

Intermodal Connects



Intermodal Analyzed

February 22, 2022
2:00 PM EST

Housekeeping



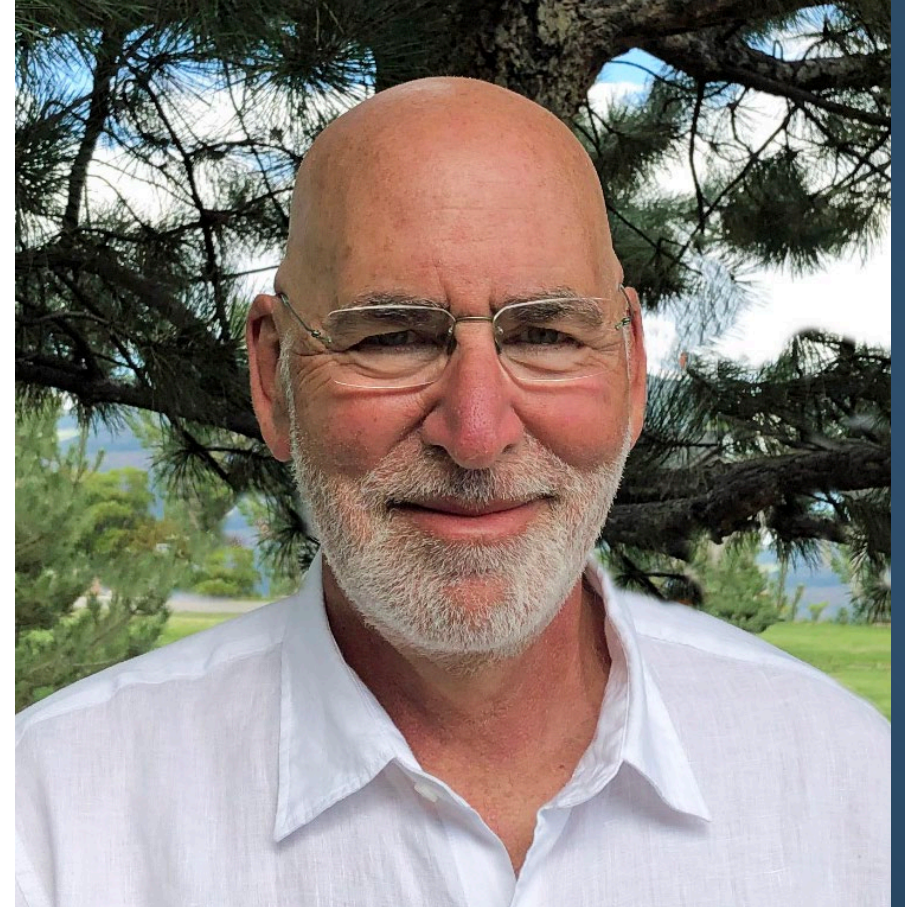
- Audience will be muted
- A question & answer session will follow the presentation
- Submit questions by clicking the Q&A icon at the bottom of your screen
- A recording of this webinar, including the slides, will be available in the near future

Today's Presenter

Larry Gross

President & Founder

Gross Transportation
Consulting



Hello!

Larry Gross:

President
Gross Transportation Consulting

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lgross@intermodalindepth.com

