

HEAVY DUTY AFTERMARKET
DIALOGUE

January 20, 2025 • Grapevine, TX



PRESENTED BY:

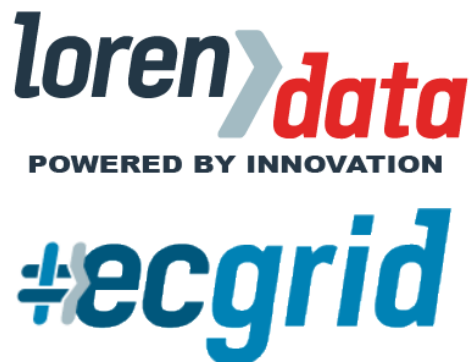
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Aftermarket Suppliers

**MacKay
& Company**

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SPARTAN
GROUP



HDAD 2025 AGENDA

7:00 am NETWORKING BREAKFAST

8:00 am OPENING COMMENTS

8:15 am OEM PERSPECTIVE

Jason Skoog – President & General Manager, Peterbilt Motors Company

8:55 am TALK FROM THE TOP: A REPORT ON 1:1 CONVERSATIONS WITH TOP AFTERMARKET EXECUTIVES

Shannon O'Brien – Senior Director & Commercial Vehicle Lead, MEMA Aftermarket Suppliers

9:15 am REAL-WORLD VIEW OF THE AFTERMARKET FT. HEAVY DUTY BUSINESS FORUM

Dominic Grote – President & CEO, Grote Industries

Chip Stuhr – President, STEMCO

Matt Wolfe – Vice President & General Manager, Aftermarket, SAF-Holland

Moderator: Paul McCarthy – President, MEMA Aftermarket Suppliers

10:00 am BREAK

10:15 am 360-DEGREE VIEW OF THE HEAVY DUTY AFTERMARKET

Chuck Broadus – President & CEO, TruckPro, LLC

Don Gritzmacher – President, Enders & Associates, Inc.

Larry Gruendike – Vice President, Product Management & Supply Chain, Rush Enterprises, Inc.

Kyle Treadway – President & Dealer Principal, Kenworth Sales Company

Moderators: John Blodgett – Vice President, Sales & Marketing, MacKay & Company

Lucas Deal – Content Director, Editor, *Truck, Parts, Service*

11:00 am AFTERMARKET ECONOMY & OUTLOOK

Dr. Bob Dieli – Economist, MacKay & Company

Dave Kalvelage – Client Consultant & Senior Market Analyst, MacKay & Company

11:50 am NETWORKING LUNCH

12:55 pm SUPPLIER EXECUTIVE KEYNOTE: ATMUS FILTRATION TECHNOLOGIES

Charles Masters – SVP & President, Power Solutions, Atmus Filtration Technologies

1:35 pm MEMA AFTERMARKET COMMERCIAL VEHICLE LANDMARK STUDY WITH ROLAND BERGER

Giovanni Schelfi – Partner, Roland Berger

Elena Yakushkina – Principal, Roland Berger

2:10 pm BREAK

2:25 pm GOVERNMENT AFFAIRS & IMPACTS ON THE AFTERMARKET

Ana Meuwissen – Senior Vice President, Government Affairs, MEMA

3:05 pm FLEET PERSPECTIVE

Nick Forte – Vice President, Maintenance, Stevens Transport/Paragon Leasing

Joe Phillips – Vice President, Fleet Maintenance & Equipment, Eagle Transport

Amanda Schuier – Strategic Maintenance Director, Jetco Delivery & TMC General Chair

