

The outlook for trucking

May 20, 2010
3 p.m. to 4 p.m. EDT



Eric Starks
President
FTR Associates

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Attendees (1) Staff (1)


NAMES - ALPHABETICALLY

Rob Hoffman (Me)

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President

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Trucking Update

FREIGHT TRANSPORTATION

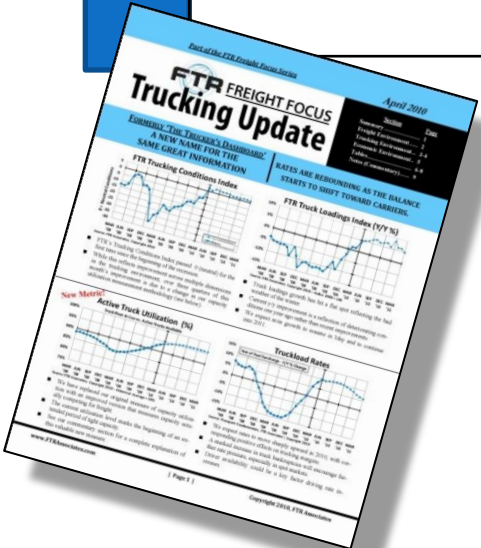
RESEARCH ASSOCIATES



FTR Associates

We link and interpret broad economic trends to freight transportation, providing accurate forecasts of freight demand, equipment demand, capacity utilization and pricing trends for shippers, highway and rail carriers and their equipment suppliers.

FTR Products	<p>FTR Freight Focus Series:</p> <ul style="list-style-type: none"> ▪ <u>Trucking Update</u> ▪ Intermodal Update ▪ Rail Update ▪ Shippers Update ▪ Driver Supply Update 	<p>FTR Equipment Focus Series:</p> <ul style="list-style-type: none"> ▪ FTR North American Commercial Truck & Trailer Outlook ▪ N.A. Railroad Equipment & Deliveries Outlook 	<p>Transportation Fundamentals</p> <ul style="list-style-type: none"> ▪ Monthly Newsletter
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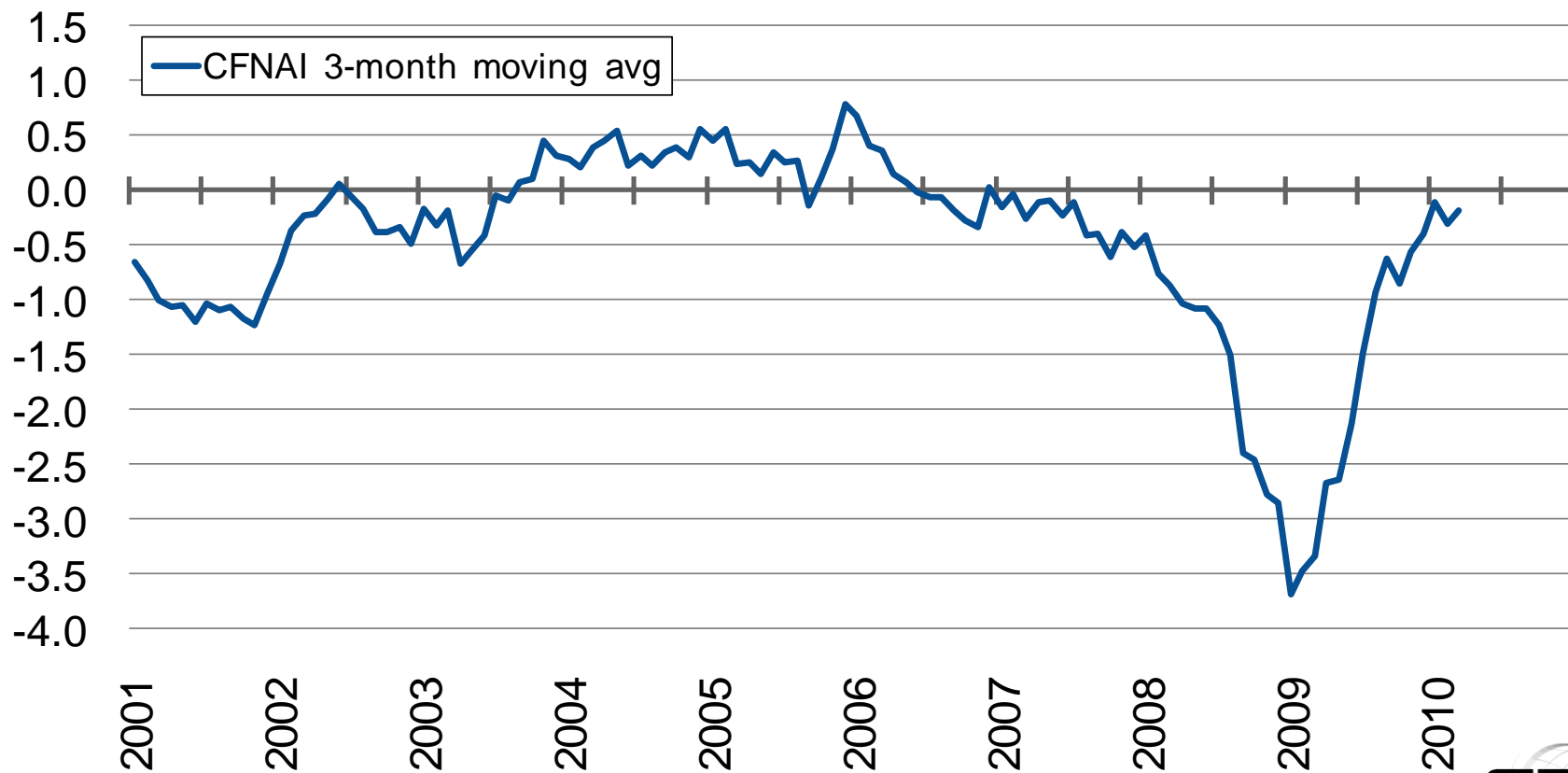
We Provide the Info You Need In the Format that Works for You:

For both senior executives and transportation research professionals, we provide the information you need in the ways you want it

We Are Historically Accurate: We have a history of accurately predicting inflection points in the economy, providing timely support for critical investment decisions.

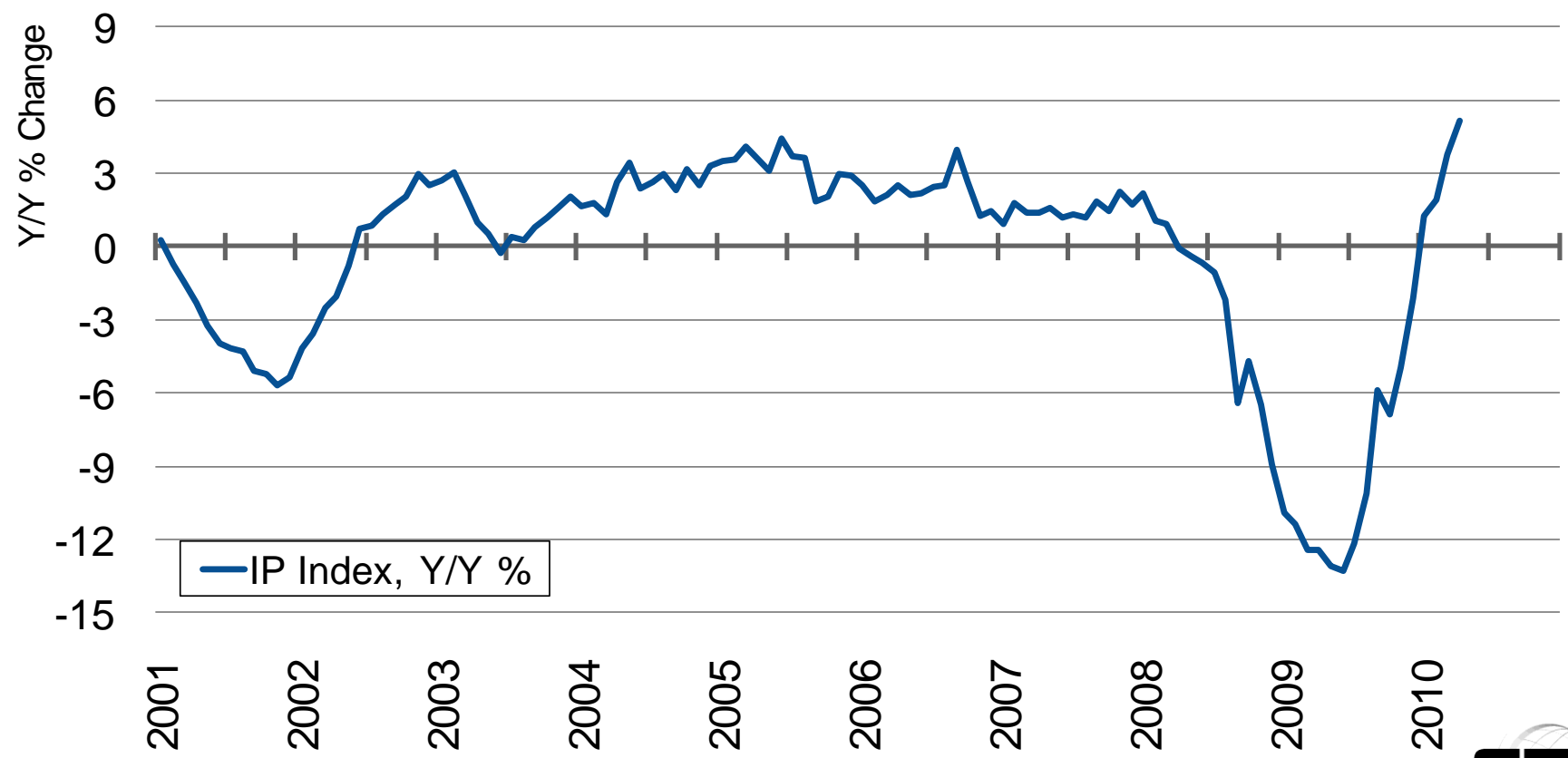
Our Customers are Extremely Satisfied: Our customer retention rate is over 90% and has been for over 20 years.

