

GMA Trucking

Education Workshop 1

October 6, 2026



Today's Agenda

- 01** Introduction
- 02** GHG Accounting
- 03** Book-and-Claim
- 04** Business Case
- 05** Demand Aggregation
- 06** Next Steps
- 07** Q&A

Meet the Team



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Managing Director



Clayton Gerber
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Associate

In strategic partnership with Smart Freight Centre (SFC)



Illina Frankiv
Fleet Electrification Program Manager @ SFC

THE GMA APPROACH HAS TWO PARTS

The Center for Green Market Activation (GMA) helps companies find and scale critical climate technologies in hard to abate sectors through the use of book and claim systems and demand-aggregating buyers alliances.



Aviation



Trucking



Maritime



Cement & Concrete



Chemicals



Agriculture



System Design & Build

- Organize stakeholders and gather perspectives from across value chain
- Align on system design elements
- Establish systems, including certification standards and registry



Demand Aggregation & Execution

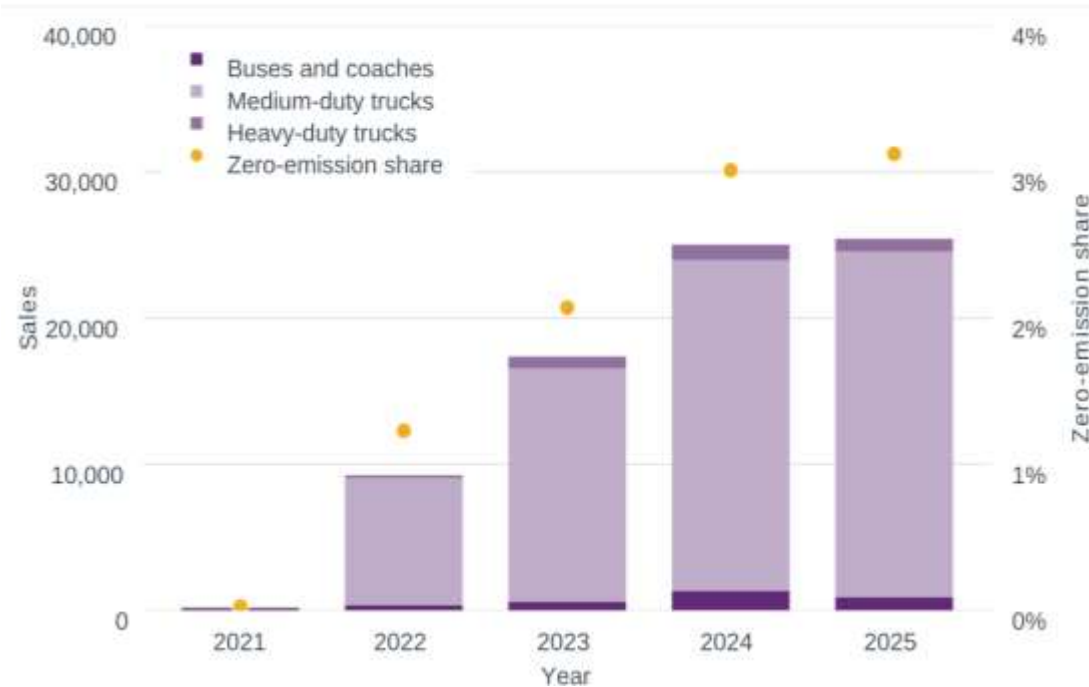
- Find, on-board and educate companies who could benefit from buyers alliances
- Facilitate member company choice of procurement criteria
- Aggregate demand and run procurement processes on behalf of members

We go beyond target setting to help members execute on their demand through collective procurement.

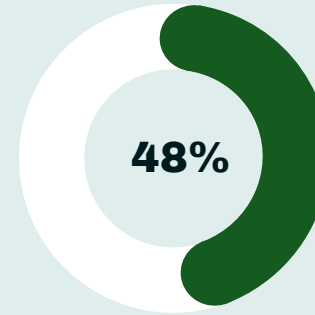
Why Care?

To stay on a **net-zero trajectory for 2050**, the International Energy Agency (IEA) estimates **that 35% of heavy-duty truck sales must be zero-emission by 2035**

UNITED STATES

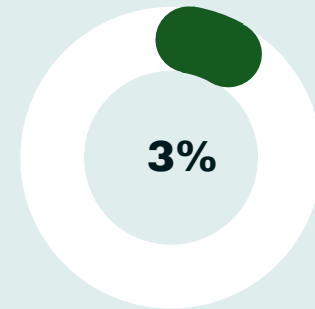


From ICCT, "An overview of the global zero-emission medium- and heavy-duty vehicle market (2026)"



Representing just 9% of the U.S. truck fleet, **heavy-duty trucks are responsible for 48% of emissions**, equal to roughly