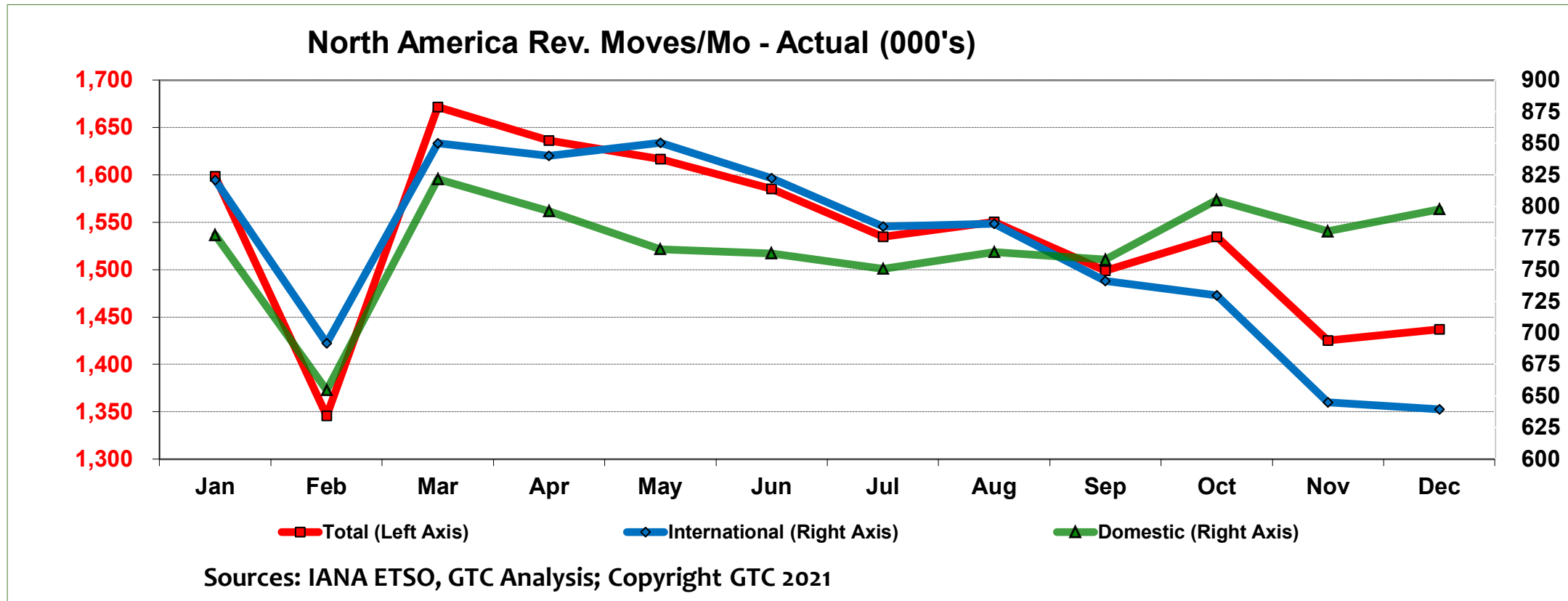
@Intermodalist

INTERMODAL ANALYZED

For: IANA

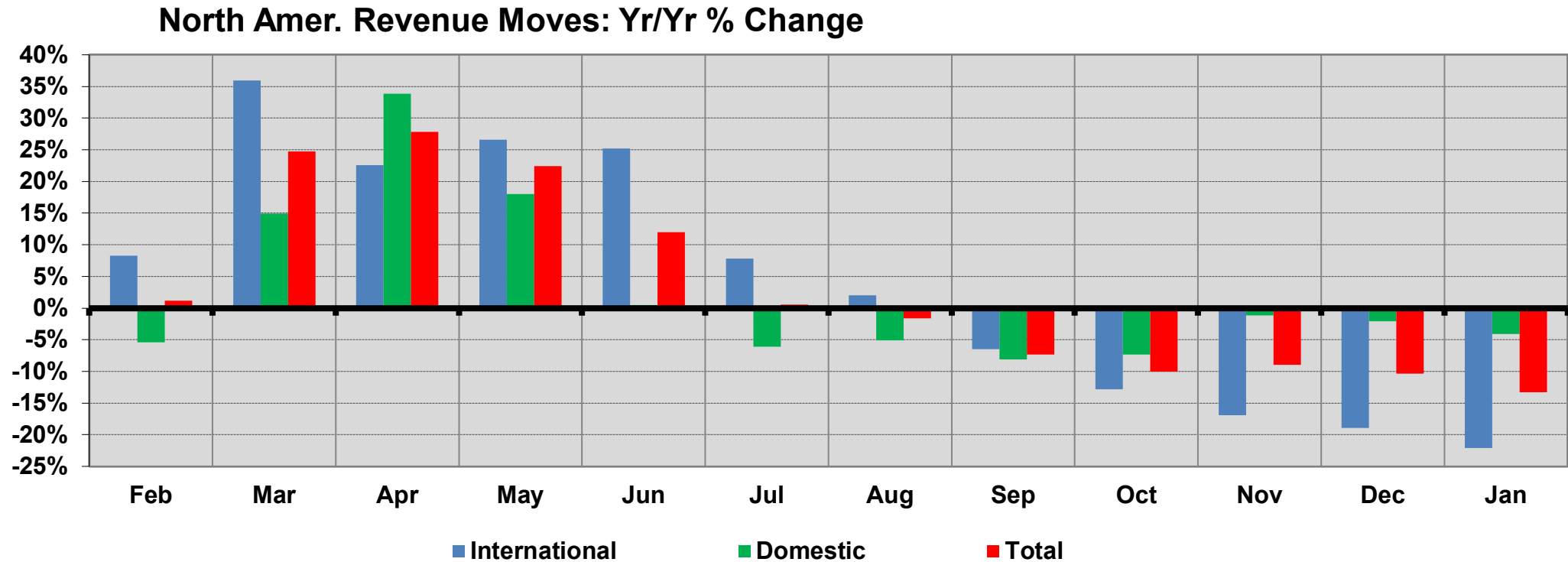
February 22, 2022

2021 WAS A UNIQUE YEAR



Sources: IANA ETSO, GTC Analysis

2021 WAS A UNIQUE YEAR

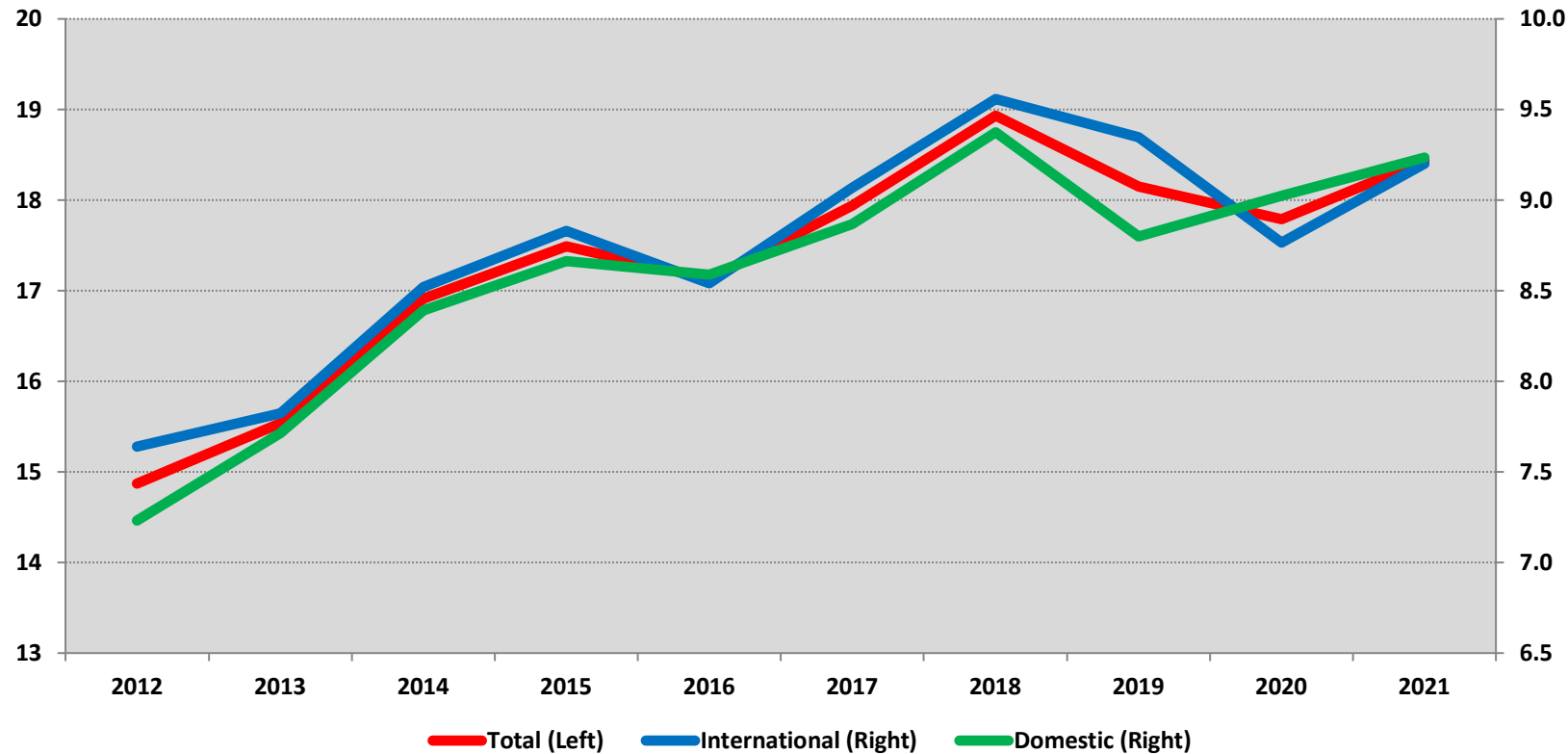


Sources: IANA ETSO, GTC Analysis; Copyright GTC 2022

Sources: IANA ETSO, GTC Analysis

2021 VERSUS PRIOR YEARS

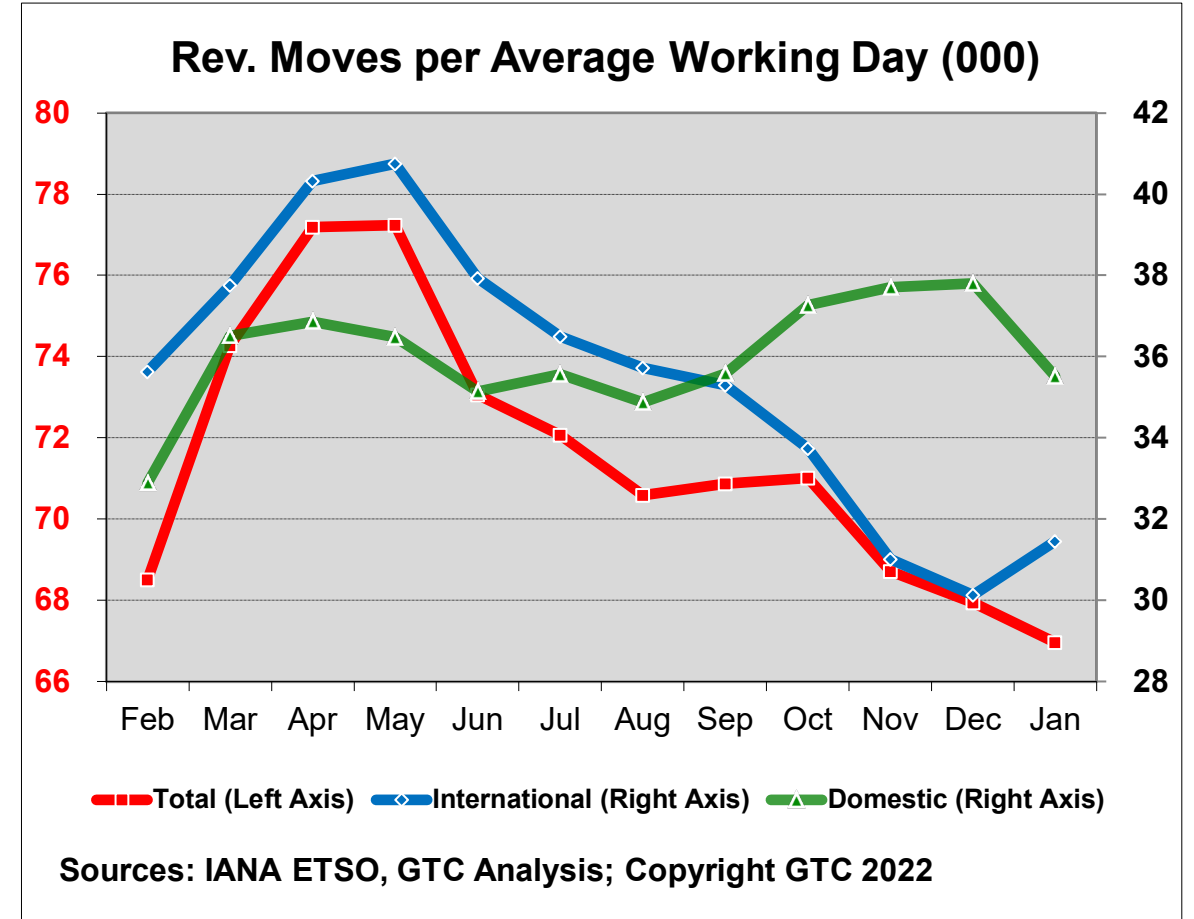
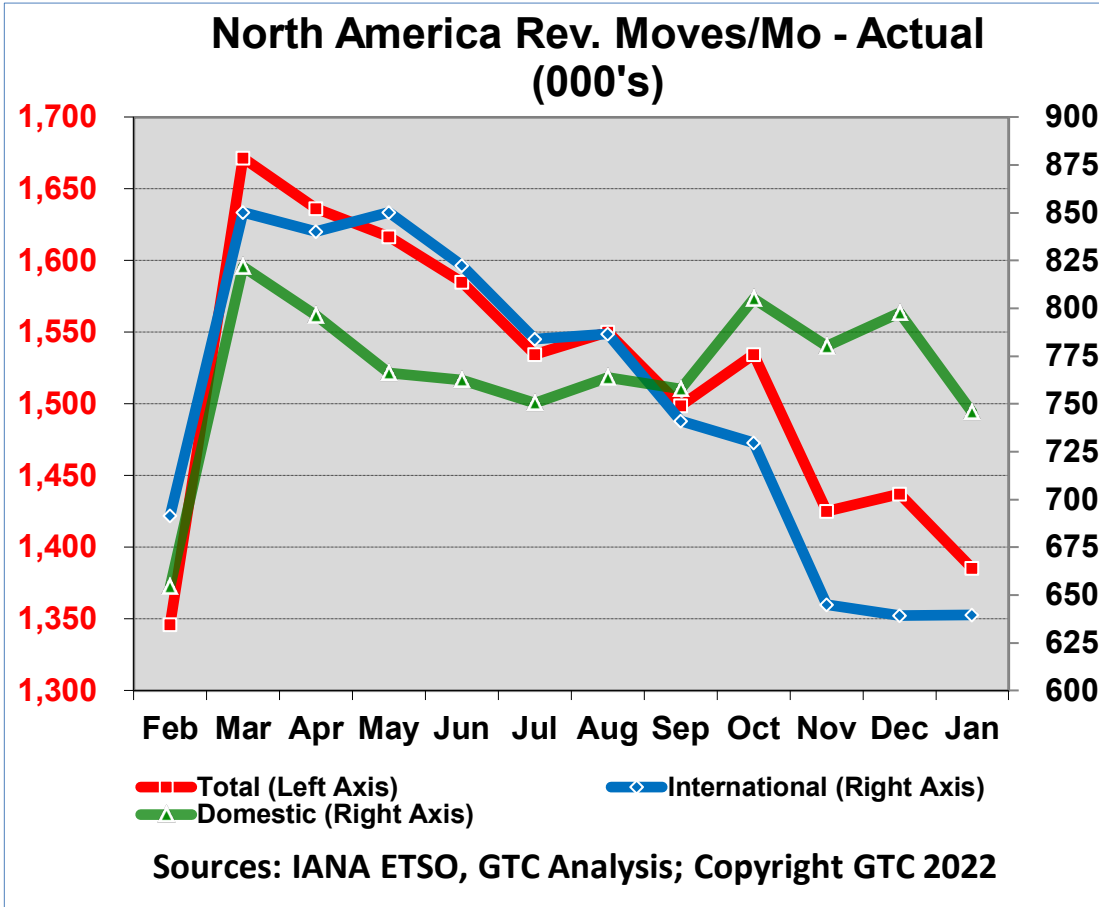
IANA ETSO Annual Volume (Mill)