Moderator: Molly MacKay Zacker – Vice President, Operations, MacKay & Company

3:50 pm CLOSING REMARKS

3:55 pm HDAD '25 NETWORKING RECEPTION

mem.
Aftermarket Suppliers



BILL LONG
President & CEO,
MEMA. The Vehicle
Suppliers Association



PAUL MCCARTHY
President,
MEMA Aftermarket
Suppliers



ANA MEUWISSEN
Senior Vice President,
Government Affairs,
MEMA



JOHN CHALIFOUX
COO, MEMA Aftermarket
& Chief Sustainability
Officer, MEMA



CHRIS GARDNER
Senior Vice President,
Programs & Technology



BEN BRUCATO
Vice President,
Membership &
Engagement



CHERYL DRY
Senior Director, Program
Management &
Operations



SHANNON O'BRIEN
Senior Director,
Commercial Vehicle
Aftermarket



SUSAN PASE
Senior Advisor & Director,
Councils



DANIELLE KASPAR
Director, Programs &
Commercial Vehicle
Aftermarket



BRENNA MCCANN
Director, Membership &
Business Development



NIKKI RANKIN
Director, Councils &
Engagement

2025 SCHEDULE-AT-A-GLANCE

EVENTS

January 19	Chasing the Aftermarket – Grapevine, TX
January 20	Heavy Duty Aftermarket Dialogue – Grapevine, TX
January 20-23	Heavy Duty Aftermarket Week (HDAW) – Grapevine, TX
February 10	Sustainability Hour – Virtual
February 11	EDI Resources and Usage: Research Results & Roundtable – Virtual
February 20-21	2025 Global Summit – Miami, FL
February 25	Commercial Vehicle Landmark Study Webinar – Virtual
February 25	Protecting Data IP & Detecting Counterfeits: BTC Webinar – Virtual
February 26	Commercial Vehicle Pulse Webinar – Virtual
March 10	Sustainability Hour – Virtual
March 19	Commercial Vehicle Pulse Webinar – Virtual
April 2	MEMA Aftermarket Vision Conference – Chicago
April 7	Sustainability Hour – Virtual
April 9	Commercial Vehicle Pulse Webinar – Virtual
April 29	Commercial Vehicle Briefing at ACT Expo – Anaheim, CA
May 12	Sustainability Hour – Virtual
May 28	Commercial Vehicle Pulse Webinar – Virtual
Date TBA	Remanufacturing Roadshow & Annual Conference – Springfield, MO
June 3	Business Technology Council Webinar – Virtual
June 9	Sustainability Hour – Virtual
June 24	Commercial Vehicle Town Hall – Greensboro, NC
June 25	Commercial Vehicle Pulse Webinar – Virtual
July 7	Sustainability Hour – Virtual
July 16-18	INA PAACE Automechanika – Mexico City
July 22	Heavy Duty Talk from the Top Webinar – Virtual
July 29	Mobility Technology Council Webinar – Virtual
August 11	Sustainability Hour – Virtual
August 27	Commercial Vehicle Pulse Webinar – Virtual
September 8	Sustainability Conference – Virtual
September 29	MiX National Coffee Day Webinar – Virtual
September 30	Commercial Vehicle Pulse Webinar – Virtual
October 5-7	Aftermarket Technology Conference – Springfield, MO
October 13	Sustainability Hour – Virtual
October 29	Commercial Vehicle Pulse Webinar – Virtual
November 4-6	AAPEX – Las Vegas
November 10	Sustainability Hour – Virtual
November 19	Commercial Vehicle Pulse Webinar – Virtual
December 8	Sustainability Hour – Virtual



2025 SCHEDULE-AT-A-GLANCE

COUNCILS, COMMITTEES, FORUMS, GROUPS

COMMERCIAL VEHICLE (AFTERMARKET & OE)

HEAVY DUTY MANUFACTURERS REPRESENTATIVES COUNCIL (HDMRC)

January 19
Grapevine, TX

August 12-13
Southfield, MI

HEAVY DUTY BUSINESS FORUM (HDBF)

May 6-8
Irvine, CA

September 23-25
Nashville, TN

HEAVY DUTY MARKETING & SALES FORUM (HDMSF)

May 6-8
Irvine, CA

September 23-25
Nashville, TN

HEAVY DUTY ADVANCED TECHNOLOGY COUNCIL (HDATC)

April 16-17
Auburn Hills, MI

October 7-9
TBA

MEMA

DIVERSITY, EQUITY & INCLUSION COUNCIL (DEI)

March 11
Southfield, MI (Hybrid)

June 10
Southfield, MI (Hybrid)

September 30
Southfield, MI (Hybrid)

December 2
Southfield, MI (Hybrid)

GOVERNMENT AFFAIRS COMMITTEE (GAC)

June 18
Southfield, MI (Hybrid)

December 9
Southfield, MI (Hybrid)

SUSTAINABILITY COUNCIL

February 11
Southfield, MI (Hybrid)

May 6
Southfield, MI (Hybrid)

August 5
Southfield, MI (Hybrid)

November 11
Southfield, MI (Hybrid)

MEMA AFTERMARKET (COMMERCIAL VEHICLE, AUTOMOTIVE & REMANUFACTURING SUPPLIERS)

AFTERMARKET SUPPLIERS CEO COUNCIL

February 6 Virtual	March 6 Virtual	April 1 Chicago
May 22 Virtual	June 19 Virtual	August 7 Virtual
September 25-26 Nashville, TN	October 16 Virtual	December 4 Virtual

BRAKE MANUFACTURERS COUNCIL

May 30 Naples, FL	November 3 Las Vegas
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BUSINESS TECHNOLOGY COUNCIL

April 1 Chicago	September 16 Virtual	October 6 Springfield, MO	December 3 Virtual
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COUNCIL OF REMANUFACTURING EXCELLENCE (CoRE)