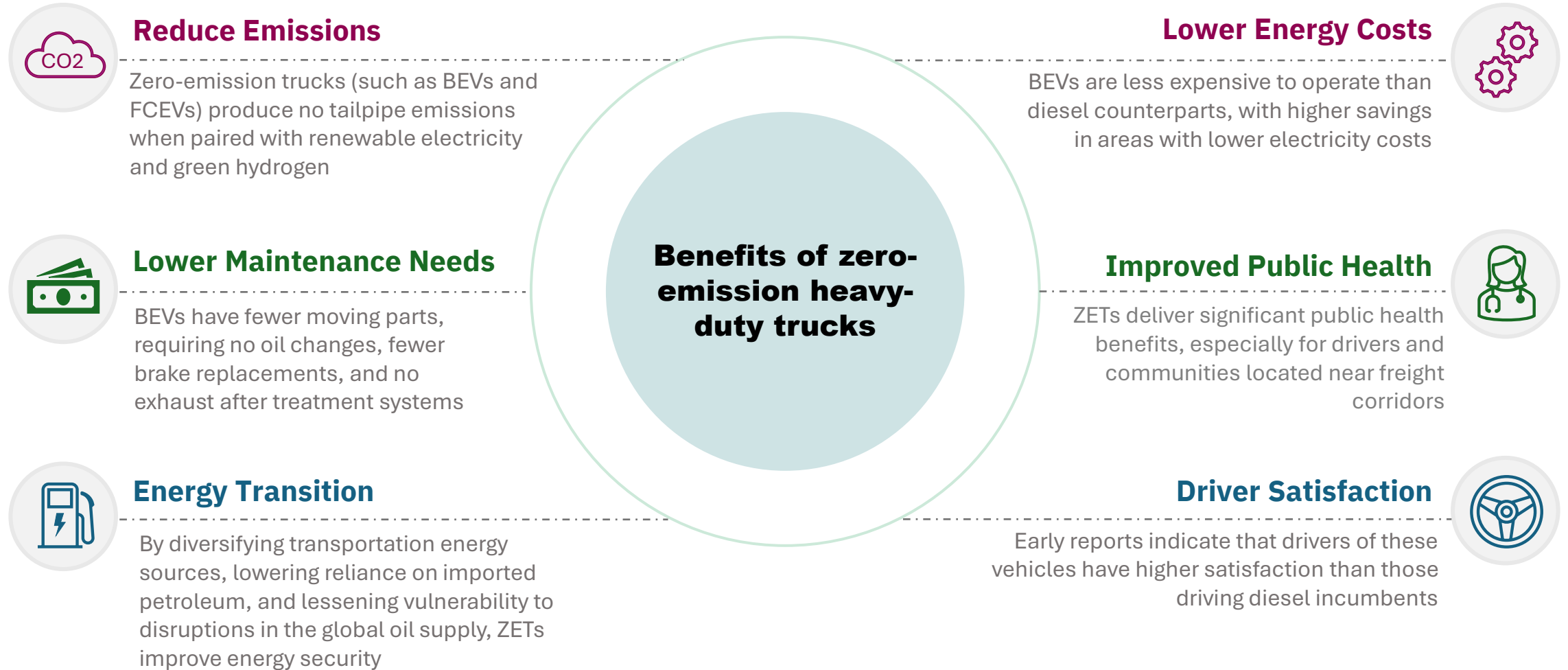
1.2 gigatons CO₂e



The US is the largest non-China market for **zero-emission (ZE) trucks**, yet only **3.1% of new sales** are ZE, and **heavy-duty EV** adoption is only

0.3% of new sales

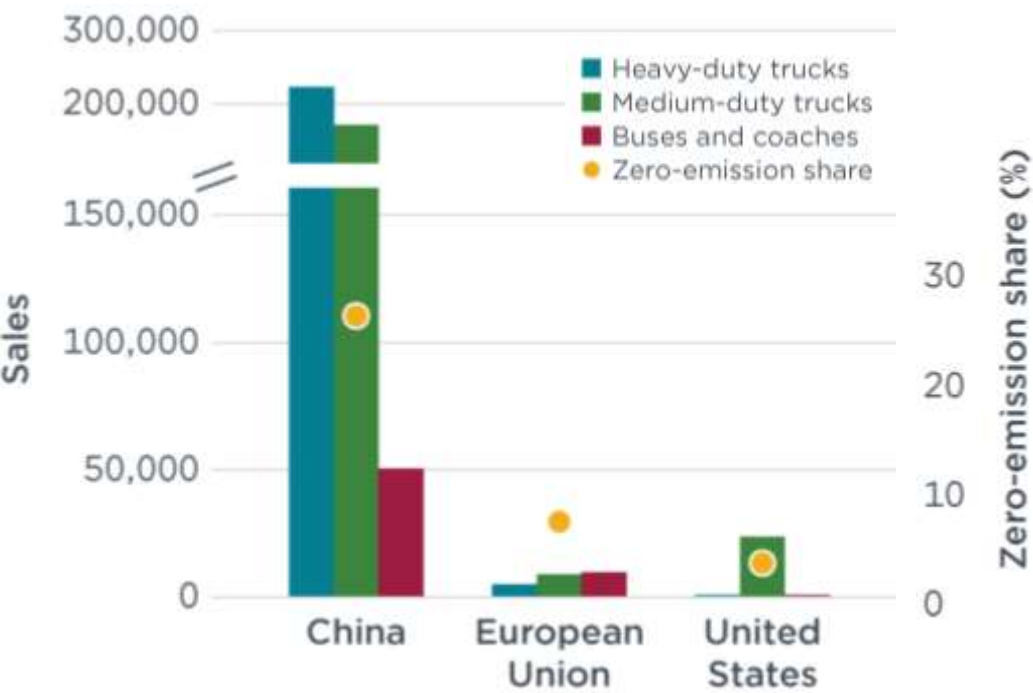
Why Electric?



The Market Challenge

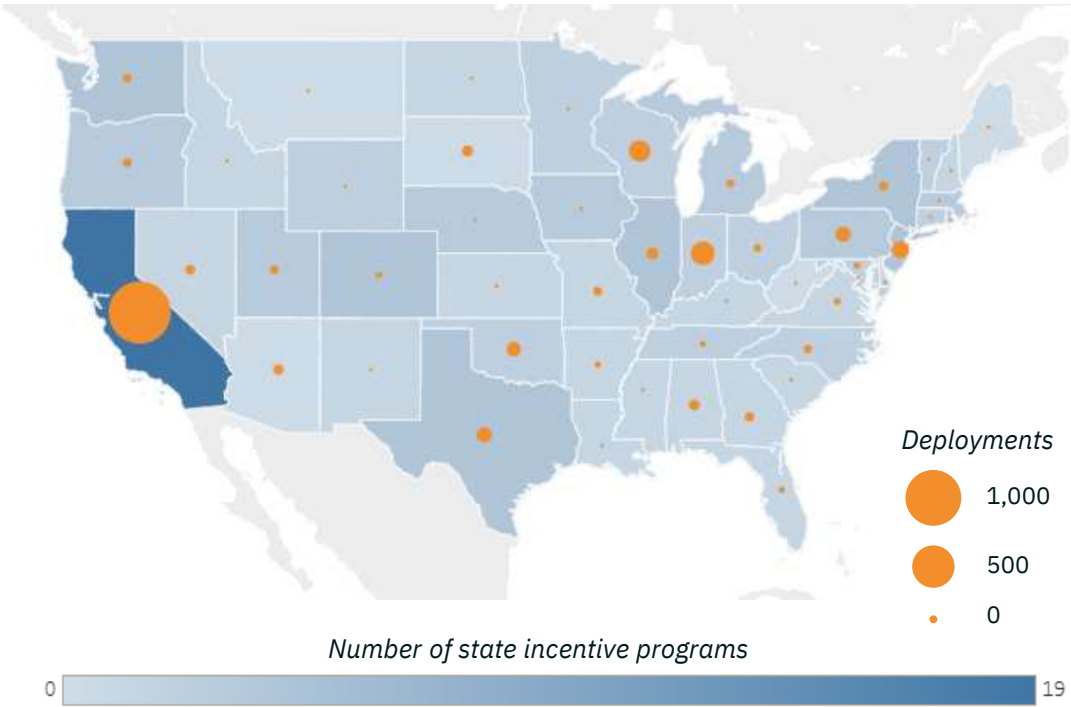
Zero-emission truck **deployment** in the U.S. has been largely **concentrated in markets with robust incentive programs**, highlighting the economic challenges carriers face in transitioning to ZEVs. While global deployment trends remain positive, **U.S. adoption has been slower**. Recent reductions in vehicle costs and continued infrastructure buildout, however, are **improving the outlook** for broader commercial adoption.

Global ZE MHDV Sales and Market Share



Adapted from ICCT, “An overview of the global zero-emission medium- and heavy-duty vehicle market (2026)”

US Heavy-duty ZET deployment



From Catalyst Mobility's “Zeroing in on Zero-Emission Trucks” dashboard

The Levers

No single lever can transform the market alone. Today, **corporate demand** can help **bridge the gap** between **policy support** and **cost-competitive deployment**.