2021 vs. 2018	
Sector	% Change
International	-3.7%
Domestic	-1.5%
Dom Con	+1.2%
TOTAL	-2.6%

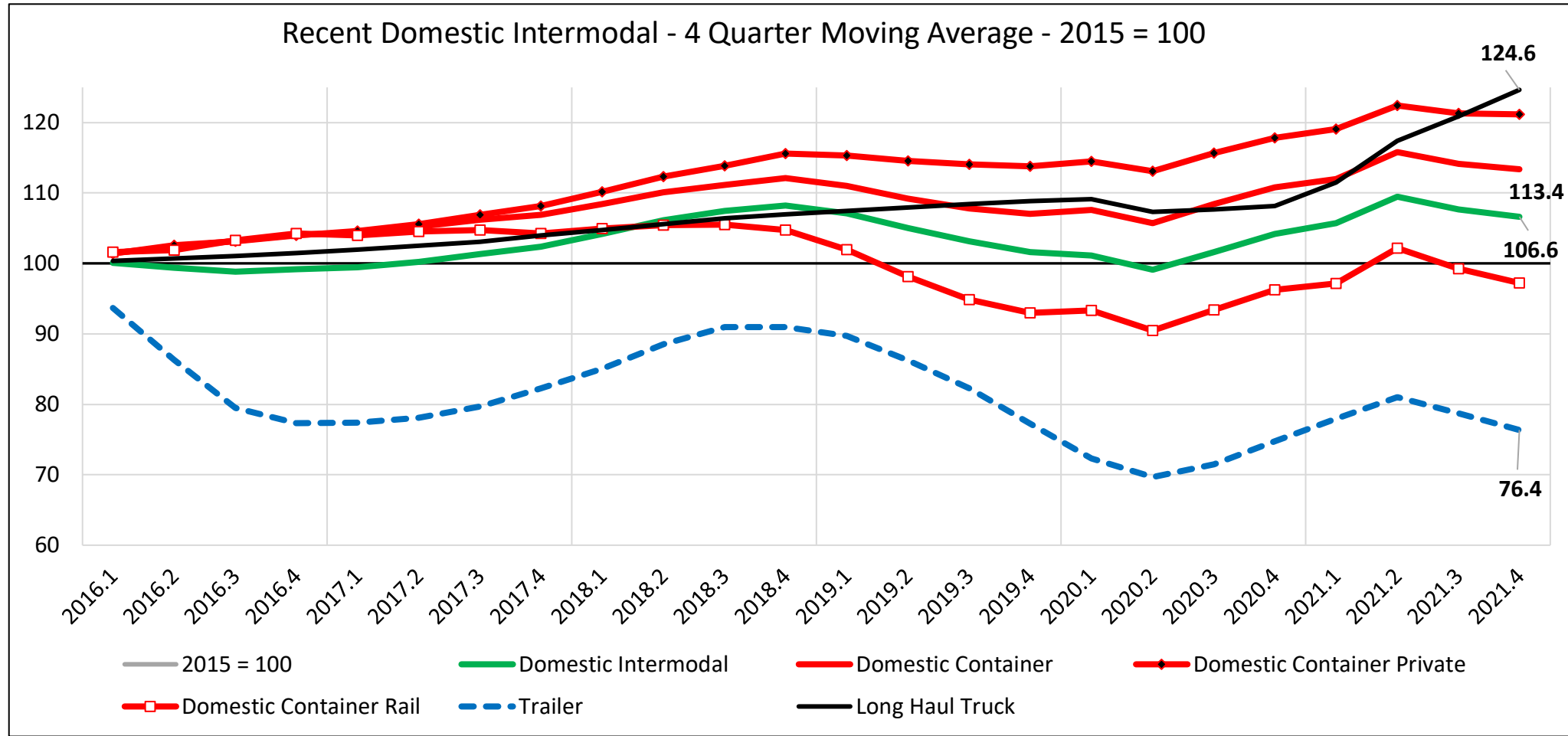
Sources: IANA ETSO, GTC Analysis

JANUARY NUMBERS

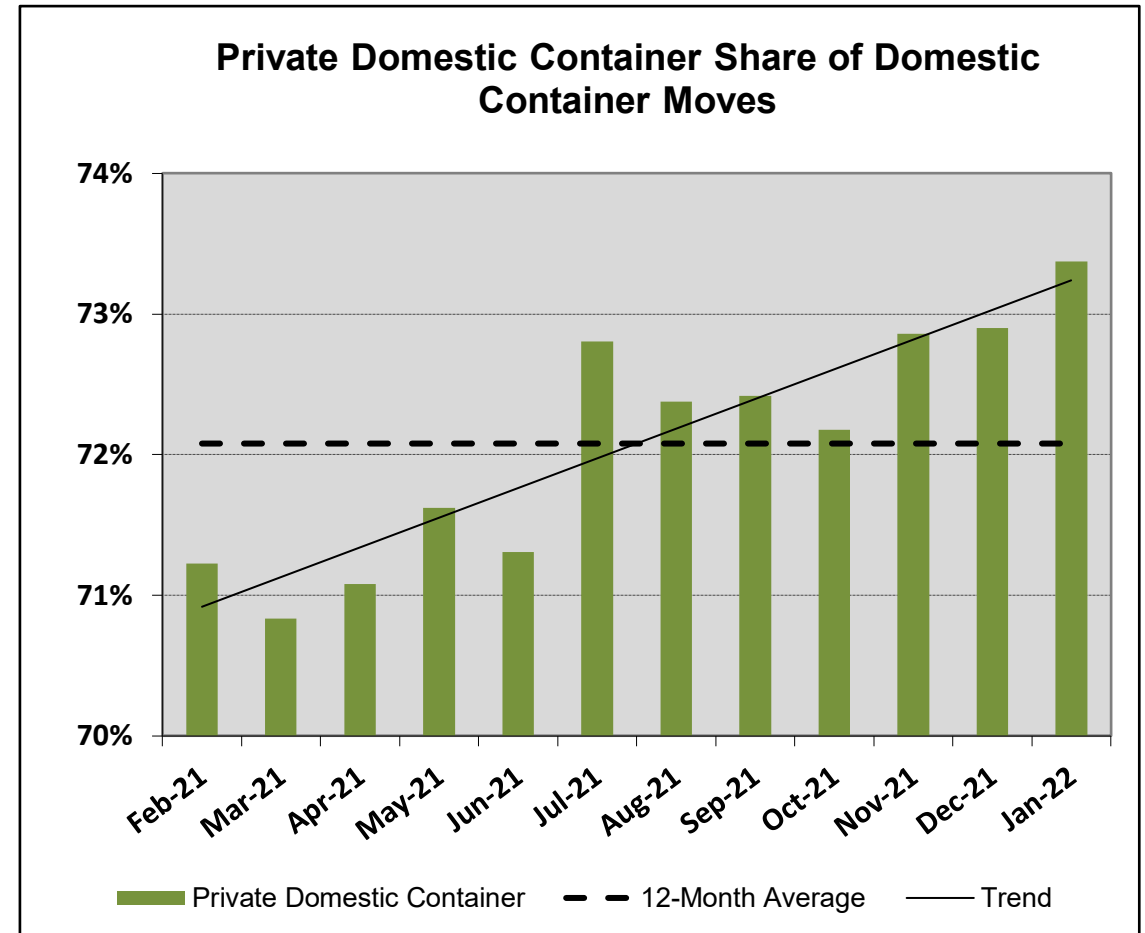
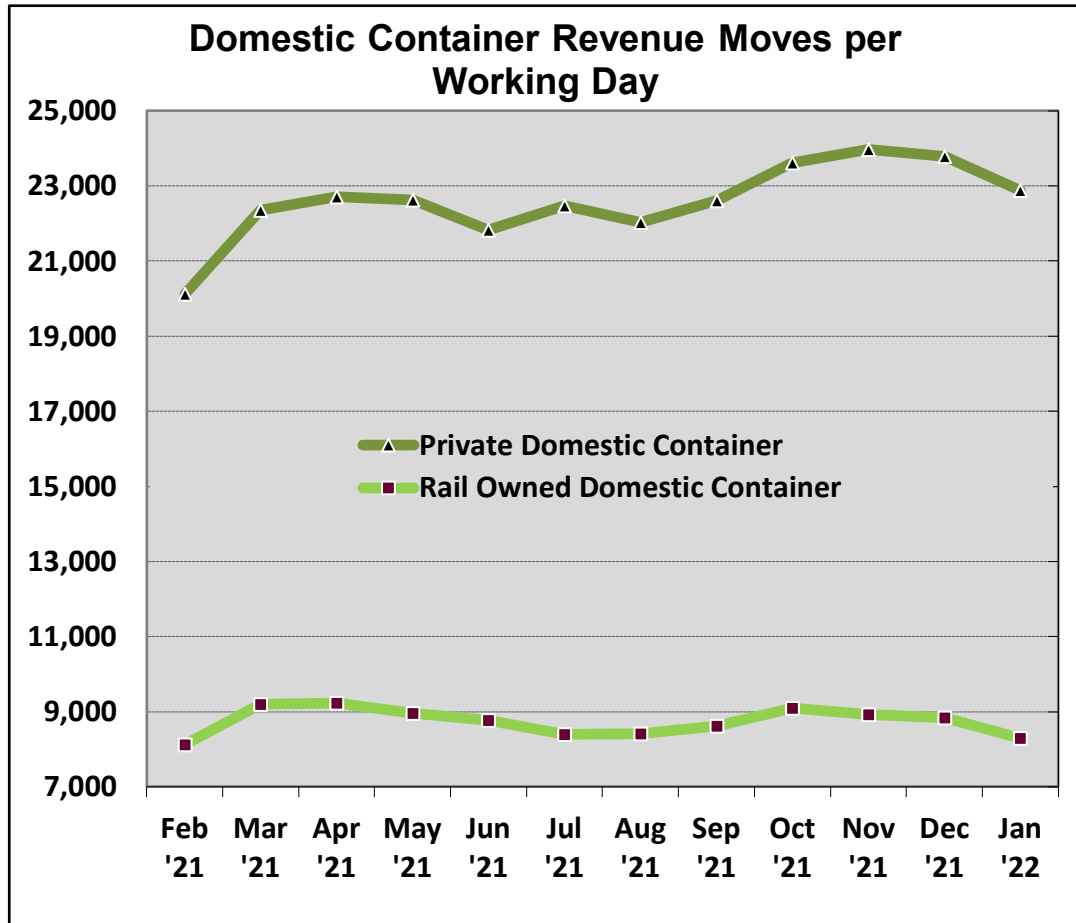


