

Winter 2018

ROLLING ALONG

NORTH DAKOTA MOTOR CARRIERS ASSOCIATION PUBLICATION

NDMCA Takes Its Message to Washington

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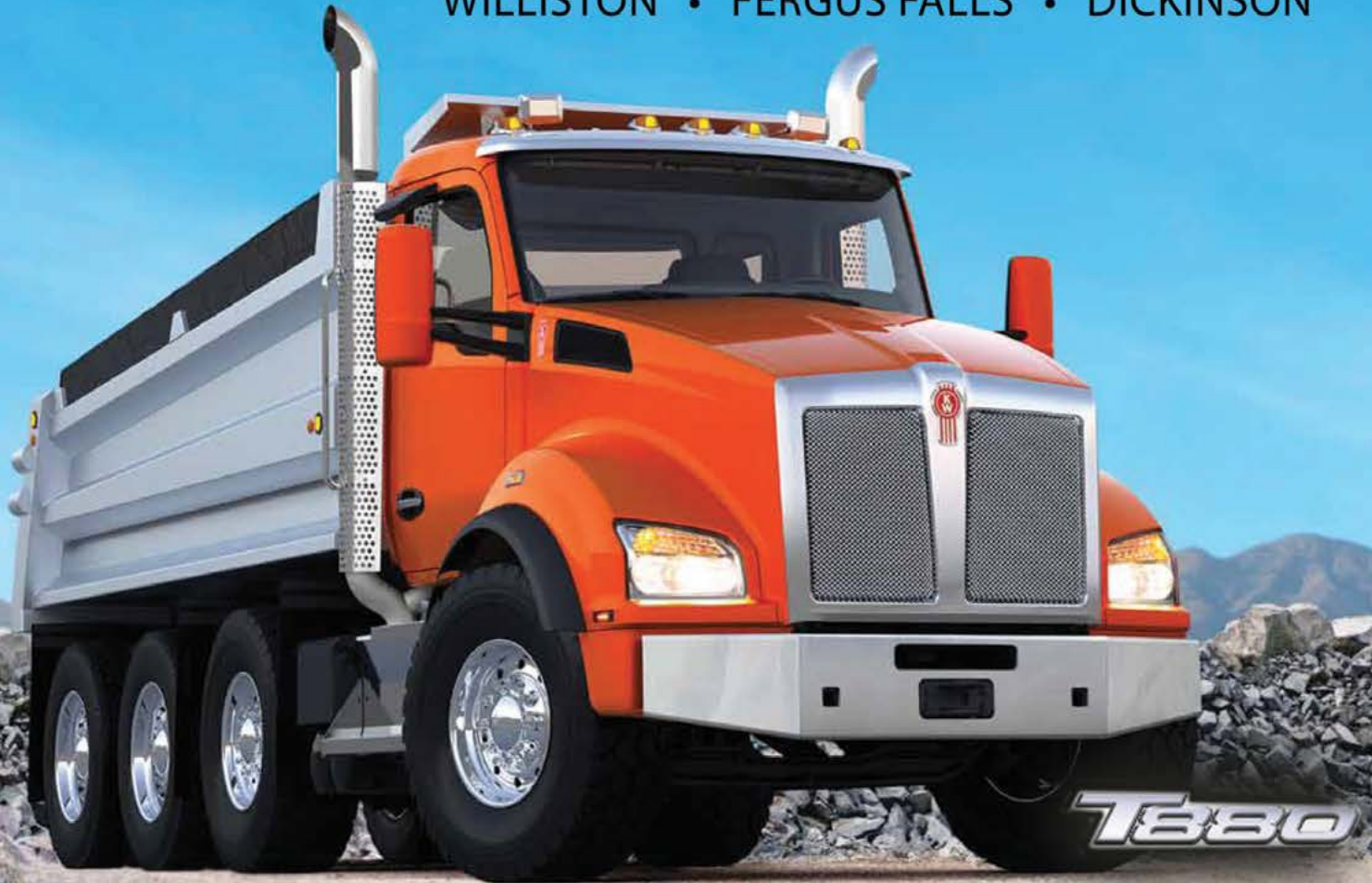




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NORTH DAKOTA MOTOR CARRIERS ASSOCIATION PUBLICATION

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The North Dakota Motor Carriers Association has been publishing the Rolling Along magazine since 1948. Each issue provides members with information concerning their association and the issues impacting the trucking industry.



Rolling Along is published quarterly (April, July, October and January) by the North Dakota Motor Carriers Association. Statements of fact and opinion are the responsibility of the authors alone and do not imply an opinion on the part of the officers, members or staff of the North Dakota Motor Carriers Association.

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NEWS & NOTES FROM THE EXECUTIVE VICE PRESIDENT



ARIK SPENCER
arik@ndmca.org

Tax Reform and the Power of Association



Last September, I was fortunate enough to be on hand when President Trump visited Bismarck to talk about tax reform. Specifically, the President called for lowering the corporate tax rate, offering tax cuts for the middle class and the elimination of the estate tax. It was exciting to be there and hear a proposal that I knew would benefit the hard-working men and women of the trucking industry.

A month later in Middletown, PA, President Trump held an event with trucking leaders to talk about how tax reform would benefit our industry as well as many others. “We truly admire you. You are our heroes,” Trump said. “American trucks will glide along our highways. We will build this future together.”

