

# The Road Ahead

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North America On-Highway

*Cummins Inc.*





# POWERING A MORE PROSPEROUS WORLD

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**73,600** Global employees

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**104** Years of industry leadership

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**190** Countries and territories

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**10,600** Cummins certified dealer locations

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**\$1.2B** Invested in research and technology in 2022

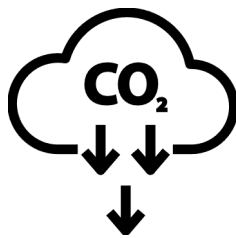
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# ON-HIGHWAY TRUCKS AND FLEETS

THE BACKBONE OF U.S. ECONOMY

1



**25% GHG contribution**  
within the transportation  
sector

2



**~70% of U.S. goods**  
(by tonnage) are transported  
by trucks

**~\$1 trillion freight revenue**  
from trucking

3



**~10M trucks**  
transport goods within U.S.

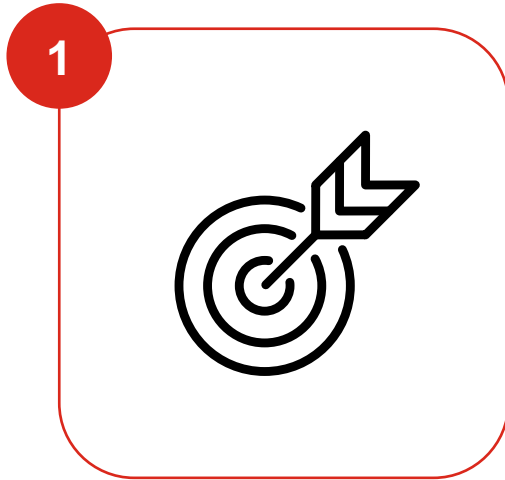
**~750k fleets**  
that own or lease these trucks

- 95% operate <10 trucks
- 99% operate <100 trucks

MOVING FORWARD

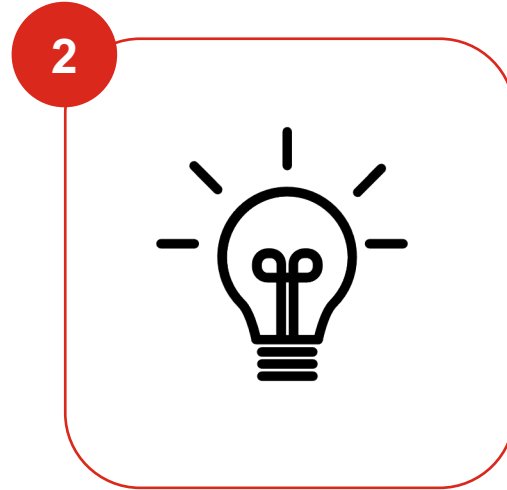
# THE ROAD AHEAD

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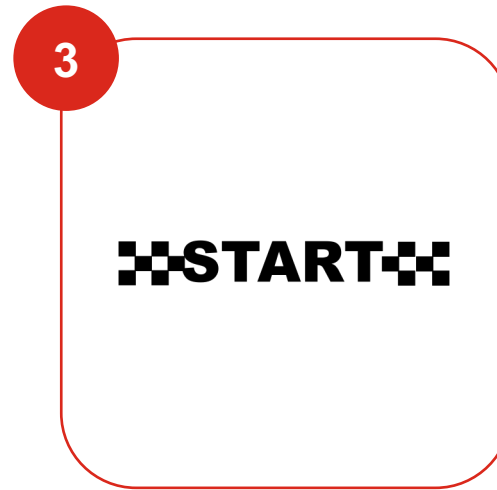
## LOOK DOWN

*Your fleet  
Your goals  
Your boundaries*



## LOOK UP

*Ask and learn  
Explore tech choices  
Take a wide view*



## STEP UP

*Find a place to start*



**WHERE ARE WE?**

WHERE ARE WE?