CHICAGO FED NATIONAL ACTIVITY INDEX



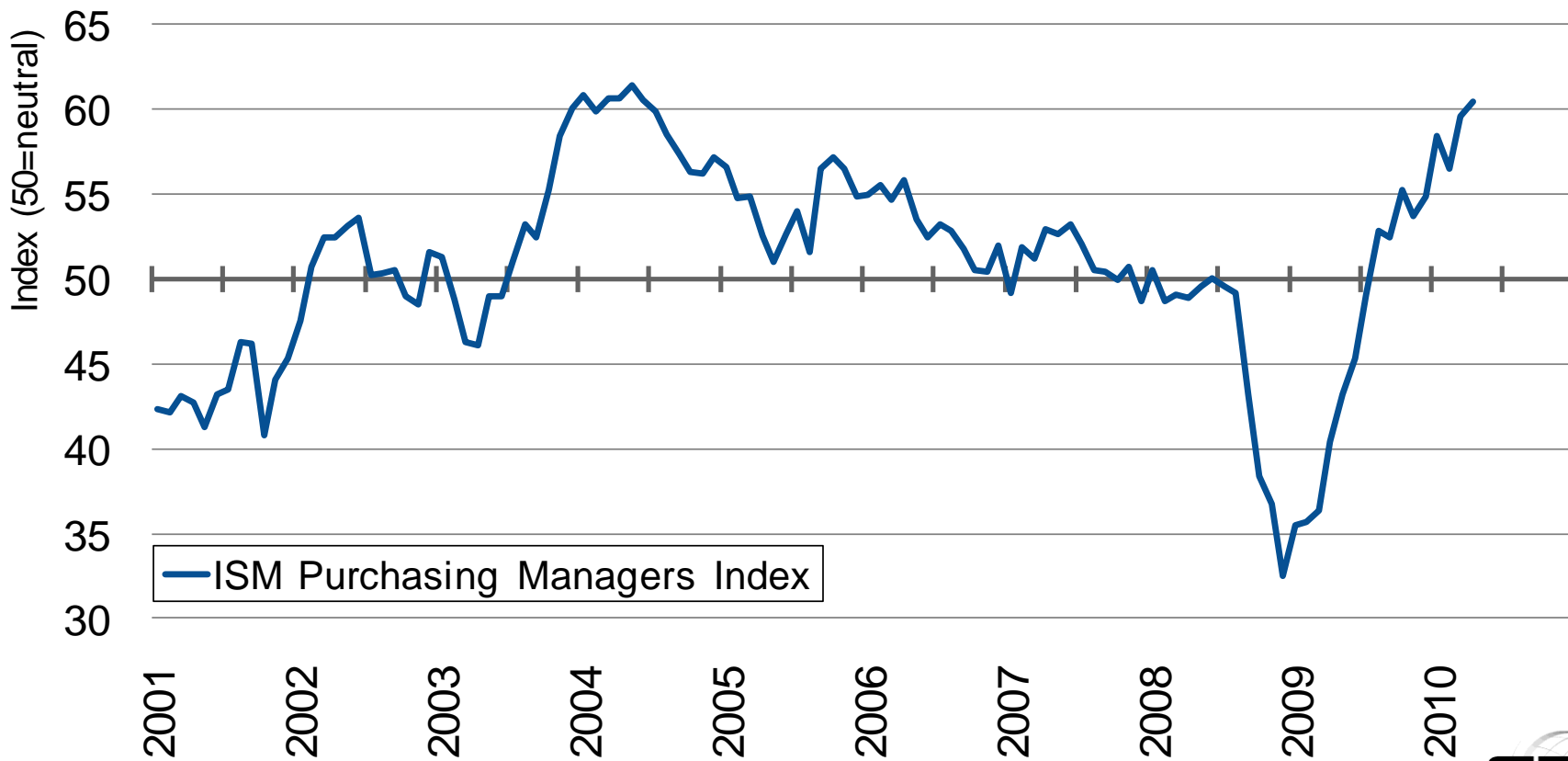
Sources: FTR Associates, Federal Reserve Bank of Chicago

INDUSTRIAL PRODUCTION (IP) INDEX



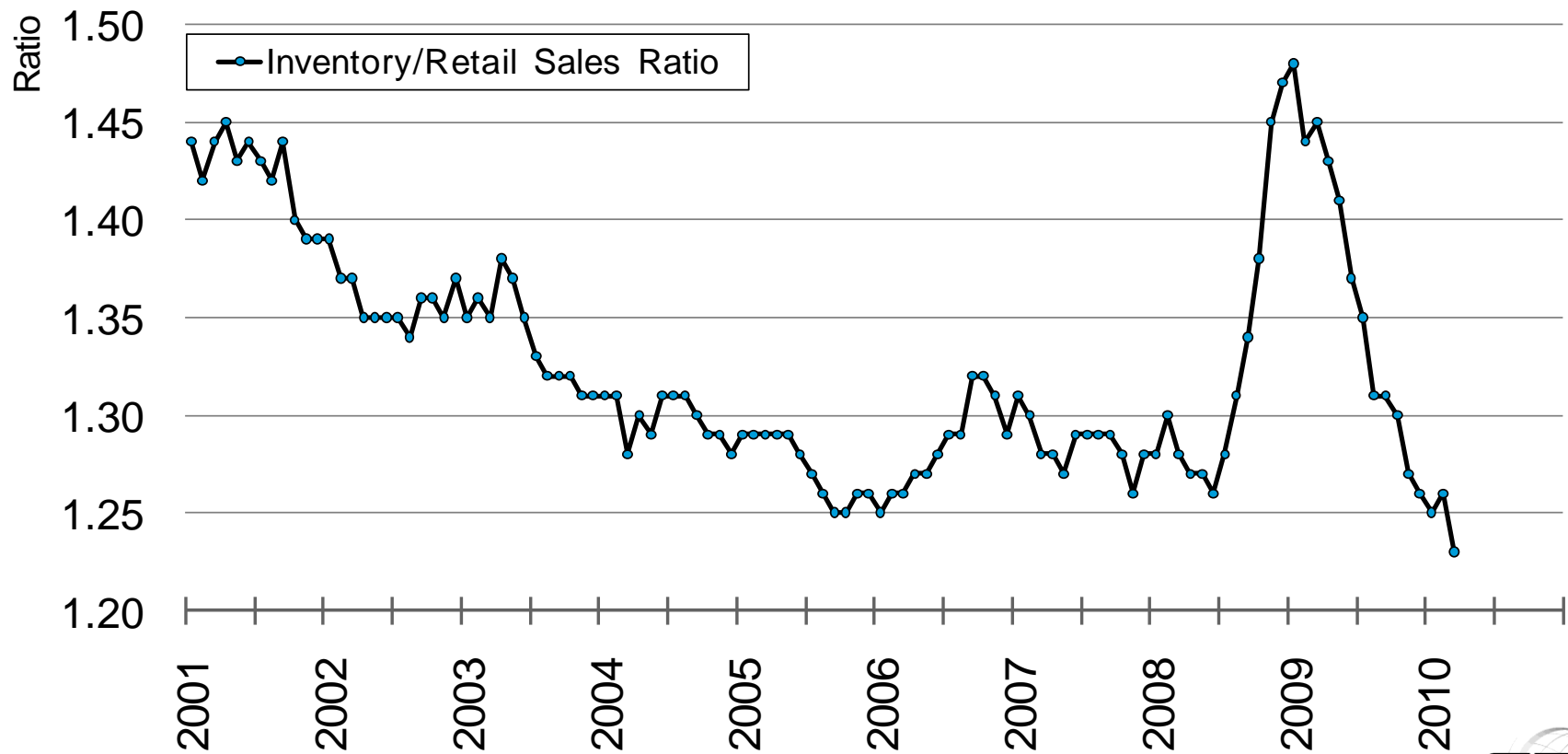
Sources: FTR Associates, Federal Reserve