February 13 Virtual	April 29 Virtual	August 14 Virtual	October 6 Springfield, MO	December 2 Virtual
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CREDIT RISK & RECEIVABLES COUNCIL

January 23 Virtual	February 19 Virtual	March 20 Virtual	April 16 Virtual	May 15 Virtual
July 17 Virtual	August 20 Virtual	September 17-18 TBA	October 15 Virtual	November 20 Virtual

INTELLECTUAL PROPERTY COMMITTEE

February 12 Virtual	April 9 Virtual	June 11 Virtual	August 13 Virtual	October 8 Virtual	December 10 Virtual
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MARKETING EXECUTIVES COUNCIL

April 3 Chicago	November 6 Las Vegas
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MOBILITY TECHNOLOGY COUNCIL

March 13 Virtual	April 3 Chicago	October 8 Springfield, MO	November 18 Virtual
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MODERN INDUSTRY eXPERTISE (MiX)

February 18 Virtual	April 1 Chicago	June 17 Virtual	September 4 Virtual	October 8 Springfield, MO	November 13 Virtual	December 10 Virtual
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WOMEN IN REMANUFACTURING NETWORK

February 6 Virtual	May 8 Virtual	August 21 Virtual	December 11 Virtual
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Event and meeting dates and locations are subject to change. See full up-to-date schedules at mema.org.

MacKay & Company



JOHN BLODGETT
Vice President, Sales &
Marketing



STU MACKAY
President Emeritus



MOLLY MACKAY ZACKER
Vice President,
Operations



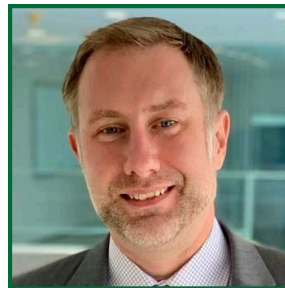
DR. BOB DIELI
Economist



DAVE KALVELAGE
Senior Market Analyst



RICHARD ILSEMAN
Data Analyst



BRIAN VAN CAMP
Market Analyst



TRAVIS KOKENES
Market Research Manager



JOHN MOERY
Manager, Multi-Client
Services



JACOB PRINSEN
Business Analyst &
Programmer



VANIA CORREA
Accountant

ABOUT Launched in 1968, MacKay & Company specializes in market research and management consulting for commercial on-highway vehicles, construction equipment, farm field machinery and related components such as engines and transmissions.

Since the mid-1980s, MacKay & Company has been providing detailed analyses of the replacement market for parts, tires, and lubricants used on Class 2c-8 trucks, school buses, trailers, off-highway agriculture and construction equipment with our DataMac® services.

In addition to DataMac, MacKay & Company provides clients with analyses of original equipment and aftermarket potential, strategic options, distribution policies, product introduction, quality management, acquisitions and a range of related subjects. MacKay has been providing quantitative detailed market reviews with qualitative recommendations that improve sales, profitability and cost. This information is gleaned from all points in the marketplace, including but not limited to vehicle operators, dealers and distributors.

SESSION 1

OEM PERSPECTIVE



JASON SKOOG

PRESIDENT & GENERAL MANAGER, PETERBILT MOTORS COMPANY

Jason Skoog is the General Manager at Peterbilt Motors Company and Vice President of PACCAR. Prior to this role, he worked at Kenworth Truck Co. for over 9 years in various roles like Assistant General Manager Operations, Director of Marketing - Planning & Research, and Assistant General Manager - Sales/Marketing/Service. Jason also held the position of Director of Operations, Dir of Bus Dev/Assigned to Special Projects, and Director of Business Development at PACCAR, Inc.

Jason completed his Stanford Executive Program (SEP) from Stanford University in Organizational Leadership and MBA from the University of Phoenix.

SESSION 2

TALK FROM THE TOP: A REPORT ON 1:1 CONVERSATIONS WITH TOP AFTERMARKET EXECUTIVES



SHANNON O'BRIEN

SENIOR DIRECTOR, COMMERCIAL VEHICLE AFTERMARKET, MEMA AFTERMARKET SUPPLIERS

Shannon O'Brien is senior director of commercial vehicle aftermarket at MEMA Aftermarket Suppliers. Originally joining the legacy Heavy Duty Manufacturers Association in 2022, O'Brien is responsible for aftermarket commercial vehicle programming with MEMA Aftermarket Suppliers.

Previously, O'Brien held marketing roles at organizations including Marquardt Switches, Inc. and WABCO, where she most recently served as aftermarket marketing communications team leader - North America. Prior to entering the commercial vehicle industry, O'Brien spent 15 years working at North America's largest coupon provider and still has a love for finding good deals.

O'Brien received her B.A. in communications from Michigan State University.