The President’s understanding of how tax reform will impact the trucking industry helped spur industry leaders into action. In North Dakota, NDMCA members told lawmakers how tax reform would impact their businesses and employees during our Call on Washington, which you can read more about in this edition of *Rolling Along*. NDMCA wasn’t alone in this effort as state trucking

associations, and industry leaders across the county made a concerted effort to speak to lawmakers.

Then in mid-December, I submitted an editorial to the Fargo Forum, among other papers, again calling on our Congressional delegation to pass tax reform because lowering the tax rates will free up small businesses to reinvest more of their hard-earned revenue into their own growth, such as hiring new employees or purchasing new equipment. Again, trucking leaders across the county took similar steps to help push tax reform over the finish line.

While our voice was just one of many calling for tax reform, it was refreshing to see Congress pass meaningful tax reform and know that NDMCA and the trucking industry were part of making that happen.

This is the power of associations. Your voice is amplified across North Dakota, and because of our partnership with the American Trucking Associations, across the country.

While we are pleased with tax reform, now isn’t the time to congratulate ourselves. Next, we must set our sights on infrastructure funding and work together to make adequate funding of roads and bridges a reality. Hopefully, in future issues of *Rolling Along*, we’ll be talking about how the trucking industry made that happen.

Sincerely,

Arik Spencer

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PRESIDENT'S MESSAGE

Greetings Fellow Members!



It is an honor to serve as your NDMCA President. The trucking industry is an integral part of everyone's lives, but those who actually work in this industry are some of the most amazing people I know.

I am proud to say that I work in the trucking industry because I believe it to be the single most important component of our economy. There is no other industry with as many moving parts that seamlessly dance a

perfectly choreographed concert to get our goods delivered daily! From safety, dispatchers, mechanics, drivers, dock-workers and more, the trucking industry is indeed a well-oiled machine.

But things they are a-changing! With mandated ELD's, dash-cams and autonomous vehicles on the roads, it is hard to say how our industry will look in the future. One thing, however, is for sure, trucking companies will have to be nimble and adaptable to properly navigate this new landscape. Just as vehicle manufacturers will need to adapt to these

driverless opportunities, so too will the companies that purchase their products. Will your company embrace the new "tech" or fight it?

The industry fought long and hard against electronic logging devices, but now they are here to stay. Those who embraced electronic logging are ahead of the game, where many who fought till the bitter end are just now trying to get with the program; and it is proving to be difficult for some.

So if everyone needs to be nimble and adaptable, I guess that goes for the insurance industry as well. How will insurers adapt to the new 'tech' that will supposedly remove driver-error from the picture? Will they embrace driverless vehicles, be supportive of them or will they shy away? The insurance world is conservative by nature, so will some companies leave the market until time proves out how claims are settled and who pays when the "tech" fails? Or will new companies enter the market embracing the opportunities; and how will these changes affect your bottom line? Will we even need insurance if all vehicles are self-driving? I have read that by 2026 there will be 23 million driverless vehicles on the roadway. Can you imagine? As adaptability goes, I will be a hold-out on this one because I simply love to drive!

Now I don't have a crystal ball, so along with the rest of you, I will just have to "wait-and-see" how all these changes affect our industry. I just wish that I could be here 100-years from now when, just like on the "Jetson's" TV show, trucks will be flying!

Now wouldn't that be something to see?

Until the future arrives, keep on trucking, stay between the lines, and embrace change!

Melissa Dixon

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ASSOCIATION NEWS

NDMCA Awards Scholarships

The NDMCA Foundation's scholarship program supported by the annual NDMCA Golf Tournament and tax-deductible contributions from NDMCA members. This year, three students were awarded \$1,000 scholarships to help further their education. Each has written a brief biography so you can learn more about them. Please join us in congratulating the following students who each won a \$1,000 scholarship from NDMCA.

Heather Hintz



I am very honored to accept the North Dakota Motor Carriers Association scholarship. It will be of great assistance to me as I pursue a Bachelor's of Science in Nursing and minors in both Leadership and Psychology at Dickinson State University. After I graduate from DSU, I am hoping to enroll in graduate school to become a Certified Registered Nurse Anesthetist or a Nurse Practitioner. I am looking to pursue a career in the nursing field because I will be able to serve others through my work. It has been my mission to serve others ever since I was little.

I am associated with the trucking industry because both of my parents are employed at Medora Corporation, the parent company of Medora Transport Corporation, in Dickinson, North Dakota. Medora Transport takes water circulation equipment manufactured by Medora Corporation to sites to be serviced and installed.

Iida Byman



Iida Byman is a student from Alamo, ND. As the oldest of eight children, Iida has always strived to do her best. Graduating high school in May 2015 as the valedictorian of her high school class, she left the US to spend a year studying abroad. After returning to the US, Iida finished her general studies at Williston State College, graduating in May 2017 with an Associates of Science and an Associates of Arts. From there she transferred to UND where she currently studies to become a Histotechnician. Her program includes a clinical portion, which she completes at CentraCare Laboratory Services in St. Cloud, Minnesota. Iida will finish the Histotechnician program in May 2018, after which she will take the Board of Certification exam and enter the workforce as a Histotechnician. Her father, Jeff, is an employee at MBI Energy Services in Williston.

