



**kodiak**  
AUGUST 2025



Kodiak delivers AI-powered autonomy that tackles some of the toughest driving jobs that help keep the world moving.



# Transportation Faces Growing Challenges

Trucking is demanding and unforgiving—we believe rising costs, safety risks, and workforce shortages are straining the industry.

## Labor Shortages & Workforce Challenges

Long hours, time away from home, and dangerous working conditions

Estimated **60k<sup>(1)</sup>** truck driver shortage as of 2023, with **~1m** drivers needed between 2021 and 2030<sup>(2)</sup>

**70+%** annual turnover rate of driver pools for large truckload fleets<sup>(3)</sup>

## Rising Costs & Inefficiencies

Fuel costs, inefficient driving, and delays increase expenses

Since 2014, overall trucking costs are up **~33%**, driver wages are up **~68%**, and insurance costs are up **~39%**<sup>(3)</sup>

## Safety Risks

Fatigue, distraction, and extreme conditions increase risk

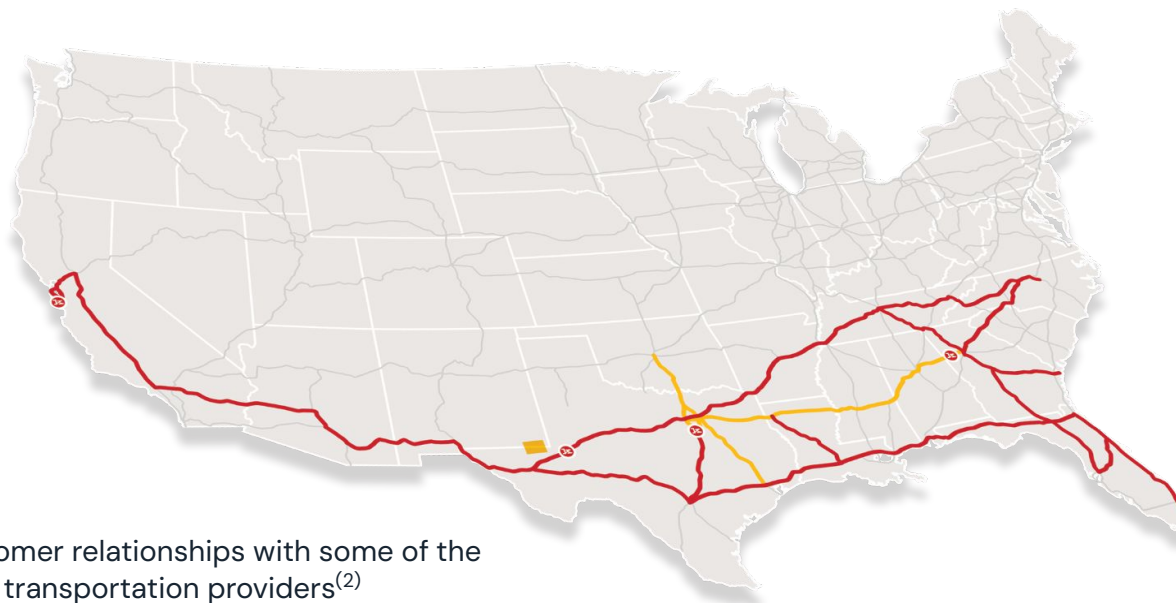
**85+%<sup>(4)</sup>** of truck crashes are caused by human error. From 2021–2023, large truck crashes resulted in over 15,000 deaths<sup>(5)</sup>

## Strategic & Operational Pressures

**71%** of retailers target next-day or same-day delivery to meet consumer demand<sup>(6)</sup>



# Coast-to-Coast Commercial Network



Announced customer relationships with some of the country's largest transportation providers<sup>(2)</sup>





# Real-World Impact and Demonstrated Market Leadership



Loads Delivered<sup>(1)</sup>

7,300+

Autonomous Miles Driven<sup>(2)</sup>

2.8m+

Network Size<sup>(3)</sup>

~23k miles

Hours of Paid Driverless Operations<sup>(4)</sup>

1,900+

# Kodiak's Core Value: Safety First, and Always

Safety is the foundation of everything we build. It's not an afterthought—it's the driving force behind what we do and why we do it.