## KEY HIGHLIGHTS

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**1**

**The trend to lower emissions is happening**  
*(regulations, customer push, internal ESG goals)*

**2**

**Large and wide technology investments by OEMs**  
*(many OEMs, significant dollars, many technologies)*

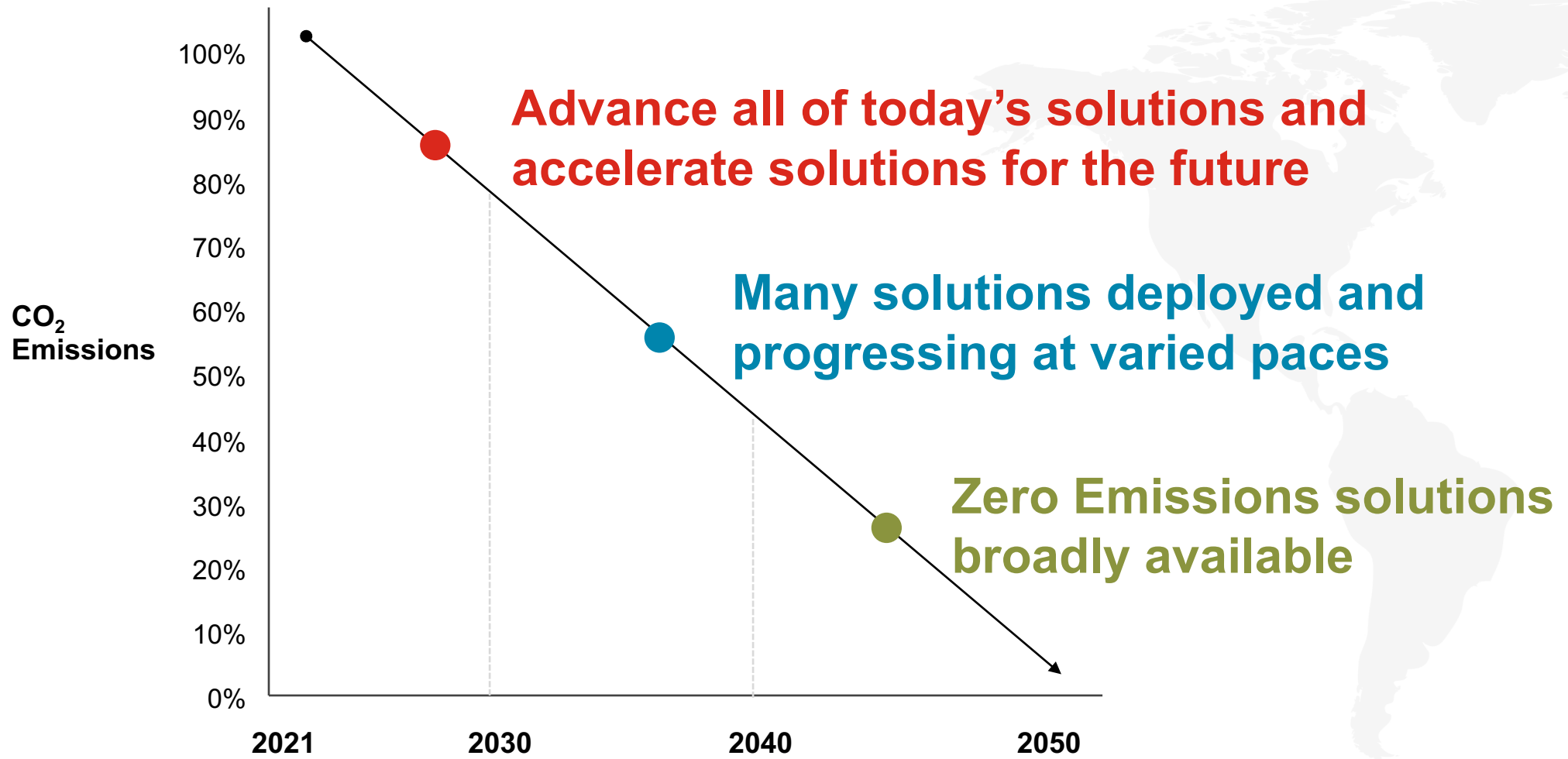
**3**

**Infrastructure becoming a large part of the conversation**  
*(manufacturing, charging / fueling, service)*

**WHERE ARE WE GOING?**



# OUR VIEW ON HOW THE TRANSITION UNFOLDS



*Driving factors: energy source decarbonization and infrastructure investment, regulatory advancements, and customer pull*

