 6:30, 7:15 PM**

**Bus Returns to Holiday Inn @ 8:15, 9:00, 9:30 PM**



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**DAY 3 - WEDNESDAY, AUGUST 14, 2019**

**REGISTRATION @ THE COMMONS || 6:30AM**

CONTINENTAL BREAKFAST PROVIDED || 6:30AM

7:55 - 8:00 AM	OPENING REMARKS	IAN MCGRUFF ACT RESEARCH Director of Marketing
8:00 - 9:45 AM	TRUCK DEALER PANEL - EMBRACING TECHNOLOGY  <i>How are dealers keeping up with the rapidly changing world of technology, from products to service, in communications and connectivity, and from tried-and-true fuels to alternative sources of power?</i>  Moderator - Steve Tam	BOB NUSS NUSS TRUCK & EQUIPMENT President  RANDY WHITEFORD TRUCK COUNTRY/STOOPS General Manager  RON WHITEFORD WHITEFORD KENWORTH Owner
9:45 - 10:00 AM	BREAK	
10:00 - 11:45 AM	THE FUTURE OF RATES IN TRUCKING: DIGITAL AND E-COMMERCE  Visibility into trucking data is better than ever and the industry is becoming increasingly well-informed. Where is the freight transportation market heading, what shifts are occurring as e-commerce increasingly dominates the retail growth landscape, and how are the digital connections between supply and demand changing?  Moderator - Tim Denoyer	RICK LaGORE InTECK FREIGHT & LOGISTICS CEO  PETER LATTI A Duie Pyle Inc. CEO  CHRIS PICKETT COYOTE LOGISTICS Chief Strategy Officer  PEGGY DORF DAT Market Analyst
11:45 - NOON	WRAP UP DISCUSSION	ACT RESEARCH STAFF
NOON	LUNCH Served at Zaharako's Ice Cream Parlor, across the street from The Commons.	
12:15 - 4:00 PM	OPTIONAL AMAZON TOUR  See the magic that happens after you click 'buy' on Amazon.com by touring Amazon's Jeffersonville, Indiana Fulfillment Center, and seeing first-hand how they deliver for their customers. Tour guests will see how items are received, stowed, picked and packed, basically the process from start to finish. Tour will be limited to the first 30 people who register. Members of the media will not be permitted to attend this post-seminar event.	

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## ADDITIONAL INFORMATION

### AMAZON FULFILLMENT CENTER TOUR

\$50 Tour Fee

Maximum 30 Participants

Limit one representative per company on tour due to limited availability.

Columbus Departure: 12:15PM from The Commons. Boxed lunch provided.

Tour Start Time: 2:00PM. Tour lasts approximately 1 hour.

Tour is a walking tour with at least one flight of stairs.

Approximate return arrival in Columbus : 4:00PM

A dinner will be provided for those staying in Columbus on Wednesday evening.

Driving yourself?

Amazon Fulfillment Center Address: 900 Patrol Rd, Jeffersonville, IN 47130

\*Want to participate but need special accommodations?

Contact Jennifer at [jsmcnealy@actresearch.net](mailto:jsmcnealy@actresearch.net)

## SEMINAR 61 SPONORED BY:



**MARKEY'S**  
RENTAL & STAGING

## SEMINAR 62

Save the Date for our next Seminar. February 11 - 13, 2020.