Sources: IANA ETSO, GTC Analysis

RECENT DOMESTIC VOLUME TRENDS

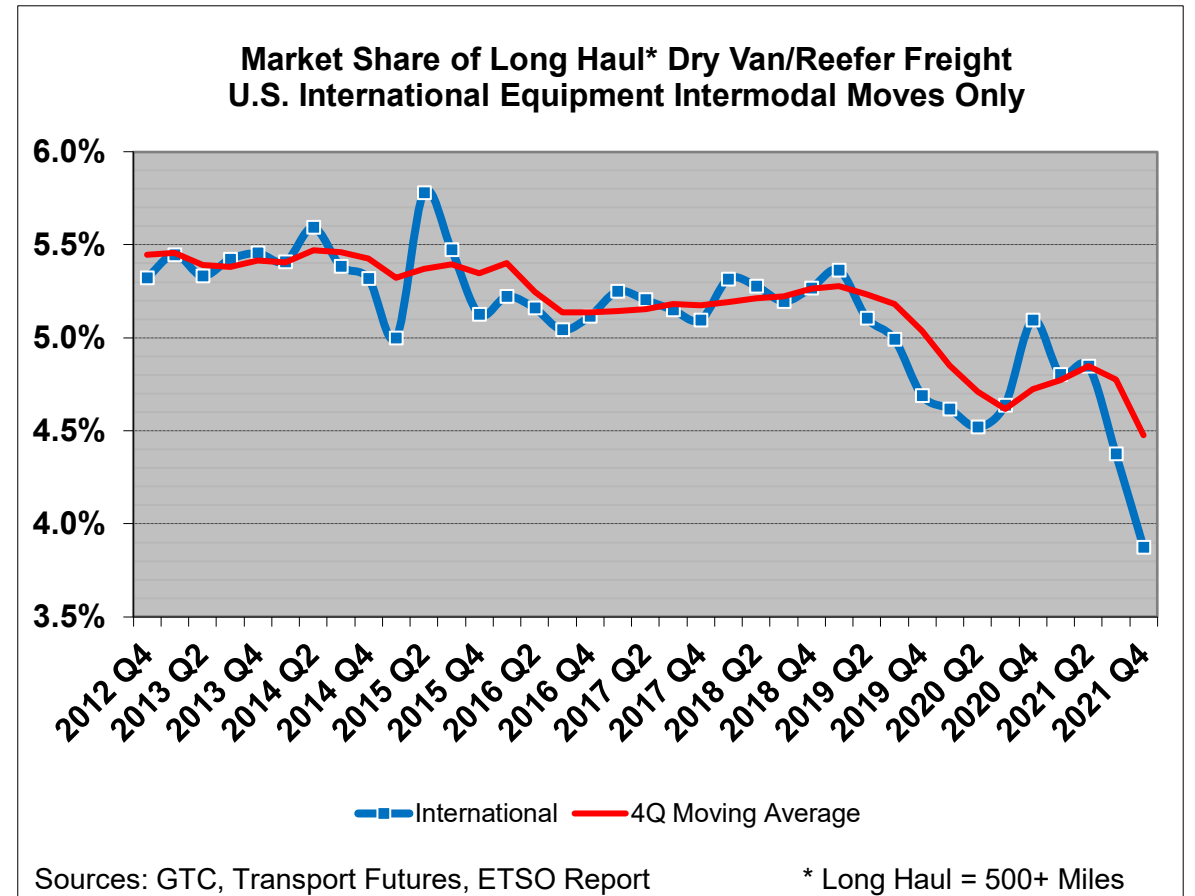
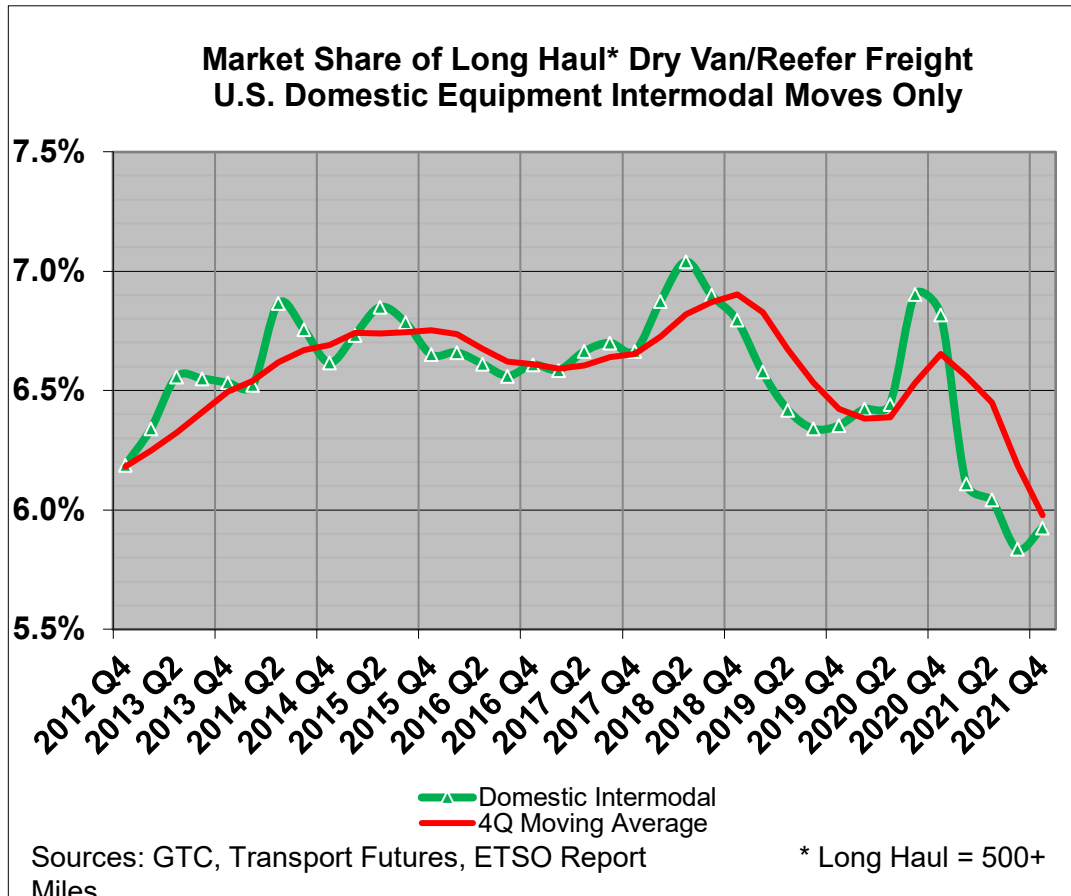


DOMESTIC CONTAINER MOVES FELL IN JANUARY... PERHAPS A RETURN TO "NORMALCY"?



