

# INTERMODAL *ADAPTS*



**IANA**

INTERMODAL ASSOCIATION  
OF NORTH AMERICA

# Intermodal Analyzed

May 25<sup>th</sup>, 2021, 2:00 PM ET



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INTERMODAL ASSOCIATION  
OF NORTH AMERICA

# Housekeeping

- Audience will be muted
- A question & answer session will follow the presentation
- Submit questions by clicking the Q&A icon at the bottom of your screen
- A recording of this webinar, including the slides, will be available in the near future



# Today's Presenter

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Larry Gross

President & Founder

Gross Transportation  
Consulting



# *Hello!*

**Larry Gross:**

President

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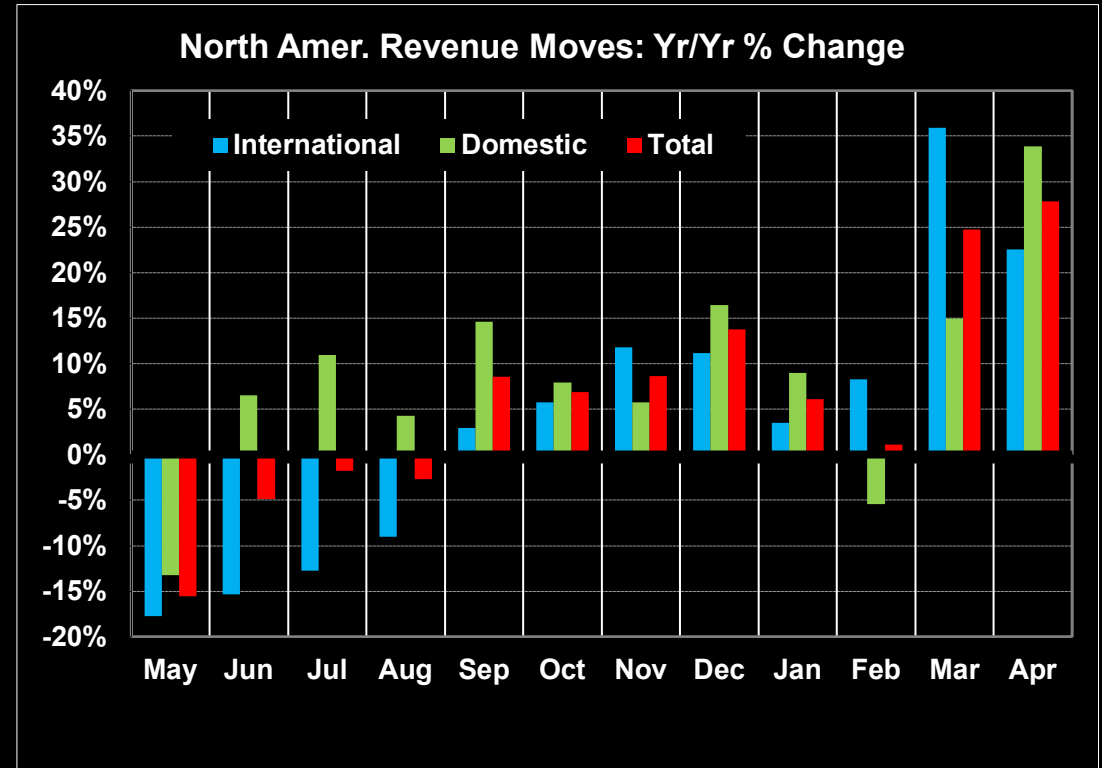
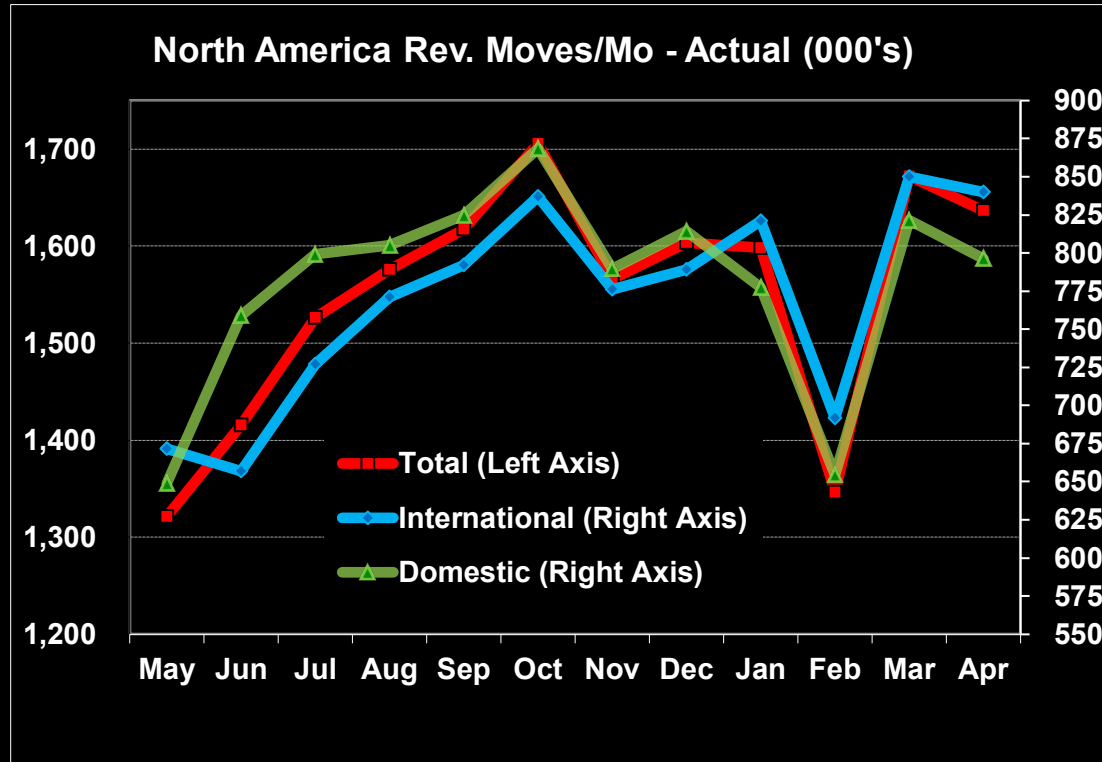
@Intermodalist