ISM MANUFACTURING INDEX



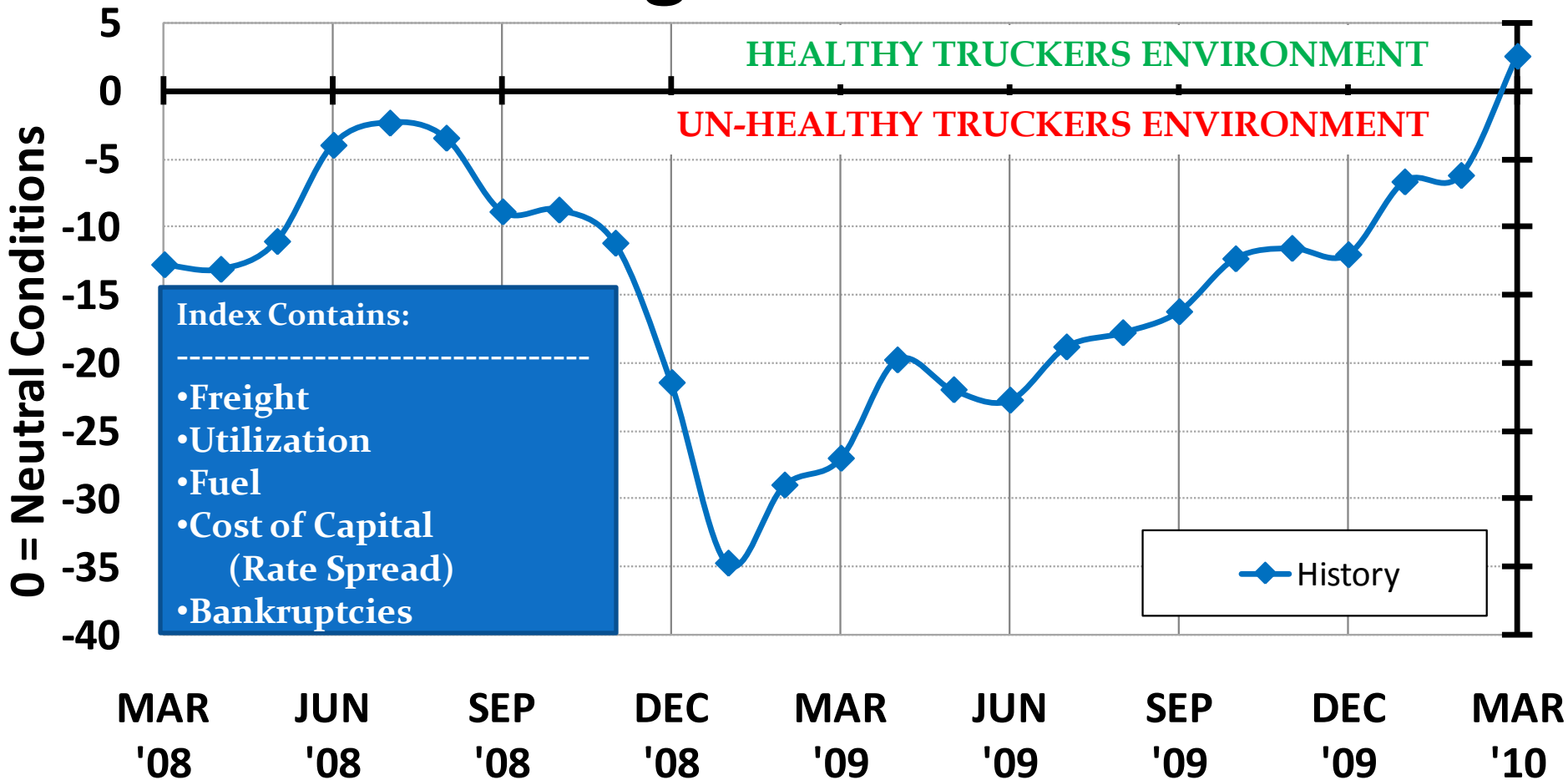
Sources: FTR Associates, Institute for Supply Management

