

# National Tank Truck Carriers

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# About National Tank Truck Carriers



# Vision and Mission

## Vision

To be the voice of the tank trucking industry and the recognized resource of its leaders.

## Mission

To Champion Safety and Success in the Tank Truck community through Advocacy and Education.



# FUNDAMENTAL PRINCIPLES

- ADVOCACY
- EDUCATION
- SAFETY
- NETWORKING

## SEGMENTS

- TRUCKING
  - ENERGY
  - CHEMICAL
  - FOOD GRADE
  - DRY BULK

## COUNCILS

- SAFETY
- TANK CLEANING
- ENVIRONMENTAL
- WORK-FORCE DEVELOPMENT



# Introduction to the US Market

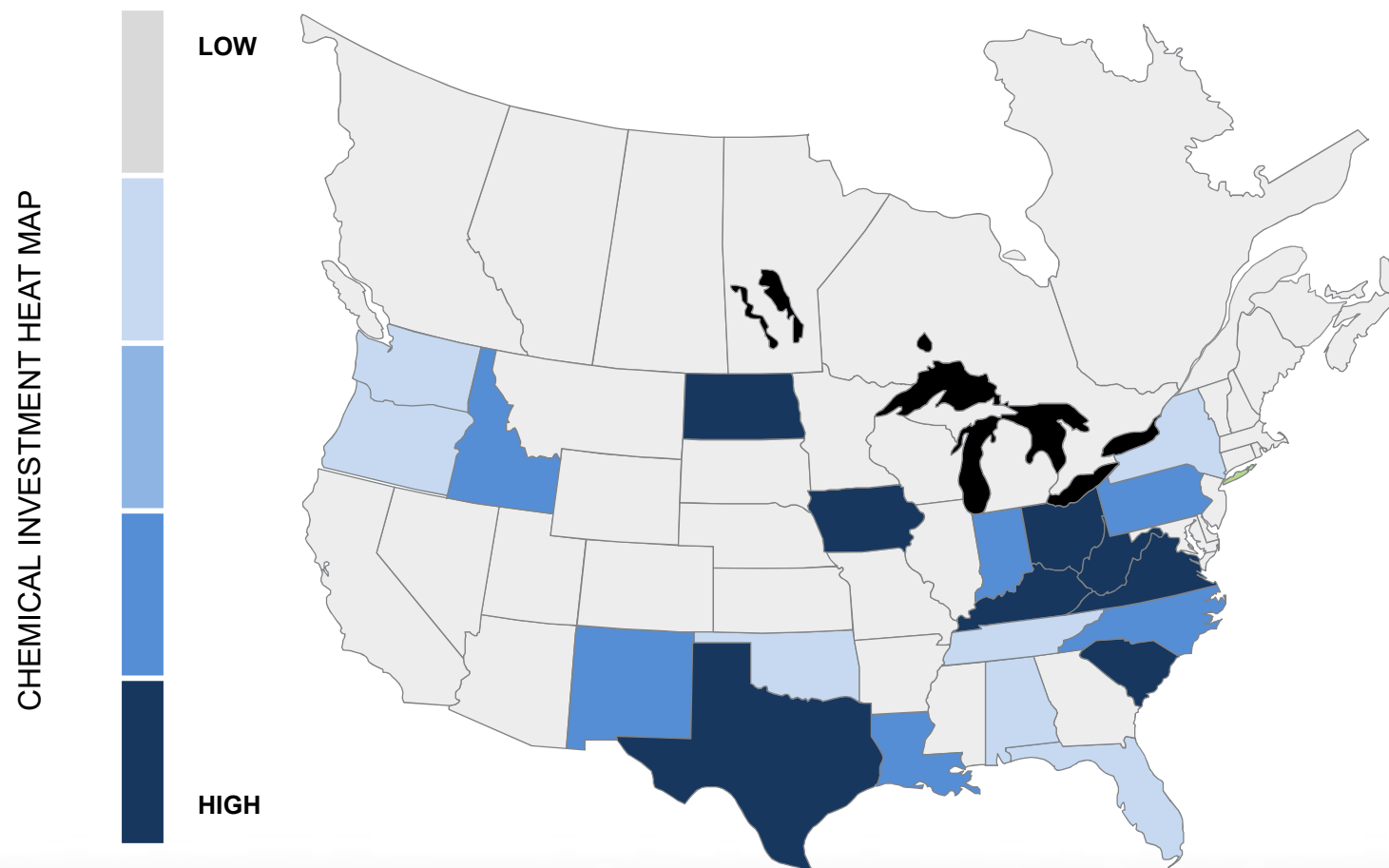


# Typical North American Cleaning Station

- 2 Chemical Bays
- 1 Food Grade Bay
- 2 Maintenance (Shop) Bays
- Office for 2 Customers
- Parking for ~150 Tractors & Trailers
- ~2 Hectares property