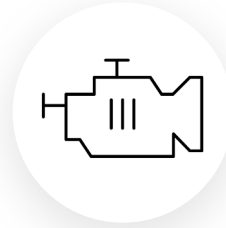
**WHAT ARE MY CHOICES?**

**ANY TECHNOLOGY THAT REDUCES  
EMISSIONS TODAY AND WORKS FOR  
YOUR BUSINESS IS GOOD**

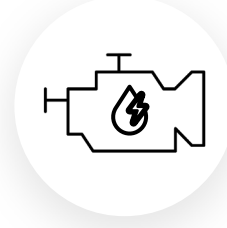
# REDUCING WELL-TO-WHEELS EMISSIONS

BY INNOVATING THE  
ENERGY SOURCES AND THE  
POWER SOLUTIONS

## POWER SOLUTIONS



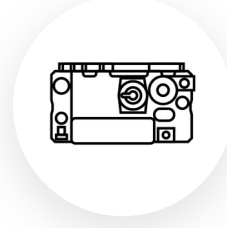
**ADVANCED  
ENGINES**



**HYBRID**



**BATTERY  
ELECTRIC**



**FUEL CELL  
ELECTRIC**

## ENERGY SOURCES



**LOW CARBON FUELS**

*Expand CNG, RNG,  
Bio/Renewable Diesel*



**ELECTRICITY**

*Decarbonize  
the grid*



**HYDROGEN**

*Produce  
green H<sub>2</sub>*

# 4 CONSIDERATIONS FOR FLEETS

WHEN ADOPTING TECHNOLOGY



**Can the technology get the job done?**

Can I complete the mission?

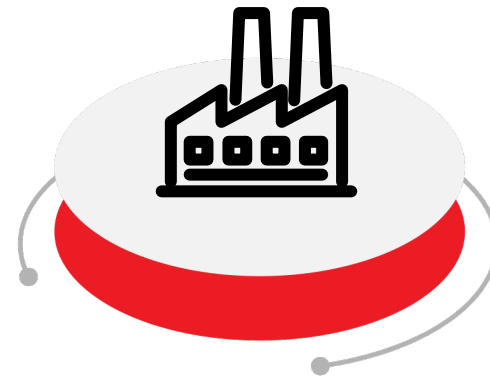
Do I need to adjust my business ops?



**Can my business afford it?**

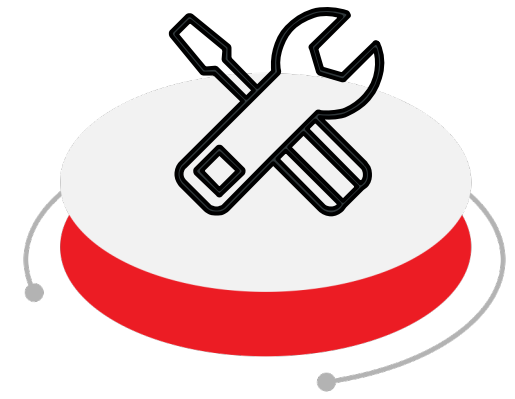
What is my TCO?

What are my boundaries?



**What is the fueling infrastructure?**

What experience do I have?