Policy and Incentives

Public policy can help overcome early adoption barriers by reducing costs and supporting infrastructure development

Examples include:

- California's Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP)
- Low Carbon Fuel Standard (LCFS) carbon intensity mandates
- Utility make-ready electrification programs

Corporate Demand

Corporate sustainability commitments create demand for lower-emission freight services and provide carriers with confidence to invest

Examples include:

- Science Based Targets initiative (SBTi) commitments
- United Nations Race to Zero campaign
- Demand aggregation through buyer alliances such as GMA Trucking

Cost Competitive

Long-term market growth will ultimately depend on zero-emission trucking becoming an attractive business decision on its own merits

Examples include:

- Lower vehicle costs from next-generation platforms such as the Tesla Semi
- Reduced on-peak electricity prices
- Expanded access to reliable and accessible charging infrastructure
- Better financing terms driven by a maturing leasing partners

What is Corporate GHG Accounting?



Scoped Accounting is how companies categorize emissions from their operations and supply chain into buckets referred to as Scope 1, 2, and 3



Companies can **set targets** using different recognized standards and frameworks to establish emission reduction goals and **track progress** toward them



For many companies, emissions from **freight and logistics** represent a significant and **hard-to-abate** source of Scope 3 emissions

GHG Protocol Scoped Accounting

Accounting as a Tool

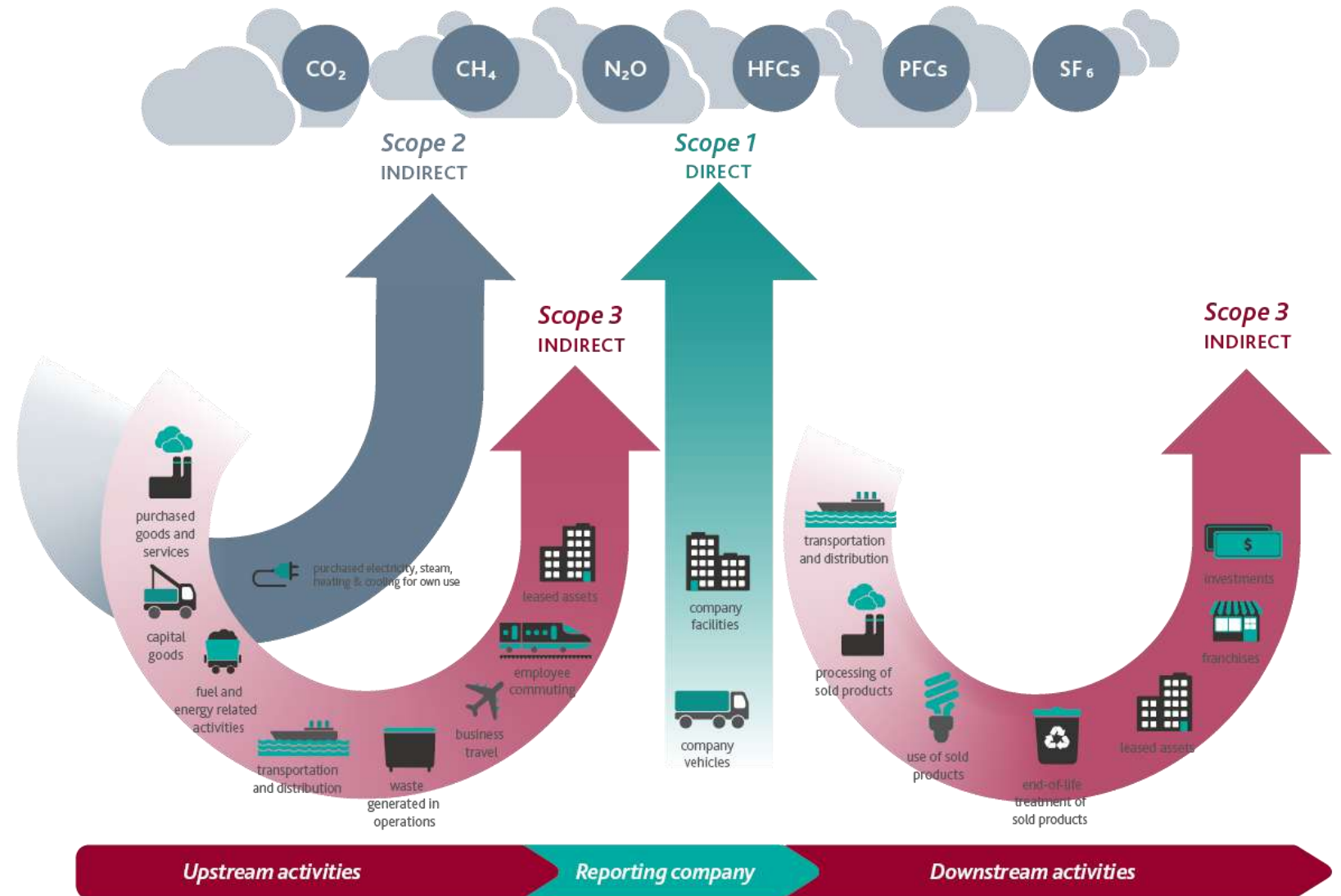
- GHG accounting is ultimately a decision-making tool to prioritize action, track progress, and communicate results

Scope 3 is a Major Challenge

- Scope 3 is often a meaningful source of a company's total emissions and can be difficult to address

Growing Market Demand

- Companies are increasingly seeking solutions that help them advance sustainability objectives within Scope 3 categories



Source: Greenhouse Gas Protocol: Corporate Value Chain (Scope 3) Accounting and Reporting Standard