SESSION 3

REAL WORLD VIEW OF THE AFTERMARKET FEATURING THE HEAVY DUTY BUSINESS FORUM



DOMINIC GROTE

PRESIDENT & CEO, GROTE INDUSTRIES

William "Dominic" Grote IV is the President and CEO of Grote Industries, a fourth-generation family-owned company based in Madison, IN. For over 120 years, Grote has been a global leader in visibility and safety systems for the on-highway, off-highway, and trailer body builder markets. Under Dominic's leadership since 2009,

the company has expanded its global operations, emphasizing innovation, trust, and customer-focused solutions, including pioneering the first LED light for the heavy-duty commercial vehicle industry.

Dominic began his career at Grote in 1993 after earning a BA in Political Science from Southern Methodist University and an MBA from George Washington University. Starting as an aftermarket sales representative, he advanced through leadership roles in sales, marketing, and product development, driving the adoption of advanced lighting technologies.

Committed to industry success, Dominic has served in advisory and leadership roles with key associations such as MEMA, where he is currently Chair of MEMA Aftermarket Suppliers, and the Indiana Economic Development Corporation. Locally, he is active in workforce development, education, and economic initiatives, including co-founding the Madison Music Movement.

Dominic and his wife Patti reside in Madison, IN, where they raised five children and enjoy time with their family, live music, travel, and outdoor activities.



CHIP STUHR

PRESIDENT, STEMCO

Chip Stuhr serves as president of STEMCO, a leading manufacturer of high-quality wheel-end and suspension products for the commercial vehicle industry. With nearly two decades of experience at STEMCO, Stuhr has been instrumental in shaping the company's success and driving its mission of "Making the Roadways Safer."

Stuhr began his career at STEMCO in 2004 as a district sales manager and steadily advanced through roles of increasing responsibility, including regional manager, director of marketing, director of wheel end products, vice president of sales and marketing, and vice president and general manager. His promotions reflect his exceptional leadership and deep understanding of the commercial vehicle industry.

Stuhr earned his bachelor's degree from the University of Minnesota – Twin Cities and his MBA from LeTourneau University.

SESSION 3

REAL WORLD VIEW OF THE AFTERMARKET FEATURING THE HEAVY DUTY BUSINESS FORUM



MATT WOLFE

VICE PRESIDENT & GENERAL MANAGER, AFTERMARKET, SAF-HOLLAND

Matthew Wolfe serves as the vice president and general manager of aftermarket at SAF-Holland, where he leads customer engagement, product distribution, and supply chain management across the Americas. With a strategic focus on enhancing aftersales support, Wolfe aims to strengthen end-user relationships, refine operational practices, and drive customer satisfactions.

Wolfe prioritizes leveraging market data analytics to inform product planning and deliver precise demand forecasting. His responsibilities also include sourcing aftermarket products and complementary third-party offerings, ensuring a comprehensive product portfolio to meet market needs.

Bringing 23 years of experience in the automotive and manufacturing sectors, including 15 years in the commercial vehicle industry, Wolfe has held several senior leadership roles throughout his career. At Meritor, he served as vice president of aftermarket for Europe, the Middle East, and Africa; vice president for the Asia Pacific region; and vice president of industrial business. Wolfe's extensive international expertise includes managing director roles in Australia and Wales, as well as senior finance positions with significant P&L responsibilities.

Prior to joining Meritor, Wolfe worked with DaimlerChrysler and Stealth Engineering & Technologies. He also served in the U.S. Army's Military Intelligence Battalion. Wolfe holds a bachelor's degree in finance and an MBA from Michigan State University's Eli Broad School of Management.



MODERATOR: PAUL MCCARTHY

PRESIDENT, MEMA AFTERMARKET SUPPLIERS

Paul McCarthy is the president of MEMA Aftermarket Suppliers. He leads an organization that champions the aftermarket industry and advances the business interests of MEMA members, working toward supporting a growing, profitable, innovative and influential aftermarket supplier industry. MEMA Aftermarket Suppliers represents automotive, commercial vehicle, and remanufacturing suppliers that provide the parts, tools, chemicals, diagnostics, and technologies that keep vehicles running safely and affordably throughout their lifecycle.

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McCarthy has served in other leadership roles with MEMA, including president and CEO of the Automotive Aftermarket Suppliers Association (AASA), the former MEMA light vehicle aftermarket division; and senior vice president of strategy for all of MEMA, overseeing board management and strategic initiatives.