Quinn Vculek



My name is Quinn Vculek, and I am from Crete, North Dakota. I grew up in a family of four consisting of myself, my parents Jack and Eileen, and my older brother Nick. My ties to the trucking industry are through my dad, who has been an over-the-road trucker for 17 years. He is leased through U.S. Express of Oakes, ND. A lot of my favorite childhood memories come from the trips taken in the truck with my dad around the country.

I am currently enrolled at North Dakota State University pursuing a Bachelor's of Science degree in Respiratory Care. To get experience within the healthcare field, I volunteered at the Roger Maris Cancer Center for 6 months, and am currently volunteering at the new Sanford Medical Center in Fargo as a Pediatric Playroom volunteer. I also work as a Plasma Center Technician at Biolife Plasma Services. Lastly, I am a member of two clubs on campus, which are both very involved in volunteering activities throughout the community. In the end, my goals of working in healthcare and becoming a Registered Respiratory Therapist are centered around my passion for helping others, whether they are physically, mentally, or emotionally in need.

Thank you very much for awarding me this scholarship. I feel honored to have been chosen as the recipient of the North Dakota Motor Carriers Association Scholarship.

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Description of proposed 2018 NDMCA Bylaw Changes

At the December 6th, 2017 NDMCA Board of Directors Meeting, a series of bylaw amendments were tentatively approved. As required by Article X of the Bylaws, proposed amendments must be approved by two-thirds vote of the Board of Directors at the annual meeting of the Association, provided notice of the substance of the proposed amendment is provided to the membership no less than 60 days prior to the meeting. If you have questions about the proposed amendments contact Arik Spencer at 701-223-2700.

Substance of Amendments:

- 1. Fold the Household Conference into the Specialized Conference.** Currently, NDMCA has five Household Carrier members, two of which are owned by one company. At this year's convention, only one household carrier attended the conference meeting, and not all board positions were filled from the conference. In the future, it will continue to be hard to find directors who are willing to serve from this conference. Under the proposed bylaw change, the three director positions from the household conference would be split between the three largest conferences, Truckload, Allied, and Specialized.
- 2. Add the Chair of the NDMCA Foundation Board of Trustees to the NDMCA Executive Committee.** This change is for better communication and coordination of activities between the NDMCA & the Foundation.
- 3. Prevent any current NDMCA officer (President, 1st VP, 2nd VP, Immediate Past President, ATA VP, or Treasurer) from serving as a Foundation, Board of Trustees officer (Chair, Vice Chair, Secretary/Treasurer) at the same time.** This is, so that leadership positions are not consolidated with just a few people and the workloads of each position are at a reasonable level.
- 4. Put a limit on the total number of directors.** Currently, there is no limit on the number of at-large directors that can be elected to the board. In this proposal, the total number of board members is capped at 35, which means there can be between four and eight at-large directors.
- 5. Remove the term "conferences" from the bylaws.** In the Bylaws, our conferences are referred to as membership groups or conferences in different areas of the document. Also, when visiting with newer members, they seem to be confused when we refer to our conferences. In the future NDMCA is going to phase out the term "conferences" for clearer communication.
- 6. Adding additional requirements to hold the ATA State Vice President Position.** The ATA has recently updated the qualifications for being on their board of directors. Because the person elected as the ATA State Vice President has a seat on their board, NDMCA must change our bylaws to reflect the new ATA requirements.

NDMCA Announces New, Member-Only Benefits

We are excited to announce three new, member-only benefits available in 2018.

- Goodyear Tire and Rubber Company is extending discounted pricing on all Goodyear Commercial Truck Tires, Passenger and Light Truck Tires and Goodyear Retreads at selected member tire dealers in North Dakota to NDMCA members.
- Delta by Marriot, Fargo is offering 15% off of their standard, prevailing room rate to NDMCA members. Call 701-227-9000 and tell them you're a member of the North Dakota Motor Carriers Association.
- The Ramkota, Bismarck is offering rooms to NDMCA members at the discounted rate of \$91/night. This includes a free breakfast and a free drink ticket. Some blackout dates may apply.

To learn more about these great benefits, go to www.ndmca.org and click on member resources.

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NDMCA TAKES ITS MESSAGE TO WASHINGTON

Arik Spencer

On September 7-9 the North Dakota Motor Carriers Association (NDMCA) held its Call on Washington, an event which is held in cooperation with the American Trucking Associations (ATA), and gives NDMCA members the opportunity to meet with North Dakota's congressional delegation to discuss issues affecting the trucking industry face to face. Attending this year was Board President Melissa Dixon (Dixon Insurance), Immediate Past President Mark Wolter (Midnite Express), Sue Wolter, Kimberly Bonhart (UPS), Sarah Gratton (Britton Transport) Jerry Killoran (Killoran Trucking), Clint Larby (Killoran Trucking), and NDMCA Executive Vice President, Arik Spencer.

Call on Washington began at ATA's Washington D.C. office where ATA staff experts highlighted key legislative and regulatory issues including comprehensive tax reform, infrastructure funding, F4A, regulatory reform and automated vehicles, to name just a few. These briefings were an excellent opportunity not only to hear from the experts but to also engage in some good discussion of the many issues affecting the trucking industry and their impacts. After our policy briefing, we were treated to a social by ATA, which was a great opportunity to network with others.