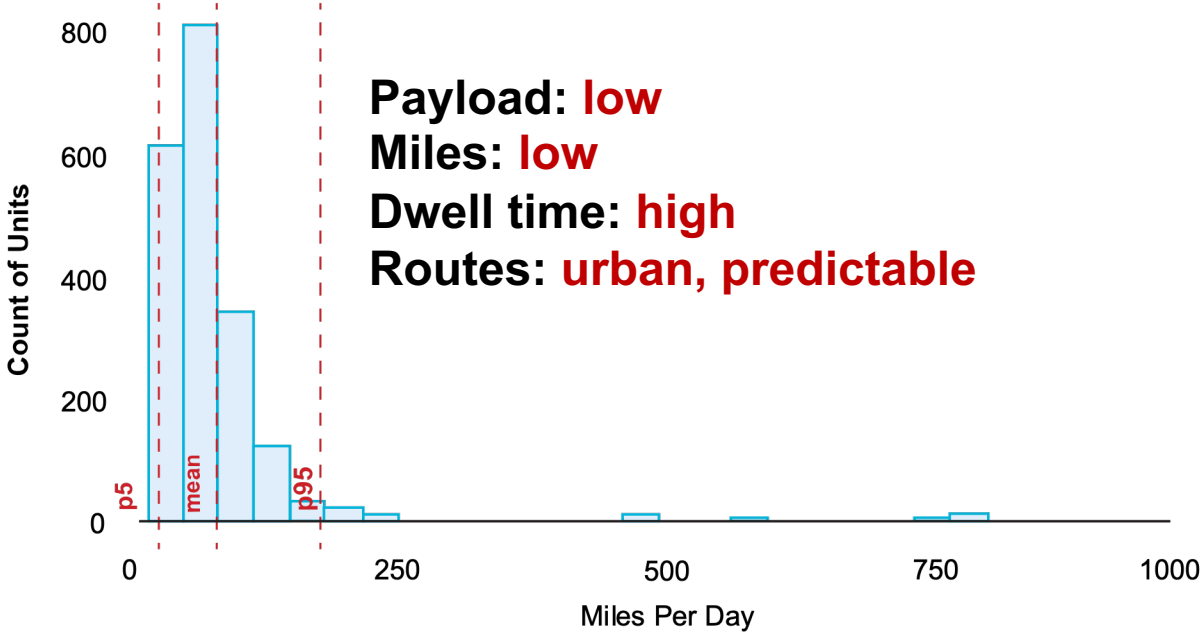


**What is the service infrastructure?**

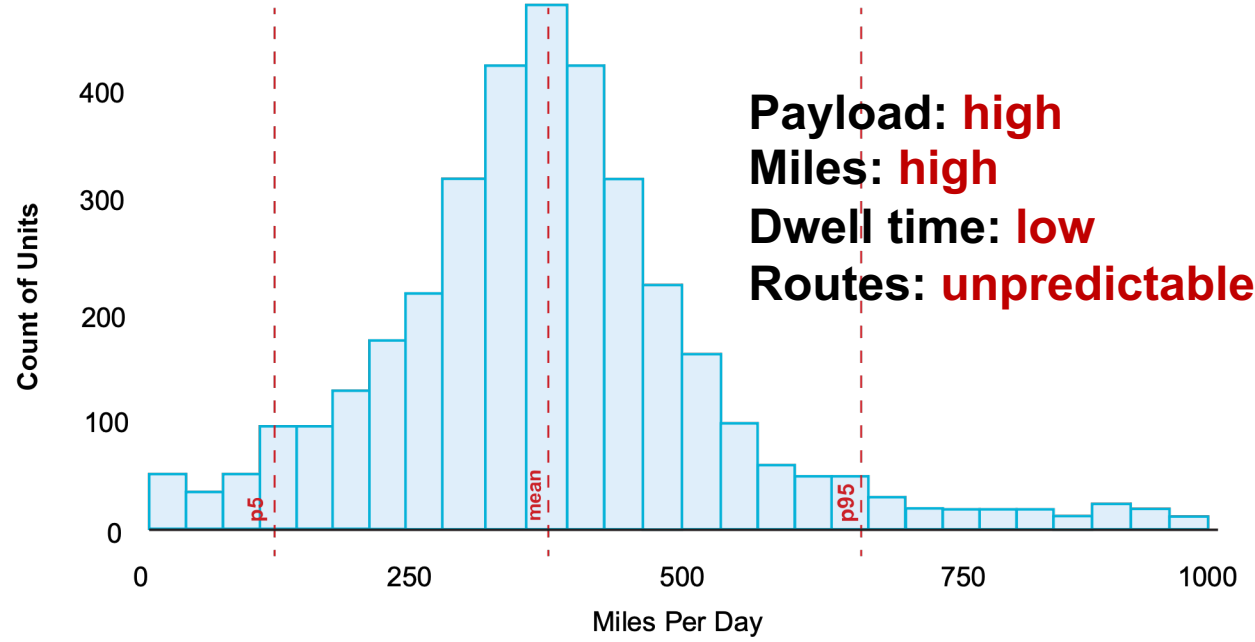
How do I prepare for it?