INV/RETAIL SALES RATIO



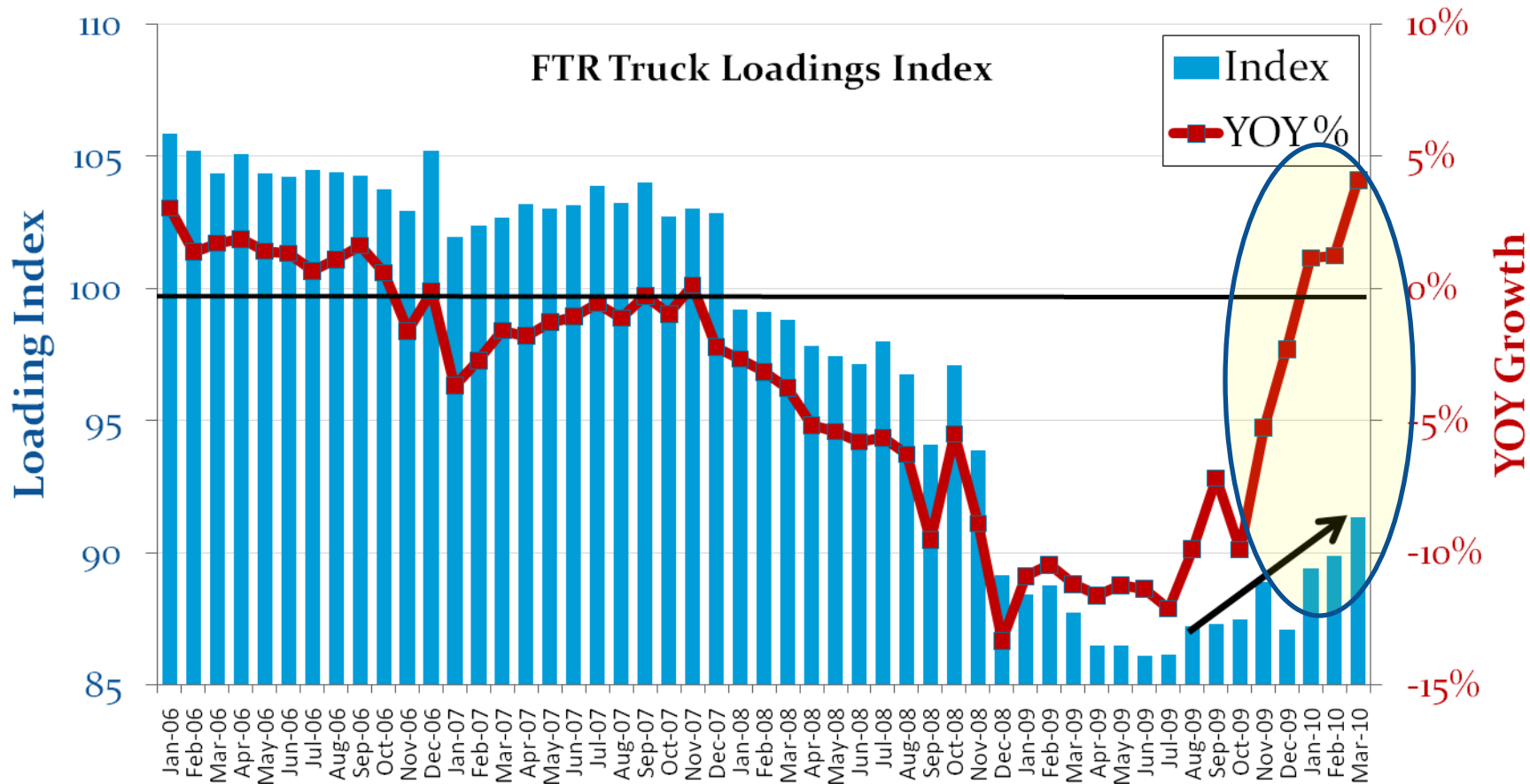
Sources: FTR Associates, Census Bureau

FTR Trucking Conditions Index

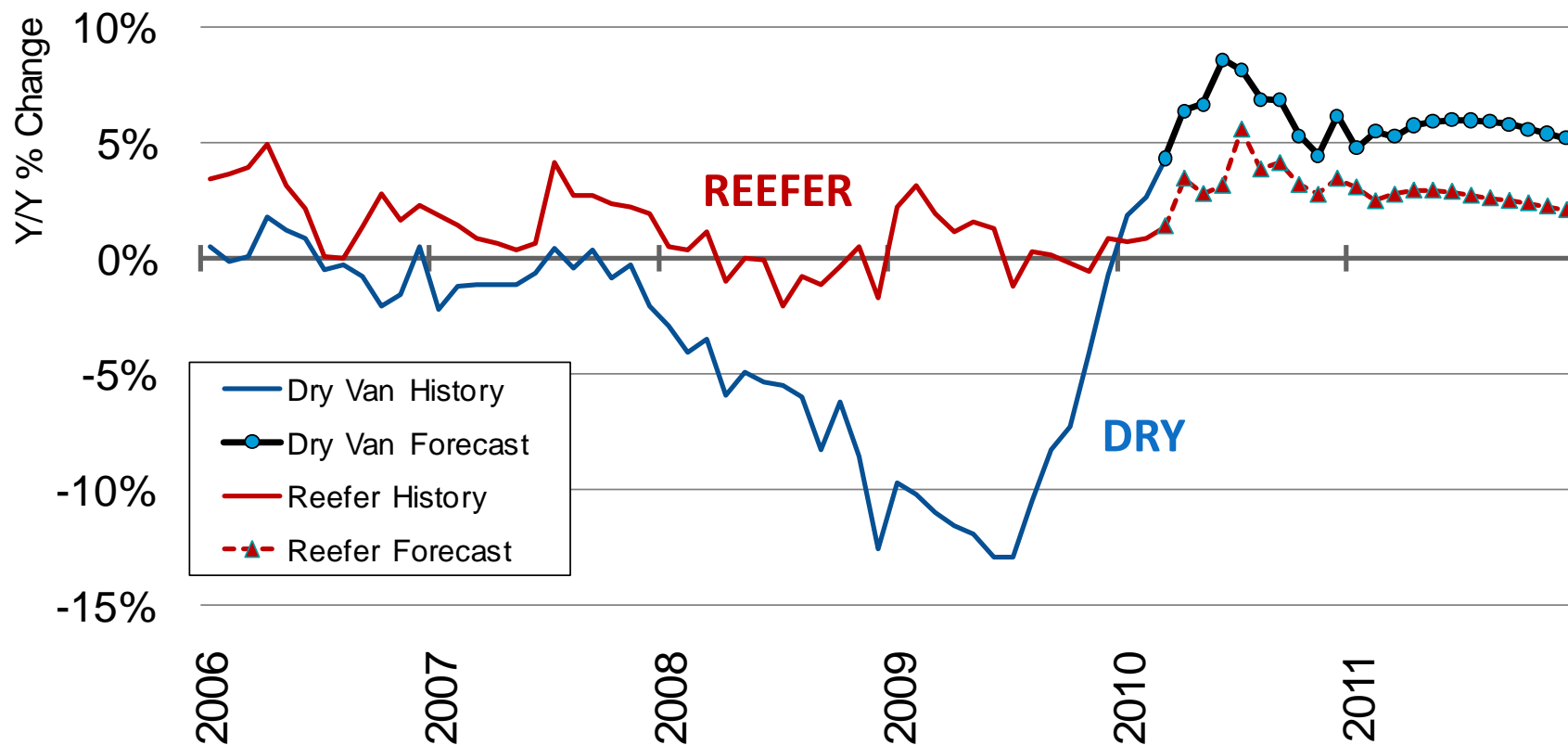


Source: FTR Associates; Copyright 2010

Monthly Truck Freight Rises

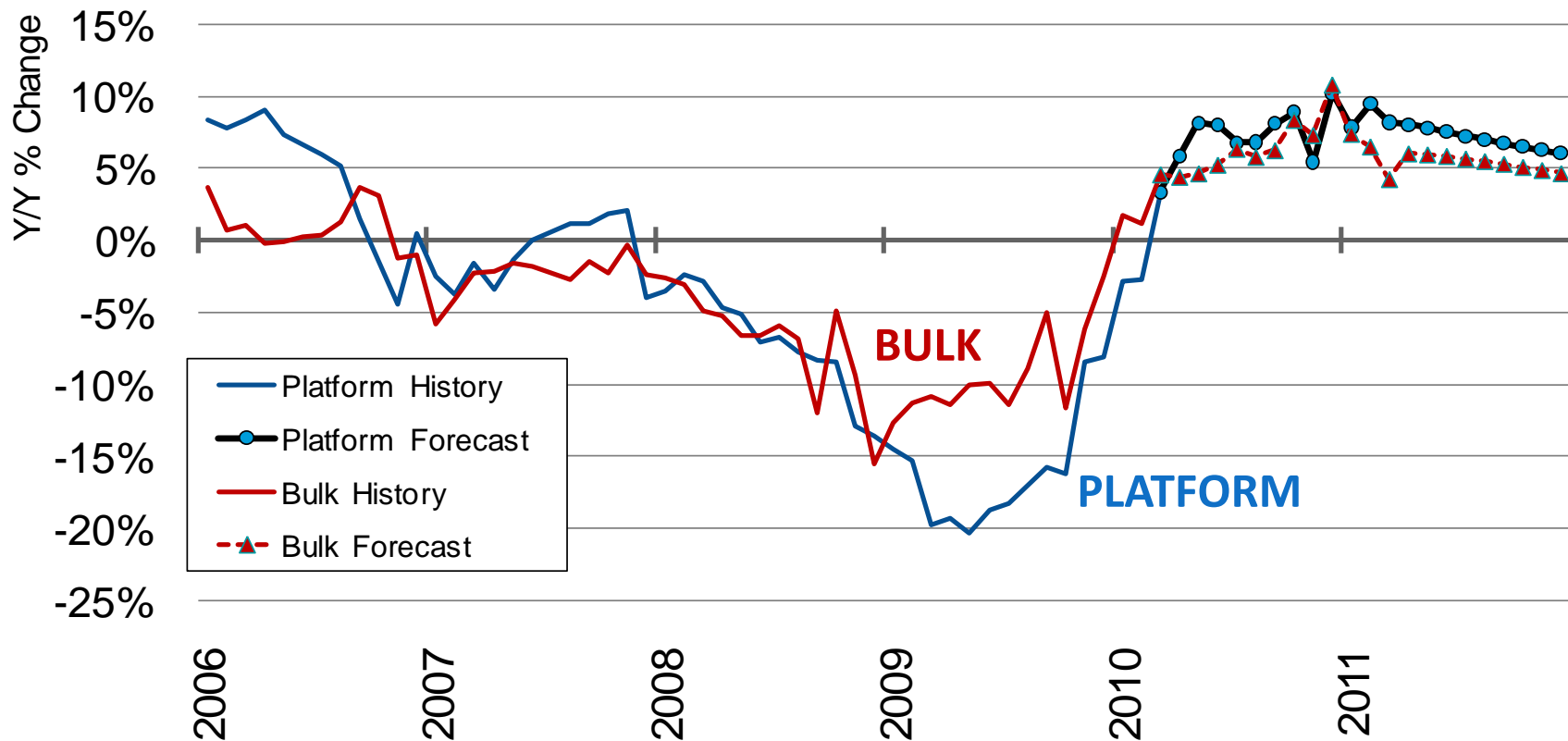


TRUCK LOADINGS: DRY VAN / REEFER



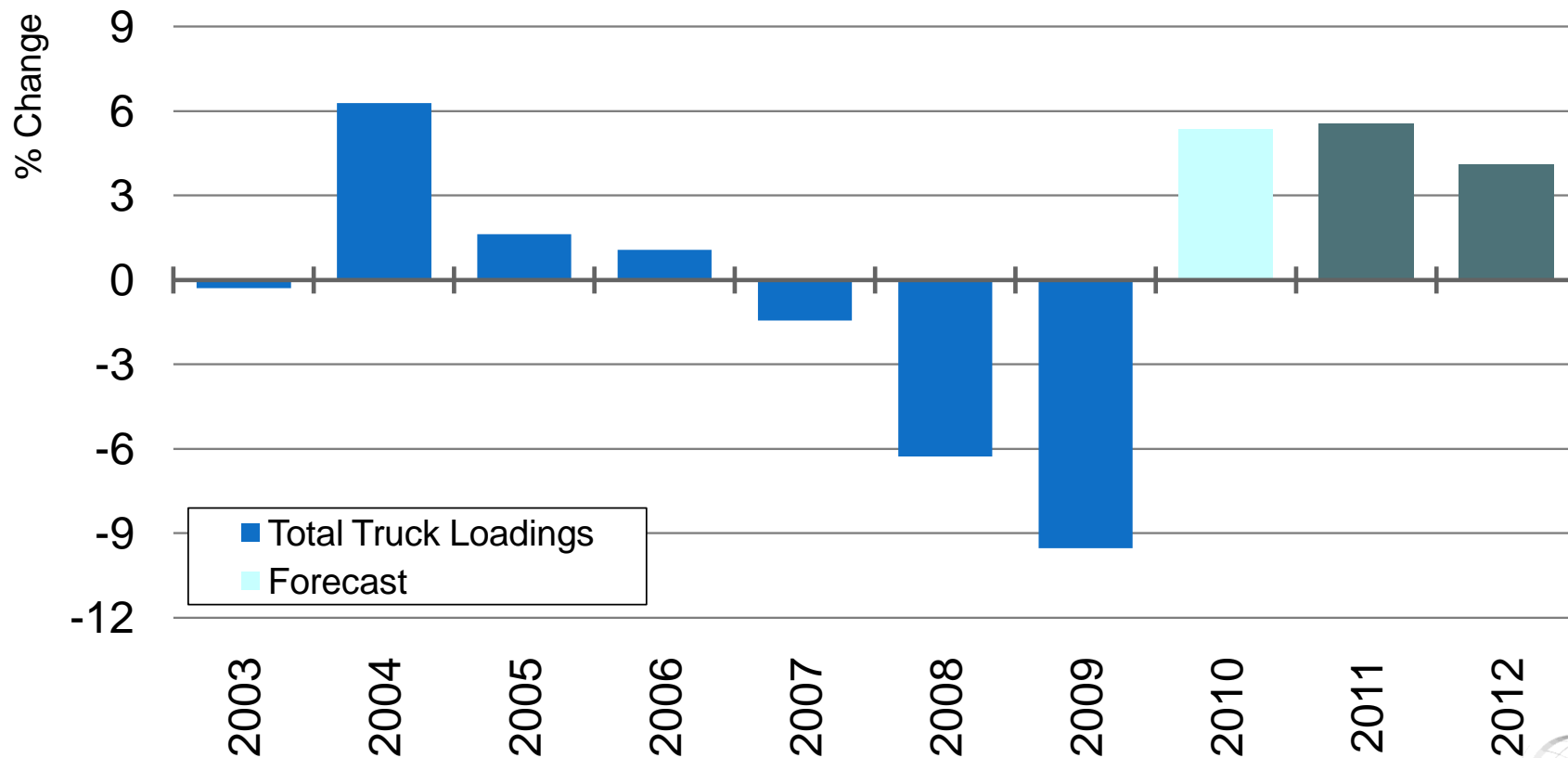
Source: FTR Associates

