

Market Position and Size

Ryder is a market leader or holds similar share to the market leader in all major segments in which it operates. Current estimated market sizes are as follows:

Market Segment	Market Size
Lease and rental market (outsourced) – U.S., Canada, U.K.	0.8 million vehicles
Private fleet market (non-outsourced) – U.S., Canada	4.2 million vehicles
Dedicated contract carriage market (outsourced) – U.S.	\$14 billion
Supply chain logistics market (outsourced) – North America and Asia	\$310 billion

Note: Vehicle market shown is class 3-8

Sources: Truck Rental and Leasing Association, R.L. Polk, Monitor Group, A.T. Kearney