***INTERMODAL ANALYZED***

Intermodal Association of  
North America

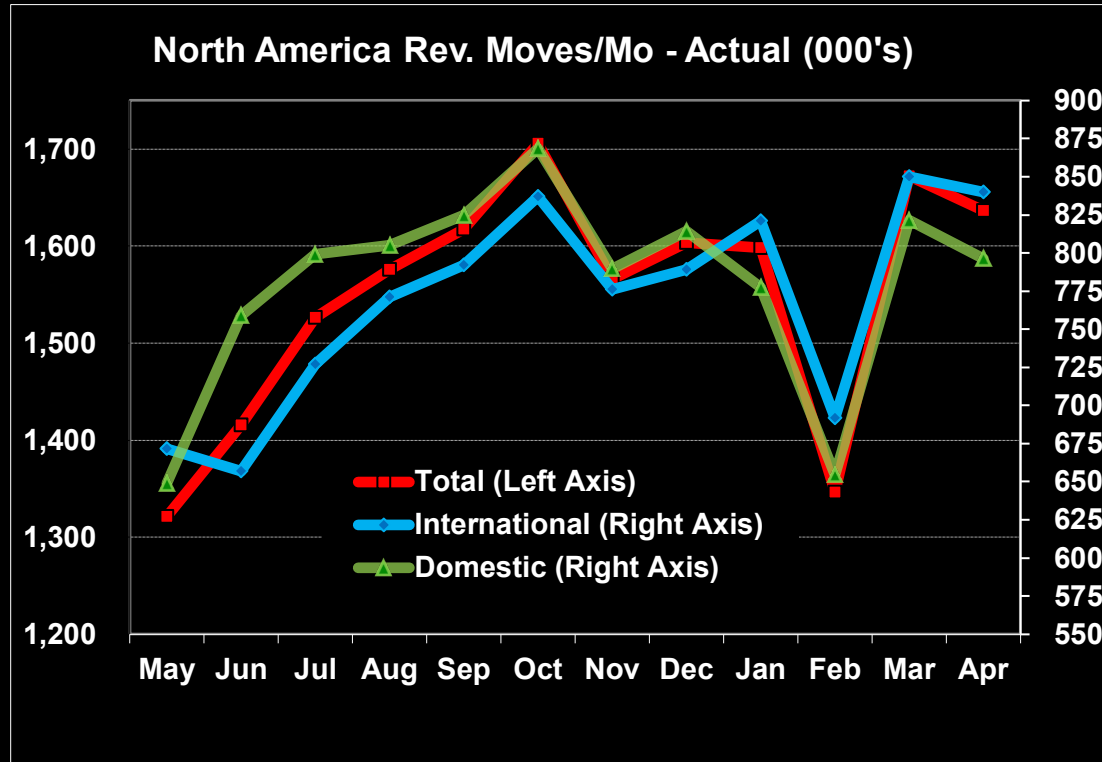
*May 25, 2021*

# INTERNATIONAL IS BACK AT/ABOVE PEAK LEVELS OF LAST YEAR. DOMESTIC IS NOT



Source: IANA ETSO, GTC Analysis

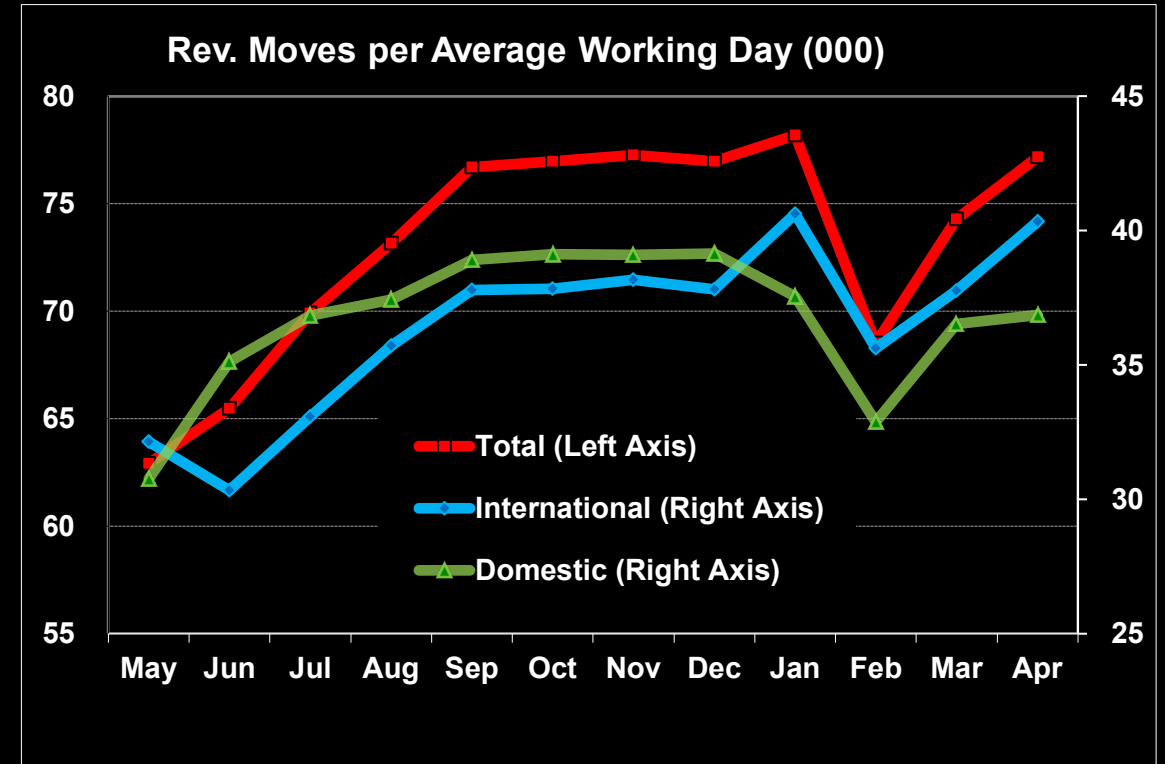
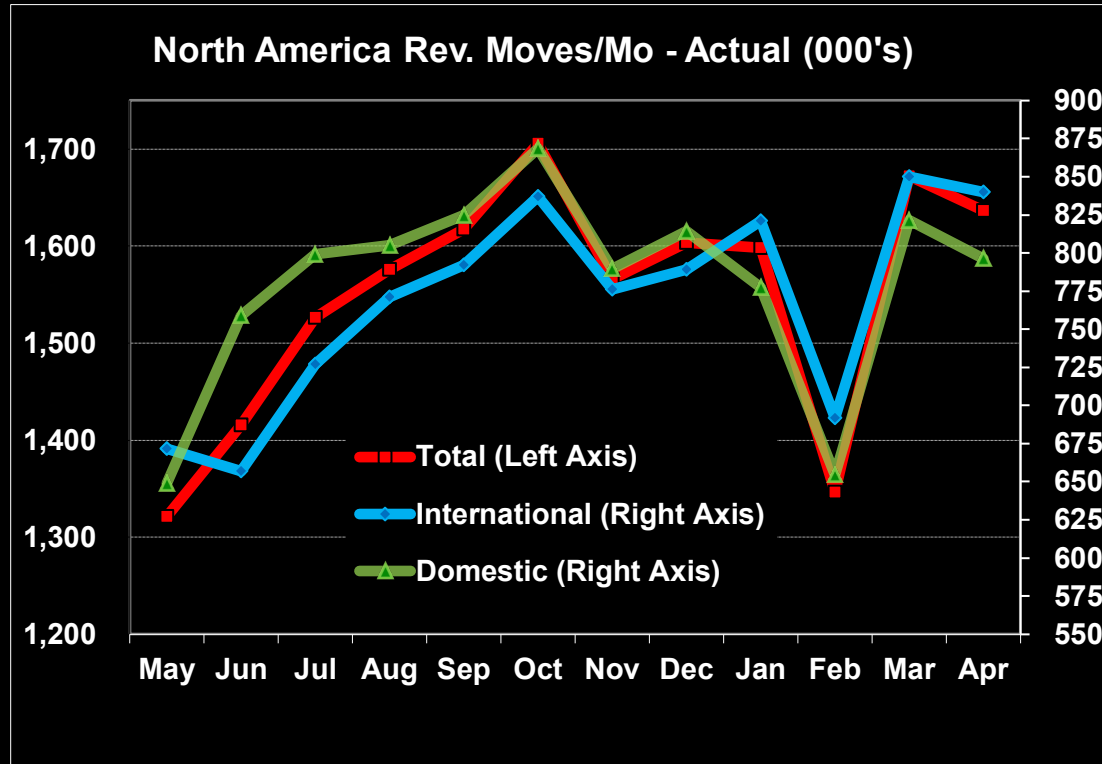
# NOT MUCH DIFFERENCE CURRENTLY ACROSS PRODUCT LINES



Source: IANA ETSO, GTC Analysis

April 2021	M/M	Y/Y
International	-1.2%	+22.6%
Short Trailer	-4.0%	+21.0%
53' Trailer	-4.8%	+63.0%
Total Trailer	-4.6%	+49.6%
Private Domestic Container	-2.6%	+25.1%
Rail Domestic Container	-3.5%	+51.4%
Total Domestic Container	-2.9%	+31.7%
Domestic	-3.1%	+33.9%
Grand Total	-2.1%	+27.8%

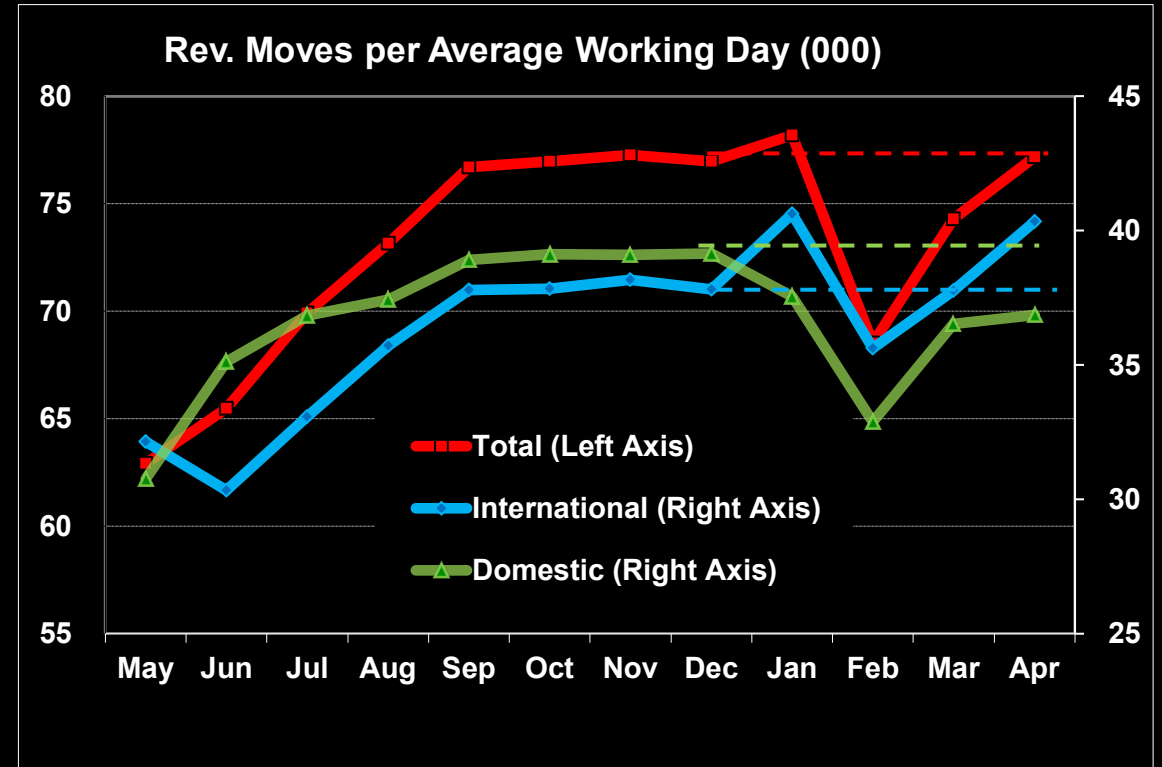
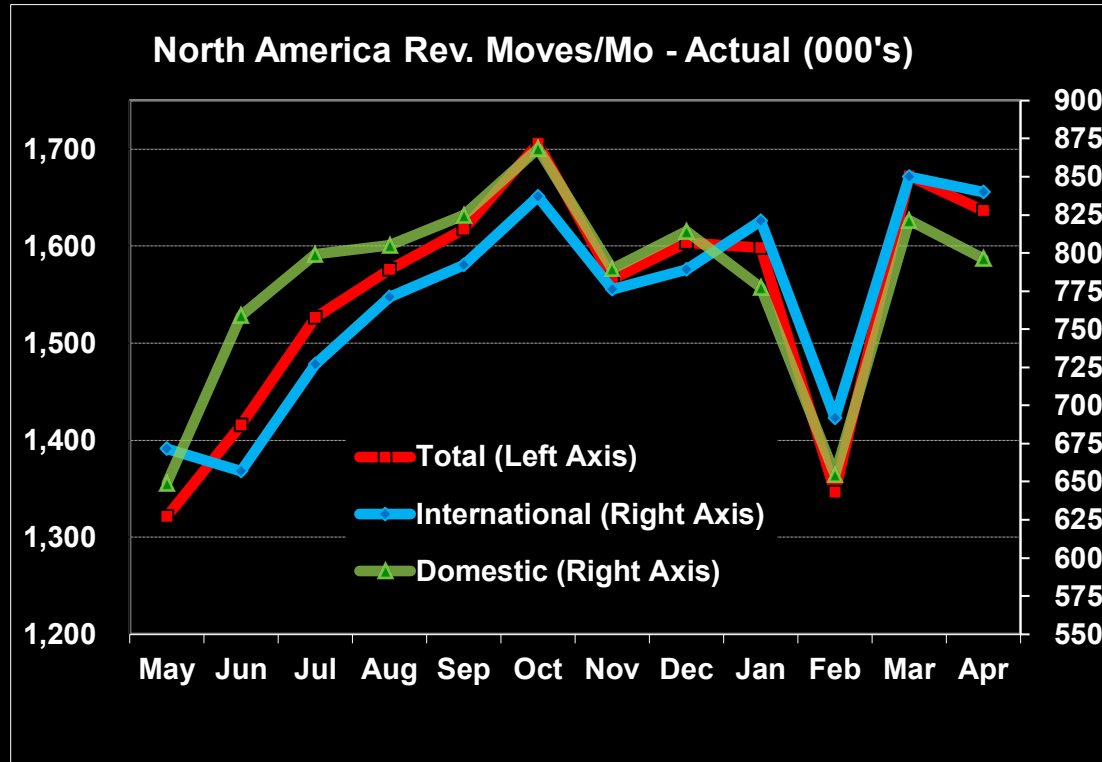
# INTERNATIONAL REVENUE MOVES PER DAY ARE MOVING UP BUT NOT DOMESTIC