TRUCK LOADINGS: PLATFORM / BULK



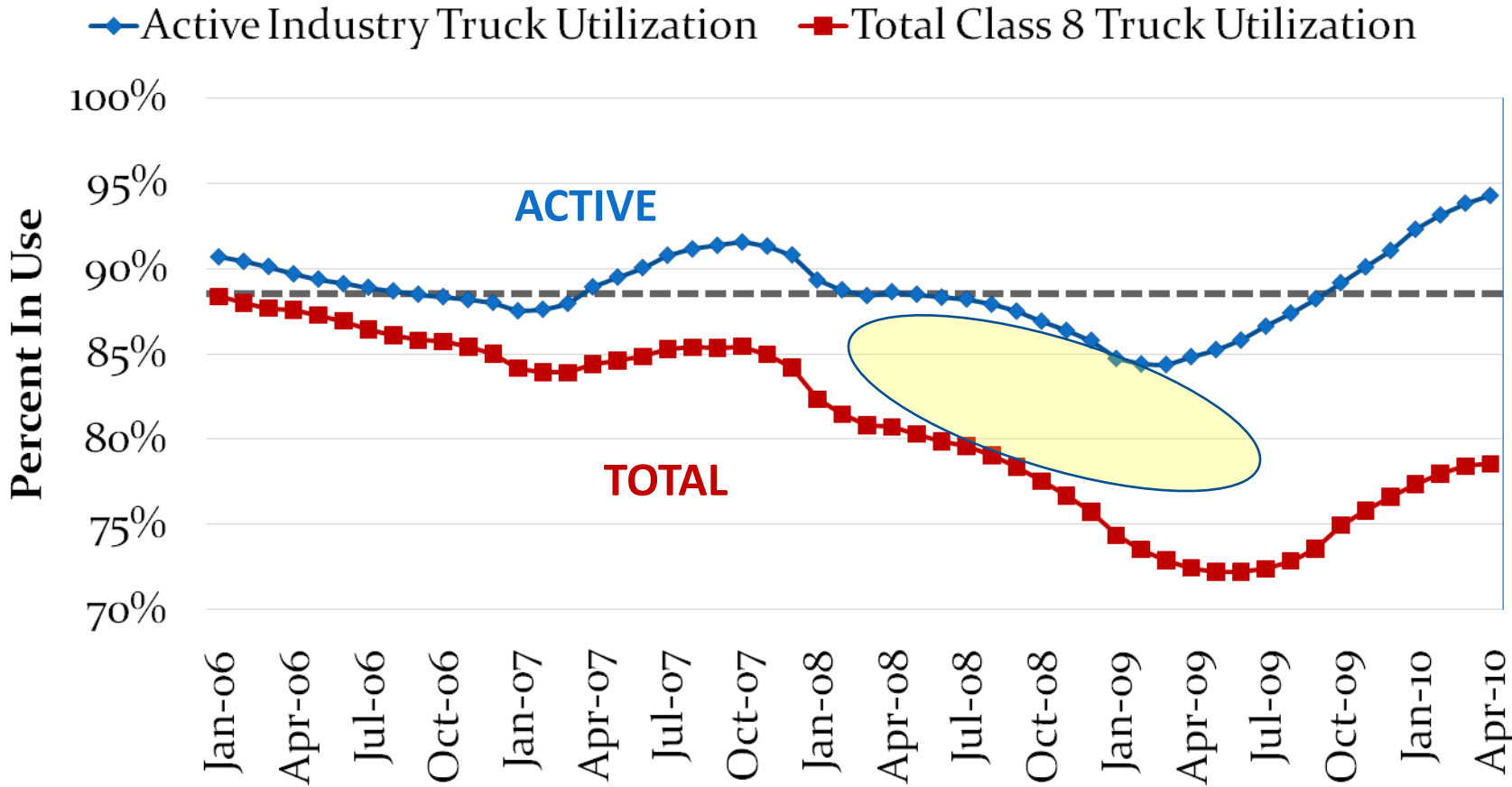
Source: FTR Associates

U.S. TRUCK FREIGHT OUTLOOK: ANNUAL



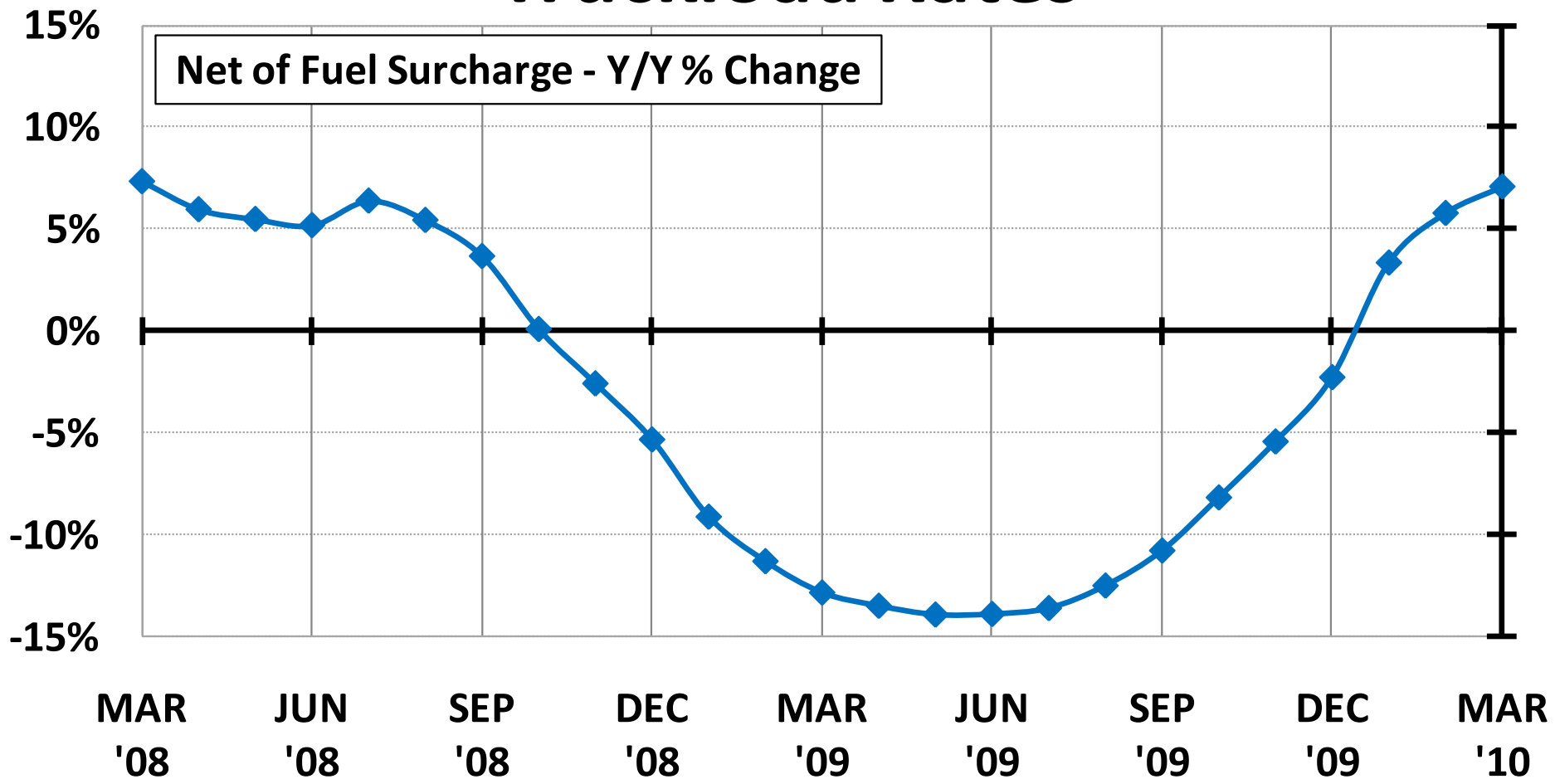
Source: FTR Associates

Truck Utilization: The Disconnect



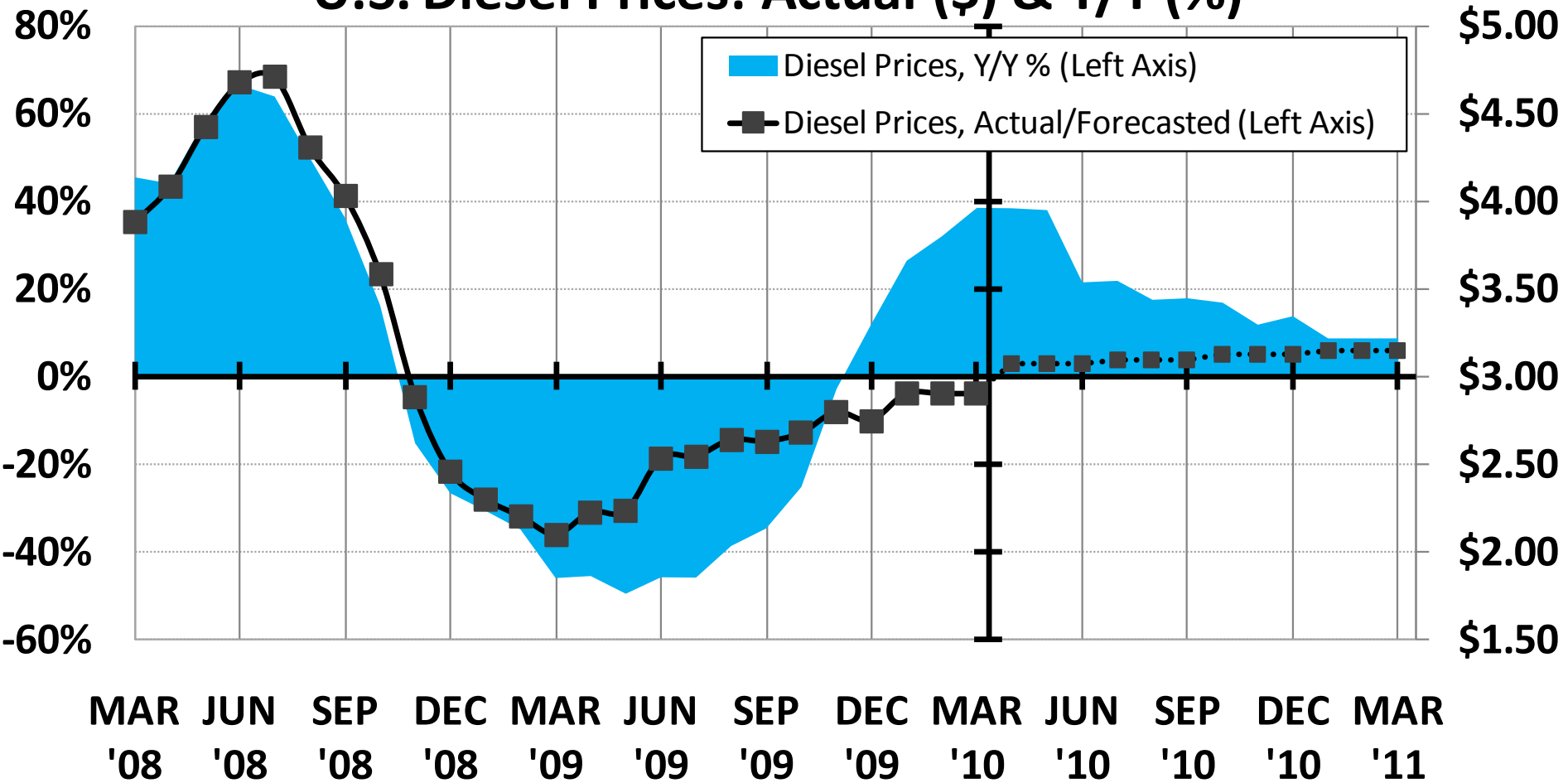
Sources: FTR Associates' *FTR Freight Focus: Trucking Update*
 FTR Associates' *N.A. Commercial Truck & Trailer Outlook*