McCarthy has more than a quarter century of experience in the automotive industry. Before joining MEMA, Paul led the Automotive and Industrial Products Strategy Practice at PricewaterhouseCoopers (PwC). In this role, he led projects supporting major business decisions at dozens of automotive suppliers, eight of the top ten global automakers, and financial institutions. His past leadership roles include heading PwC Germany's automotive strategy advisory practice and leading global forecasting and analysis for a prominent vehicle forecast organization. He has conducted business in 18 countries and traveled to over 60 countries.

McCarthy has an MBA from Duke University, where he was awarded the Fuqua Scholar designation. He has also been presented with the Northwood Education Award and the AWDA Outstanding Leadership Award.

SESSION 4

360-DEGREE VIEW OF THE HEAVY DUTY AFTERMARKET



CHUCK BROADUS

PRESIDENT & CEO, TRUCKPRO, LLC

Chuck Broadus has served as the president and CEO of TruckPro, LLC since 2015, leading one of the nation's largest independent distributors of heavy-duty truck and trailer parts. Under his leadership, TruckPro has grown into a trusted partner for customers across the commercial transportation industry, recognized for operational excellence and customer-centric solutions.

Prior to TruckPro, Chuck worked in industrial distribution for 20+ years and held senior leadership roles at Airgas, Inc., Reliant Energy, Inc., and BOC Gases, Inc. His expertise spans strategic growth, operational optimization, and building high-performing teams in complex, competitive markets.

Before beginning his business career, Chuck served as a U.S. Army infantry officer. He holds a B.S. in Engineering from the United States Military Academy at West Point and an MBA from Vanderbilt University.



DON GRITZMACHER

PRESIDENT, ENDERS & ASSOCIATES, INC.

After working in warehouse operations for the tire and industrial chain company Standard Chain Corporation, Don transferred to the sales department. As sales manager covering the eastern and mid-western parts of the country, Don became familiar with the transportation industry, calling on various channels of distribution, key fleets, and mass merchandise accounts.

In 1988, Don was hired by the former CEO at Standard to help start up a new venture in the steel market. As general manager of the small start up, he tackled and learned financial disciplines necessary to build a business from scratch. Under his leadership, the business grew from \$0 to nearly \$10 million during his 2.5-year tenure. Today it is listed in the top 50 privately held companies in Oregon.

In 1990, Don was hired by Enders & Associates founder Dick Enders to grow the territories of Oregon and Idaho. For the next six years, sales grew at a pace of nearly 32%. In 1996, Don purchased the company from Enders and immediately focused on the company's largest account, Freightliner, LLC. Despite a brief industry downturn in 2000/2001, Don grew Enders' business with the company by over 40%.

Don enjoys security privileges with Daimler Trucks North America and has become adept at working in all facets of their business, including Purchasing, Engineering, Aftermarket, Manufacturing and all other critical departments.



LARRY GRUENDIKE

VICE PRESIDENT, PRODUCT MANAGEMENT & SUPPLY CHAIN, RUSH ENTERPRISES, INC.

Larry Gruendike is the Vice President of Product Management and Supply Chain at Rush Enterprises, overseeing product management, procurement, and supply chain for parts. With 32 years of experience in the commercial vehicle aftermarket, Larry has held leadership roles at PACCAR Parts, FleetPride, and Rush Enterprises.

He earned a Bachelor's degree in Communication from the University at Buffalo and an MBA from the University of Warwick.

SESSION 4

360-DEGREE VIEW OF THE HEAVY DUTY AFTERMARKET



KYLE TREADWAY

PRESIDENT & DEALER PRINCIPAL, KENWORTH SALES COMPANY

As a third-generation Kenworth dealer, Kyle Treadway proudly claims to have “diesel in the blood.” A brief stint practicing bankruptcy law in the mid-80s cured him of any doubts about the value of commercial transportation, and today, he oversees a mid-sized dealership operating 40 rooftops in the Rocky Mountain and Mid-Atlantic regions.

A veteran of trade associations, Kyle has served on state and national dealer governing Boards, franchise dealer councils, state trucking associations, state and national Bar Associations. He also actively serves on community advisory boards including a private industrial bank, community college foundation, university advisory board, and a national industry think tank.

Industry honors include the Utah Trucking Assoc. Distinguished Service Award (1984), Dealer Excellence and Volume awards (1985 – 2022), American Truck Dealer of the Year (2014), Medium Duty Dealer of the Year (2017, 2021), and Kenworth Dealer of the Year (2022).

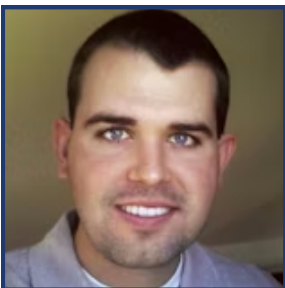


MODERATOR: JOHN BLODGETT

VICE PRESIDENT, SALES & MARKETING, MACKAY & COMPANY

John Blodgett started working for MacKay & Company, a specialized market research and consulting firm, in 1994 as a project manager overseeing single and multi-client research projects. Today, Blodgett is vice president of sales and marketing, responsible for client contact for single and multi-client projects. Prior to MacKay & Company, Blodgett worked for John Fluke Manufacturing, Gould Electronics, and Syracuse Supply Company (Caterpillar Dealer) in a variety of sales positions.