Source: IANA ETSO, Transport Futures, GTC Analysis

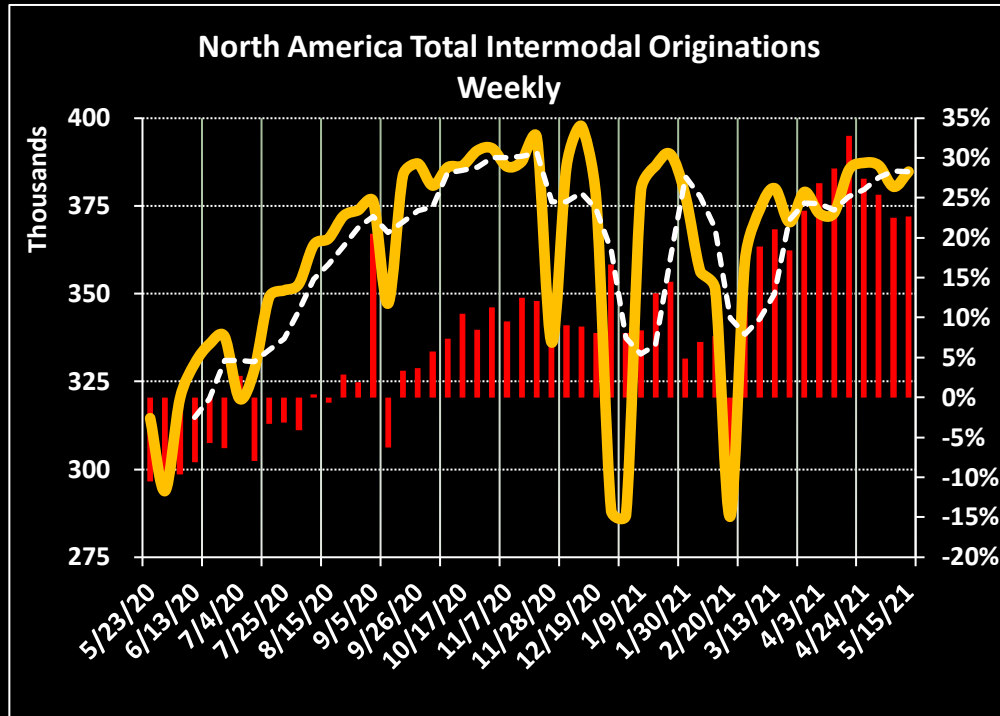


# INTERNATIONAL REVENUE MOVES PER DAY ARE MOVING UP BUT NOT DOMESTIC

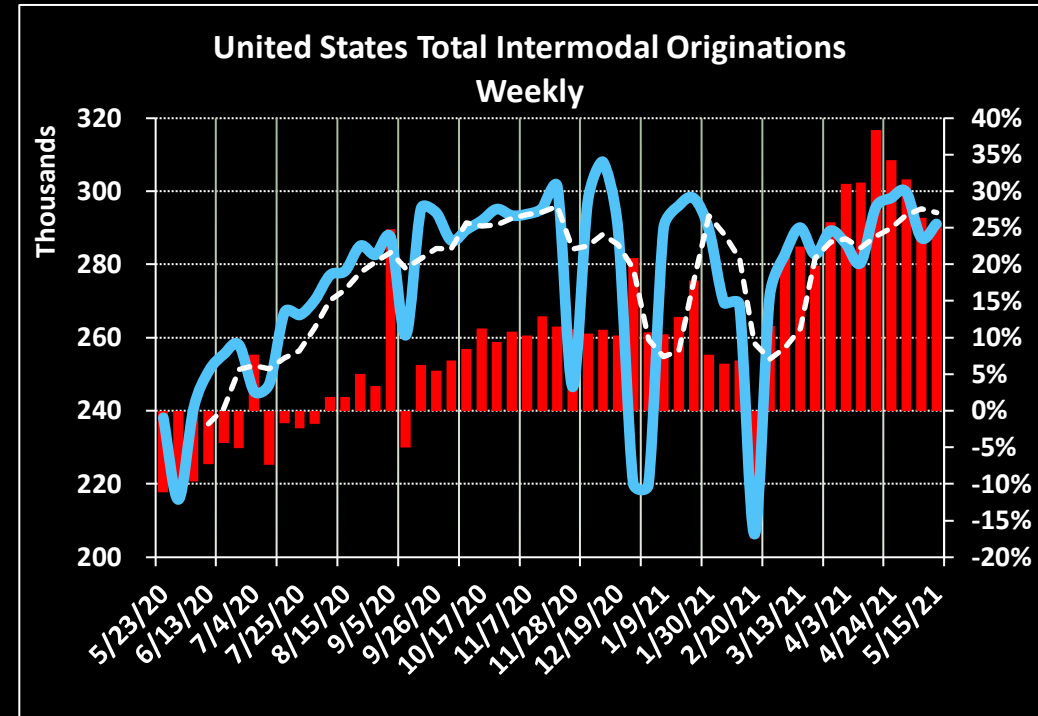


Source: IANA ETSO, Transport Futures, GTC Analysis

# AAR WEEKLY DATA INDICATES VOLUME HAS FLATTENED AT A HIGH LEVEL



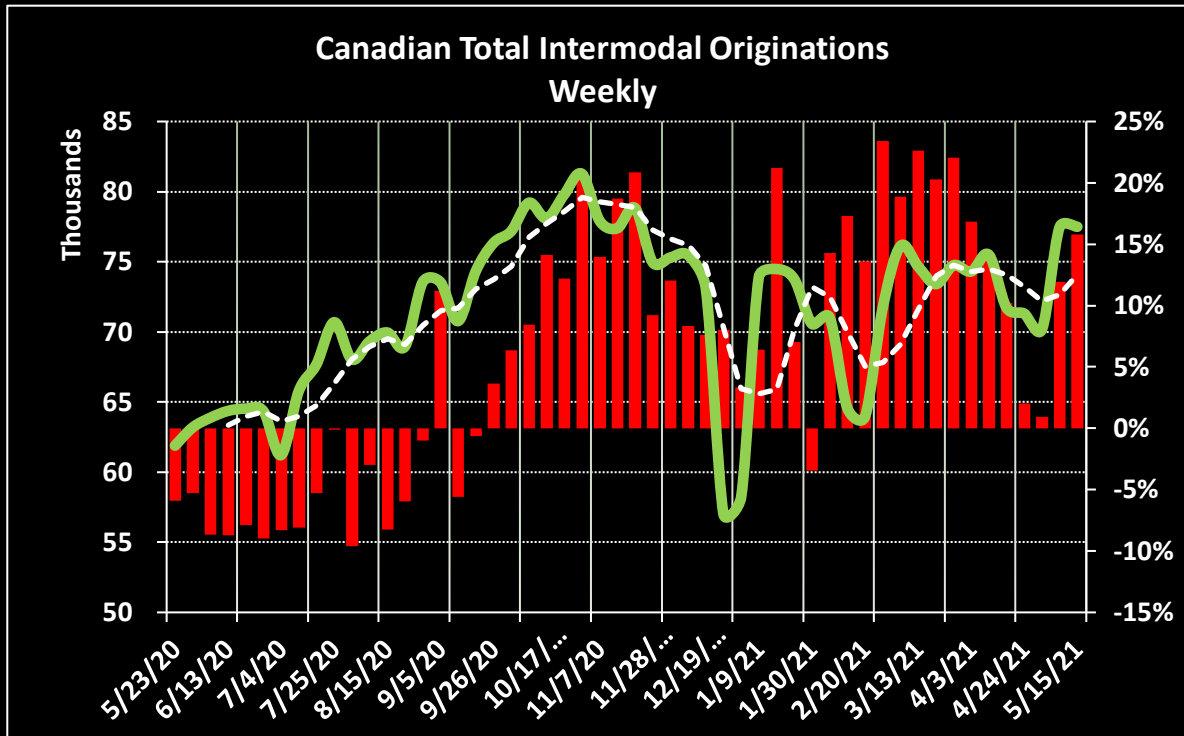
- Last Week: +22.7% Y/Y
- Last 4 Weeks: +25.4% Y/Y



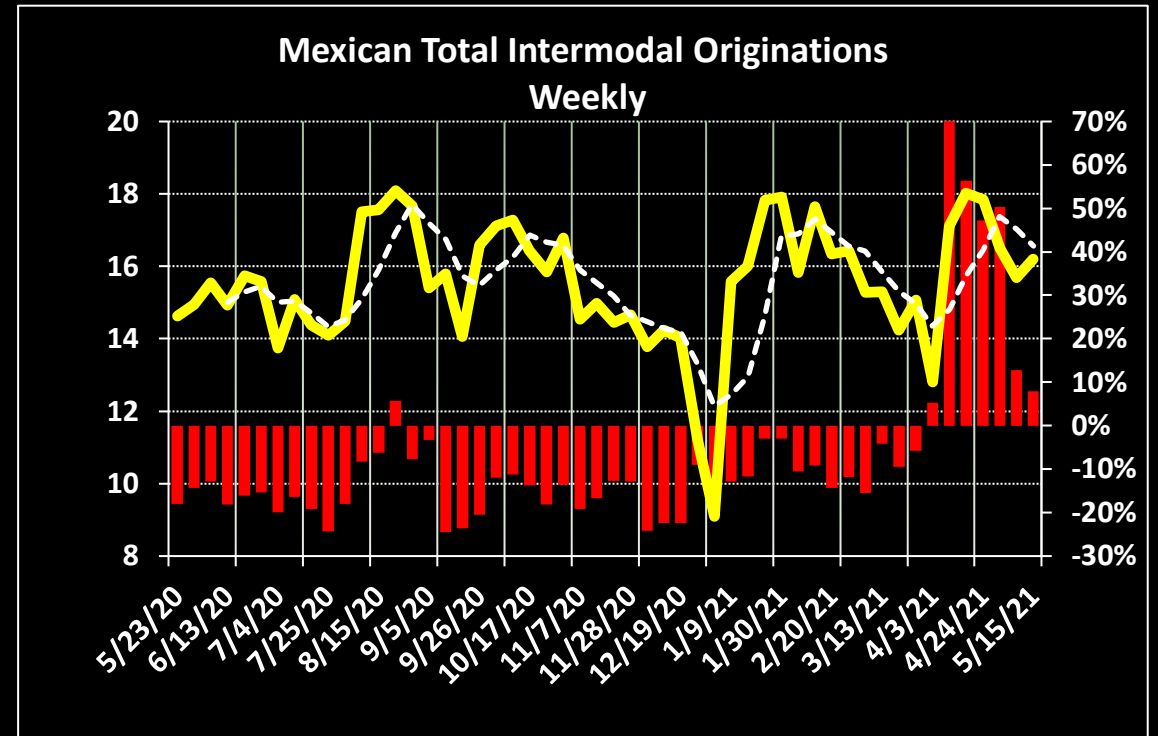
- Last Week: +25.6% Y/Y
- Last 4 Weeks: +29.4% Y/Y