# Us Tank Cleaning Market



There are ~ 425 cleaning stations in North America



# Service Offering Overview

## Tank Trailers



*Tank Trailers*

## Intermediate Bulk Containers



*IBC Containers*

## ISOs, Frac Tanks, Repair and Other



*ISO Containers*

*MCUs*

## Commercial Waste Water



*Commercial Waste Water Treatment*

## Rail



*Rail Cleaning & Repair*



# Key Similarities: Europe vs. US

Highly fragmented market

Market size

Highly regulated

Mission Critical

One Stop Solution for Transportation Services beyond Cleaning

Mix of cleaning station operators: T&L vs. Independent



# Key Differences: Europe vs. US

Port Development more advanced in Europe

Rail service more advanced in Europe

Real Estate costs higher in Europe

European working hours more regulated vs. North America 24/7

Utilities expense higher in Europe

Types of Equipment cleaned are different

SQAS Process more advanced in Europe

European Cleaning Document (ECD) vs Individual Company Cleaning Certificates

Prior product restrictions & controls are more apparent in Europe

Trailer to Tractor Ratio higher in US (2.2 to 1)

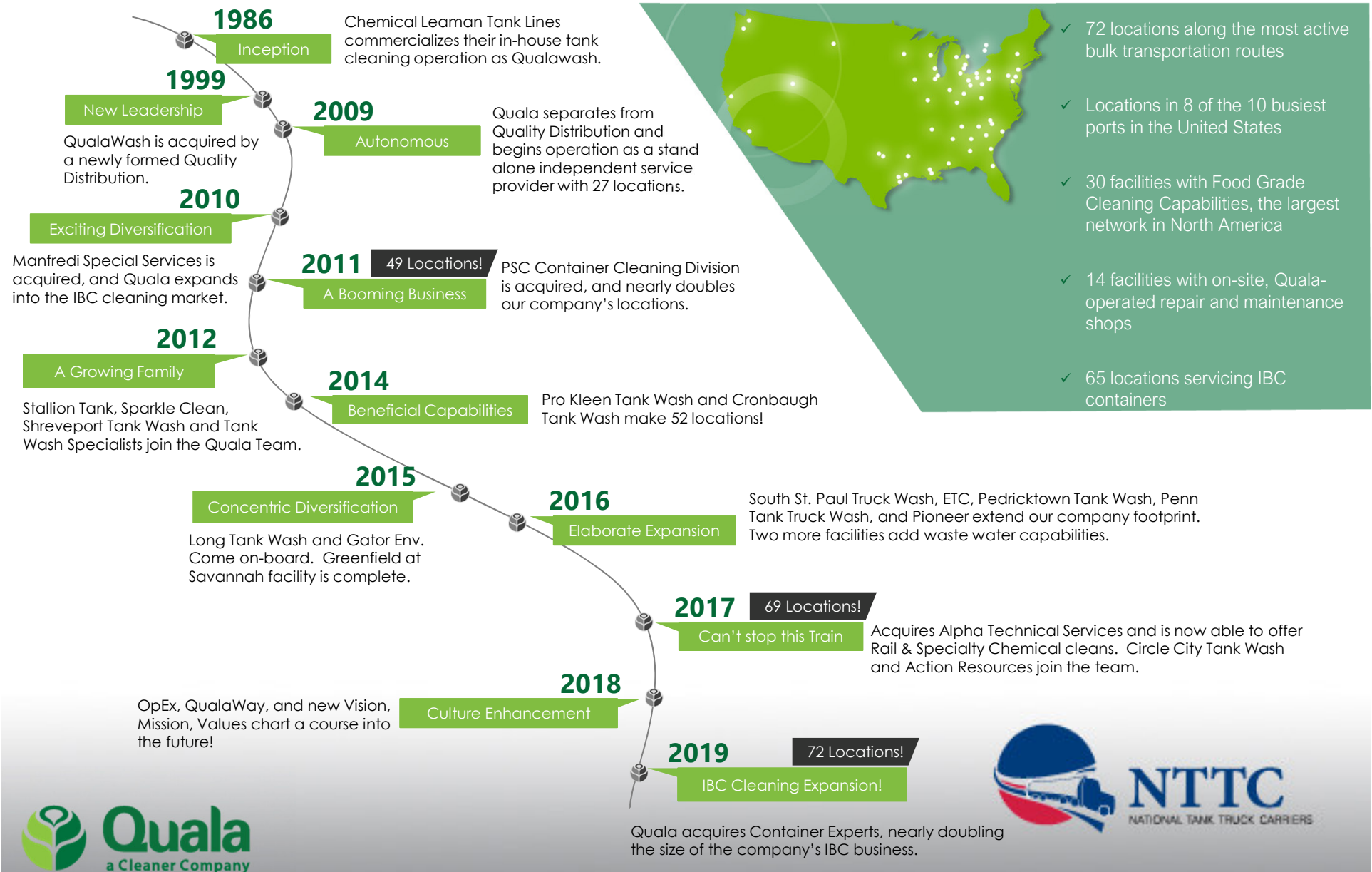
Speed of cycle times: Hi Pressure / Low Vol vs. Low Pressure / Hi Vol