Blodgett has served as vice president of the MPSA (Midwest Parts and Service Association) and is a member of TMC (Technology & Maintenance Council), AEM (Association of Equipment Manufacturers) and IAC (Intermodal Association of Chicago). Blodgett received his B.S. in interdisciplinary engineering and management from Clarkson University and an MBA from Pepperdine University Graziadio School of Business and Management.



MODERATOR: LUCAS DEAL

CONTENT DIRECTOR, EDITOR, *TRUCKS, PARTS, SERVICE*

Lucas Deal joined Randall-Reilly in 2011 and serves as chief editor and content director of *Trucks, Parts, Service*. He is a board member of the independent aftermarket group GenNext HD and participates in various other industry organizations.

SESSION 5

AFTERMARKET ECONOMY & OUTLOOK



DR. BOB DIELI

ECONOMIST, MACKAY & COMPANY

Dr. Robert "Bob" F. Dieli is the economist for MacKay & Company. He is also president and founder of RDLB, Inc., an economic research and management consulting firm based in Lombard, Ill. In addition to being an advisor to firms in the manufacturing, trucking, management consulting and financial services sectors, RDLB, Inc. also publishes Mr. Model, a monthly series of reports on current and prospective conditions

in the U.S. economy.

Bob received a B.S. in finance, with honors, from Boston College in 1968, an M.A. in Latin American Studies from the University of Texas at Austin in 1969, and a Ph.D. in economics from the University of Texas at Austin in 1977.



DAVE KALVELAGE

SENIOR MARKET ANALYST, MACKAY & COMPANY

In his role as senior market analyst, Dave Kalvelage analyzes survey data as well as market trends, regulations, segmentations, products and customer behaviors to provide market intelligence to clients to assist them in making strategic decisions. Kalvelage manages the data analysis and reporting for MacKay's aftermarket services subscriptions as well as single- and multi-client projects.

Kalvelage first joined MacKay & Company in 2002 as manager of database services and information technology. Prior to joining MacKay, he worked as a project manager at Lucent Technologies.

Kalvelage is a member of SAE International (Society of Automotive Engineers) and AEM (Association of Equipment Manufacturers). He received a bachelor's degree from Iowa State University and earned his MBA and Master's in Information Systems from the University of Colorado at Denver.

SESSION 6

SUPPLIER EXECUTIVE KEYNOTE: ATMUS FILTRATION TECHNOLOGIES



CHARLES MASTERS

SENIOR VICE PRESIDENT & PRESIDENT, POWER SOLUTIONS, ATMUS FILTRATION TECHNOLOGIES

As the senior vice president and president of power solutions for Atmus Filtration Technologies, Charles is a member of the Atmus leadership team and is responsible for commercial leadership of Atmus' core business. He oversees sales, marketing, business development, product planning and product management, as well as new product launches.

Most recently, Masters served as executive director of sales for Cummins Filtration. Prior to that, he held various other leadership positions throughout Cummins Inc., including as general manager of the Eaton Cummins Automated Transmission Technologies JV from 2018 to 2021 and as president of Cummins Western Canada from 2016 to 2018. Masters has extensive global experience with the filtration business having prior roles in Belgium as general manager for Europe, Middle East and Africa, and in China as the global operations leader.

Charles' early career was with Kimberly-Clark in various roles in sales; marketing and business development in Canada. He has a bachelor's degree in commerce from the University of Alberta and an MBA from Harvard Business School.

SESSION 7

MEMA AFTERMARKET COMMERCIAL VEHICLE LANDMARK STUDY WITH ROLAND BERGER



Dr. WILFRIED AULBUR

SENIOR PARTNER, ROLAND BERGER

Dr. Wilfried Aulbur is a Senior Partner overseeing the firm's global Commercial Vehicle, Construction and Agricultural business. Wilfried is based in Chicago and supports the US Automotive, Industrials and Private Equity practice.

Previously, he was the Managing Partner of Roland Berger in India, a practice that he continues to support in the Automotive and Industrials space. He was the head of Roland Berger's Asia Automotive practice as well as the Chairman of Roland Berger Middle East and Africa.

Wilfried's work includes growth strategies, M&A and due diligence, operational performance improvements and technology strategies.