Source: AAR, GTC Analysis

# CANADA SAW A RECENT UPTICK IN VOLUME MEXICO MOVED AHEAD OF WEAK PRIOR YEAR



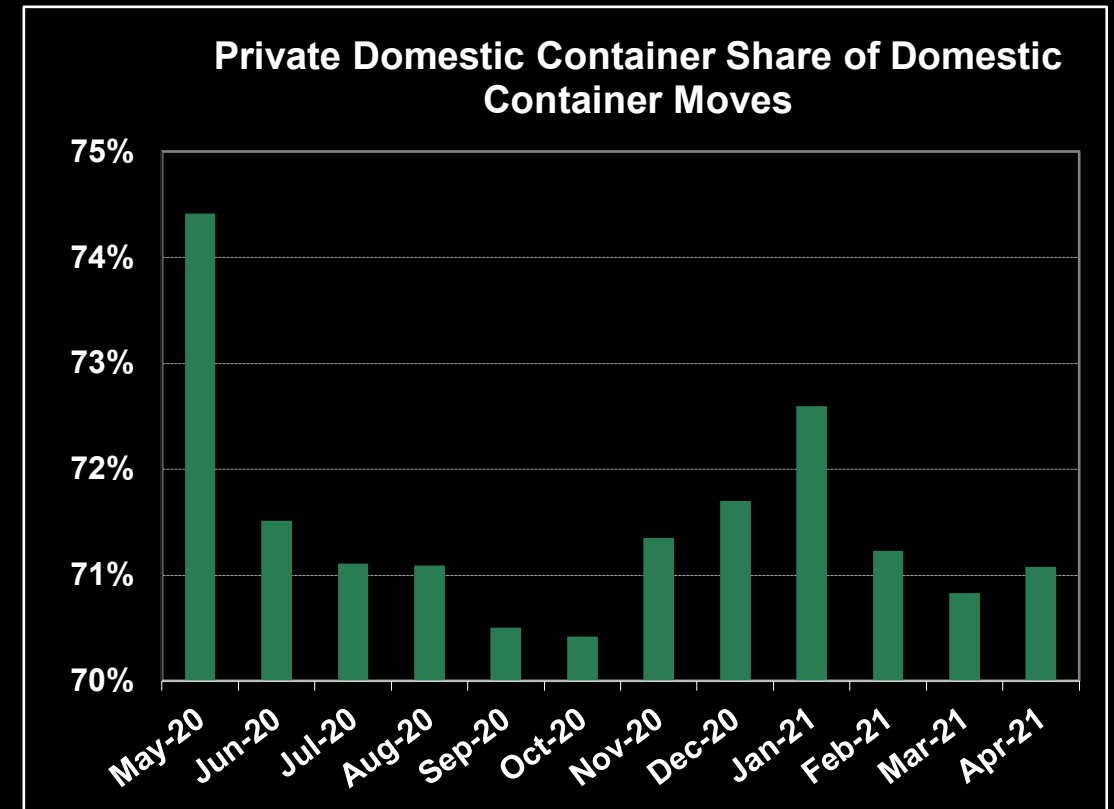
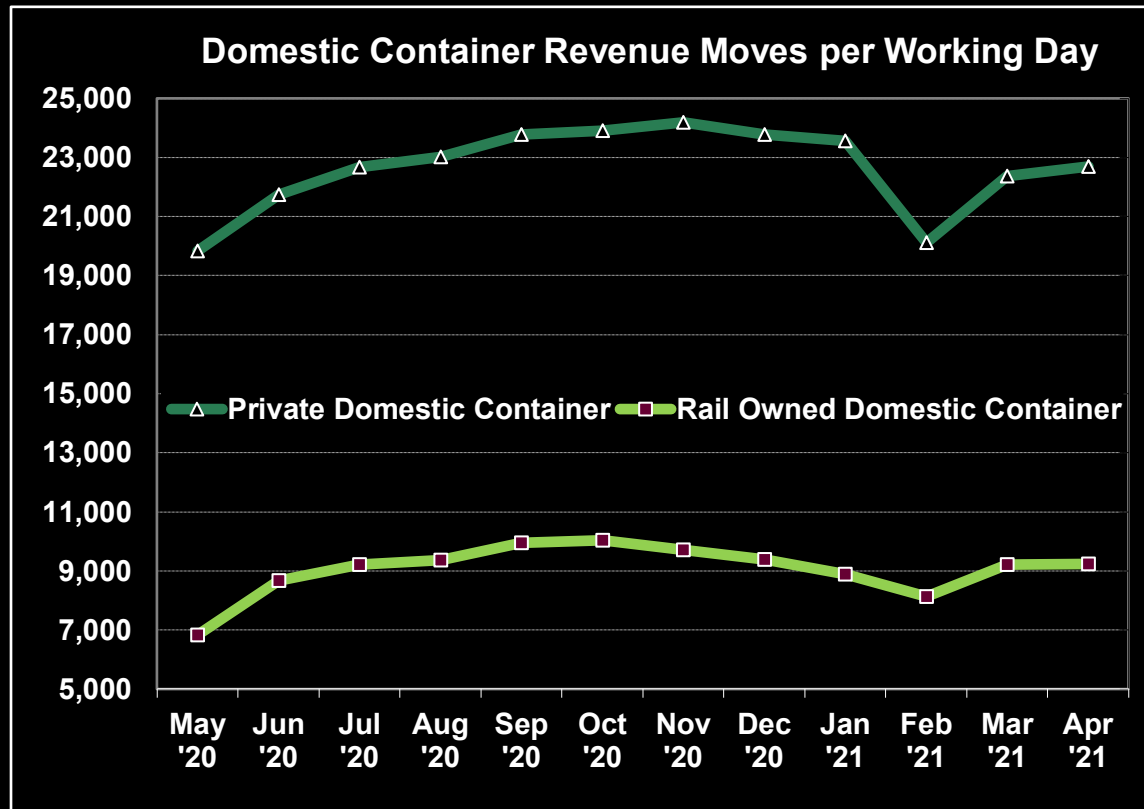
- Last Week: +15.8% Y/Y
- Last 4 Weeks: +7.6% Y/Y



- Last Week: +7.9% Y/Y
- Last 4 Weeks: +27.3% Y/Y

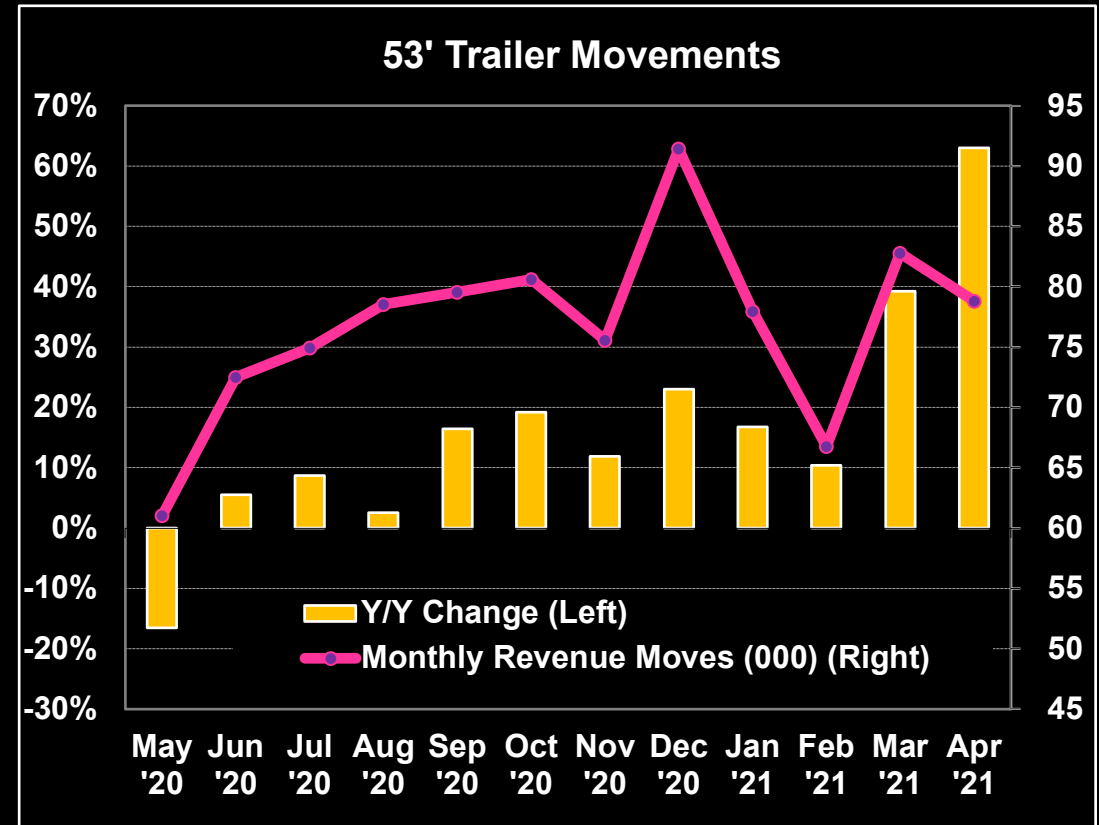
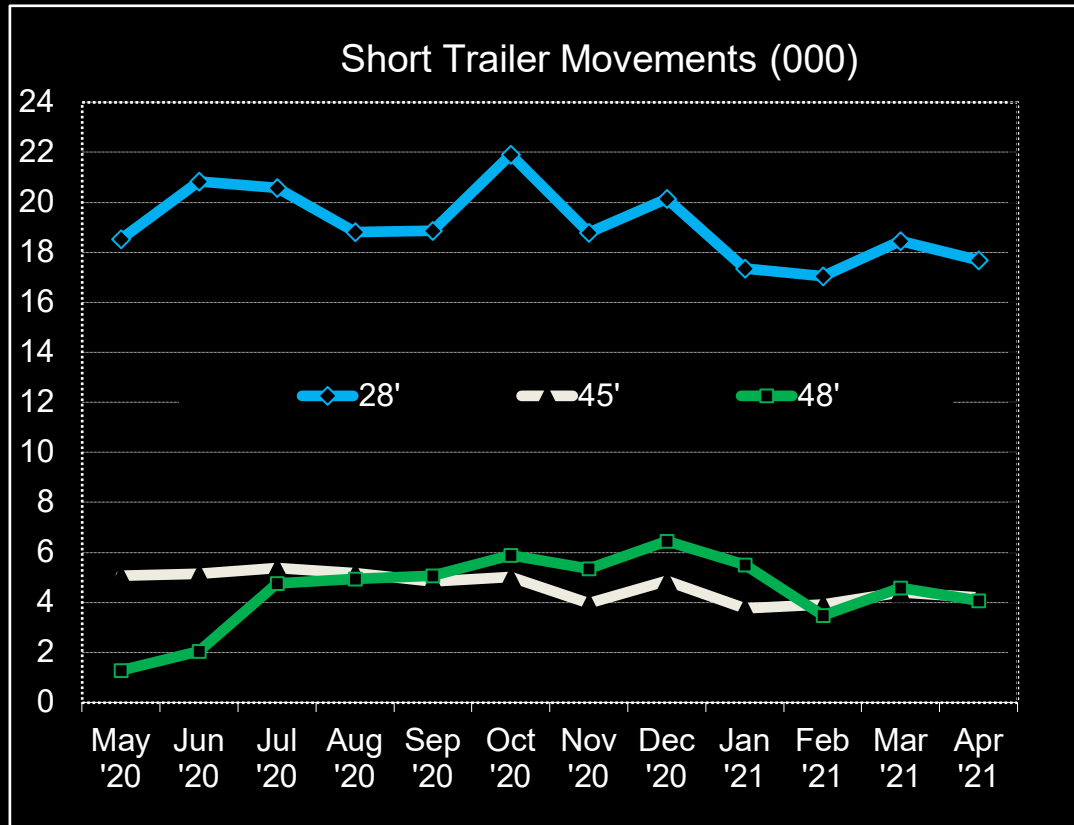
Source: AAR, GTC Analysis

