



Atlas Energy Solutions Expands AI-Enabled Digital Transformation of Oilfield Logistics with Kodiak-Powered Driverless Trucks

July 31, 2026

Partnership to expand autonomous truck fleet to 100 vehicles by mid-2027 for deliveries across the Permian Basin

Atlas now operates driverless trucks at additional load-out point, expanding service and increasing daily load counts and customer responsiveness

AUSTIN, Texas--(BUSINESS WIRE)--Jul. 31, 2026--

Atlas Energy Solutions Inc. (NYSE: AESI) ("Atlas"), a leading energy solutions provider, today announced an expansion of its autonomous truck operations in the Permian Basin, advancing its commitment to unlocking energy by digitally transforming oilfield logistics.

This press release features multimedia. View the full release here: <https://www.businesswire.com/news/home/20260731504868/en/>



Working with Kodiak AI, Inc.

("Kodiak") (Nasdaq: KDK), a leading

provider of Physical AI-powered autonomous driving technology, Atlas is expanding its driverless proppant delivery program to a second simultaneous load-out point along its 42-mile Dune Express sand conveyor system. This additional load-out point expands the reach of autonomous deliveries and increases Atlas's responsiveness to growing customer demand.

In addition, Atlas and Kodiak have agreed to a delivery timetable that will expand Atlas's Kodiak-enabled fleet from 28 driverless trucks operating as of March 31, 2026, to 100 autonomous delivery trucks by mid-2027. The companies also expect to have the fleet operating on public roads by early 2027, subject to regulatory and operational milestones, dramatically expanding the reach of the Atlas autonomous fleet.

"This partnership with Kodiak is a critical part of the Atlas strategy to transform oilfield sand logistics through innovation," said John Turner, CEO and President of Atlas Energy Solutions. "Our mission is to seek critical energy infrastructure with inefficiencies, then engineer solutions that improve efficiency, reduce risk and enhance our customers' operational success."

Atlas helps oil and gas producers overcome complex operational and technical challenges by providing high-quality proppant critical to well completions. By integrating mining and transportation automation with advanced last-mile logistics management, Atlas accelerates and simplifies access to critical oil and natural gas resources while reducing operational complexity, risk and cost.

Atlas is now concurrently operating driverless trucks at load-out sites located in Texas and New Mexico. Trucks equipped with the AI-enabled Kodiak Driver, Kodiak's autonomous driving system, now have expanded reach and service area to haul sand to well sites across the Permian, one of the world's most prolific oil and gas basins. Previously, Atlas's driverless trucks operated from one load-out point at a time. With autonomous operations now running from two distinct locations, approximately 90 minutes apart, Atlas can serve customers across a larger geographic area simultaneously.

Atlas's autonomous program has scaled steadily since its initial driverless deployments in 2024. As of March 31, 2026, Atlas operated 28 driverless trucks across 15 distinct routes, which together have carried approximately 7,000 loads and hauled more than 450,000 tons of sand. The fleet also completed over 23,500 driverless hours of operation in the first quarter of 2026. On July 20, Kodiak-powered trucks delivered 176 loads of sand in a single day, an all-time daily high across 18 months of driverless deployments with Atlas in the Permian Basin.

"Together, Atlas and Kodiak have deployed the world's largest fleet of driverless big-rig trucks," said Don Burnette, Founder and CEO, Kodiak. "We've demonstrated that autonomous trucking is delivering meaningful results today. Our expanding partnership, which now covers two unique locations, is creating a blueprint for how autonomy can transform logistics by improving efficiency, increasing productivity, and delivering lasting value for customers at commercial scale."

Earlier this year, Kodiak and Atlas collaborated to introduce advanced capabilities making it possible for one autonomous truck to haul three connected trailers simultaneously. This milestone marks the first ever autonomous triple-trailer trucking operation, with a combined loaded weight of more than 135 tons. Kodiak and Atlas expect to operate Atlas trucks on public roads by 2027, dramatically expanding the reach of Atlas's autonomous fleet.

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About Atlas Energy Solutions

Atlas Energy Solutions Inc. (NYSE: AESI) is a leading energy solutions provider, unlocking energy that powers the world's critical

infrastructure. For companies requiring power where grid utilities are unavailable, Atlas can help customers overcome the schedule and capital expense barriers that hinder project and operational success. For oil & gas producers, Atlas helps companies overcome disruptive operational and technical challenges to maximize oilfield completions and operations. From large scale private grid power systems to the world's most advanced frac sand delivery networks, Atlas delivers the engineering, technology and turnkey project execution expertise that turns energy constraints into advantages.

About Kodiak AI, Inc.

Kodiak AI, Inc. was founded in 2018 and is a leading provider of AI-powered autonomous vehicle technology designed to help tackle some of the toughest driving jobs. Kodiak's driverless solution addresses 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, and the company is committed to a safer and more efficient future through the commercialization of driverless technology at scale. To that end, Kodiak developed the Kodiak Driver, a virtual driver that combines advanced AI-powered software with modular, vehicle-agnostic hardware. The Kodiak Driver is not just an idea. It is operating without anyone in the cab today. Kodiak serves customers in the long-haul trucking, industrial trucking, and defense industries. In 2024, Kodiak became the first company to deploy customer-owned and -operated driverless trucks in commercial service. For more information, visit <https://kodiak.ai/investors>. The Kodiak press kit, including videos and images, is available [here](#).

Forward-Looking Statements

This press release includes forward-looking statements within the meaning of the federal securities laws. Forward-looking statements may be identified by the use of words such as "anticipate," "believe," "continue," "could," "estimate," "expect," "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, though the absence of these words does not mean a statement is not forward-looking. These forward-looking statements include, but are not limited to, statements regarding Atlas's integration of and reliance on Kodiak-powered driverless trucks, the planned expansion of Atlas's autonomous fleet, expectations related to the benefits, performance and reliability of autonomous trucking in Atlas's operations, and Atlas's broader strategy to re-engineer oilfield logistics. These statements are based on various assumptions and on the current expectations of Atlas's management and are not predictions of actual performance. Actual events and circumstances are difficult or impossible to predict and may differ from assumptions, and many are beyond Atlas's control. 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 any flaws, errors or misuse of that technology; risks related to Atlas's dependence on Kodiak and other third parties; the timing of expected business milestones; competition; and other factors discussed or referenced in our filings made from time to time with the U.S. Securities and Exchange Commission (the "SEC"), including those discussed under the heading "Risk Factors" in our Annual Report on Form 10-K, filed with the SEC on February 24, 2026, our Quarterly Report on Form 10-Q, filed with the SEC on May 5, 2026, and any subsequently filed Quarterly Reports on Form 10-Q and Current Reports on Form 8-K. Readers are cautioned not to place undue reliance on forward-looking statements, which speak only as of the date hereof. Factors or events that could cause our actual results to differ may emerge from time to time, and it is not possible for us to predict all of them. We undertake no obligation to publicly update or revise any forward-looking statement, whether as a result of new information, future development or otherwise, except as may be required by law.

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