Our second day began back at ATA's Washington D.C. office, where we received additional training on how to craft memorable stories that members of Congress will remember. The training was put to good use, just a few hours later when we visited Senator Hoeven, Senator Heitkamp's staff, and Congressman Cramer. The staff and lawmakers were all very welcoming and actively concerned about the issues we brought to them. Key topics discussed included:

- **Increasing the Maximum GVW on ND Interstates**, specifically increasing the weight restrictions on Interstates 29 & 94 through North Dakota to 129,000 lbs. in order to more efficiently move goods through ND, which is similar to maximum highway weights in Montana and South Dakota.
- **Federal Tax Reform**: specifically lowering the rate of the income tax on all business income, simplifying the tax code, and retaining Section 1031 of the Internal Revenue Code.
- **Transportation Infrastructure Funding**: establishing long-term, stable and sustainable funding for the Federal-aid highway program, including an increase in the fuel tax.



Mark Wolter, Sue Wolter, Arik Spencer, Sarah Gratton, Melissa Dixon, Congressman Cramer, Kimberly Bonhart, Jerry Killoran, Clint Larby

- **Clarify Preemption Under the FAAAA**: clarifying the Federal Aviation Administration Authorization Act's preemption provision over state meal and rest break requirements and state bans on "piece rate" pay practices. This clarification will ensure motor carriers can continue to operate efficiently and competitively, under nationally-uniform federal regulations, rather than being subjected to a state-by-state patchwork of rules governing

driver hours and pay practices.

- **Regulatory Reform**: ensuring regulations are based on sound science along with input from experts. Federal regulations should be narrowly tailored, supported by strong and credible data and evidence, and impose the least burden possible while implementing congressional intent.
- **Autonomous Vehicles**: advancing market driven autonomous vehicle technologies that improve safety and reduce environmental impacts.
- **Driver Shortage**: implementation of a pilot program to allow drivers between the ages of 18 to 21 to operate a commercial motor vehicle in interstate commerce.

While many of these issues have been around for years and only time will tell what the outcomes will be, the issue of tax reform was one that resonated with Senator Hoeven and Congressman Cramer, who both supported the final passage of the tax reform that was passed in December.

NDMCA also took time to visit with FMCSA's chief legal counsel, Randy Hutchinson regarding the lack of flexibility with the current Hours of Service Regulations. This meeting was extremely productive and, hopefully, a sign of things to come with the new administration at FMCSA.

NDMCA'S Call on Washington was a very busy and productive two days but not so rushed that there was no time to take in a couple sights. Congressman Cramer's office arranged for a staff-led tour of the U.S. Capitol, which was one of the highlights of the trip.

The North Dakota Motor Carriers Association would like to extend appreciation to the members who participated this year and to North Dakota's congressional delegation and staff for making Call on Washington a success.



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GOVERNMENT NEWS



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1. Permitted movements not exceeding 16 feet in width may travel on any day, ½ hour before sunrise to ½ hour after sunset.
2. Permitted movements that are over-height and/or over-length only, may travel on any day, ½ hour before sunrise to ½ hour after sunset.
3. Permitted movements that are ten feet in width or less, one hundred twenty feet long or less, or overweight only may travel on any day or night with proper lighting.

Holidays	Permit Office closed	Load Movement
New Year's Day	January 1, 2018	Permitted movements <u>exceeding</u> 16 feet in width, <u>may not</u> travel from noon on December 30 until ½ hour before sunrise on January 2.
Martin Luther King Day	January 15, 2018	Permitted vehicles and load movements are allowed to travel as stipulated.
President's Day	February 19, 2018	Permitted vehicles and load movements are allowed to travel as stipulated.
Good Friday	March 30, 2018	Permitted vehicles and load movements are allowed to travel as stipulated.
Memorial Day	May 28, 2018	Permitted movements <u>exceeding</u> 16 feet in width, <u>may not</u> travel from noon on May 26 until ½ hour before sunrise on May 29.
Independence Day	July 4, 2018	Permitted movements <u>exceeding</u> 16 feet in width, <u>may not</u> travel from noon on July 3 until ½ hour before sunrise on July 5.
Labor Day	September 3, 2018	Permitted movements <u>exceeding</u> 16 feet in width, <u>may not</u> travel from noon on September 1 until ½ hour before sunrise on September 4.
Veteran's Day	November 11, 2018 November 12, 2018	Permitted vehicles and load movements are allowed to travel as stipulated.
Thanksgiving Day	November 22, 2018	Permitted movements <u>exceeding</u> 16 feet in width, <u>may not</u> travel from noon on November 21 until ½ hour before sunrise on November 23.
Christmas Day	December 25, 2018	Permitted movements <u>exceeding</u> 16 feet in width, <u>may not</u> travel from noon on December 24 until ½ hour before sunrise on December 26.
New Year's Day	January 1, 2019	Permitted movements <u>exceeding</u> 16 feet in width, <u>may not</u> travel from noon on December 31 until ½ hour before sunrise on January 2.

4. North Dakota has a travel information map that provides width, length and height restrictions on state highways due to construction, road conditions, load restriction information, as well as weight limits placed on the state highways in the spring of the year. If you have any questions please contact the Permit Office at 701-328-2621 or visit the NDDOT travel information map at www.dot.nd.gov/travel-info.