# DOMESTIC CONTAINER HAS NOT FULLY REGAINED Q4 LEVELS



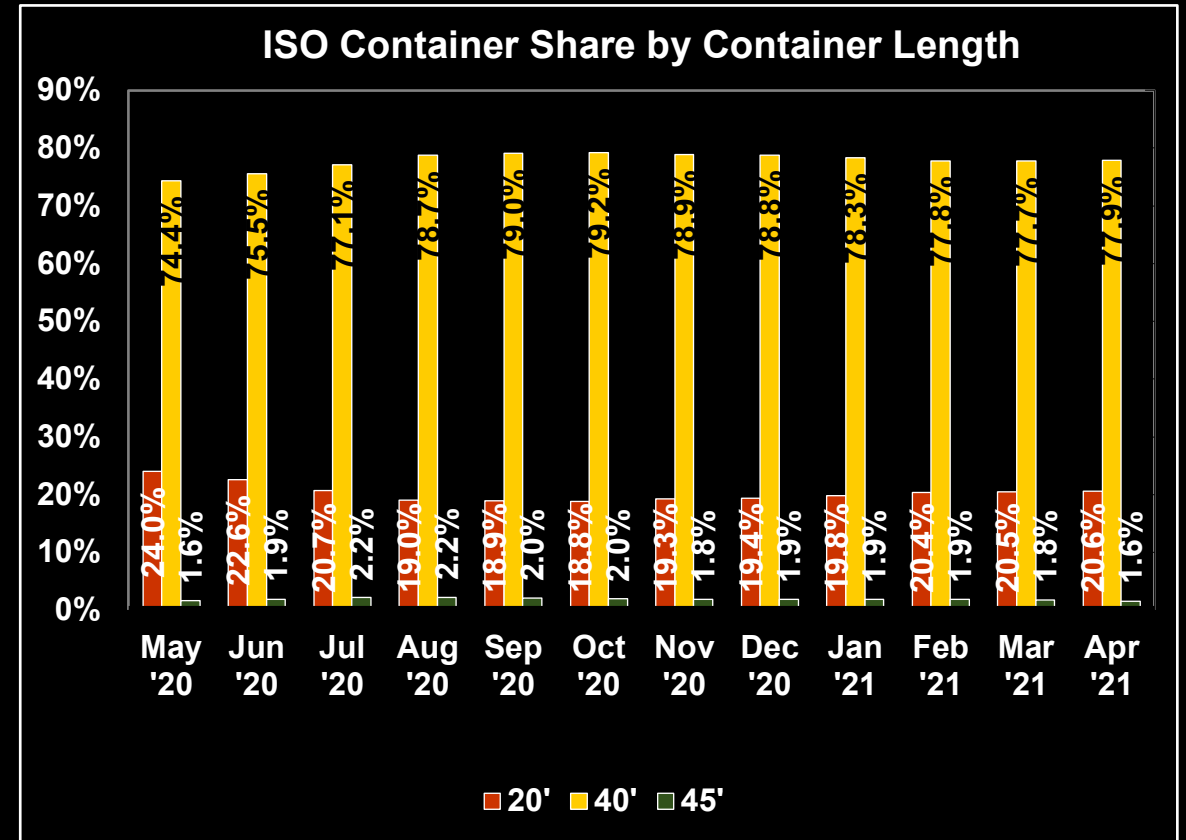
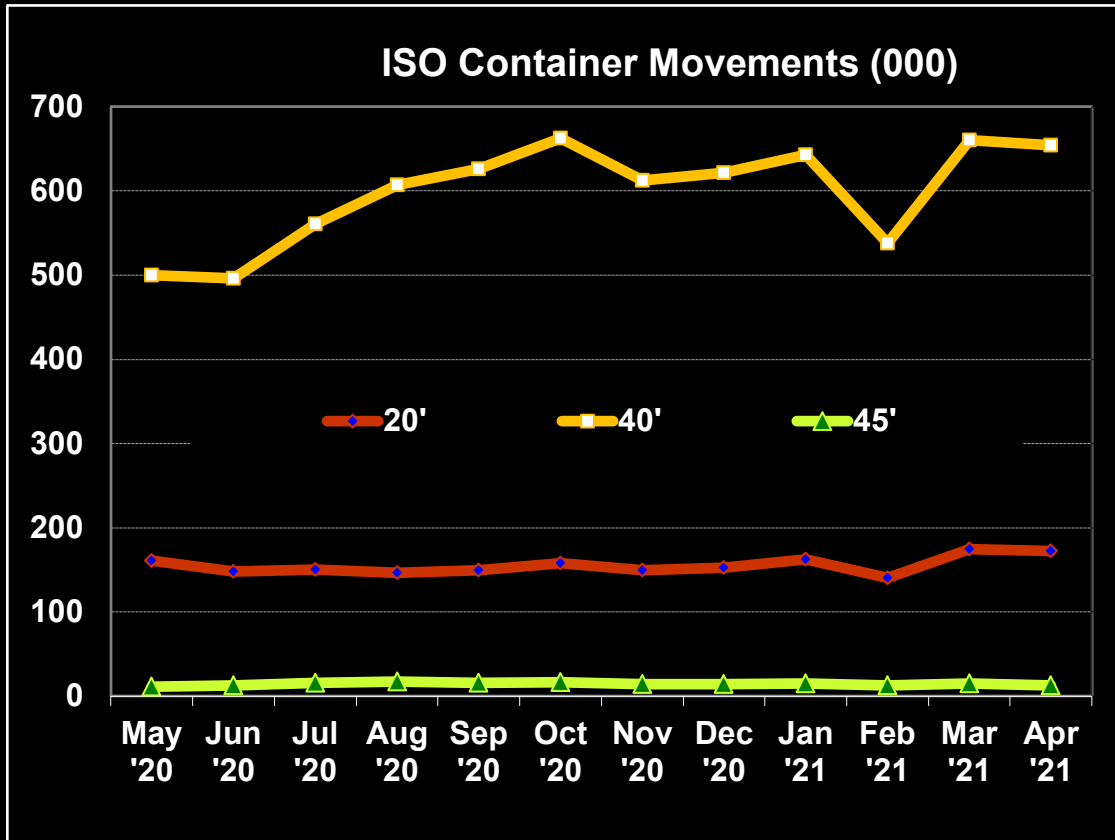
Source: IANA ETSO, GTC Analysis

# SHORT TRAILER MOVES ARE DOWN, BUT 53' TRAILER IS STILL HANGING IN THERE



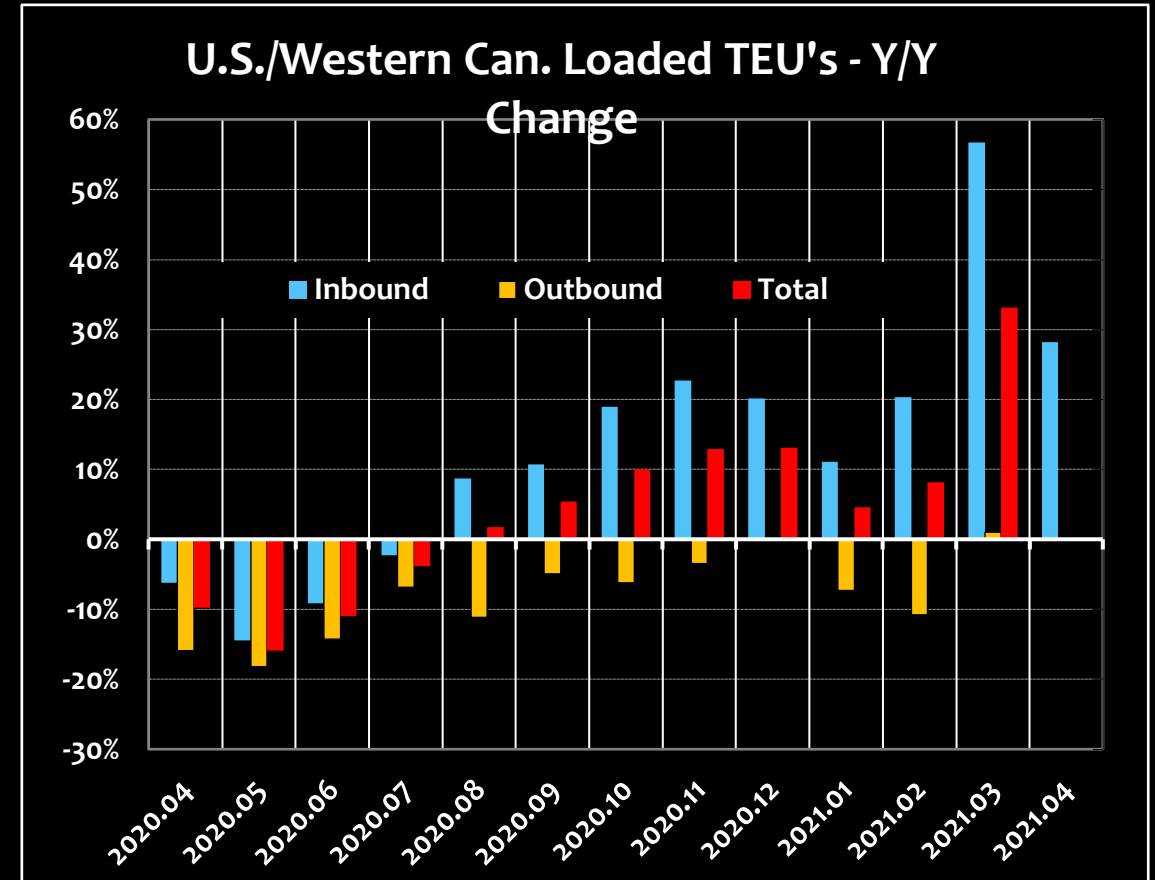
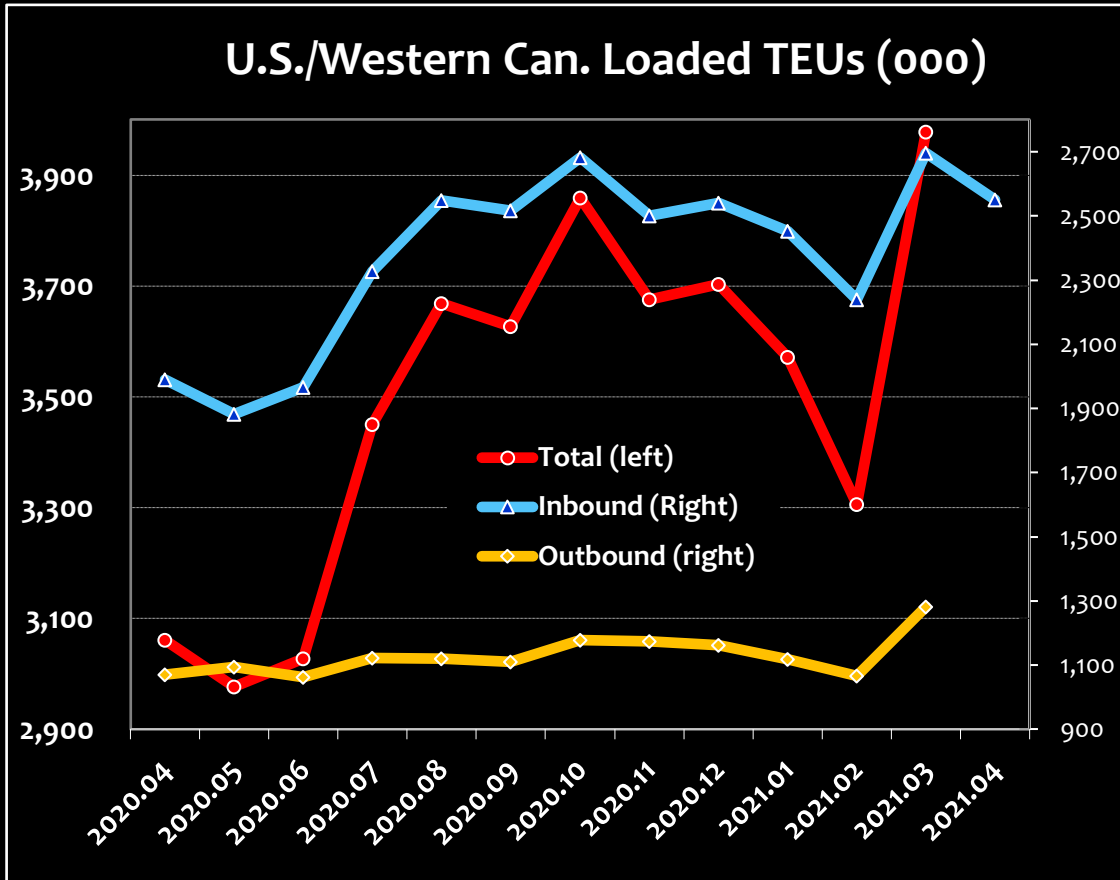
Source: IANA ETSO, GTC Analysis