GHG Protocol Scoped Accounting

Where Freight Appears in
Corporate GHG Inventories

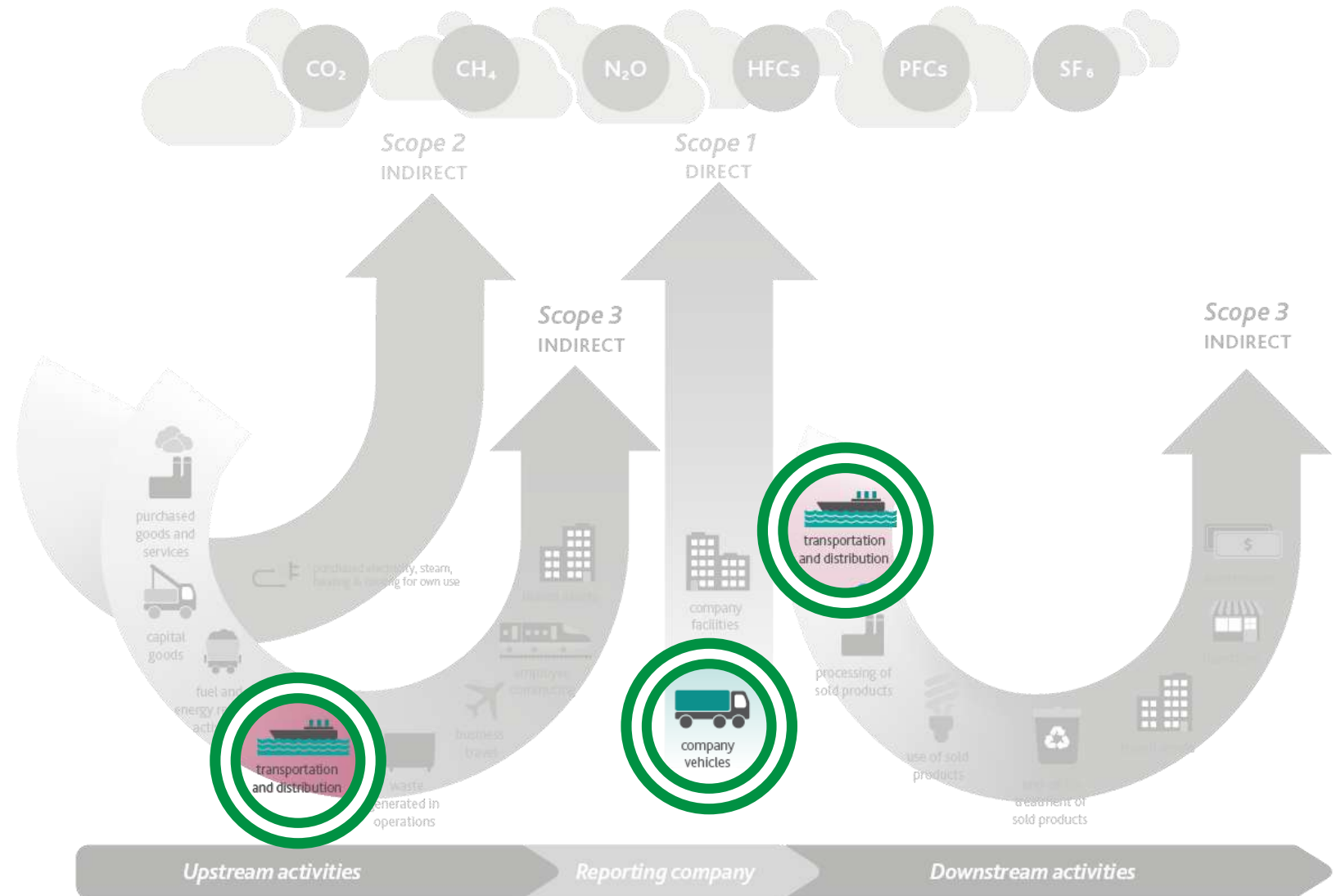
Scope 1 Mobile Combustion

Scope 3 Category 4: Upstream T&D

- Transportation and storage of **purchased goods** and other third-party freight services purchased by the **reporting company**

Scope 3 Category 9: Downstream T&D

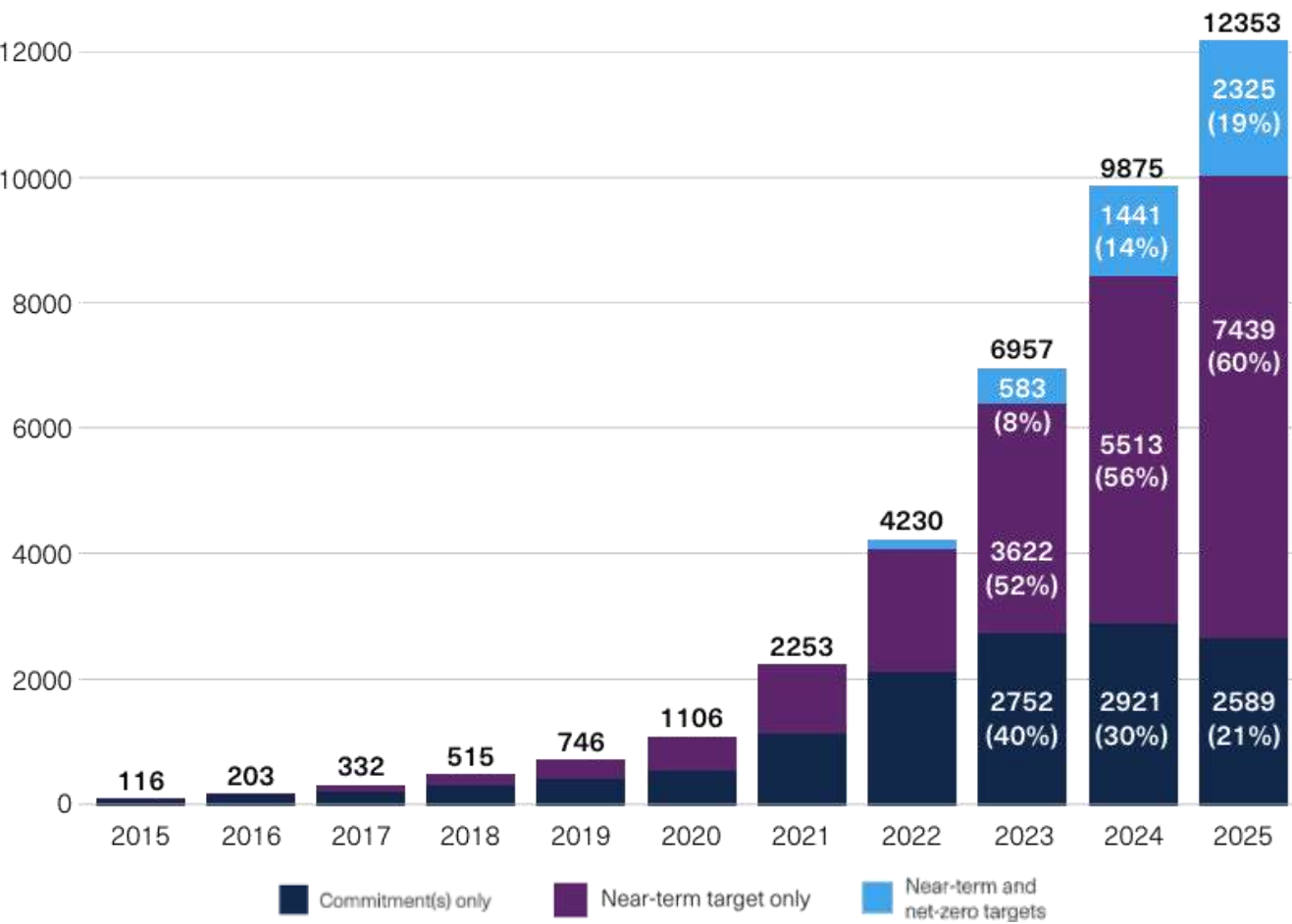
- Transportation and storage of sold products **after the point of sale** when the reporting company **does not purchase** the freight service.