Wilfried has served on numerous industry associations and panels, is a regular speaker at key industry events and publishes extensively. His recent book "Riding the Tiger" is a Random House bestseller. He is a lecturer of Harvard Business Publishing and a mentor for the International Innovation Corps of the University of Chicago. Prior to his work with Roland Berger, Dr. Aulbur was the Managing Director and CEO of a well-known German automobile manufacturer, India, where he was responsible for the passenger cars, trucks and buses. He held various positions with that company in Europe, the US and India. Wilfried is a PhD in Physics with a focus on Computational Material Science.



GIOVANNI SCHELFI

PARTNER, ROLAND BERGER

Giovanni Schelfi is a fully home-grown Roland Berger family member. He joined the Italian office in 2009 and afterwards moved to the Chicago office in 2014.

In the past years, Schelfi has successfully built and managed some of Roland Berger's largest accounts in the U.S., with a focus on the automotive industry and on large global transformational projects. His methodological expertise covers corporate strategy, M&A support and performance improvement.

Schelfi holds a master's degree in international institutions management from Bocconi University in Italy and an MBA from the University of Geneva in Switzerland.



ELENA YAKUSHKINA

PRINCIPAL, ROLAND BERGER

Elena Yakushkina is a principal in Roland Berger's Toronto office. She has been serving global clients for over 15 years with a special focus on automotive manufacturers, retail groups and mobility providers. She has extensive experience in sales and after-sales strategies and operations, multi-level distribution structures and new mobility concepts.

Yakushkina studied international economics at Moscow State University of Management and holds an MBA from the London South Bank University.

SESSION 7

MEMA AFTERMARKET COMMERCIAL VEHICLE LANDMARK STUDY WITH ROLAND BERGER



INTRODUCED BY: PHILIP ATKINS

DIRECTOR, STRATEGIC RESEARCH & PLANNING, MEMA

Philip has a history of analyzing research data, identifying trends, and making recommendations to companies in the automotive industry, high tech, and consumer package goods. He is now Director, Strategic Research & Planning for MEMA charged with providing insights about where the aftermarket has been, where it is now, and where it is going.

Prior to joining MEMA, Philip was at FGI Research where he annually developed and managed the most profitable accounts, including Advance Auto Parts, Kroger, Blue Cross Blue Shield-North Carolina and other well-known, high-profile consumer brands. Prior to that Philip was at The Hatteras Group where he landed the IBM account and managed research for BB&T bank, Milliken, and other Fortune 500 companies.

After graduation from the University of North Carolina, Philip worked in New York City on the advertising accounts of Nabisco and Campbell Soup Company brands.

SESSION 8

GOVERNMENT AFFAIRS & IMPACTS ON THE AFTERMARKET



ANA MEUWISSEN

SENIOR VICE PRESIDENT, GOVERNMENT AFFAIRS, MEMA

Ana M. Meuwissen serves as the senior vice president of government affairs for MEMA. Meuwissen previously was the director of government affairs for Robert Bosch LLC for over 11 years and oversaw the development and implementation of the company's government affairs strategy in the U.S. During that time, she was engaged in the renegotiation of NAFTA and the creation of the U.S.-Mexico-Canada trade agreement.

Meuwissen joined Bosch from the law firm of Nelson Mullins Riley & Scarborough LLP in Washington, D.C. where she represented the interests of clients in the mobility sector before the White House, the U.S. Congress and various regulatory agencies. Her key areas of expertise include passenger car and commercial vehicle safety and advanced technology, international trade policy, transatlantic relations and vehicle cybersecurity.

Meuwissen holds a Master of Arts degree in international relations and political theory from the University of Westminster in London and a B.A. in government and biology from Georgetown University in Washington, D.C.

SESSION 9

FLEET PERSPECTIVE



NICK FORTE

VICE PRESIDENT, MAINTENANCE, STEVENS TRANSPORT/PARAGON LEASING

Nick Forte is a seasoned transportation maintenance executive with over 20 years of experience, specializing in equipment specification, utilization, KPI analysis, and lifecycle management. With a technology-driven approach, Nick leverages practical analytics to monitor trends, optimize maintenance processes, reduce asset purchasing costs, and deliver measurable bottom-line results.

Throughout his career, Nick has been deeply committed to the safety of equipment, ensuring the protection of families on the road, while also advocating for sustainable practices that help reduce emissions across the industry. A forward-thinking leader, he focuses on enabling, energizing, and engaging teams to achieve organizational goals and drive innovation.

Nick currently serves as the Vice President of Maintenance and Facilities at Stevens Transport, a leader in refrigerated transportation. Stevens Transport is recognized for its expertise in temperature-controlled logistics, valued by a wide range of Fortune 500® companies.