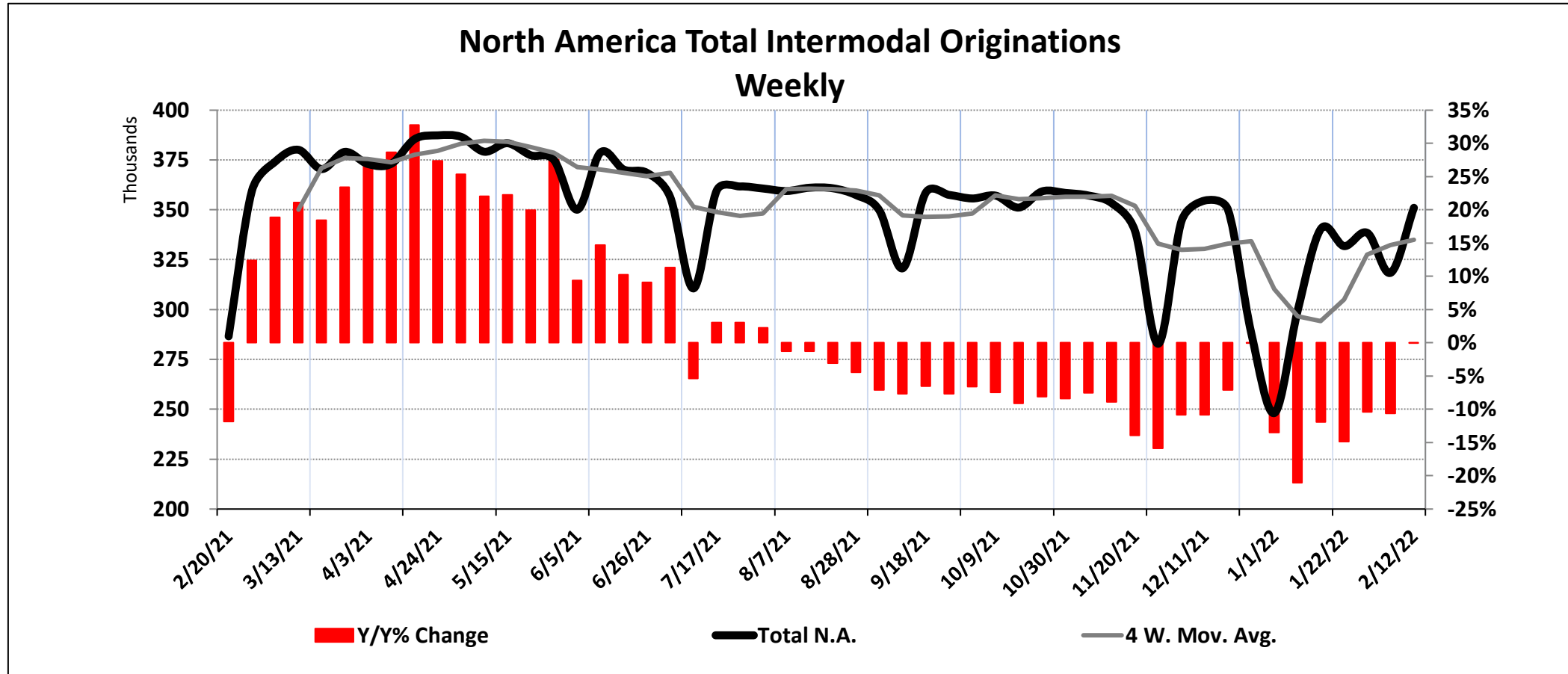
Source: IANA ETSO, GTC Analysis

INTERMODAL MARKET SHARE TRENDS



Sources: IANA ETSO, GTC Analysis

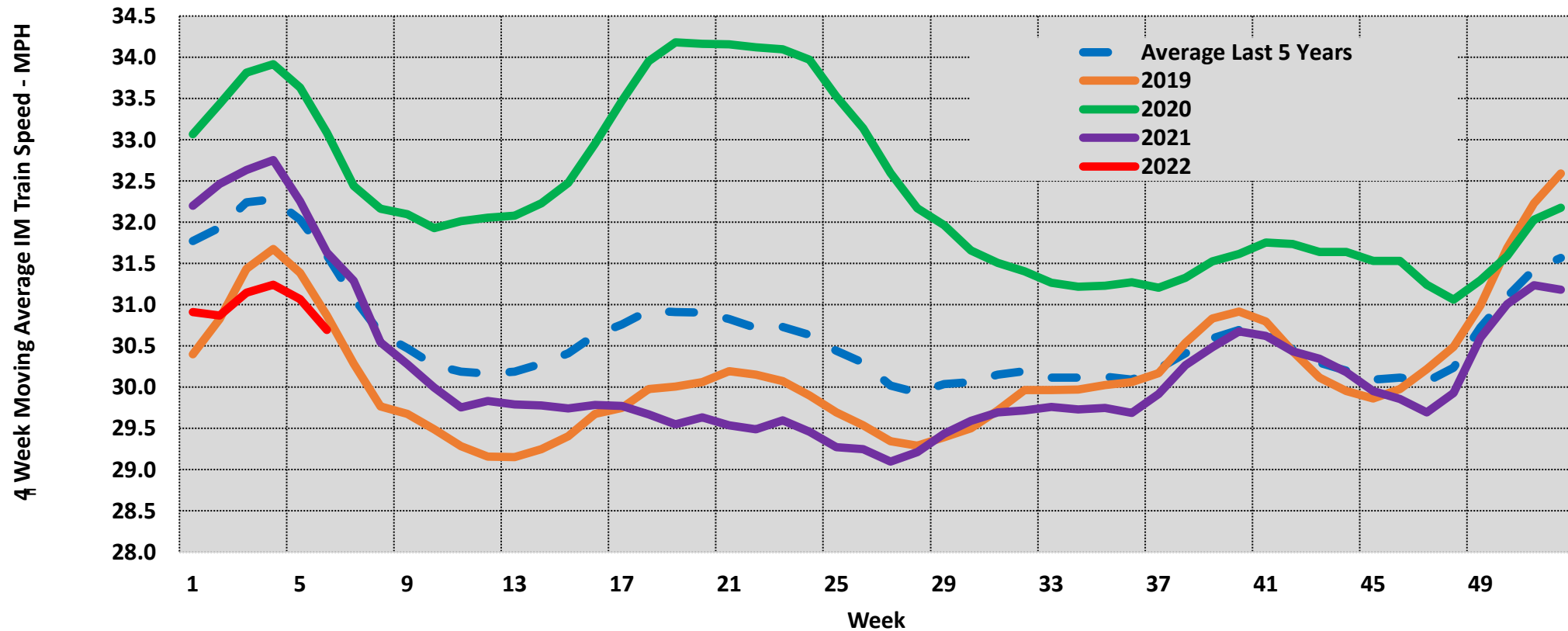
LATEST AAR DATA SHOWS A NICE UPTICK...BUT ONE WEEK DOESN'T MAKE A TREND



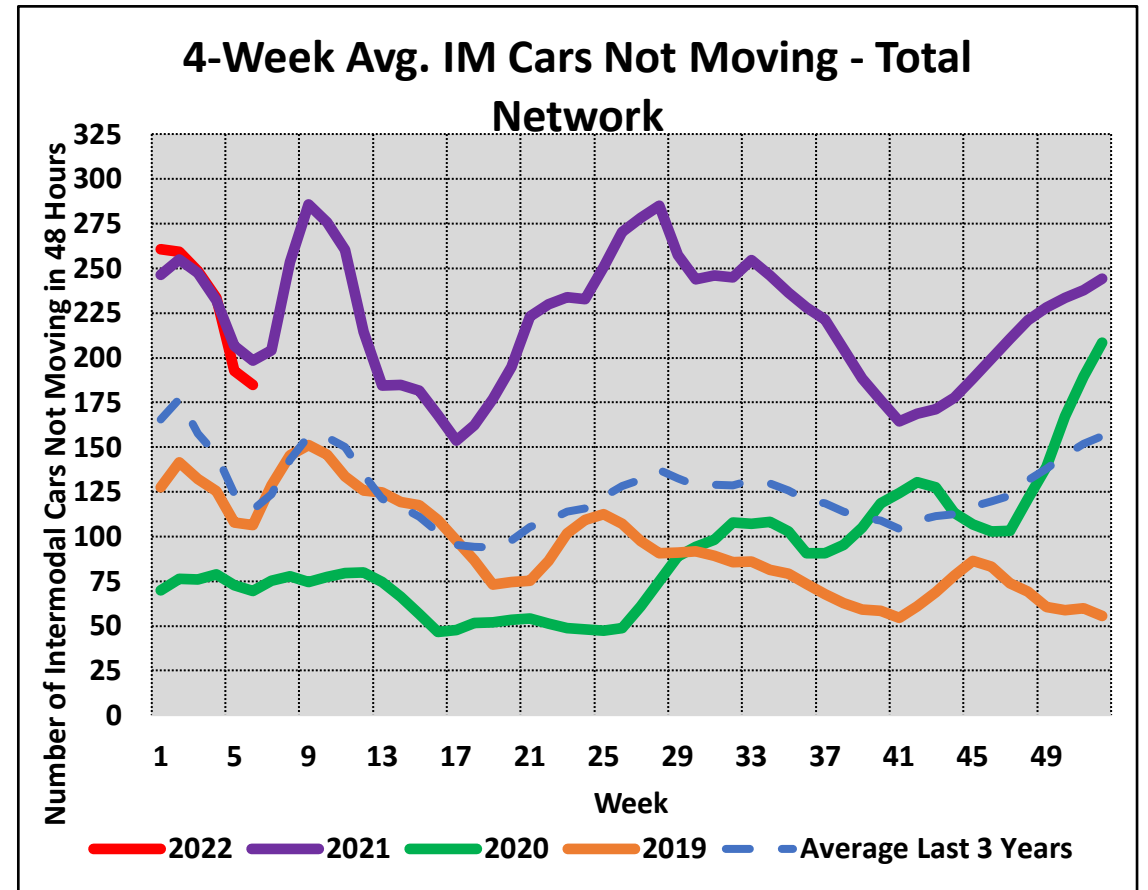