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INDUSTRY NEWS

2017 IN REVIEW: A YEAR SPENT LOOKING AHEAD

Daniel P. Bearth | Transport Topics Senior Features Writer, American Trucking Associations



The year 2017 was one of anticipation for the freight transportation industry.

On one hand, the long buildup to the Dec. 18 federal deadline for broad adoption of electronic logging devices to track hours of service stoked concern that the law would increase pressure on an already challenging market for drivers.

That said, there also was a growing sense that the road ahead in 2018 will be better in most respects, with the market for freight hauling showing signs of tightening up as 2017 drew to a close.

Topping the list of expectations among trucking executives is faster economic growth, but also a new political climate based on pledges from President Donald Trump to reduce taxes, cut back on business regulations and set new terms for international trade.

Although little progress was seen on the president's promise to invest \$1 trillion over 10 years to rebuild the nation's roads and bridges, many states acted to increase spending on highways, including Kansas, Idaho, North Carolina, Nevada and Wyoming. In Texas, Gov. Greg Abbott said the state would not set up any more toll roads and called for a study of new ways to fund roadway improvements.

With the Trump administration's arrival came a changing of the guard at several key agencies. Elaine Chao was confirmed as secretary of the U.S. Department of Transportation, and Ray Martinez, a former New Jersey transportation official, was tapped to head the Federal Motor Carrier Safety Administration.

The new administrator of the U.S. Environmental Protection Agency, Scott Pruitt, moved quickly to hold up pending greenhouse gas emissions regulations affecting trailers and glider kits.

Early in the year, American Trucking Associations reached out to the new president to show support for health insurance reform.

In March, Trump sat behind the wheel of the group's Share The Road image truck and chatted with drivers representing America's Road Team before convening a meeting in the White House to discuss efforts to repeal and replace the Affordable Care Act.

Later, in October, then-ATA Chairman Kevin Burch and executives from several family-owned trucking companies attended a Trump rally in Pennsylvania to promote the president's tax reform plan.

Congressional Republicans on Dec. 13 announced their intention to set the corporate tax rate at 21% as part of their broad parameters of an overhaul of the tax code. Trump expressed support for the rate and called for passage before Dec. 31.

Meanwhile, Trump also set new priorities for trade agreements. He pulled the United States out of a proposed Trans-Pacific Partnership and said the United States will withdraw from a United Nations-sponsored international climate agreement.

Closer to home, representatives from the United States, Canada and Mexico met in August to begin renegotiating provisions of the North American Free Trade Agreement, which Trump also has criticized. The talks appeared to be stalled, however, over U.S. demands for greater domestic content in cars and trucks produced in Mexico and Canada.

At the most recent meeting in Mexico City, in November, the administration proposed adding language that would restrict Mexican trucks from expanding operations in the United States.

As for the business of trucking, after many months of mediocre freight volume and weak pricing, capacity disruptions after a series of powerful hurricanes and a surge in holiday shipping seemed to give carriers more leverage to raise rates. That, in turn, has allowed firms to pass along pay increases to drivers and invest more in equipment and technology to make operations more efficient.

ATA's for-hire trucking index surged in October to 147.6, a jump of 9.9% from the same month a year ago. A National Driver Wage Index rose 1.6% in the third quarter of 2017 and is likely to accelerate in the fourth quarter and into 2018, according National Transportation Institute CEO Gordon Klemp.

As the deadline for adopting ELDs drew near, FMCSA officials announced plans for a transitory period of soft enforcement in which citations issued between Dec. 18, 2017, and April 1, 2018, would not count against driver safety scores under the Compliance, Safety, Accountability program.

Betting on better business conditions, sales of new trucks and trailers picked up in the second half of 2017.

Sales of Class 8 trucks in the United States reached 17,928 units in October, a gain of 31.6% compared with the same month a year ago, and the fourth consecutive monthly gain versus 2016. Orders for new vehicles also swelled, and at least one industry analyst, Don Ake of ACT Research Co., said he expects sales to rise 25% in 2018.

Trucking company profits mostly were down compared with 2016, while several motor carriers encountered unusual financial turbulence in 2017.

Auto hauler Jack Cooper Transport agreed to exchange hundreds of millions of dollars in debt for equity and stave off bankruptcy. Celadon Group and Roadrunner Transportation System replaced their top executives and held up filings with the U.S. Securities and Exchange Commission amid questions about the veracity of earlier financial statements.

It was nonetheless an active year for mergers and acquisitions. Knight Transportation and Swift Transportation led the way with their \$6 billion deal that closed in September, combining two of the nation's largest truckload carriers.

Belgium-based bpost, a postal operator and parcel carrier, made a splash with its \$820 million purchase of e-commerce fulfillment provider Radial Inc.

NFI Industries acquired the nation's largest intermodal trucking group, California Cartage Co., in an effort to become a more complete provider of transportation and logistics services for shippers.

Other notable transactions included Heartland Express' purchase of truckload carrier Interstate Distributor Co., Hub Group's buyout of dedicated contract carrier Estenson Logistics and Central Freight Lines' acquisition of Wilson Trucking, a regional less-than-truckload carrier.