Source: Greenhouse Gas Protocol: Corporate Value Chain (Scope 3) Accounting and Reporting Standard

Setting Targets

Companies with SBTi commitments or targets, cumulative, by target type



THE OPPORTUNITY

>12,000

Companies have validated targets under SBTi¹

70%+

of SBTs include scope 3 targets¹

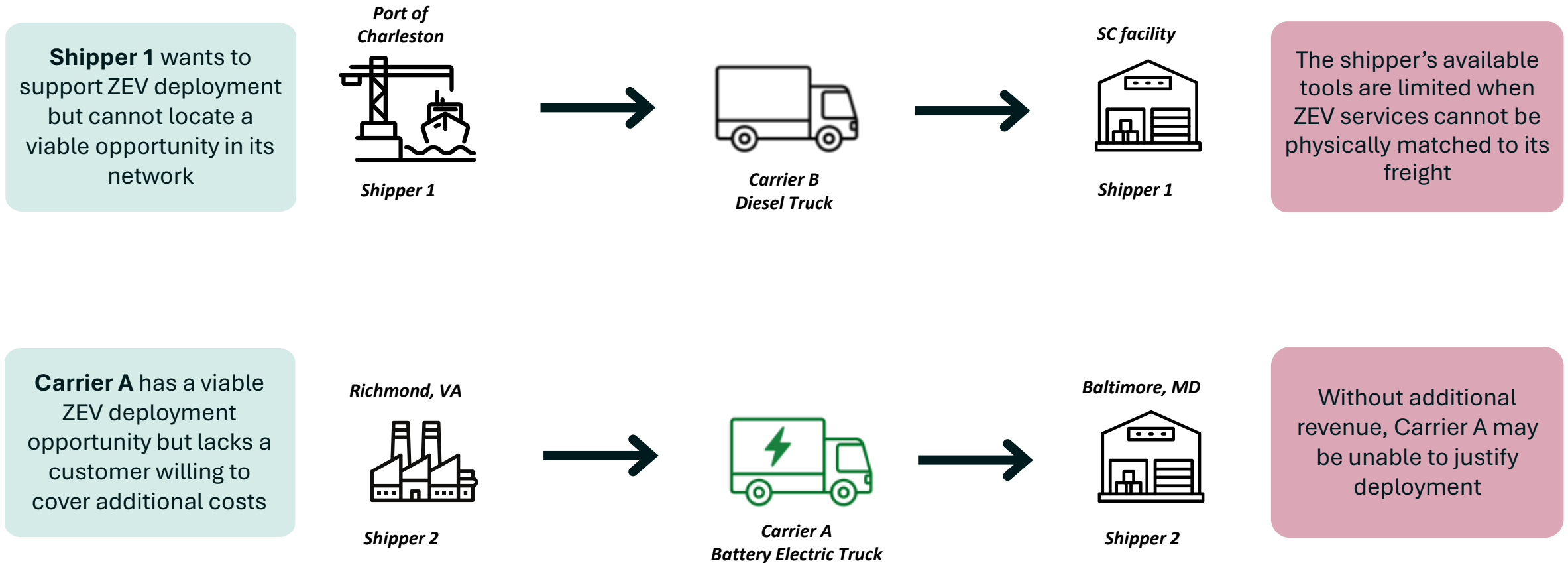
75%

of corporate emissions come from scope 3 value chain activities²

Source: ¹ SBTi ² CDP

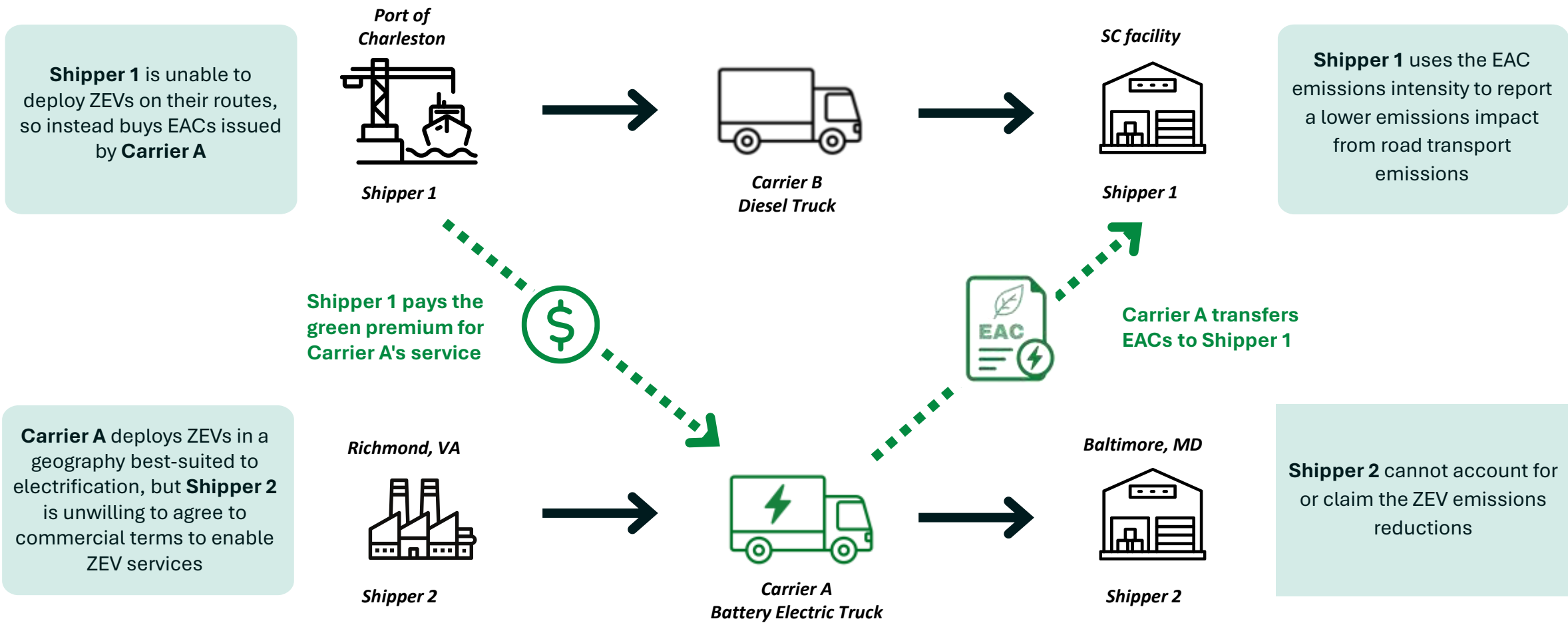
A Fragmented Ecosystem

Shippers **may be willing to support** zero-emission trucking, but **conventional tools** require the right **demand, route, carrier, and deployment opportunity** to align. Willing shippers and viable ZEV deployments do not always occur in the same place, at the same time, or within the same freight relationship.