Truckload Rates



Source: Transport Fundamentals, FTR Associates'; Copyright 2010

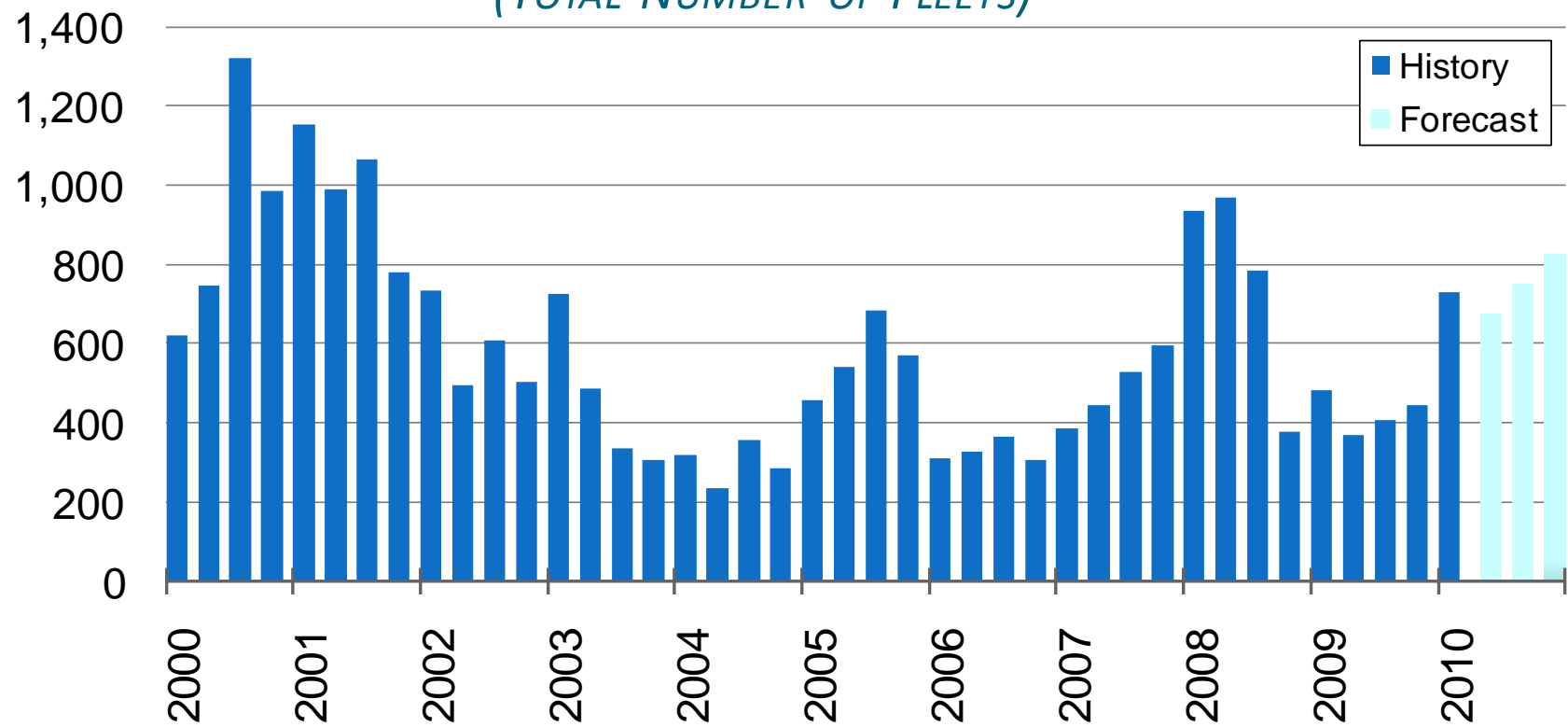
U.S. Diesel Prices: Actual (\$) & Y/Y (%)



Source: EIA, FTR Associates; Copyright 2010

TRUCKING BANKRUPTCIES

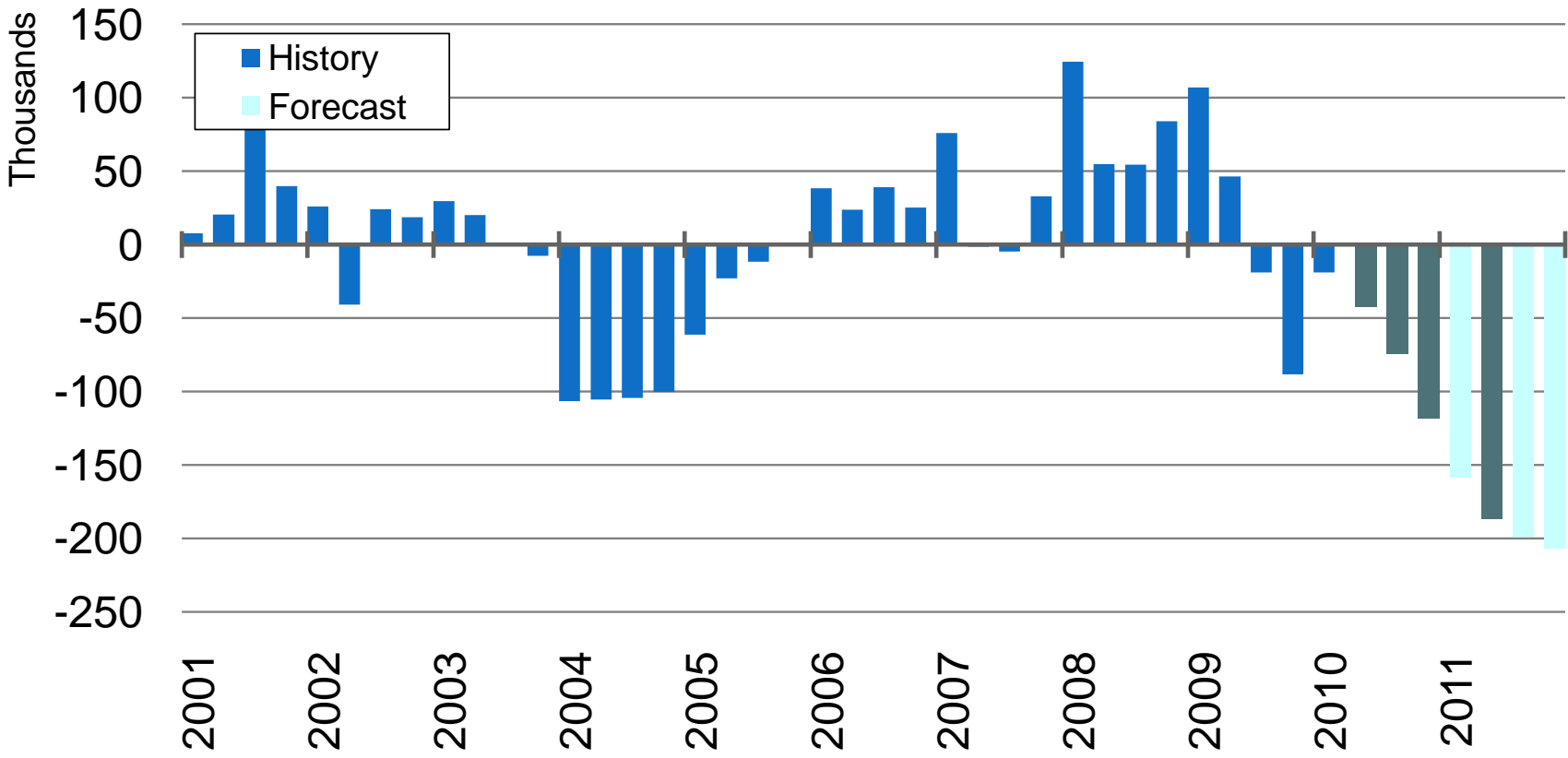
(TOTAL NUMBER OF FLEETS)



Note: Data includes fleets with 5+ trucks

Sources: Avondale Partners (History), FTR Associates (Forecast Estimate)