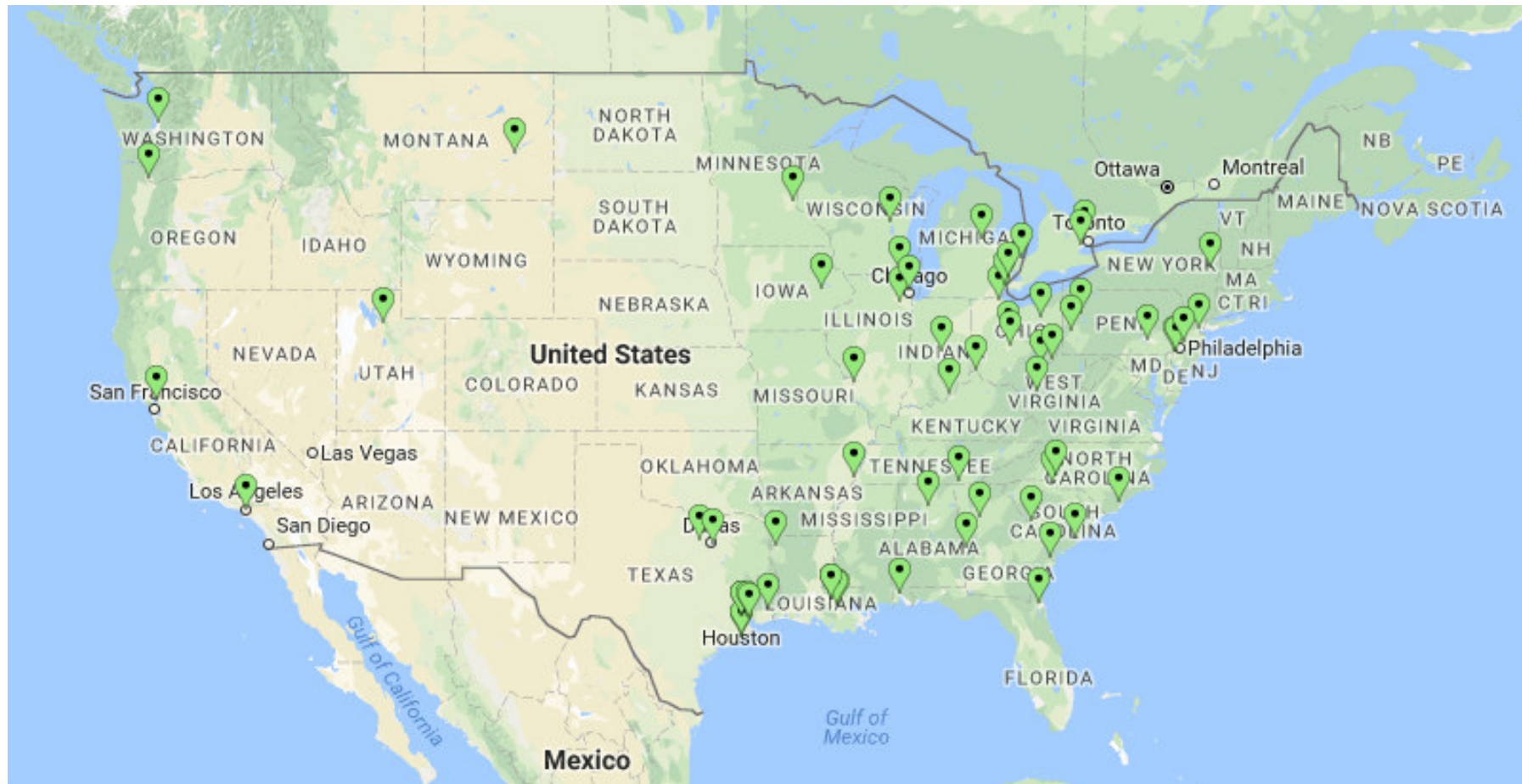
# Introduction To Quala



# Quala History



# Quala Facility Map



72 locations in North America creating an unrivaled network



# Contact Information



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Thank You