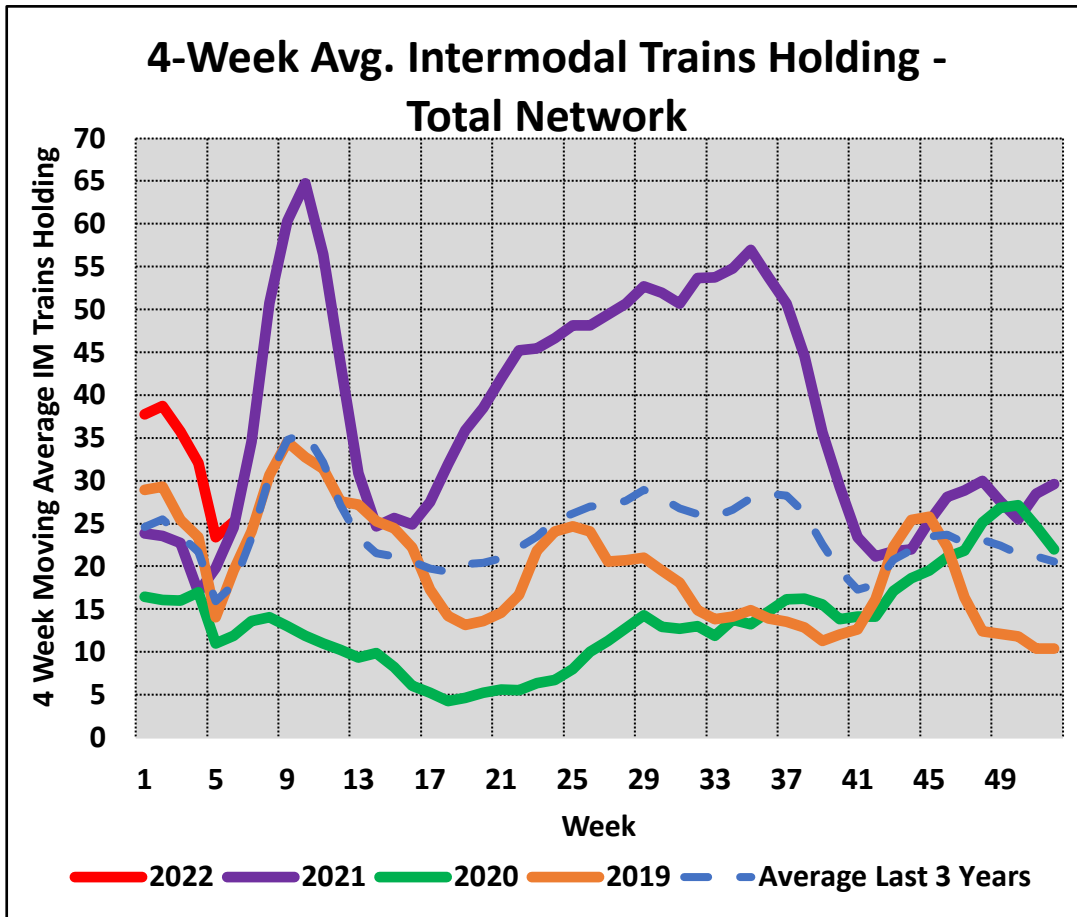
Sources: AAR, GTC Analysis, Copyright GTC 2022

BASED ON STB SERVICE STATS, PERFORMANCE IS UNDERWHELMING DESPITE LOWER RAIL VOLUME

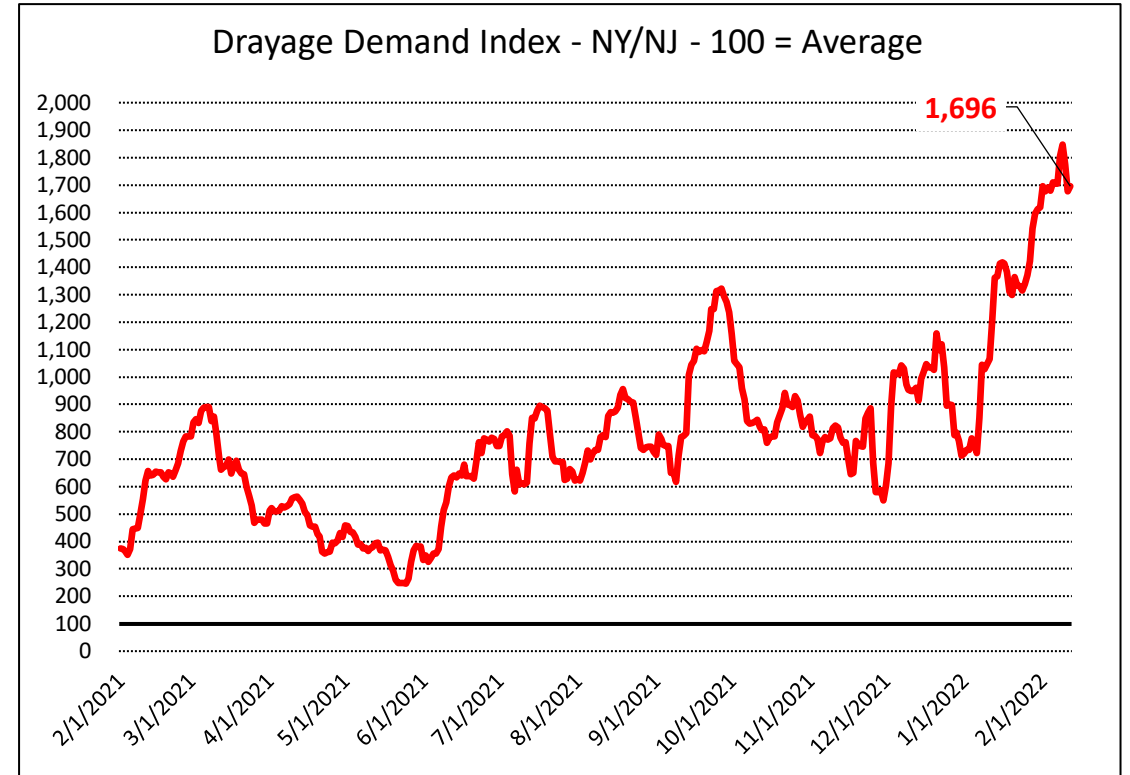
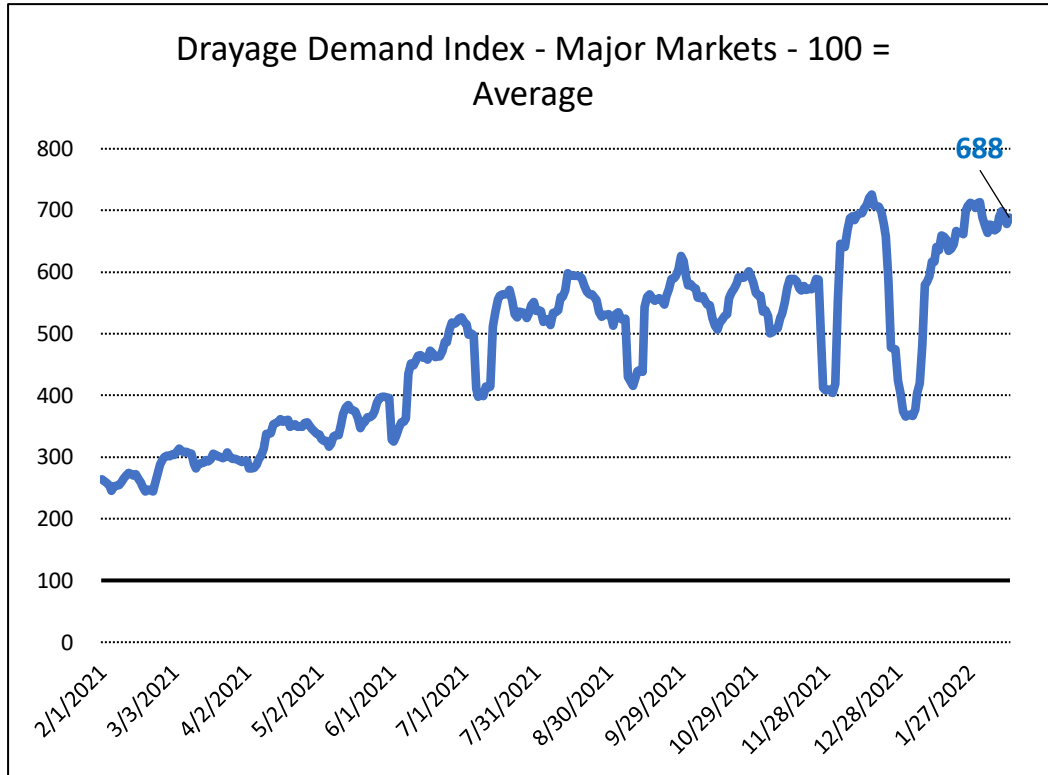
4-Week Avg. Intermodal Train Speeds - Total Network