Daseke Inc. added specialized munitions and explosives haulers R&R Trucking and The Roadmaster Group; flatbed carriers The Steelman Cos. and Tennessee Steel Haulers & Co.; and commercial glass transporter Moore Freight Service to its flatbed/heavy specialized carrier group.

And Canadian company Day & Ross Transportation Group established its first U.S. base of operations for dedicated trucking with the purchase of REI Group and Korten Quality Systems in Romeo, Mich.

Both Daseke and truckload/intermodal carrier and logistics services firm Schneider tapped into public equity markets with

initial public offerings of stock in 2017.

Warren Buffett's Berkshire Hathaway Inc. struck a deal to buy a minority stake in Pilot Travel Centers LLC, owner of Pilot Flying J, the truck stop chain in which four former executives are standing trial on charges that they systematically cheated customers out of fuel rebates.

Private equity firms also made some investments in trucking, with the Carlyle Group acquiring vehicle hauler United Road and Blackstone Group buying a controlling stake in refrigerated warehouse operator Cloverleaf Cold Storage.

The growing shortage of truck drivers and technicians remained an industry issue in 2017. At ATA's annual Management Conference & Exhibition in Orlando, Fla., President Chris Spear announced the formation of a Workforce Development subcommittee to explore what can be done to address the problem.

With the national unemployment rate falling to 4.1% in October, ATA Chief Economist Bob Costello issued a new estimate of the number of drivers needed beyond those currently available. He put the number at 50,000 a year but doubling to 100,000 in five years unless something happens to change current trends.

"Our industry faces several barriers that must be addressed if we're to grow," Spear said in his state of the industry address at the conference, "including establishing pre-apprenticeship and apprenticeship training programs and hiring and training 18- to 21-year-olds."

Spear also promised more vigorous opposition to state initiatives, such as legislation in Rhode Island that allows the state to collect tolls on trucks and laws in California that mandate meal and rest breaks for interstate drivers.

The future of truck equipment also was on display in 2017. The North American Commercial Vehicle Show debuted in October, while Elon Musk unveiled the Tesla Semi, a battery-powered, all-electric Class 8 truck in November.

Mack Trucks and Volvo Trucks, both part of Volvo Trucks North America, introduced new models; Volvo in June unveiled its new VNR regional tractor, and followed that in July by showcasing its VNL highway tractor. Mack in September unveiled its new Anthem highway tractor.

Navistar International Corp. launched a new HV severe service model while solidifying ties with Germany's Volkswagen AG. Japan's Hino Motors disclosed plans to open a truck assembly plant in West Virginia that will produce a new line of Classes 7-8 trucks.

Drivetrain supplier Eaton Corp. and diesel engine maker Cummins Inc. announced a plan to jointly produce a new 12-speed automated transmission, while Cummins said separately that it will offer a fully electric powertrain by 2019 and an electric truck by 2020.

On the technology front, Uber Technologies launched its first load-matching app, and interest in the use of blockchain technology was reflected in the establishment of the Blockchain in Trucking Alliance. Descartes Systems Group acquired shipment-tracking specialist Macropoint, and Trimble Inc. added 10-4 Systems to its growing portfolio of transportation technology firms.

FULL SPEED AHEAD FOR ECONOMY, TRUCKING IN 2018

Daniel P. Bearth | *Transport Topics Senior Features Writer, American Trucking Association*

Trucking firms are revved up for 2018, with predictions of tight capacity and strong demand for freight hauling setting the stage for an anticipated big year ahead for the industry, and indicators pointing to a potentially sustained period of business expansion in the United States and around the globe.

That confidence is boosted by the expectation that Congress' efforts on tax reform will lead to a friendlier regulatory environment for trucking, with uncertainty regarding health care reform and trade negotiations doing little to tamp down enthusiasm.

Congress and the Trump administration also have indicated they will finally begin consideration of a long-awaited infrastructure funding proposal in January.

"Business people are giddy with excitement as business conditions and confidence are at their highest level since the Great Recession," said Don Ake, a trucking industry analyst at FTR Transportation Intelligence in Bloomington, Ind. "CEOs all the way down to factory workers are hopeful the economy has broken through seven years of the slow-growth recovery and will get even better in the future."

Another FTR analyst, Steve Graham, said the outlook is positive for both domestic and foreign markets.

"Global expansion is accelerating as growth continues to synchronize across both developed and emerging economies," Graham said in a recently published commentary. "The U.S. economy is hitting on most of its cylinders, with healthy consumption and a return of business investment. Autos have probably seen their best days and housing remains weak, but most of the parts of the U.S. economy are working together."

Graham said that he expects real gross domestic product to continue accelerating from 1.5% growth in 2016 to 2.2% in 2017 and to reach 2.8% in 2018, even before taking into account the impact of tax reform legislation that was being ironed out as 2017 drew to a close.

Tax reform and economic growth could also provide a lift to truck equipment suppliers in 2018, said Steve Latin-Kasper, director of market data and research for the National Truck Equipment Association in Bloomfield Hills, Mich. He expects economic growth in 2018 to exceed 2017 levels, providing a boost to the trucking industry.

"Consumers are expected to spend more and businesses are expected to spend more on structures and equipment. That means more freight will likely have to be moved, which will be good for the industry," Latin-Kasper said in response to questions from *Transport Topics*.