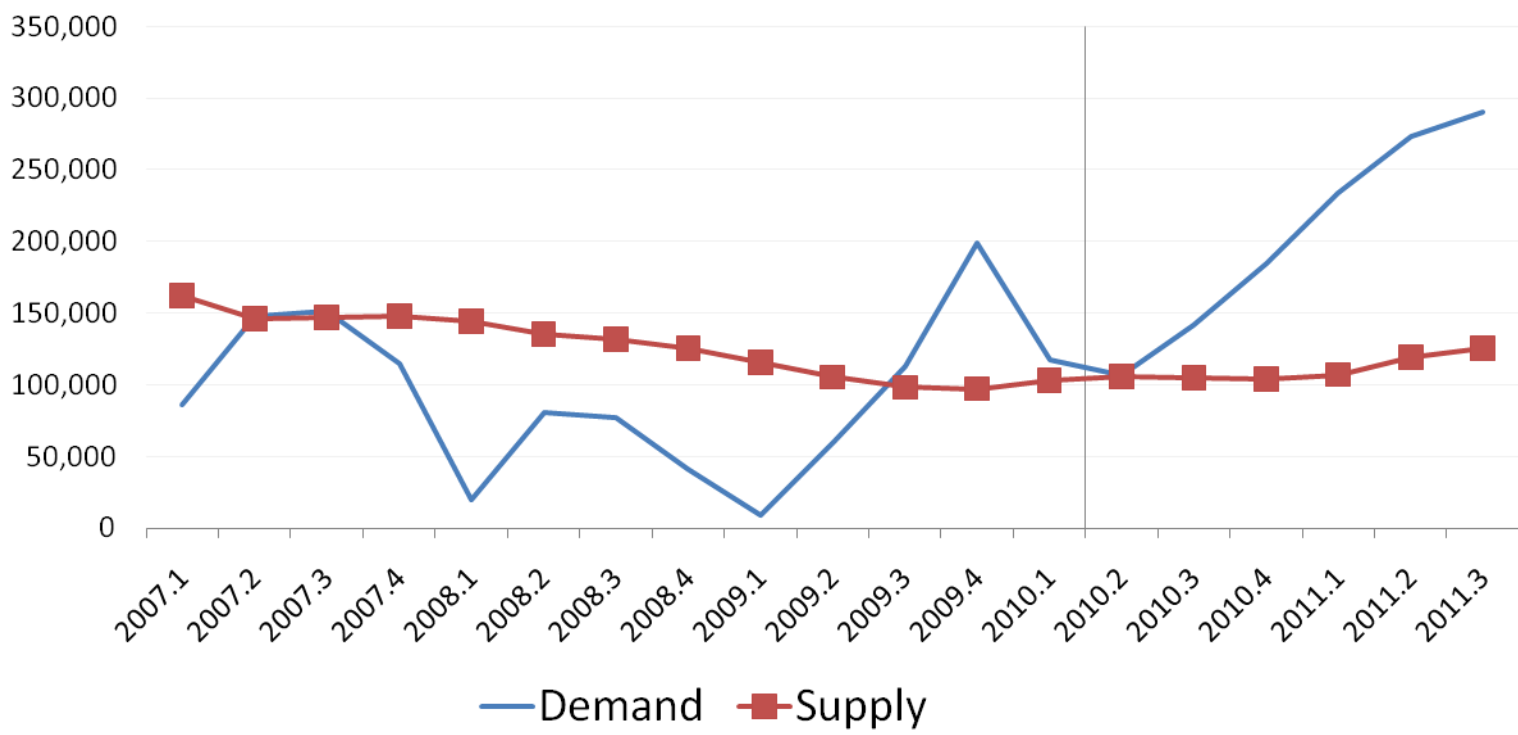
DRIVER LABOR: SHORTAGE/SURPLUS



Source: FTR Associates

The overall driver hiring pipeline has constricted by 33%

Truck Driver Hiring Pipeline

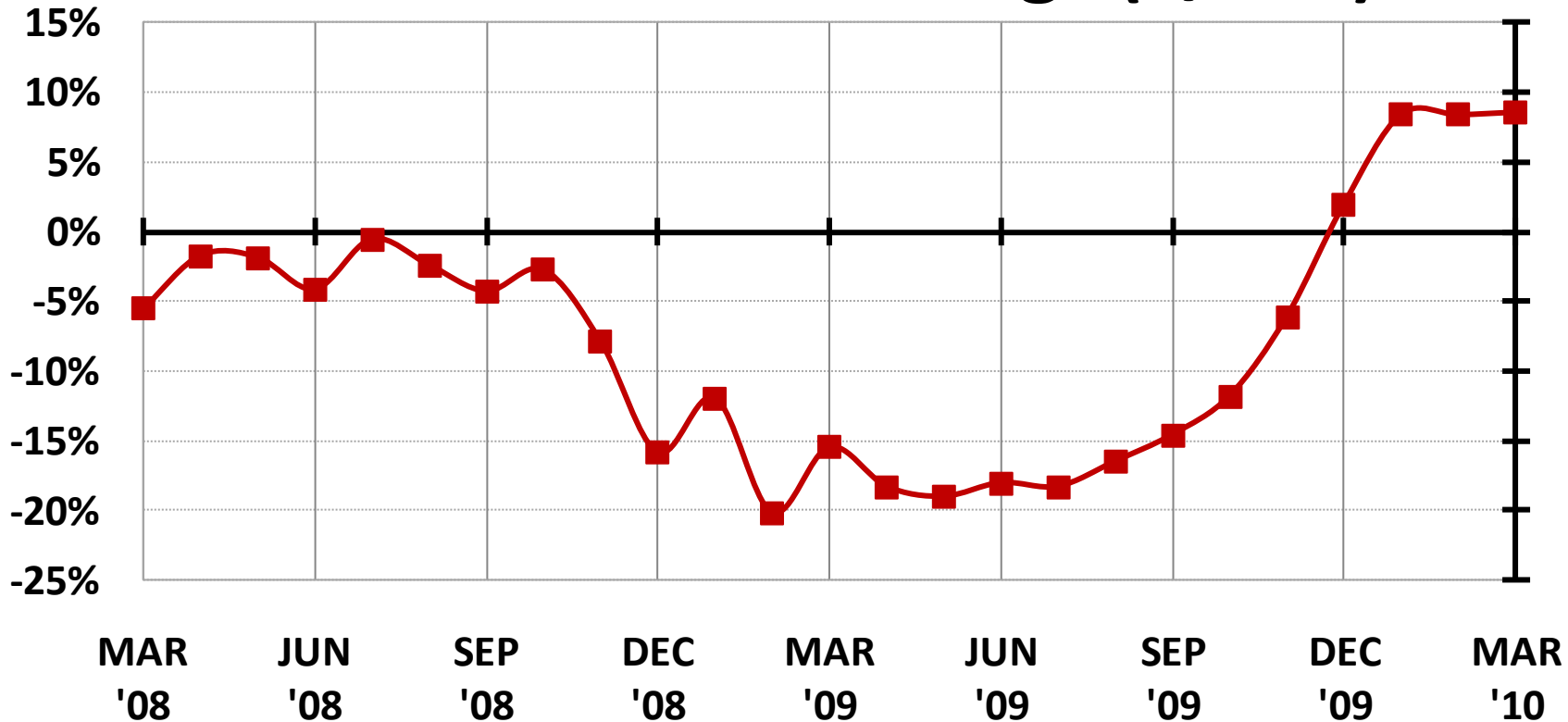


Sources: FTR Associates, Transport Fundamentals



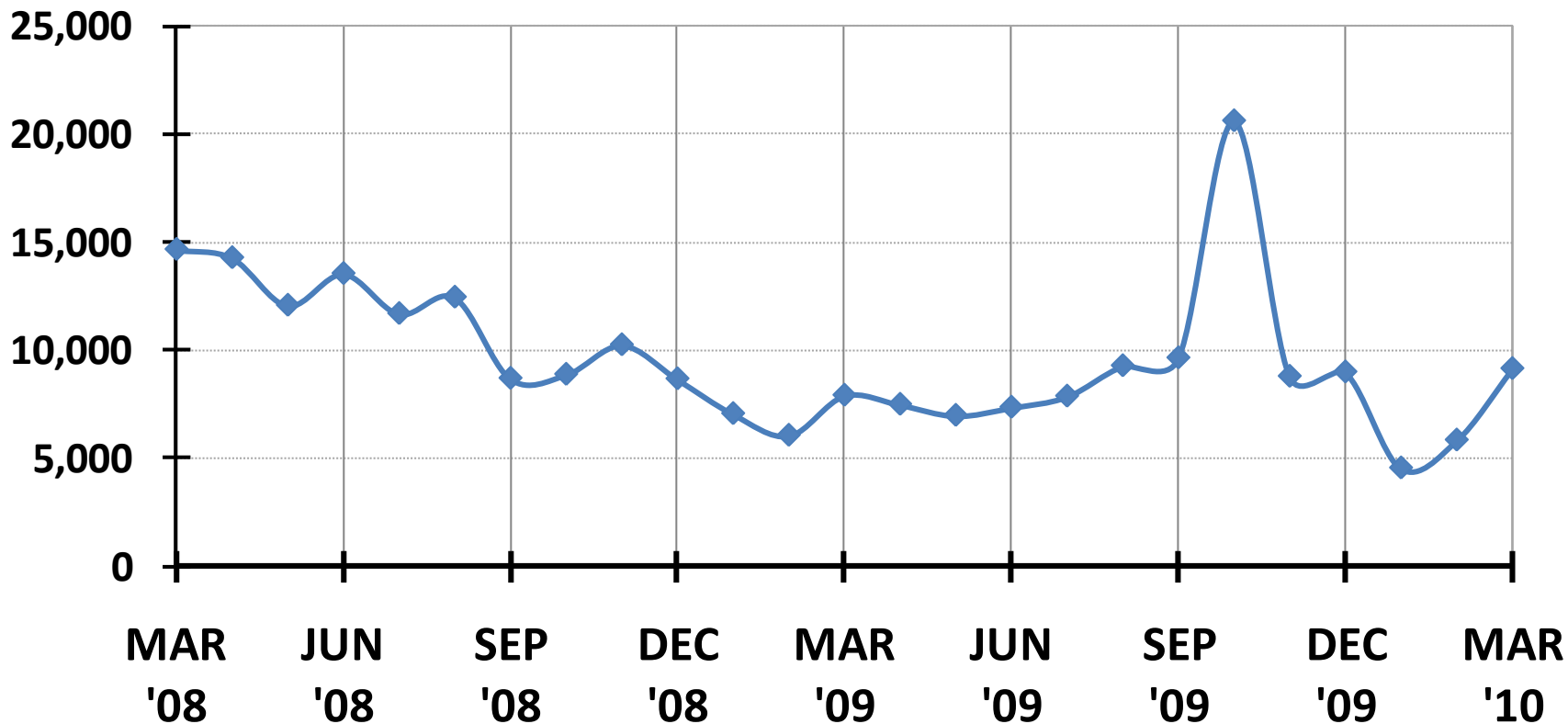
It will take several years before the conservative fleets build this pipeline back up.