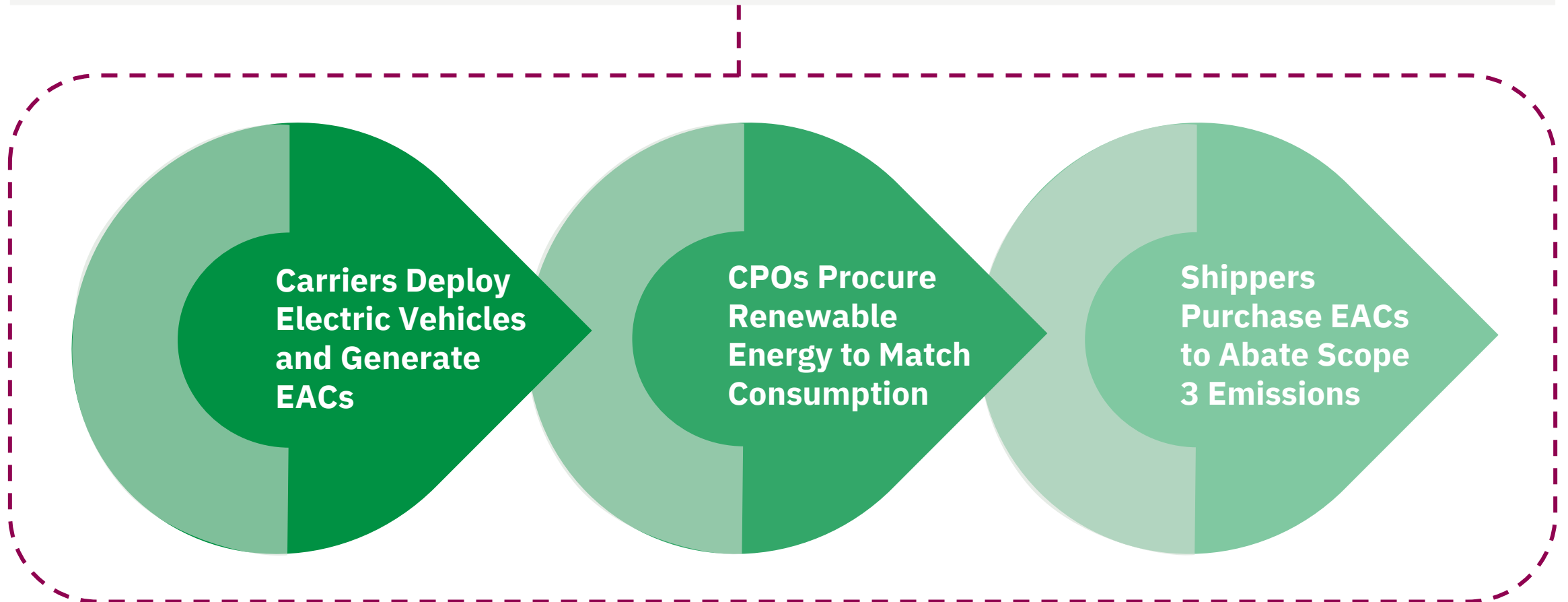
Book-and-Claim

Shipper 1 **willing to contribute to the green premium**, but unable to locate ZEV trucking services for their goods. Carrier A moves goods for Shipper 2 on ZEVs, but Shipper 2 **unwilling to contribute to green premium**.



What's GMAs Role?

GMA helps design the system for book-and-claim, identifies willing carrier partners, convenes the buyer's alliance of member shippers interested in the procurement of zero-emission trucking attributes, and facilitates bilateral contracting between parties



How GMA Trucking Works

GMA Trucking offers a **solution** to the **challenges carriers and shippers** face to streamline **ZET deployment** through four key pillars:



DEMAND AGGREGATION

Convene a group of shippers and freight-forwarders as members and develop preferences for procurement



PROJECT IDENTIFICATION

Through a competitive RFP process, identify zero-emission road transport service funding opportunities



BOOK AND CLAIM SYSTEM DESIGN

Develop and refine book and claim guidance and infrastructure to ensure credible accounting and tracking of attributes



CONTRACT FACILITATION

Help our members negotiate and sign bilateral contracts for ZE trucking service attributes

GMA | TRUCKING

Member Organizations

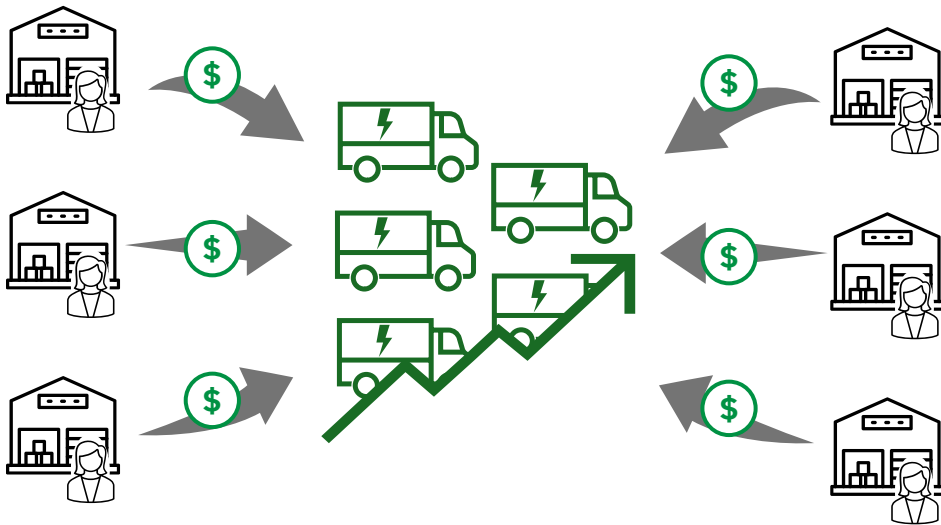


Strategic partner to GMA Trucking provides additional expertise in transportation and book-and-claim systems



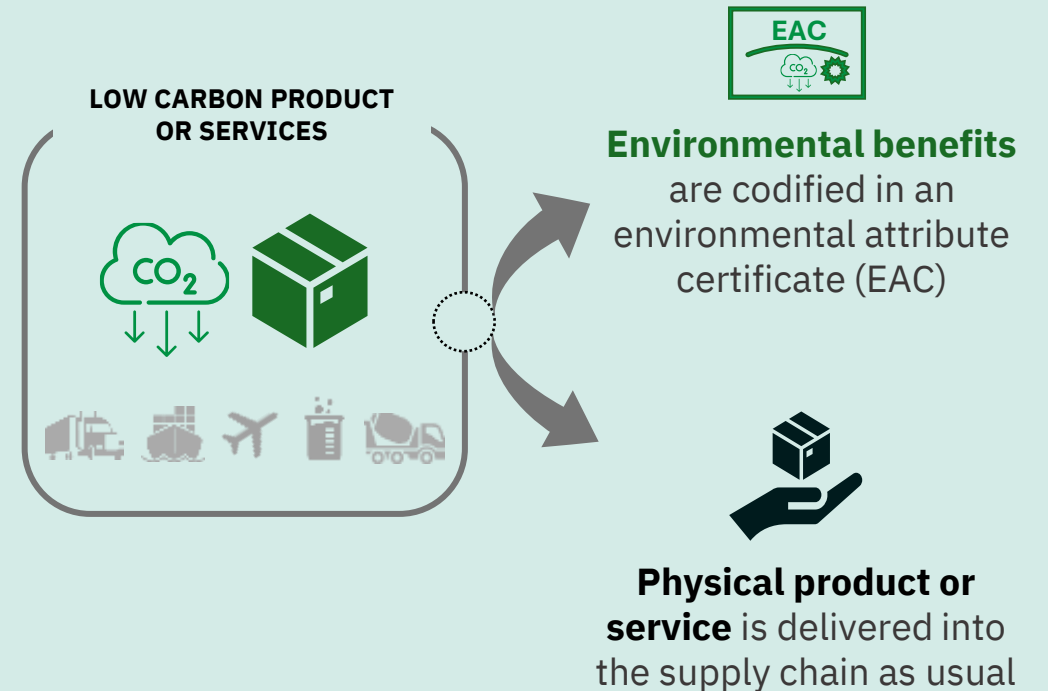
Demand aggregation

Leveraging collective buyer power involves combining separate purchasing needs from multiple buyers into a single, large order to unlock economies of scale and lower costs.