Tax cuts also will have a positive impact on carrier finances and

make it easier to justify spending on equipment, technology and employees, according to Russ Burlison, senior vice president of finance at Southeastern Freight Lines in Lexington, S.C.

"Every decision we make is based on analysis of after-tax cash flows," he told *Transport Topics*. "So I can say [that] as tax costs incrementally go down, more cash is available to make decisions to reinvest in new equipment, real estate and computers. We're a capital intensive business."

A&R Logistics ordered 75 new tractors for delivery in early 2018, and plans to grow its fleet by more than 10%. The company also increased driver pay and benefits to help remain competitive in a tight labor market.

"We increased driver wages by over \$2 million, enhanced our vacation policy to provide drivers more home time, overhauled and refurbished over 30 tractors with the latest engine and cab specifications and invested in new technology to be a safer company," CEO Mark Holden said.

Holden said A&R has added more than 60 pneumatic tank trailers to its fleet and opened new transportation and packaging facilities in the Port of Savannah, Ga., and Port Freeport, Texas, to handle increased demand for export of plastic resin.

On the issue of global trade, NTEA's Latin-Kasper is cautious about the year ahead. "China is attempting to forge its own version of the Trans-Pacific Partnership that could lead to lower U.S. exports to Asia," he said.

In addition, Latin-Kasper said the outcome of ongoing talks to renegotiate the North American Free Trade Agreement could affect trucking, since Canada and Mexico are by far the two largest trading partners of the United States. He noted, however, that it's too early to know how the 23-year-old trade pact might be changed.

"It's difficult to make a forward-looking statement regarding the negotiations since it is highly complex and unlikely to be completed until the second half of 2018 at the earliest," he said.

The Trump administration has set returning manufacturing jobs to the United States and reducing trade deficits with countries such as China and Mexico as key trade goals.

Research by the Motor & Equipment Manufacturers Association, however, casts doubt on whether U.S. companies can take on more production because of shortages of skilled labor. In a survey, 72% of responding MEMA member companies reported a skilled labor shortage. More than 45% of skilled and professional staff are eligible for retirement in the next five years and 79% of companies reported not pursuing business due to lack of talent on staff.

Despite labor difficulties, Brad Delco, a research analyst at Stephens Inc. in Little Rock, Ark., said he believes the industrial

economy will remain a strong point in the U.S. economy in the year ahead.

“Our view is that the industrial economy will stay strong with higher oil prices and could potentially accelerate if the government gets an infrastructure deal done,” Delco said. “Consumer confidence and wage inflation will keep the retail side of the equation strong as well, in our view.”

The outlook for trucking is buoyed by signs of tightening in the market for transportation services.

“We believe the real supply constraint in the industry is truck drivers,” Delco said. “We saw extremely tight post-hurricane conditions in late summer, and we will gradually see capacity tighten over the course of 2018 as a result of electronic logging devices. Our view is ELDs will remove utilization capacity in the industry, which will put upward pressure on freight rates and driver wages.”

The Federal Motor Carrier Safety Administration’s rule requiring most commercial truck drivers to record their hours of service via ELDs took effect Dec. 18.

Rachal Snider, vice president of customer supply chain at AFN, a freight brokerage and supply chain consulting firm based in Niles, Ill., said shippers can expect to see higher rates in the year ahead.

“A recent report from FTR indicated that truckload demand will grow by 3.6% in 2018, which will outpace the existing capacity, particularly since capacity utilization is already at 99%,” Snider said.

Market conditions are similar, in some respects, to a capacity crunch from 2014 when severe winter storms impacted transportation in much the same way hurricanes Harvey and Irma did in 2017, Snider noted.

“The difference today is that since the Great Recession of 2008, carriers have made strides in paring their fleets to improve their operating ratios and this trend has continued to the present. The result is there is simply less elasticity in the market to absorb greater demand, whether it comes from a strong economy, disaster relief or other factors.”

The ELD mandate could reduce capacity by 5% to 8%, but “only time will tell,” Snider added.

In a letter sent to shippers in September, top executives at J.B. Hunt Transport Services Inc. warned of a capacity crunch in the year ahead.

“This is one of the highest periods of turbulence and volatility in supply we’ve ever experienced and we don’t think it will abate any time soon,” CEO John Roberts and Chief Commercial Officer Shelly Simpson said. “We advise budgeting for transportation cost increases that may reach 10% or more.”

On the technology front, FourKites Chief Product Officer Priya Rajagopalan said she expects adoption of shipment tracking systems to continue to grow significantly in 2018, driven by increased demand from shippers for visibility and to meet new regulatory compliance requirements for food and pharmaceuticals.

“We’re seeing a broad shift toward narrowing delivery windows in and beyond the retail space, brought on by large formerly brick-and-mortar retailers working to remain competitive with e-commerce players in product selection and availability,” Rajagopalan

said. “These changing requirements have major downstream implications across the supply chain, as the companies that supply major retailers need to hit more precise delivery windows or face steeper fines.”

Adam Compain, CEO of ClearMetal, a predictive logistics technology company based in San Francisco, said 2018 will be remembered as the year of artificial intelligence in transportation.

