

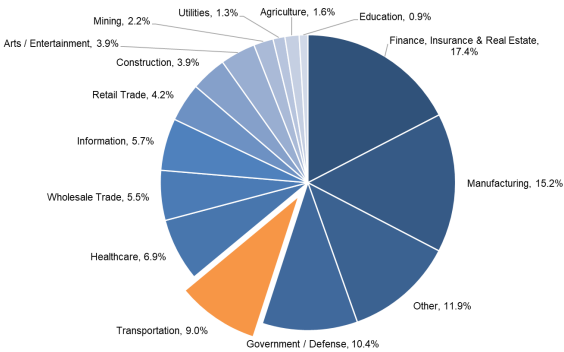


**TRP** Capital Partners

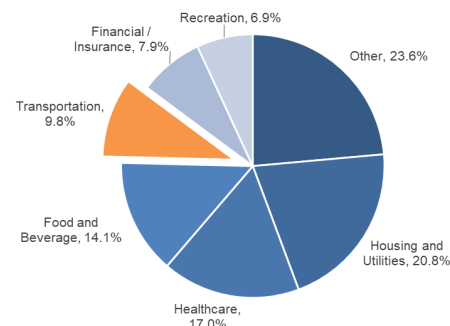
# Compelling Industry Fundamentals

The \$1.9 trillion transportation industry is the 4<sup>th</sup> largest sector of the GDP, growing at 4.3% since 1991

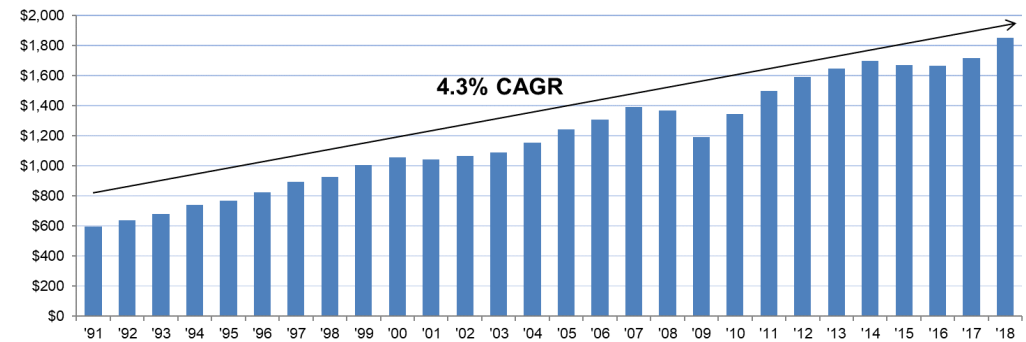
2019 U.S. GDP by Industry



2019 U.S. Personal Consumption by Product



U.S. Transportation Segment GDP (\$B)



**TRP identifies opportunities that offer compelling opportunities to grow substantially faster than the market as a whole, and leverages its network during due diligence and in post-closing value creation initiatives to reduce risk**

- New technologies that offer rapid growth potential
- Focus on installed base of vehicles rather than new unit sales
- New products with superior performance or lower cost structure
- New distribution channels
- Innovative business models that reduce historical friction points
- Business services that can benefit from TRP industry relationships
- Technology-enabled businesses that can expand the market size
- Leading companies in slow-growth sectors that offer compelling near-term growth dynamics
- Solutions to industry problems, e.g. driver shortage
- Expertise to navigate industry cycles



# Attractive Industry Subsectors

**TRP has a broad perspective on the transportation industry while focusing on certain key attractive subsectors that can capitalize on industry trends**

## Dealerships / Services

- Consumer: Automotive, Powersport, Recreational, Marine
- Commercial: Heavy-duty Truck, Off-highway
- Finance and Insurance
- Dealer Management Solutions
- Fixed Operations

## Education / Recruitment / Training

- Safety Training
- Commercial and Consumer Driver Education
- Service Technician Training
- Recruitment Services
- Software Solutions

## Outsourced Services

- Fleet Services
- Remarketing Solutions
- Fleet Lifecycle Management
- Quality Services
- Facilities Management
- Infrastructure Development / Remediation

## Energy / Environmental / Manufacturing

- Aftermarket Parts and Accessories
- Environmental Management and Solutions
- Vehicle Performance Parts and Systems
- Alternative Energy Solutions

## Distribution / Logistics / Supply Chain

- Specialty Transportation
- Distribution Services (multi-industry)
- Non Asset-based Logistics
- Truckload and LTL Carriers
- Final Mile
- Warehouse Management and Solutions

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