

kodiak

Kodiak Announces Delivery of Two Additional Customer-Owned and -Operated Driverless Trucks to Atlas; Launches Driverless Service Up To 24/7

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- With the delivery of these new trucks, Atlas Energy Solutions now owns and operates a fleet of four driverless trucks equipped with Kodiak's technology, with more expected in 2025
- Atlas's fully driverless trucks are now capable of operating up to 24/7

MOUNTAIN VIEW, Calif. —Kodiak Robotics, Inc. ("Kodiak"), a leading provider of AI-powered autonomous vehicle technology, today announced the delivery of two additional driverless trucks to Atlas Energy Solutions Inc. ("Atlas") and the launch of up to 24/7 driverless service, stopping only for things such as maintenance and refueling. Atlas now owns and operates four trucks equipped with the Kodiak Driver, Kodiak's advanced AI-powered autonomous solution. The new Kodiak Driver-powered trucks entered service in late May.

The two new Kodiak Driver-powered trucks are part of a 100-truck order placed by Atlas as the company seeks to automate its supply chain. The driverless trucks pick up frac sand from Atlas's Dune Express, a 42-mile conveyor system that carries the sand from Atlas's mine closer to well sites. From there, the driverless trucks transport the sand to Atlas's customer well sites across in the Permian Basin, which spans parts of West Texas and Eastern New Mexico.

"Our initial rollout of Kodiak Driver-powered driverless trucks represents a significant operational milestone in our autonomous strategy, creating a clear path to continue scaling our businesses together," said John Turner, President and CEO, Atlas Energy Solutions. "Kodiak's autonomous technology can meaningfully help us address challenges ranging from driver recruitment to demanding operating conditions. We plan to continue adding Kodiak Driver-powered trucks to our fleet helping to strengthen our long-term competitiveness."

Since launching commercial operations with driverless trucks in December 2024, Atlas's Kodiak Driver-powered trucks have delivered over 800 loads and conducted over 1,600 hours of driverless service. In April, Kodiak announced that it had received a firm commitment from Atlas to order an initial total of 100 trucks, after Kodiak achieved certain key performance and operational milestones.

Kodiak offers its Kodiak Driver-powered trucks under a Driver as a Service model, where customers pay a per-mile or per-vehicle licensing fee that covers driverless operations and ongoing system support, with its trucks delivering day and night in most weather conditions.

"We continue to make rapid progress on the Kodiak Driver's core technology, enabling such critical features as night driving," said Don Burnette, Founder and CEO of Kodiak. "Our work with Atlas demonstrates the Kodiak Driver's ability to provide value to commercial trucking customers. We believe the driverless operational experience we're gaining in the Permian Basin will position us to more efficiently scale our driverless operations across domains, including on-highway."

About Kodiak Robotics, Inc.

Kodiak Robotics, Inc. was founded in 2018 and is a leading provider of AI-powered autonomous vehicle technology that is designed to help tackle some of the toughest driving jobs. Kodiak's driverless solution can help address the critical problem of safely transporting goods in the face of unprecedented supply chain challenges. Kodiak's vision is to become the trusted world leader in autonomous ground transportation. Kodiak is committed to a safer and more efficient future for all through the commercialization of driverless trucking at scale. To that end, Kodiak developed the Kodiak Driver, a virtual driver that combines advanced AI-powered software with modular and vehicle-agnostic hardware designed to help address Kodiak's customers' needs. The Kodiak Driver is not just an idea—it is operating without a human driver today. Kodiak serves customers in both commercial trucking and the public sector. In 2024, Kodiak believes it achieved a historic milestone by becoming the first company to deploy customer-owned and -operated driverless trucks in commercial service. The Kodiak Driver is also being utilized in the public sector, where Kodiak believes it can support national security initiatives and critical government applications.

About Atlas Energy Solutions

Atlas Energy Solutions Inc. (NYSE: AESI) is a leading solutions provider to the energy industry. Atlas's portfolio of offerings includes oilfield logistics, distributed power systems, and the largest proppant supply network in the Permian Basin. With a focus on leveraging technology, automation, and remote operations to enhance efficiencies, Atlas is centered on core mission of improving human access to the hydrocarbons that power our lives and, by doing so, maximizing value creation for our shareholders.

Forward-Looking Statements

This press release includes forward-looking statements relating to Kodiak's and Atlas's expectations, hopes, beliefs, intentions or strategies regarding the future. Forward-looking statements may be identified by the use of words such as "anticipate," "believe," "continue," "could," "estimate," "expect," "forecast," "intend," "may," "plan," "potential," "project," "seek," "should," "will," "would" and similar expressions that predict or indicate future events or trends or that are not statements of historical matters, but the absence of these words does not mean that a statement is not forward-looking. These forward-looking statements include, but are not limited to, statements regarding: the ability of Kodiak and Atlas to scale their businesses together; the ability of Kodiak's to help address certain challenges facing Atlas's business and improve Atlas's competitiveness; and Kodiak's ability to efficiently scale its business. These statements are based on various assumptions and on the current expectations of Kodiak's or Atlas's management, as applicable, and are not predictions of actual performance. These forward-looking statements are subject to a number of risks and uncertainties, including changes in business, market, financial, political and legal conditions; the rapid evolution of autonomous vehicle technology and flaws or errors in Kodiak's solutions or flaws in or misuse of autonomous vehicle technology in general; the effects of competition; supply shortages in the materials necessary for the production of the Kodiak Driver; risks related to working with third-party manufacturers for key components of the Kodiak Driver; risks related to the retrofitting of Kodiak's vehicles by third parties; and the termination or suspension of any of Kodiak's contracts or the reduction in counterparty spending, including with Atlas.