BASED ON STB SERVICE STATS, PERFORMANCE IS UNDERWHELMING DESPITE LOWER RAIL VOLUME

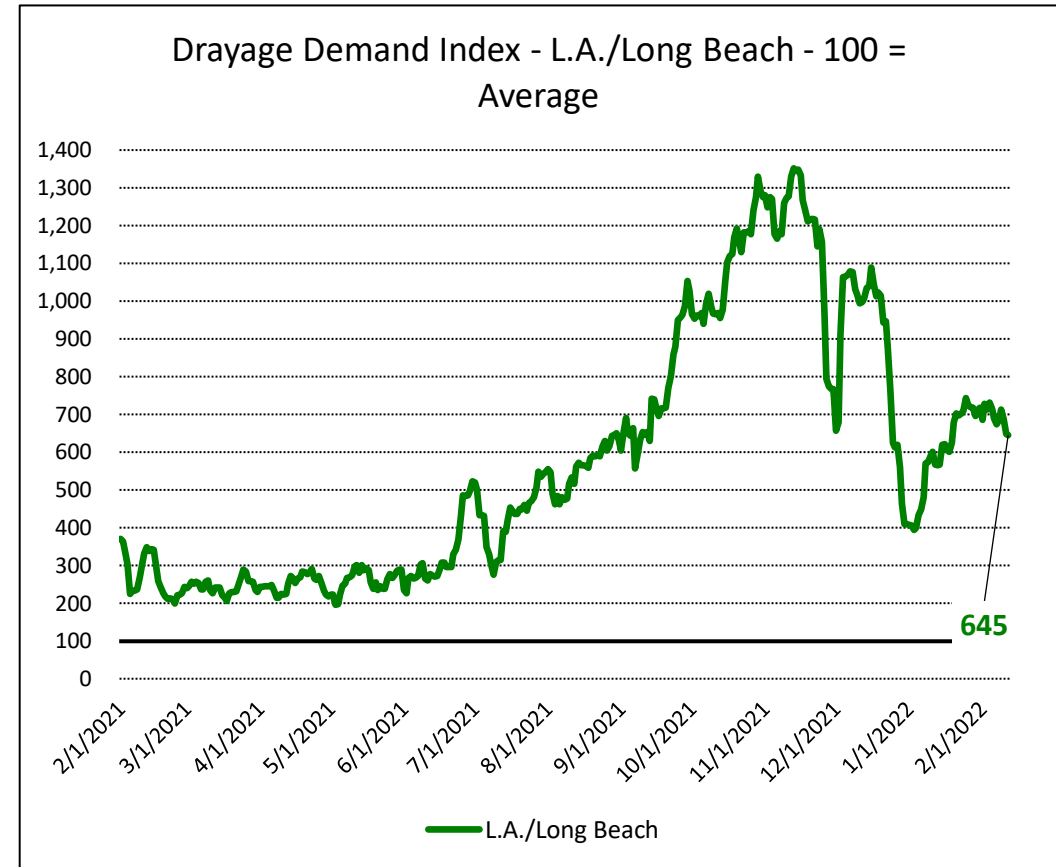
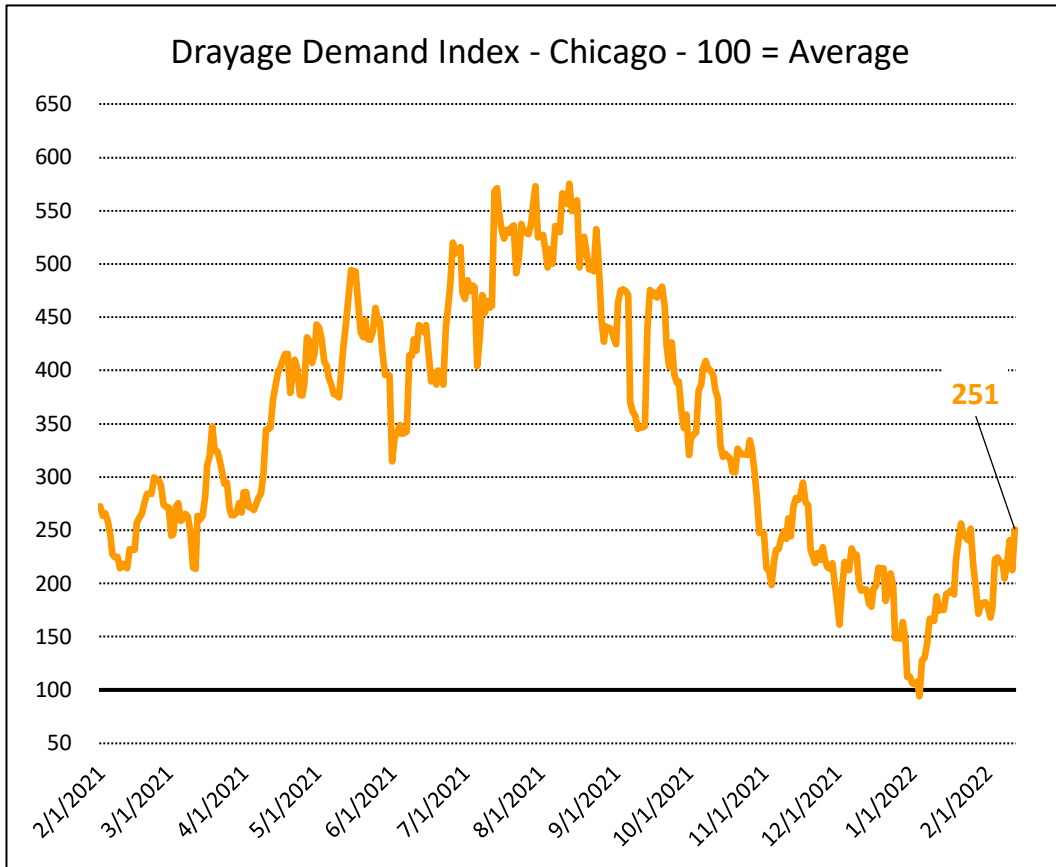


DRAYAGE IS STILL IN NOSEBLEED TERRITORY



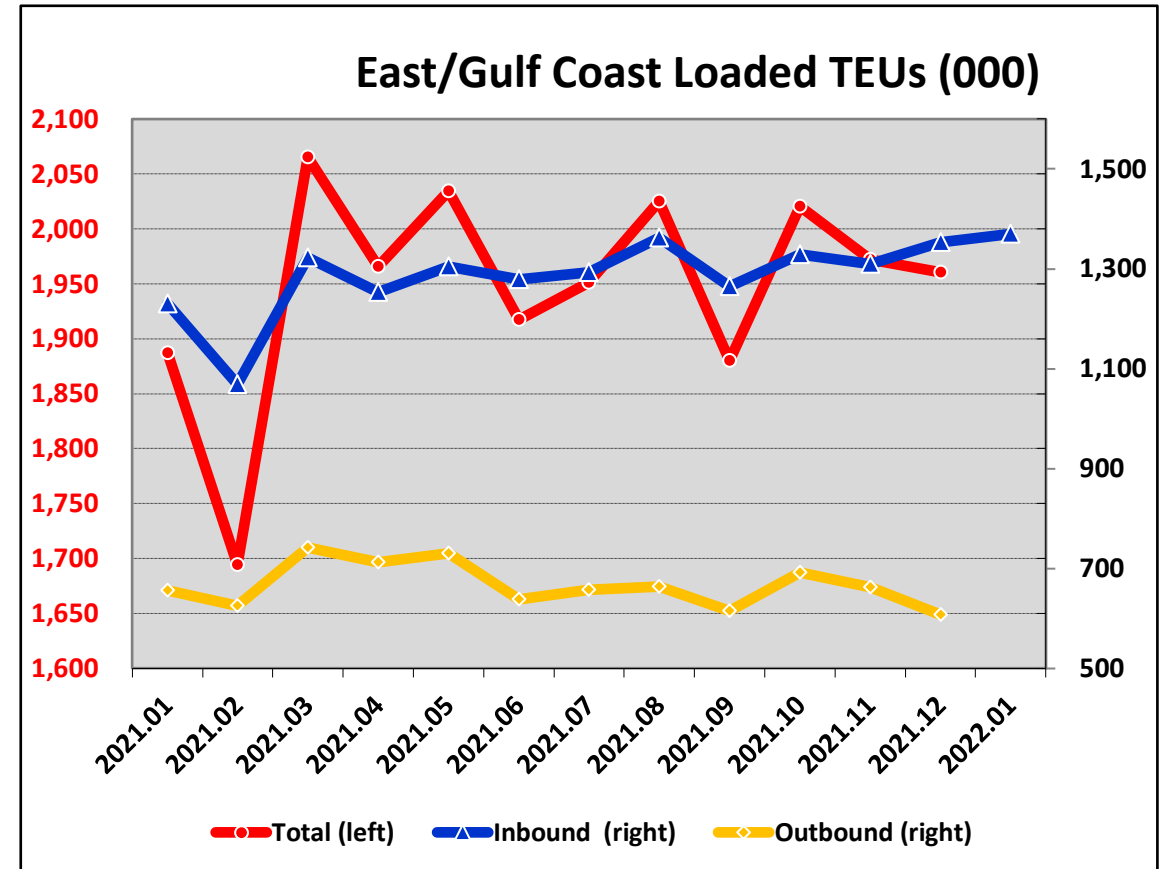
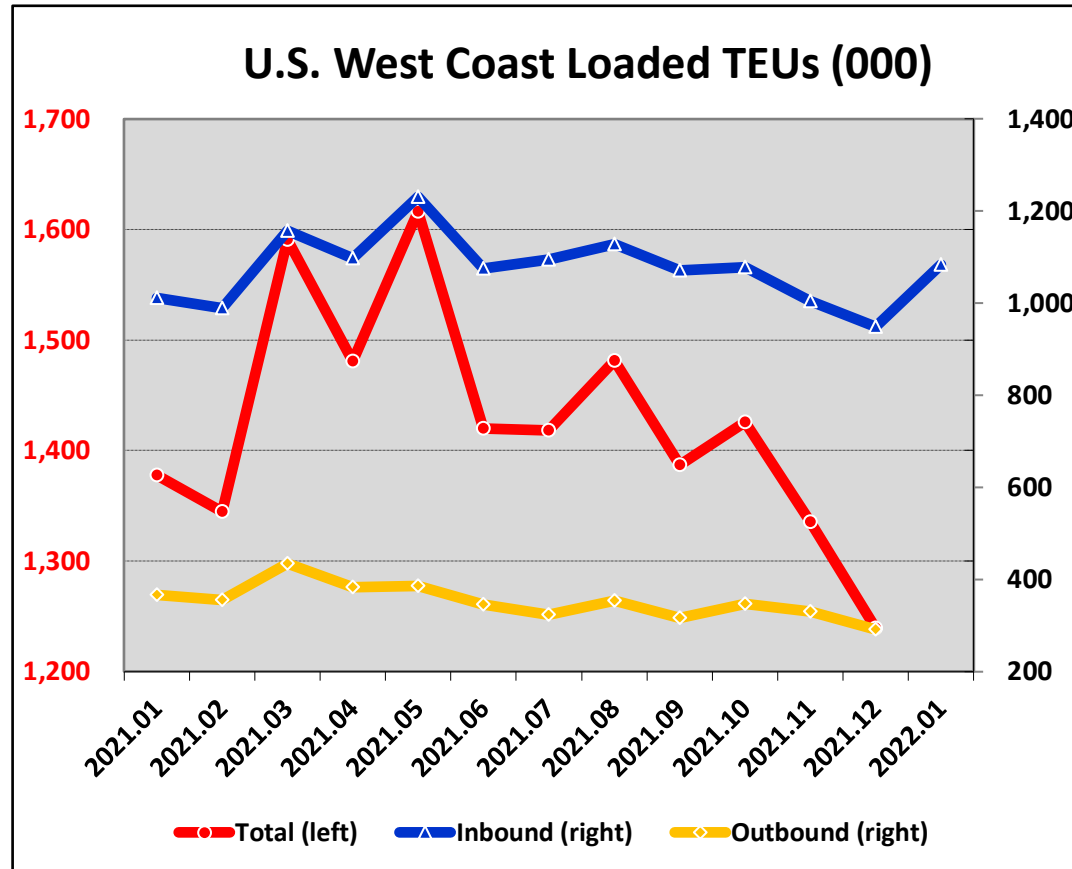
Source: Drayage.com, GTC Analysis