# ISO CONTAINER MIX IS CHANGING



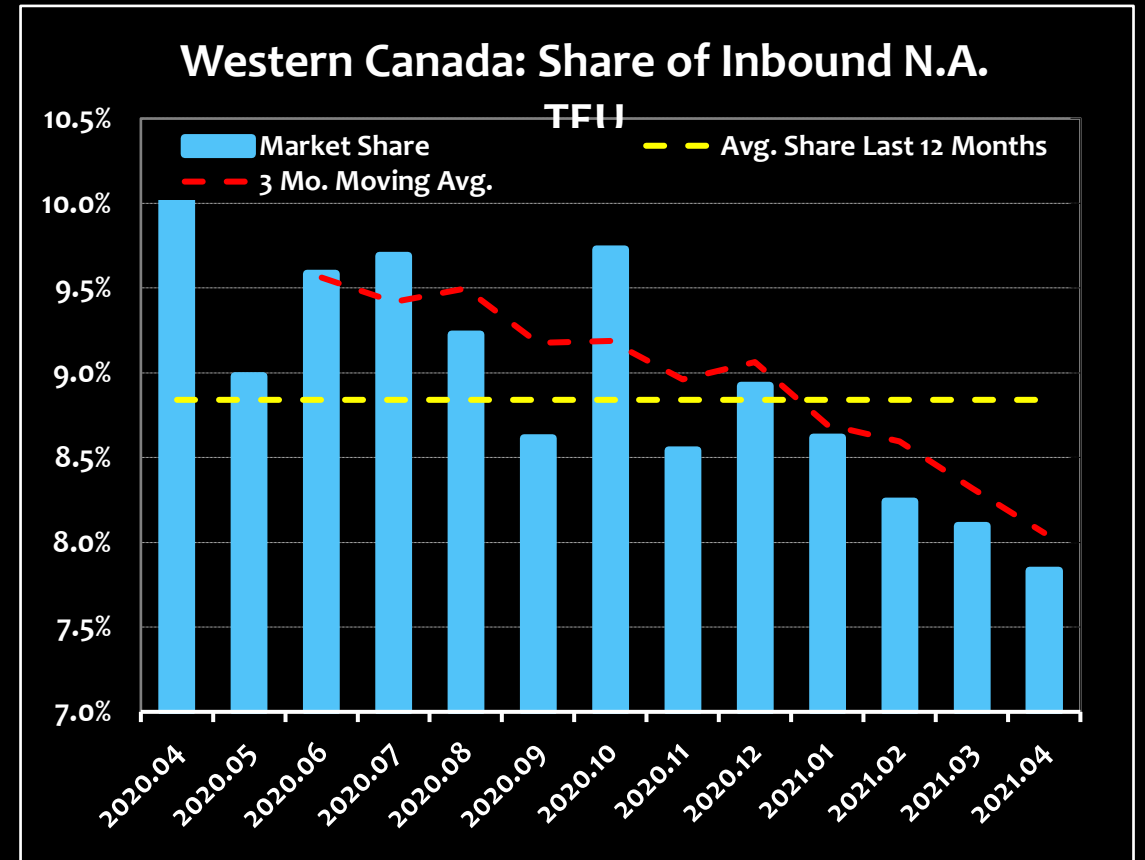
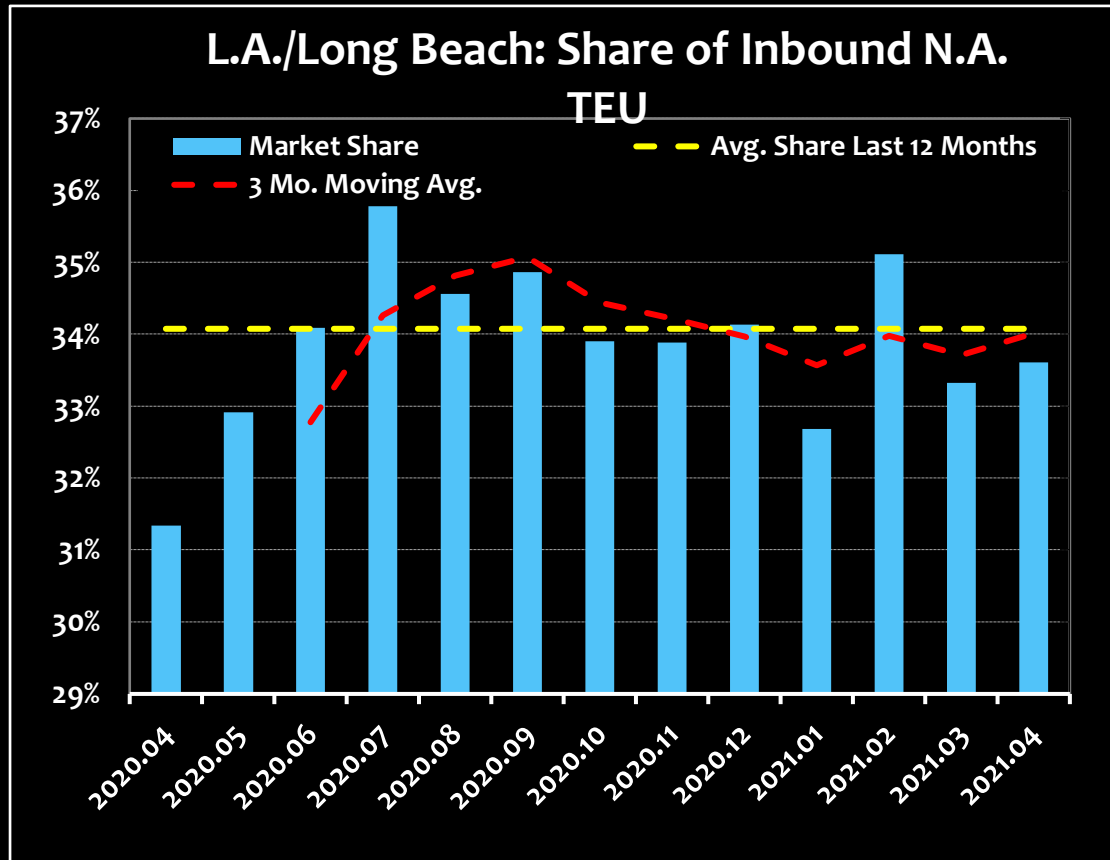
Source: IANA ETSO, GTC Analysis

# PORT PRODUCTIVITY IMPROVING EXPORTS BREAK OUT OF THEIR RUT



Source: Port Reports, IHS PIERS, GTC Analysis

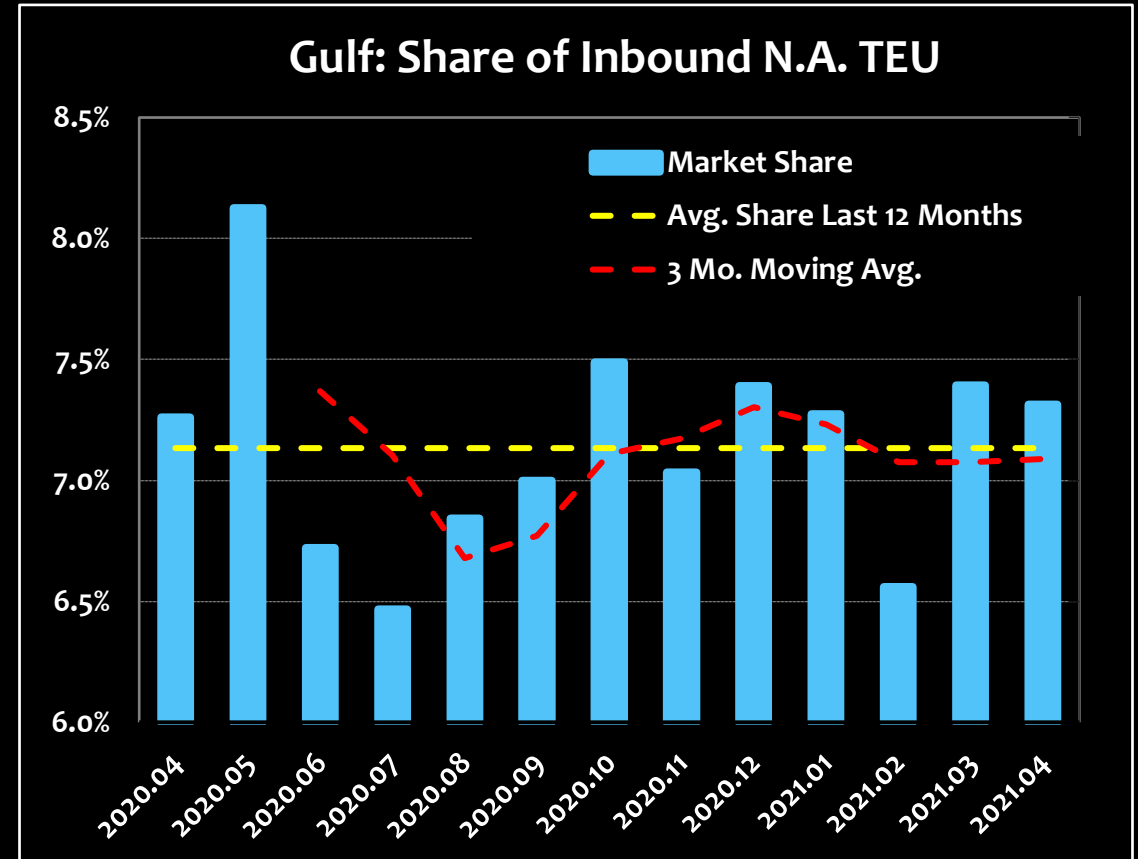
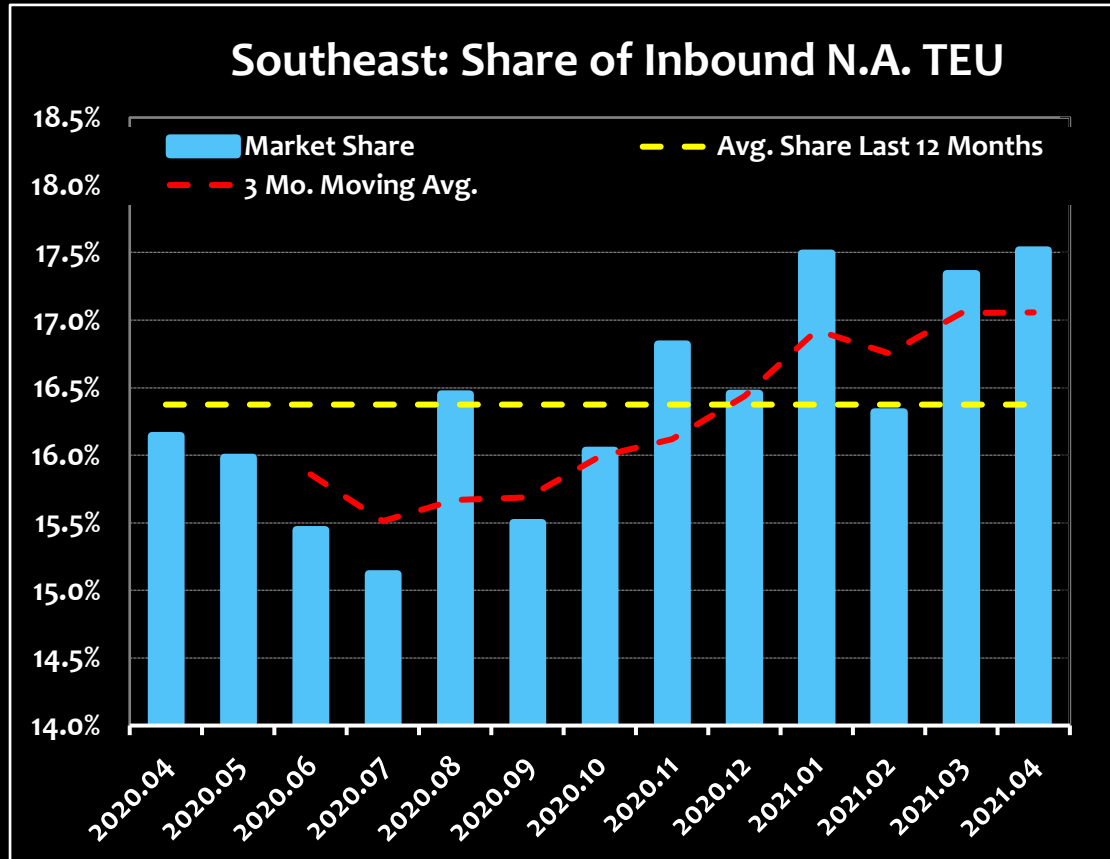
# IMPORT SHARE TRENDS – L.A./L.B. STABLE, WESTERN CANADA DECLINING