# FLEET COMPARISON – LOOK DOWN

### FLEET 1 (miles / day distribution)

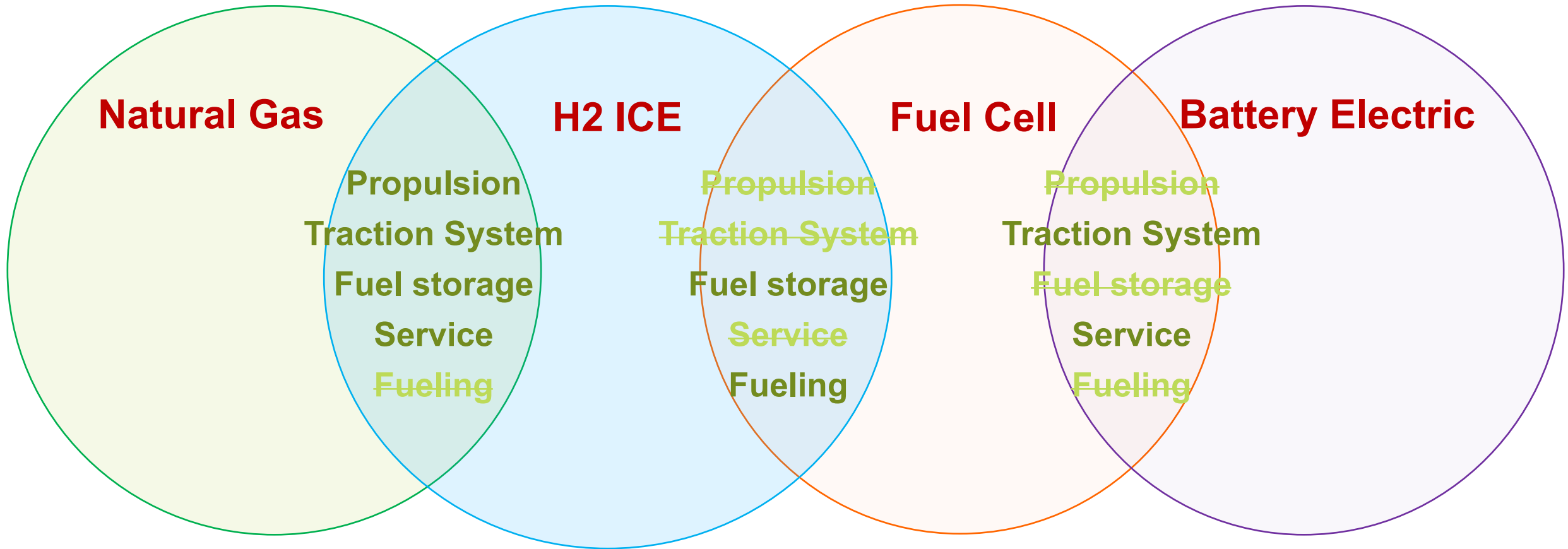


### FLEET 2 (miles / day distribution)



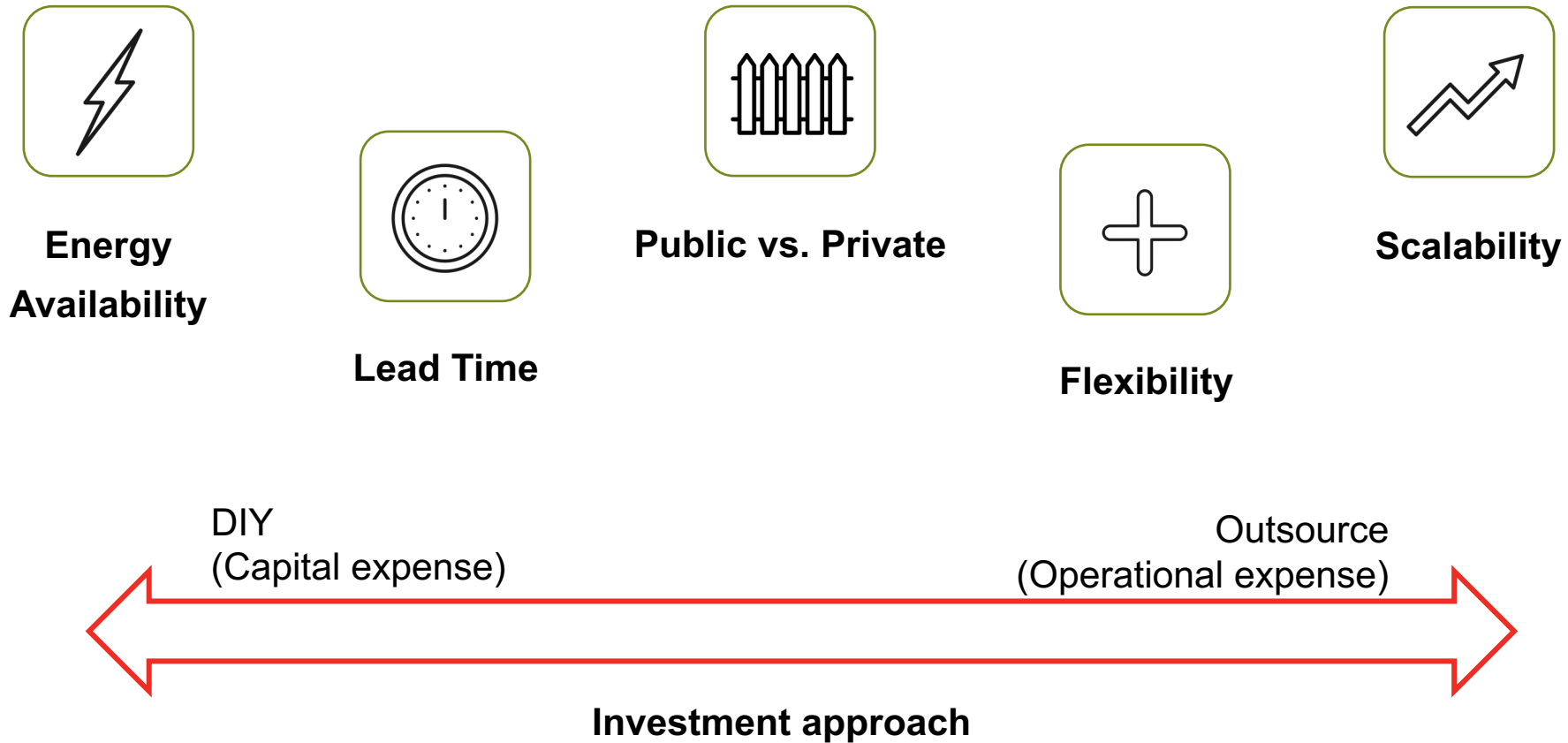
# TECHNOLOGY CHOICES – LOOK UP

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# INFRASTRUCTURE SIGNPOSTS – LOOK UP

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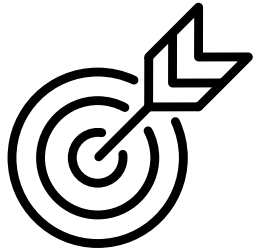


REFLECTIONS

# THE ROAD AHEAD

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1



## LOOK DOWN

*Your fleet  
Your goals  
Your boundaries*

2



## LOOK UP

*Learn  
Explore tech choices  
Take a wide view*

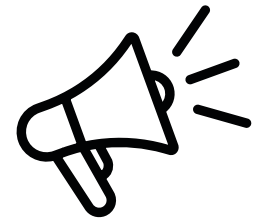
3

**START**

## STEP UP

*Find a place to start*

4



## SPEAK UP

*Share your  
experiences*

Q+A