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Kodiak AI Delivers Western Star 49X Trucks to Atlas Energy Solutions, Beginning Next Autonomous Chapter in the Permian Basin

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Daimler's rugged Western Star 49X Platform Is Well-Suited for Demanding Industrial Environment and Harsh Conditions

Deliveries Continue Fulfillment of Atlas's Initial 100-Truck Order with Kodiak, Remaining Trucks on Schedule to be Delivered by Mid-2027

Kodiak AI



Kodiak has delivered the first two Western Star 49X trucks equipped with the Kodiak Driver to Atlas Energy Solutions

MOUNTAIN VIEW, Calif. and AUSTIN, Texas, Nov. 03, 2026 (GLOBE NEWSWIRE) -- Kodiak AI, Inc. ("Kodiak") (Nasdaq: KDK), a leading provider of Physical AI-powered autonomous driving technology, today announced it delivered the first two Western Star 49X trucks equipped with the Kodiak Driver to Atlas Energy Solutions in September.

These driverless trucks build on the companies' collaboration in the Permian Basin, and are the first of 65 Western Star 49X trucks that Kodiak will deliver to fulfill Atlas's initial order of 100 Kodiak-equipped driverless trucks. Kodiak is on track to complete that order in the first half of 2027.

Manufactured by Daimler Truck North America, the Western Star 49X heavy-duty truck is tailor-made for handling harsh operating conditions like those found in the Permian. The transition to the Western Star 49X vocational platform was previously announced in August.

The two new additions bring Atlas's overall owned-and-operated fleet to 37 driverless trucks, the largest fleet of its kind in the world. These trucks operate with no human in the cab and, as of June 30, 2026, had surpassed 40,000 hours of cumulative driverless service.

Atlas's Western Star trucks represent the first vehicles equipped with Kodiak's seventh-generation (Gen7) hardware platform. They are also the first day-cab autonomous trucks deployed into commercial service.

"These developments all serve to showcase Kodiak's relentless focus on providing solutions that deliver value for our customer," said Don Burnette, Founder and CEO, Kodiak. "The Western Star 49X is an outstanding platform, and well suited for increasing durability and reliability in an unsupervised driverless operation like no other."

Kodiak's Gen7 system has a more compact design that simplifies integration and supports a broader range of vehicle configurations. It provides nearly 50% more compute power than Gen6. Stress testing indicates that Gen7 SensorPods and compute enclosures are expected to have nearly 50% greater operational lifetimes than those of prior generations.

"Uptime is everything in our operation, so reliability and performance are what we look for in every truck," said John Turner, CEO and President of Atlas Energy Solutions. "With driver shortages constraining the industry's ability to deliver, our growing fleet of autonomous vehicles, powered by Kodiak's seventh-generation hardware, gives Atlas a real advantage in serving Permian oil and gas producers. We expect the Western Stars to help us deliver proppant predictably as we add the remainder of the trucks in our initial 100 truck order through mid-2027. "

Kodiak's Gen6 platform has already achieved remarkable feats of durability. A driverless truck equipped with the Kodiak Driver achieved a record 64 consecutive days of continuous uptime, never powering off or re-starting, between June 30 and September 1, 2026.

Kodiak became the first company to deploy driverless technology in customer-owned semi-trucks in December 2024 with Atlas. The introduction of the new Western Star vehicles to the Atlas fleet coincides with the companies beginning limited service over public county roads in the Permian Basin, in cooperation with regional highway transportation authorities. Expanded use of public roads with autonomous vehicles is expected mid-2027, once all safety requirements have been met.

Forward Looking Statements

This press release includes forward-looking statements including regarding Kodiak's or its management teams' 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," "forecast," "intend," "expect," "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: Kodiak's expectations regarding the timing of launching driverless trucks for long-haul highways operations; Kodiak's expectations regarding the timing of completion of work on its highway launch

safety case; Kodiak's expectations regarding the benefits of Kodiak's Gen7 platform; Kodiak's operational and product roadmap, including its ability to produce and deploy the Kodiak Driver at scale; Kodiak's expectations regarding the expansion of the Atlas fleet in the Permian; expectations regarding the benefits and performance of Kodiak's technology; and Kodiak's expectations with respect to its future performance and success. These statements are based on various assumptions, whether or not identified in this press release, and on the current expectations of Kodiak's management and are not predictions of actual performance. These forward-looking statements are provided for illustrative purposes only and are not intended to serve as, and must not be relied upon by any investors as, a guarantee, an assurance, a prediction or a definitive statement of fact or probability. Actual events and circumstances are difficult or impossible to predict and will differ from assumptions. Many actual events and circumstances are beyond the control of Kodiak. 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; risks related to the rollout of Kodiak's business and the timing of expected business milestones; the effects of competition on Kodiak's business; 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; the termination or suspension of any of Kodiak's contracts or the reduction in counterparty spending; delays in Kodiak's operational roadmap with key partners and customers; and Kodiak's ability to raise capital in the near term and long term. Additional information concerning these and other factors that may impact such forward-looking statements can be found in filings and potential filings by Kodiak with the Securities and Exchange Commission, including under the heading "Risk Factors." If any of these risks materialize or any assumptions prove incorrect, actual results could differ materially from the results implied by these forward-looking statements. There may be additional risks that Kodiak does not presently know, or that Kodiak currently believes are immaterial that could also cause actual results to differ from those contained in the forward-looking statements.

In addition, forward-looking statements reflect Kodiak's expectations, plans or forecasts of future events and views as of the date they are made. Kodiak anticipates that subsequent events and developments will cause Kodiak's assessments to change. However, while Kodiak may elect to update these forward-looking statements at some point in the future, Kodiak specifically disclaims any obligation to do so, except as required by law. These forward-looking statements should not be relied upon as representing Kodiak's assessments as of any date subsequent to the date they are made.

About Kodiak AI, Inc.

Kodiak AI, Inc. (Nasdaq: KDK) is a leader in Physical AI, developing driverless technology that powers machines that move. The core of the company's solution is the Kodiak Driver, a vehicle-agnostic autonomous driving system that combines advanced AI-powered software with modular hardware. Today, the Kodiak Driver operates in the long-haul trucking, industrial trucking, and defense sectors, and is already deployed in commercial operation with no one in the cab. Kodiak AI commercializes its technology through both a Driver-as-a-Service business model and strategic partnerships. In 2024, Kodiak achieved a historic milestone, becoming the first company to deploy driverless technology in customer-owned driverless semi-trucks. Commercial partners and customers include Atlas Energy Solutions, IKEA, Bridgestone, Werner Enterprises, C.R. England, General Dynamics Land Systems, and Roehl Transport.

For more information about Kodiak, please visit https://kodiak.ai/investors. Kodiak's press kit with videos and images can be found HERE.

About Atlas Energy Solutions

Atlas Energy Solutions Inc. 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.

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