Source: Port Reports, IHS PIERS, GTC Analysis



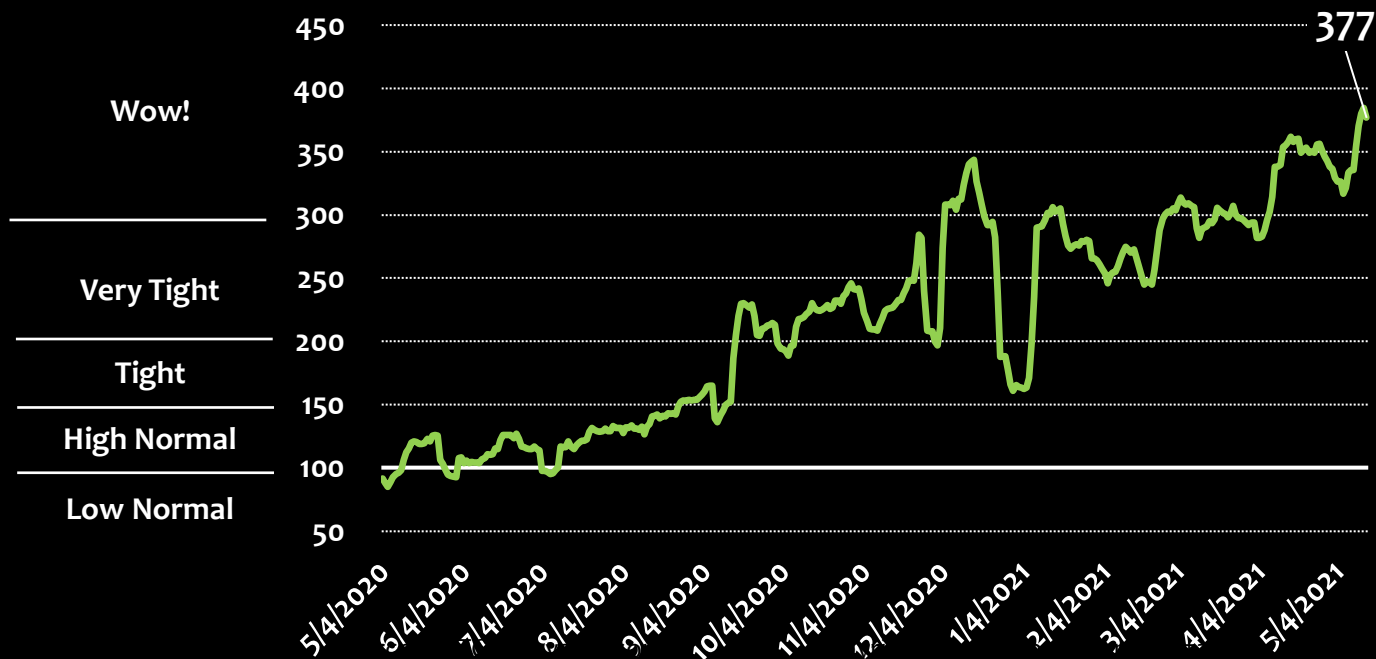
# IMPORT SHARE TRENDS – SOUTHEAST/GULF ARE STRONG



Source: Port Reports, IHS PIERS, GTC Analysis

# DRAYAGE DEMAND INDEX CONTINUES TO SHOW SYSTEM IS IN DISTRESS

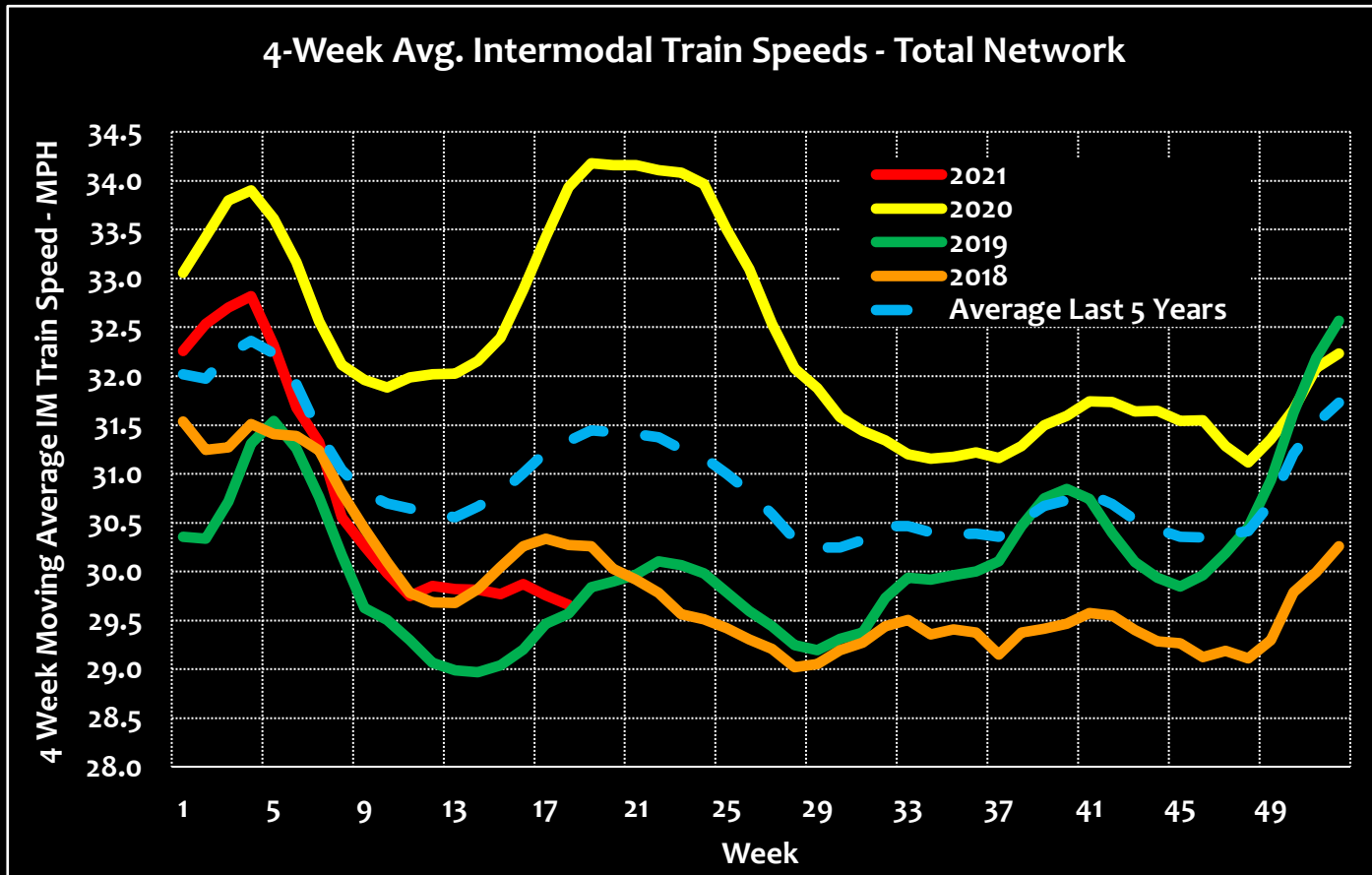
Drayage Demand Index - Major Markets -  
100 = Average



Source: Drayage.com, GTC Analysis

- Overall reading of 377
- Worst situation in Southeast right now
  - Savannah @ 916(!)
  - Charleston @ 601
- Chicago, Columbus, K.C., Memphis, Norfolk, above 400
- 10 of 21 metros above 300

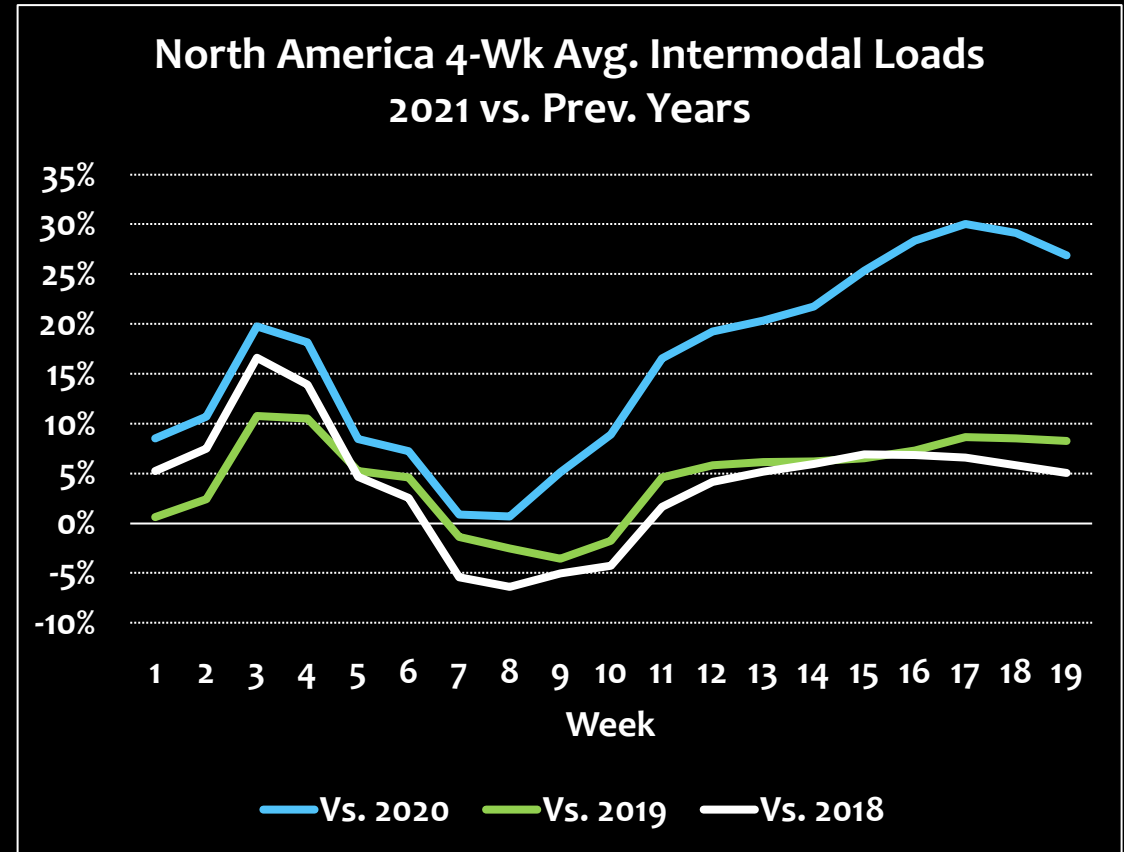
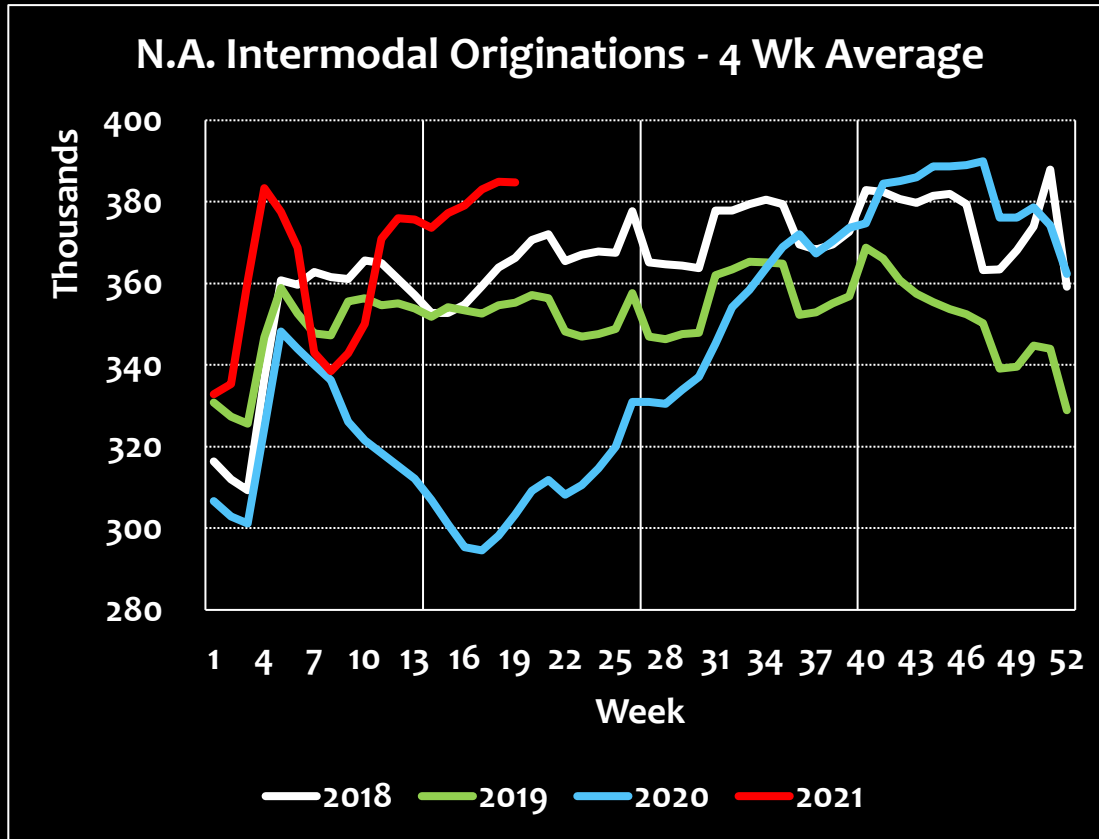
# INTERMODAL TRAIN SPEEDS HAVE NOT RECOVERED FROM THE POLAR VORTEX