“There’s a growing urgency to innovate and transform commerce today,” Compain said. “This is very much the case for logistics and supply chain teams, where processes have remained inefficient for years and the shipping community as a whole struggles to be data driven. But we’ve reached a tipping point and the status quo is no longer sufficient. Companies are embracing AI to generate value, which often comes in the form of improved visibility, mitigated risk and reduced costs.”

John Elsner, vice president of sales in North America at CalAmp Corp., a telematics software company based in Irvine, Calif., predicts further consolidation of telematics service providers, with larger companies moving away from traditional suppliers and creating their own applications and solutions for customers. He also foresees an increase in the importance of technology to fleets.

“ELDs will help companies become safer and more profitable,” Elsner said. “Also, the vast majority of fleets will implement camera-based driver behavior solutions. These cameras, placed in the front, cab and rear of the truck will monitor drivers’ actions and behaviors that waste time or can become dangerous to the driver or other motorists.”

Fred Andersky, director of government and industry affairs at Bendix Commercial Vehicle Systems, speaking at a Fleet Council meeting in December, sees continued development of automation, although he views self-driving vehicles as still far off.

“If it seems like things are moving quickly in terms of technology and the commercial vehicle ecosystem, make no mistake: they are, but so are hype and expectations,” Andersky said. “Everyone who has a stake in commercial vehicle and highway safety should be working to stay ahead of the curve, helping to create and shape the conversation, and not just react to it.”

Bob Dieli, an economist at MacKay and Co., an industry research firm in Lombard, Ill., said trucking needs to prepare for a future that may look very different.

“Our industry, all businesses, should be planning for structural change and if they are not, they are wasting their time,” he said. “Disruptions to all aspects of trucking activity are quite likely over the next five years.”

Dieli’s advice: “Plan and keep looking forward, not much to see in the rearview mirror.”



MEMBERSHIP NEWS

The North Dakota Motor Carriers Association would like to welcome the following new members, who joined with the Association between July 2017 and December 2017. We look forward to working with you in the years to come.

Arcon Solutions – Burnsville, MN
Complete Track Works, Inc. – Fordville, ND
Holland LP/ M BAR D LLC – Ardoch, ND
Mongoose Trucking and Hot Shot LLC – Parshall, ND
Oasis Petroleum – Williston, ND
R and R Contracting – Grand Forks, ND
Top Shelf Energy LLC – Devils Lake, ND
Vertical Transport North, Inc. – Minot, ND



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NDMCA FOUNDATION LAUNCHES VISION CAMPAIGN

2017 was a big year for the NDMCA Foundation, and 2018 is looking to be just as exciting with the launch of the Vision Campaign. The NDMCA Foundation's \$100,000 Vision Campaign was established to focus on the three primary goals of the NDMCA Foundation:

- **Grow the NDMCA Foundations Endowment to create a self-sustaining scholarship program, which supports careers in transportation and the educational goals of the children of those employed in the trucking industry.**
- **Invest in Meaningful Research for North Dakota's Trucking Industry. Working with partners such as the American Transportation Research Institute and the Upper Great Plain Transportation Institute, we can commission needed research to dispel rumors and further demonstrate the safety record of the trucking industry.**
- **Create an Effective, Ongoing Image Campaign for North Dakota's Trucking Industry. We want to tell our story. One of hard-working mothers and fathers, small business owners, and all those in the trucking industry whose work makes our way of life possible.**

With your support, we can do this. We are asking everyone in the trucking industry to consider a one-time donation to the NDMCA Foundation's Founders Club to provide a solid financial footing for the future of the NDMCA Foundation.

- **Every individual that donates \$250 - \$499 and company that donates \$1,000 - \$2,499 for the Founders Club will be recognized for their contribution on a Donor Wall at the NDMCA Office as well as in Rolling Along, or they can remain anonymous if they wish.**
- **Every individual that donates \$500 or more and company that donates \$2,500 or more will become a Founders Club Captain and be recognized for their contribution on a Donor Wall at the NDMCA Office as well as in Rolling Along, or they can remain anonymous if they wish.**
- **The North Dakota Motor Carriers Association has committed \$40,000 to match your contribution, making each donation that much more meaningful (does not count towards founder club status)**

The NDMCA Foundation is a 501c3 charitable organization. Donations are tax-deductible and can qualify for the ND Charitable Giving Tax Deduction. Go to www.ndmcafoundation.org to learn more.

Together, the North Dakota Motor Carriers Association and the NDMCA Foundation can and will make a difference as we continue to serve the membership in a variety of ways as well as advancing the trucking industry in the State of North Dakota. With your help, the future is bright for trucking in North Dakota.

Donate online at www.ndmca.org/donate.aspx or call 701-223-2700 to make a difference.

NDMCA Foundation Contribution Form



Please photocopy and complete the following form and return it to make a difference. Contributions can be made by check payable to NDMCA Foundation, P.O. Box 874, Bismarck, ND 58501 or we can bill you. You can also pay by credit card at www.ndmca.org/donate.aspx.

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INDUSTRY PARTNERSHIP PROGRAM

The North Dakota Motor Carriers Associations Industry Partnership Program is designed to provide for opportunities and recognition for levels of support to the Association. Sponsorship is open to both Allied and Carrier members. Levels are based on annual investments in Association sponsorship opportunities by an annual contract paid in full, quarterly or monthly or can be done on an event by event basis. Registration fees, booth fees and membership fees are not included in the calculation.



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