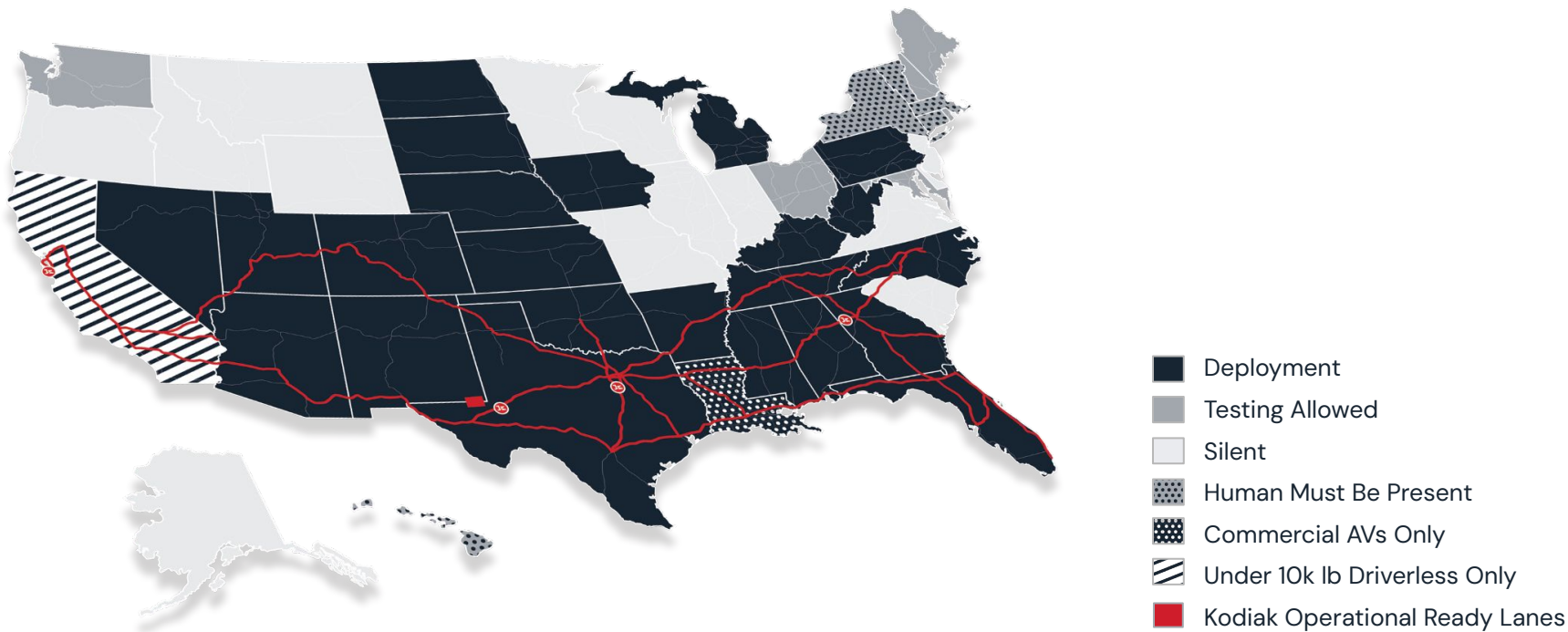
Kodiak's Safety Case Framework is a structured approach that provides clear, evidence-backed reasoning for how we manage the risks of autonomous vehicle operations, fostering confidence among customers, regulators, and the general public.

## Kodiak's Safety Case Framework



# Current Legal and Regulatory Structure Supports Deployment

Regulatory approval in 24 states for driverless operations.



# Scaling Driverless Trucks with Atlas Energy Solutions



## First Known Publicly Announced Driverless Trucks in Commercial Operations

- Solving operational challenges – Kodiak’s driverless technology helps Atlas address challenges with driver recruitment, high labor costs, and demanding operating conditions, strengthening its competitiveness.
- Customer-owned driverless deployment – Atlas Energy Solutions operates its own fleet of Kodiak-equipped semi-trucks.
- Revenue-generating driverless operations today – delivering day and night in most weather conditions.
- Integrated with Atlas’s 42-mile Dune Express conveyor system for end-to-end automation.
- Commitment from Atlas to order initial 100 trucks secured after Kodiak exceeded key performance and operational milestones in March 2025.

“We plan to be adding additional autonomous trucks to the fleet with the goal of going to a significantly higher number. We’re really excited about what we’ve seen.”

John Turner  
Atlas, President and CEO

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Customer-Operated  
Driverless Semi-Trucks<sup>(1)</sup>

100

Initial Truck  
Commitment

1,900+

Hours of Paid  
Driverless Operations<sup>(1)</sup>



# Questions?

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