- Average speed mid-May: 29.7 mph
- 5.3%/1.7 mph slower than 5-year average
- 12.6%/4.2 mph worse than prior year
- Close to the lowest speeds seen in the last ten years.

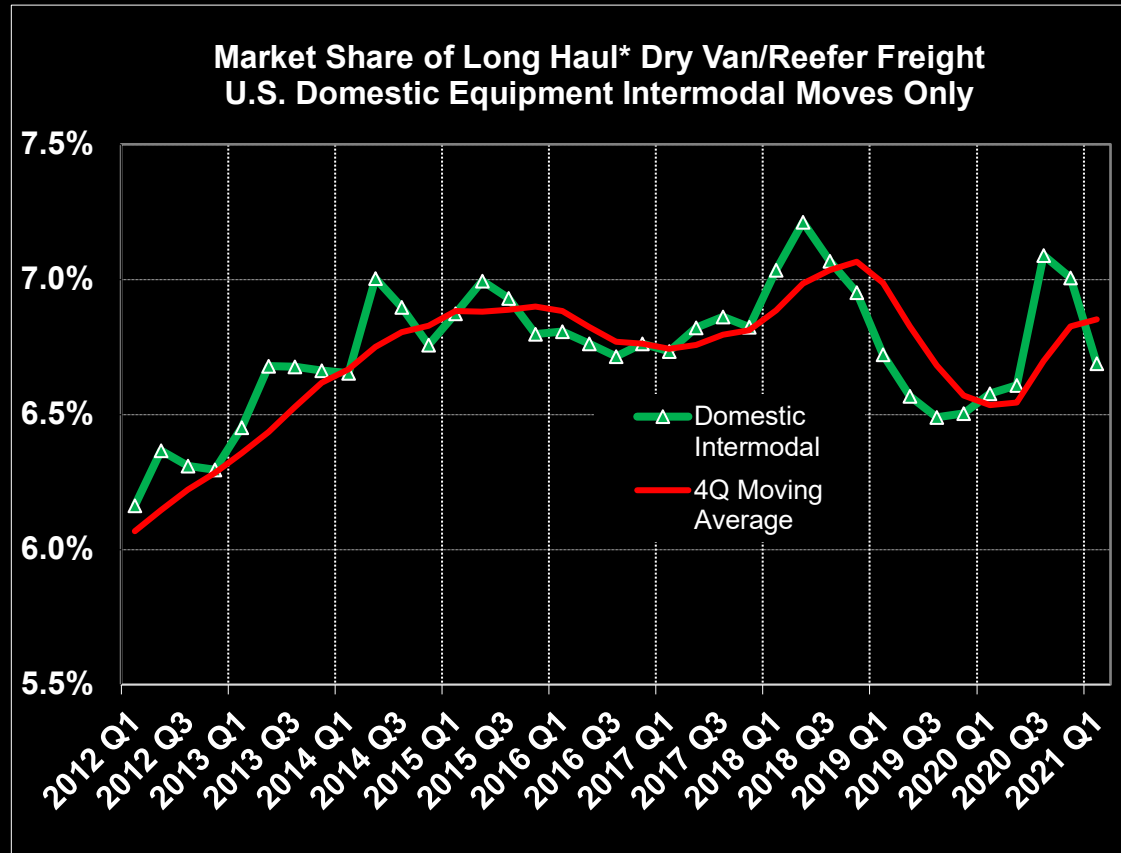
Source: STB EP 724 Rail Service Issues Reports, GTC Analysis

# PUTTING 2021 YTD IN CONTEXT

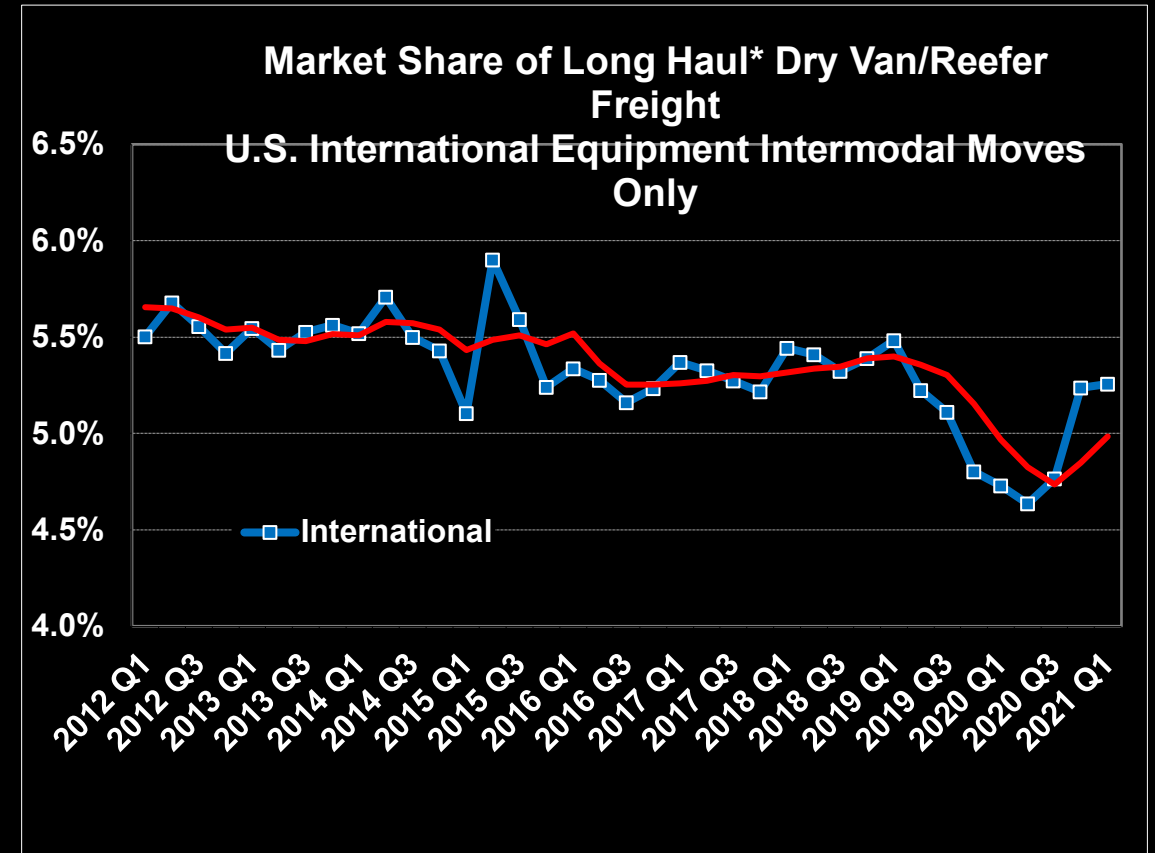


Source: AAR, GTC Analysis

# POST-COVID INTERMODAL MARKET SHARE GAINS WERE SHORT-LIVED



Source: IANA ETSO, Transport Futures, GTC Analysis

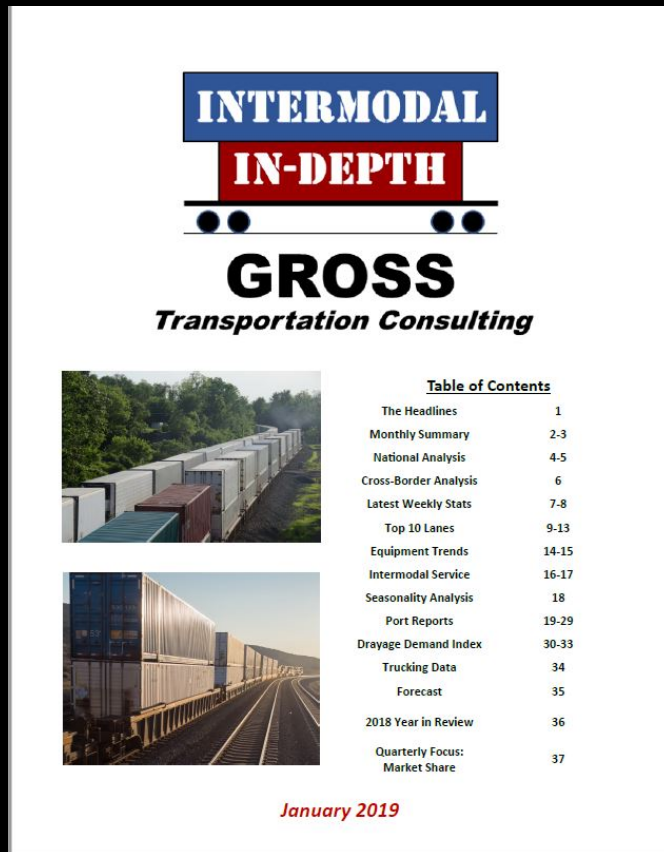


Share of U.S. Dry Van/Reefer Moves of 500+ Miles

# LOOKING FORWARD

- Q2 freight will continue to be strong
- Shift to services is underway, but strong growth will largely offset the drag
- Not much breathing room for operational recovery
- Seasonal gains will be more subdued than normal
- Peak season will be great but won't feel as great when compared to 2020
- Rate environment will be very strong

# INTERMODAL IN DEPTH



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# Thanks! Questions?

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# Q&A

Enter your questions using  
the Q&A button



For more information about **IANA** data, including the  
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