Book and claim

Book and claim systems decouple the physical product or service from its environmental benefits, enabling those benefits to be tracked, documented, and sold to willing buyers to credibly claim.



Physical Demand Aggregation through ZET Scale

SFC and **Catalyst Mobility** lead the ZET SCALE program, which leverages **aggregated Class 8 truck purchases** to create favorable TCO conditions across select freight hubs

From procurement to deployment

Lower truck prices

Achieved through aggregated procurement



Favorable TCO

In high-density freight markets



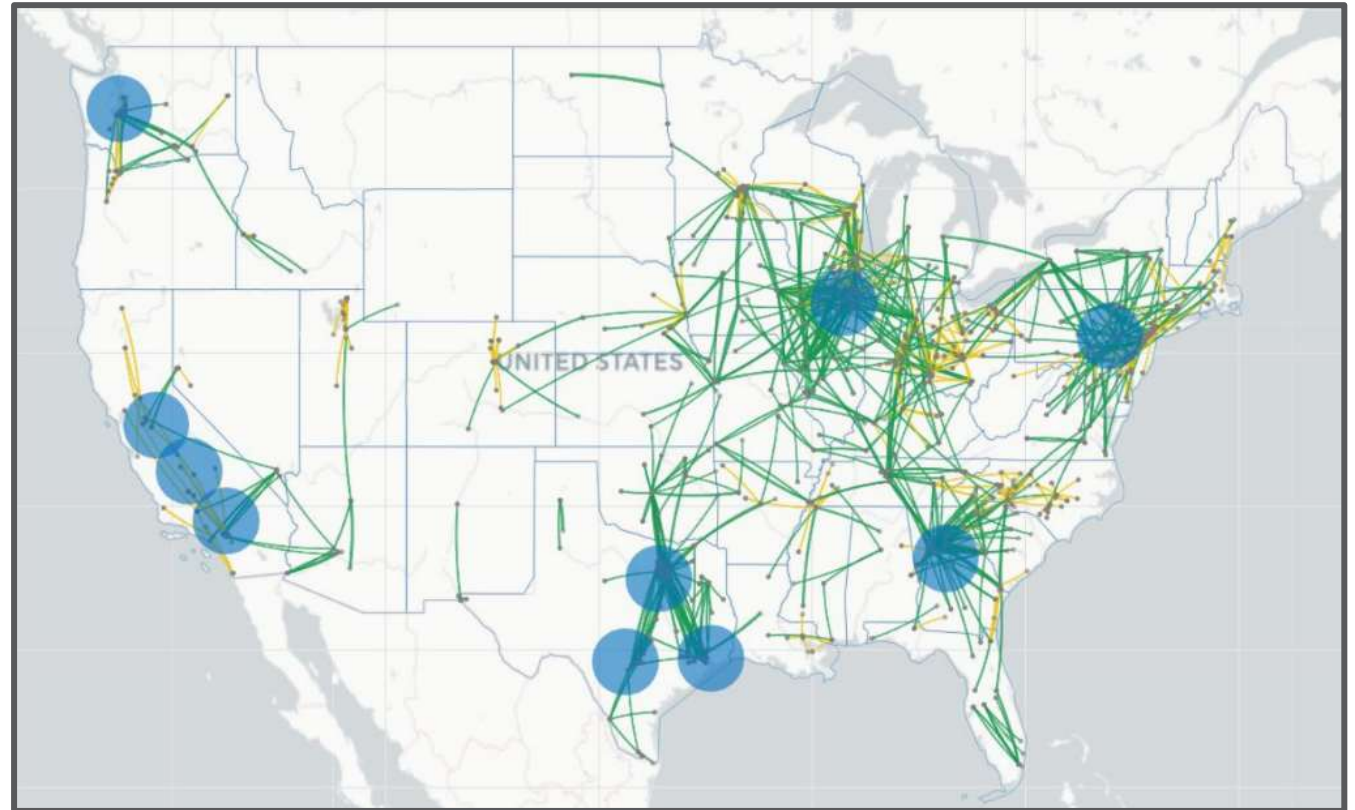
Competitive leases

Offered to participating carriers



Physical deployment

Supported by aggregated shipper demand



Available incentives, infrastructure, and economies of scale can further improve the economics but are not required for favorable TCO in the identified hubs.

Carrier Benefits of Book-and-Claim

Utilizing a **book-and-claim** system backed by a **buyers alliance** can have **multiplicative benefits** addressing the **key challenges** carriers face when deploying ZETs

De-Risk EV Investments

Multi-year, book-and-claim demand commitments from creditworthy shippers can provide additional revenue certainty, helping justify investments in electric trucks and charging infrastructure

Competitive Rates

Revenue from ZETc sales can supplement freight income, helping carriers offset higher deployment costs and offer more competitive rates to customers

Market Differentiation

Position as a leader in zero-emission freight and meet growing customer demand for lower-carbon transportation solutions