Before joining Stevens Transport, Nick spent over 18+ years at Prime Inc., rising to the role of Fleet Maintenance Manager. There, he managed daily fleet maintenance operations across seven terminal locations and oversaw a team of 300+ employees, consistently contributing to operational excellence.



JOE PHILLIPS

VICE PRESIDENT, FLEET MAINTENANCE & EQUIPMENT, EAGLE TRANSPORT

Immediately after high school graduation, Joe Phillips joined the United States Marine Corps. After serving four years on active duty, he attended Nashville Auto Diesel College in Nashville, Tenn. while completing his four years of reserve service. He received a diploma in diesel technology from NADC in 1992. He later attended Johnston Community College in Smithfield, N.C., earning his associate of applied science degree in heavy duty equipment and transport technology in 2001.

Phillips joined Eagle Transport Corp. as a shop technician in April of 1993. During his 30+ year tenure, he has held every position in Eagle's maintenance department. After serving as a technician in Eagle's Selma, N.C. facility, he was promoted to Selma shop foreman, a position he held for 11 years. In 2006, Phillips was promoted to a regional field maintenance manager position where he oversaw shop operations and equipment maintenance for all of Eagle's terminals in Georgia, South Carolina, North Carolina, Virginia, Maryland and Delaware. From 2014-2016, Phillips held the position of director of fleet maintenance and equipment before being promoted to vice president of fleet maintenance and equipment in January of 2017.

Phillips has been married to his wife Wendy for 30 years. They have two sons: Blaine (24), who is currently a Division 3 college football coach in Western N.Y., and Colby (20), who is currently service in the USMC and is stationed in Beaufort, S.C. Phillips' hobbies include golf as well as refereeing high school football and basketball.

SESSION 9

FLEET PERSPECTIVE



AMANDA SCHUIER

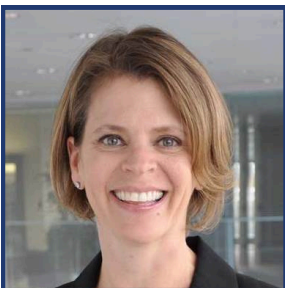
STRATEGIC MAINTENANCE DIRECTOR, JETCO DELIVERY & GENERAL CHAIR 2024-2025, TMC

Amanda Schuier is a fourth-generation member of the trucking industry. Her great grandfather owned a trucking company and her grandfather, a truck dealership. She has been involved in the trucking industry since 2006 and currently serves as the strategic maintenance director at Jetco Delivery where she focuses on shop processes, vendor relationships, and personnel management. Her numerous roles in trucking and transportation have included positions in marketing, sales, driver recruiting, operations, and safety, in the service provider, fleet and, perhaps most importantly to this group- she spent four years in Aftermarket Parts Sales.

Schuier currently serves as the 65th general chairman and treasurer for the American Trucking Associations' Technology and Maintenance Council. 2024 was the end of her four-year term serving on the American Transportation Research Institute's Research Advisory Council. In 2023, she graduated from the LEAD ATA leadership program.

Schuier was honored as a recipient of the 2017 *Heavy Duty Trucking Magazine* class of Emerging Leaders. She is a 2019 inaugural class graduate of the TMC Leaders of Tomorrow program. In 2020, she received the Women In Trucking's "Top Women to Watch" award. She was also one of *Fleet Owner Magazine's* 2020 "Women Leaders in Transportation." In 2021, she was named to the "Women in Supply Chain" by *Supply & Demand Chain Executive Magazine*. Additionally in 2021, Schuier was a finalist for the "Most Influential Woman In Trucking Award" by Women in Trucking.

Schuier has spoken at numerous professional industry webinars and conferences, including *Commercial Carrier Journal's* Solutions Summit, *Fleet Owner Magazine* webinars, the Technology and Maintenance Council, the Truckload Carriers Association, Alabama and North Carolina Trucking Associations, and Women in Trucking. Schuier also spends her free time volunteering at a local high school, teaching about careers in transportation. She resides in the Kansas City area.



MODERATOR: MOLLY MACKAY ZACKER

VICE PRESIDENT OF OPERATIONS, MACKAY & COMPANY

Molly MacKay Zacker (as her name implies) has been involved in this family business since she was old enough to put labels on surveys, type and answer phones. Work at a young age was not always by choice. Now, and by choice, she is MacKay & Company's vice president of operations. In this capacity, she coordinates many behind-the-scenes activities, manages the research department, authors and edits reports and presentations, conducts research and interfaces with clients.

In the fall of 2019, MacKay was the recipient of Northwood University's Automotive Aftermarket Management Education Award.

MacKay holds a Bachelor's degree in economics and business management from Goucher College in Towson, Md. and a Master's degree in early childhood education from Western Michigan University in Kalamazoo, Mich.

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