Rail Intermodal Loadings (Y/Y %)



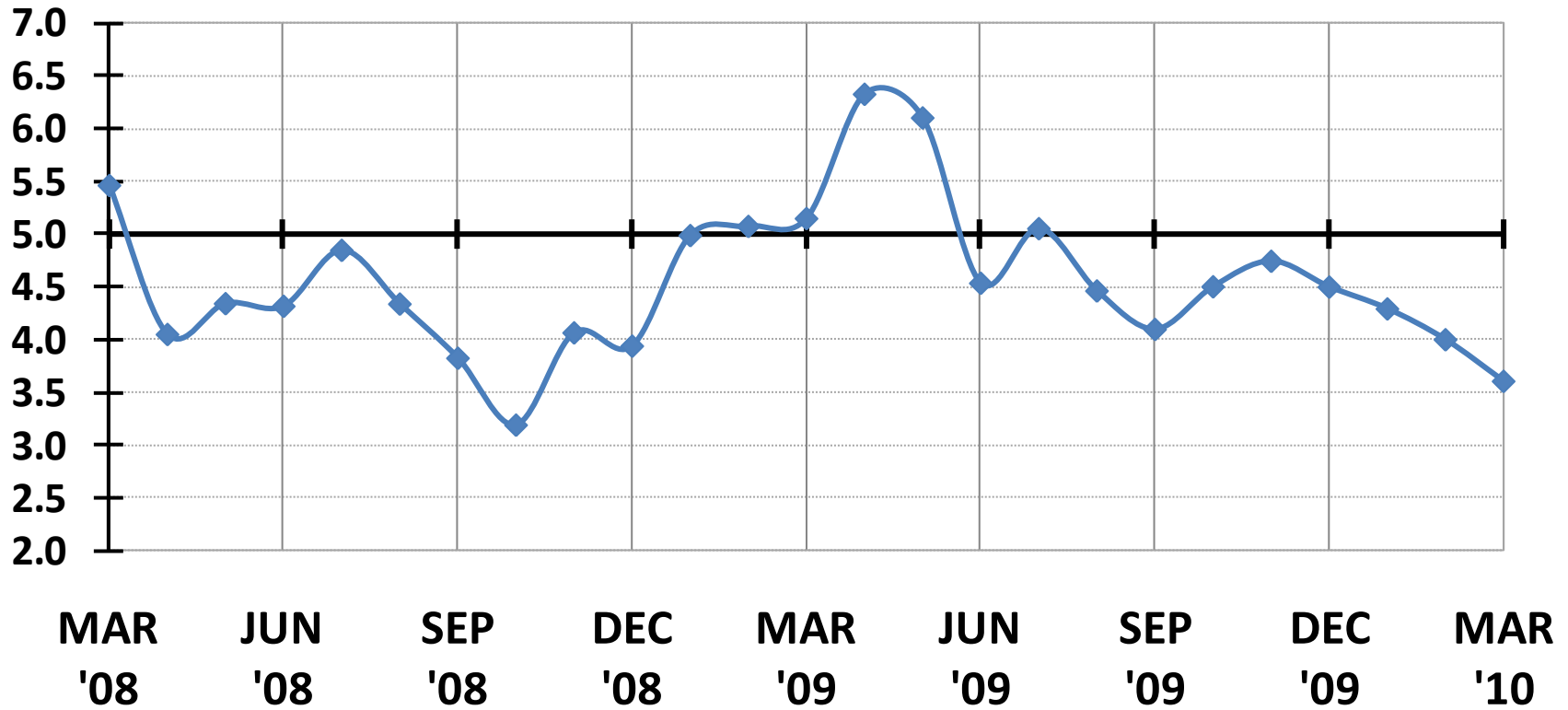
Source: FTR Associates; Copyright 2010 -- Index: 2000 = 100

New Truck Order Activity



Source: FTR Associates; Copyright 2010 (U.S./Canada Net Orders)

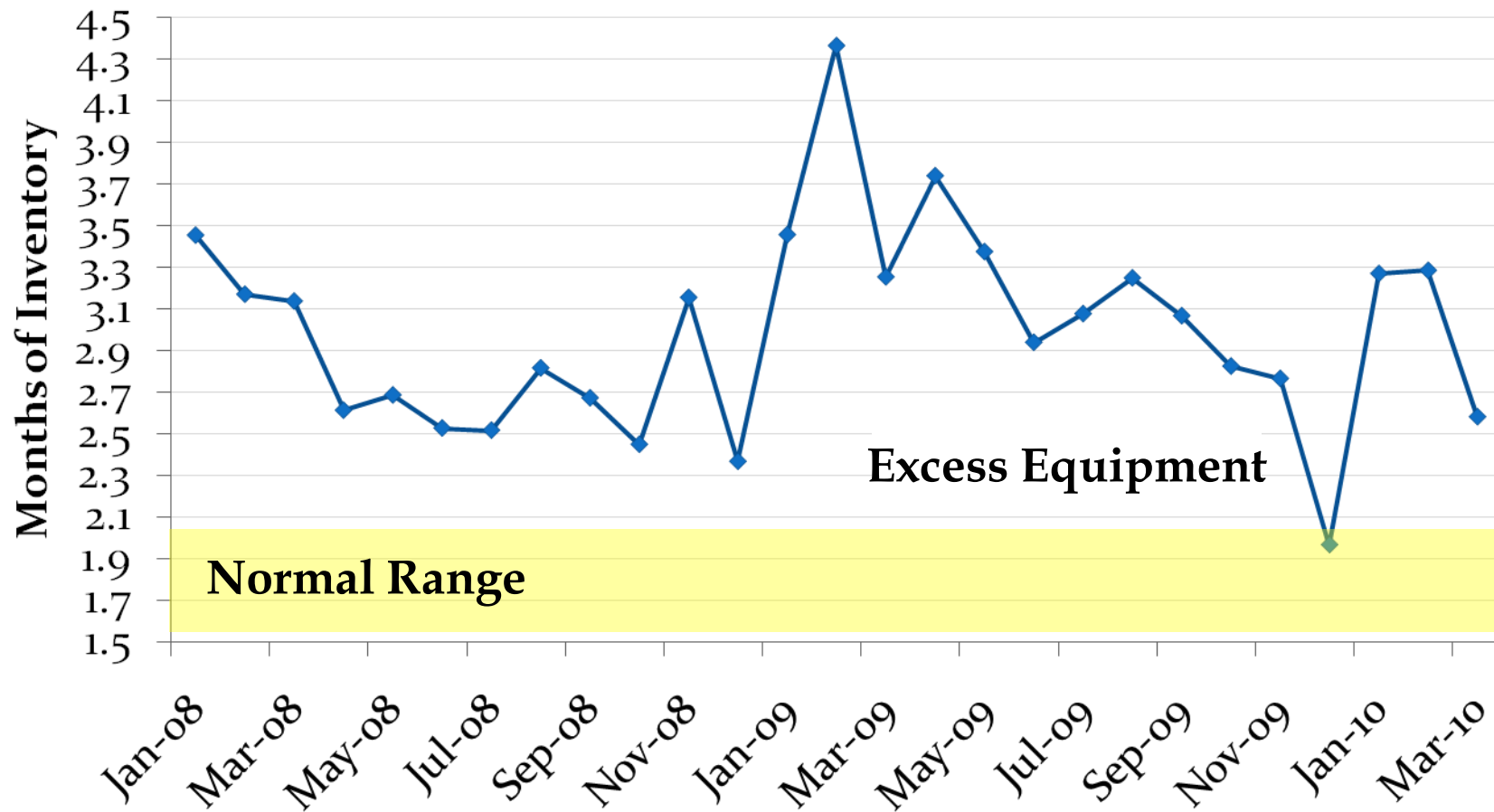
New Truck Lead Time



Source: FTR Associates; Copyright 2010 (N.A. OEM Backlog/Build Ratio, Months)

Inventory/Retail Sales Ratio

Class 8: North American Monthly Market Indicators



Source: FTR Associates; N.A. Class 8 Monthly Market Indicators Database



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