Shipper Network

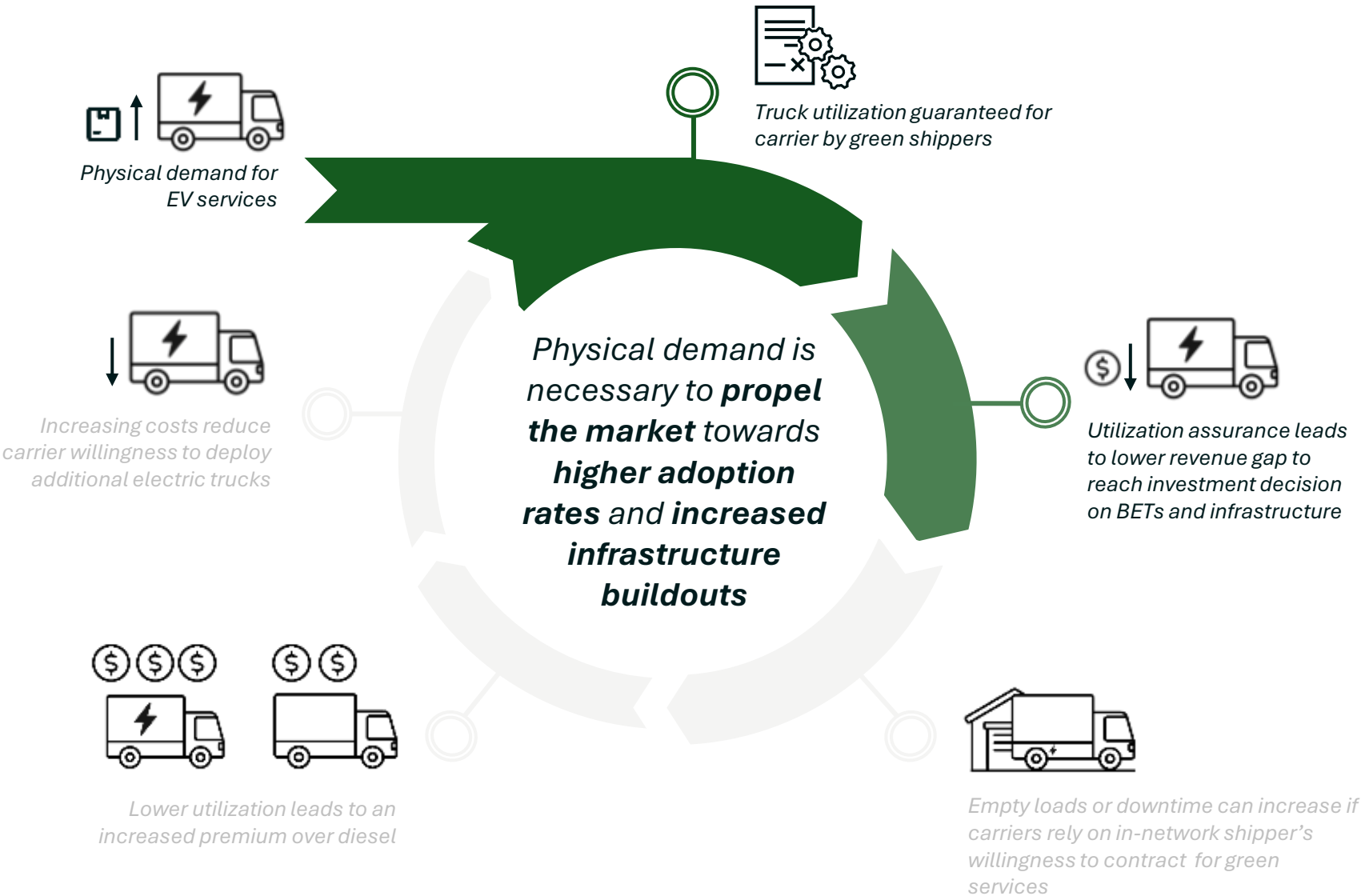
Connect directly with a coalition of leading shippers seeking to reduce transportation emissions, creating opportunities for new business relationships and long-term customer engagement

Physical Demand

Physical demand for ZEV trucking helps carriers secure utilization and build infrastructure

▼

Without sufficient utilization, carriers don't receive the needed revenue to make the BET transition worth it



Pairing physical with book and claim demand increases scale and impact

Together, physical and book and claim:

- **Maximizes utilization** by bringing known physical demand volume
- Enables book and claim to **complement uncertain physical demand**, allowing for **flexibility** when physical is insufficient
- **Lowers premiums** when compared to physical alone
- Gets physical shippers **comfortable** and practiced at **utilizing EV services** without bearing even higher cost premiums
- Serves as a **stop-gap** for when a company's physical **shipping routes change**



Next Steps

We're launching a Carrier RFI following today's workshop. The RFI is designed to help GMA Trucking refine the structure of our next procurement and better understand **carrier readiness, deployment opportunities, charging needs, and preferred commercial arrangements**. Carrier feedback will play a critical role in shaping the next procurement cycle.

Key Outcomes of RFI

- **Shape Next Procurement** Provide input on procurement design, reporting requirements and capabilities, and commercial structures
- **Identify Deployment Opportunities** Share where and under what conditions your organization could deploy additional ZE trucks
- **Prepare for Participation** Help GMA Trucking understand carrier needs so future procurement opportunities are practical and commercially attractive



Next Steps

Important RFI Information

- **Where to find it**

gmacenter.org/rfps

- **Due**

November 27th, 2026

- **Submission**

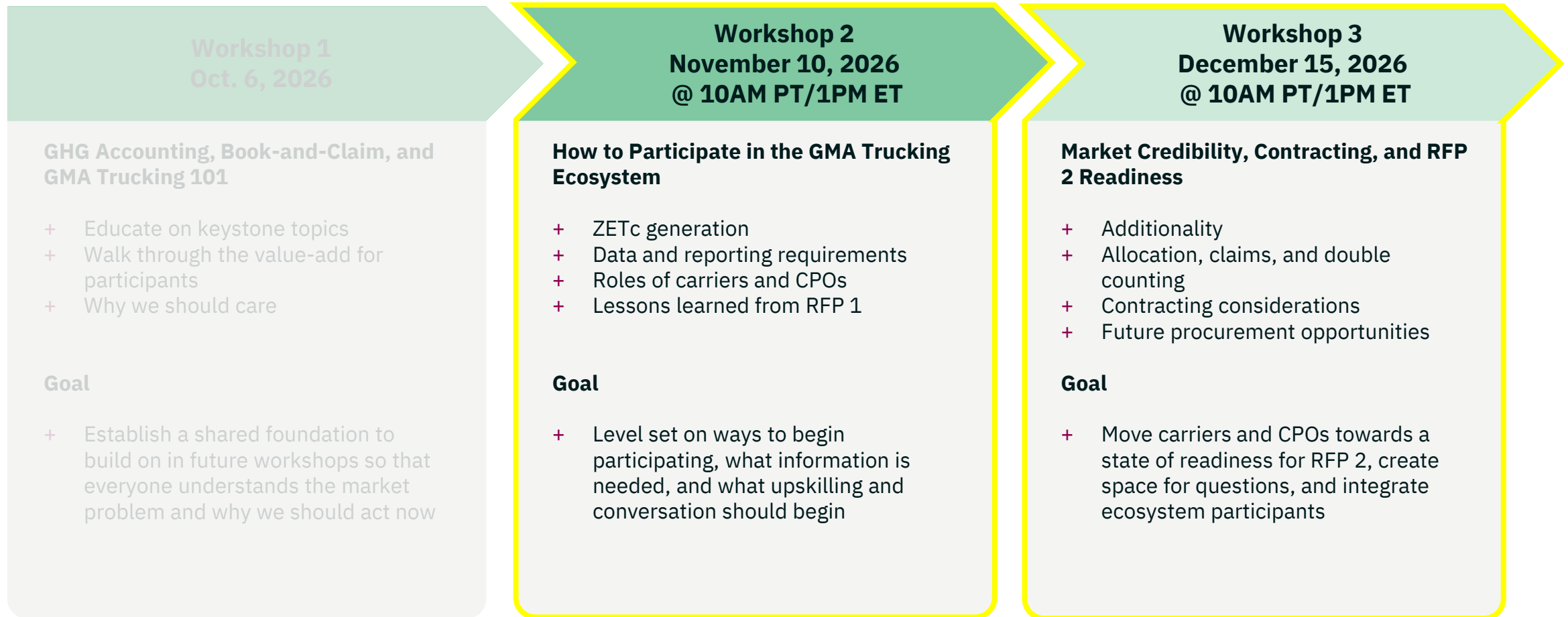
Responses may be submitted by filling out the document inline and submitting through our website portal

- **Questions**

Direct any questions you may have to trucking@gmacenter.org



Timeline





Thank You