



**JOE KICHLER**

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COX AUTOMOTIVE

# Cox Automotive and Manheim Offer Comprehensive Logistics Solutions for Clients and the Industry



## *Full-service Logistics Provider*

- “Do it for me” model
- White glove service primarily serving OEM Captives, Financial Institutions, Dealers
- 6,500+ transport partners
- ~1.1M cars will be transported in 2023 (2.5M pre-pandemic)



## *Self-service Marketplace*

- “Do it myself” model
- Industry leading website load board connecting shippers and transporters
- ~13 million cars to be posted in 2023
- 32,500+ subscribers

***We touch 3 out of 4 wholesale vehicles in the U.S.***

# Supply Chain Trends



**More Offsite Volume  
vs. Vehicles Flowing  
into an Auction**



**Greater % of Repo  
& Harder-to-Move  
Vehicles than Before**



**Transition to  
Digital Retailing  
Requires Changes**

## View on Future Pricing

# SUPPLY



Fewer Drivers and Carriers Available



Driver Wages Increasing Across Industries

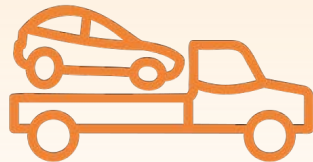


Insurance Costs Have Increased



Fuel Prices are Flat  
*...For Now*

# DEMAND

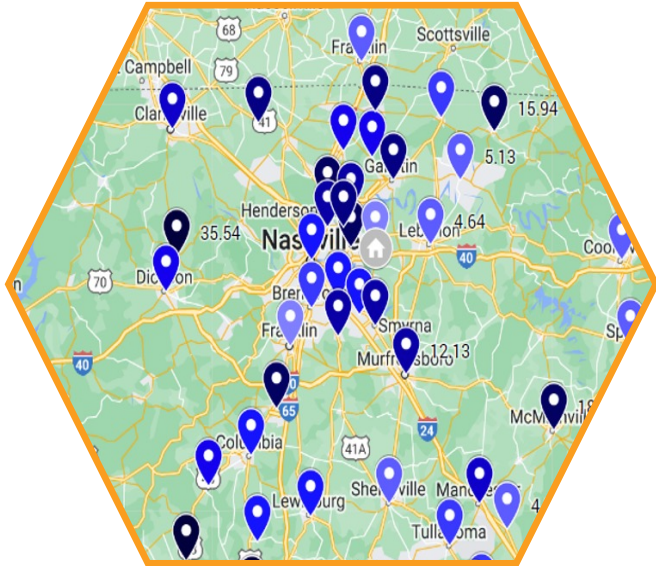


Vehicle Transport Volume & Distance Traveled Continuing to Increase



More One-sexy-Two-sexy Moves Means Less Full Loads

# What's Next for Logistics



**Load Building /  
Optimization /  
Dedicated Fleet**



**AI  
Pricing Tools**



**EV  
Transportation**



## For More Information:

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