COASTAL REGIONS STILL FARING WORSE THAN INLAND



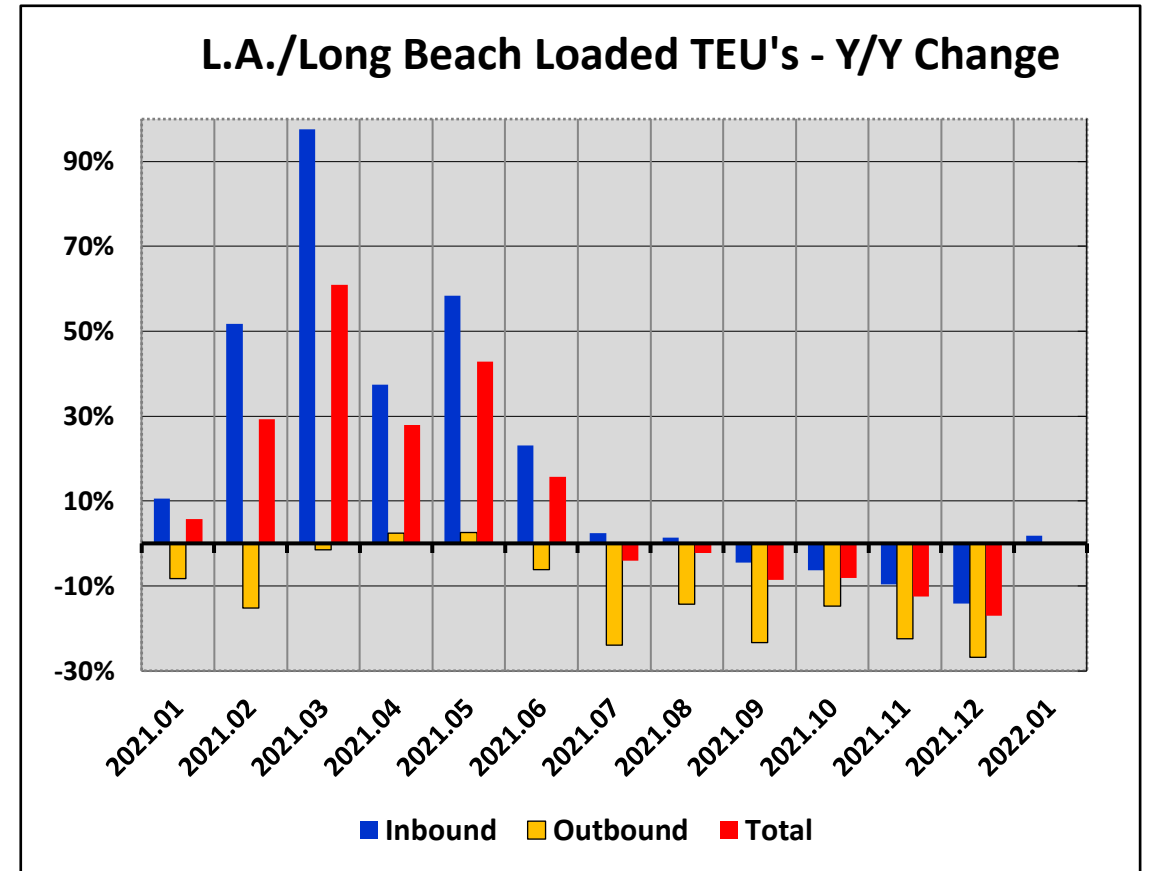
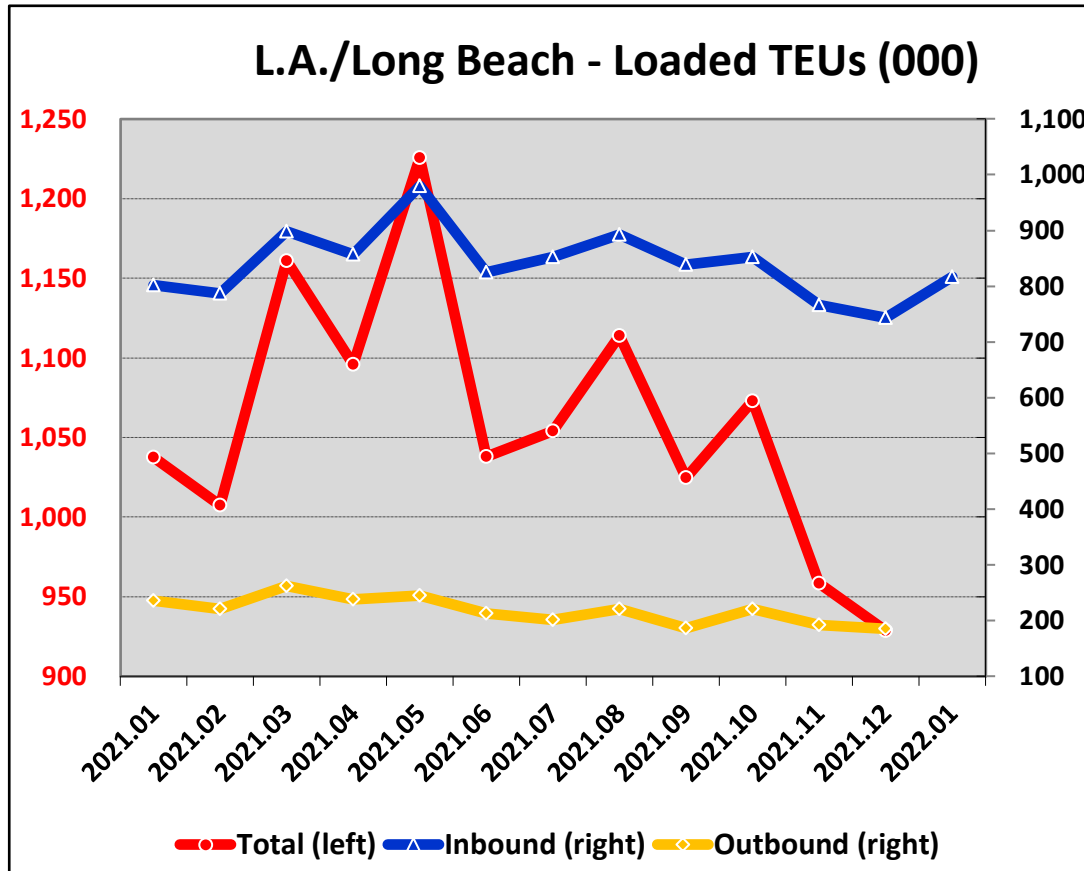
Source: Drayage.com, GTC Analysis

BASED ON PRELIMINARY DATA, U.S. WEST COAST PORTS REGAINED THEIR FOOTING IN JANUARY



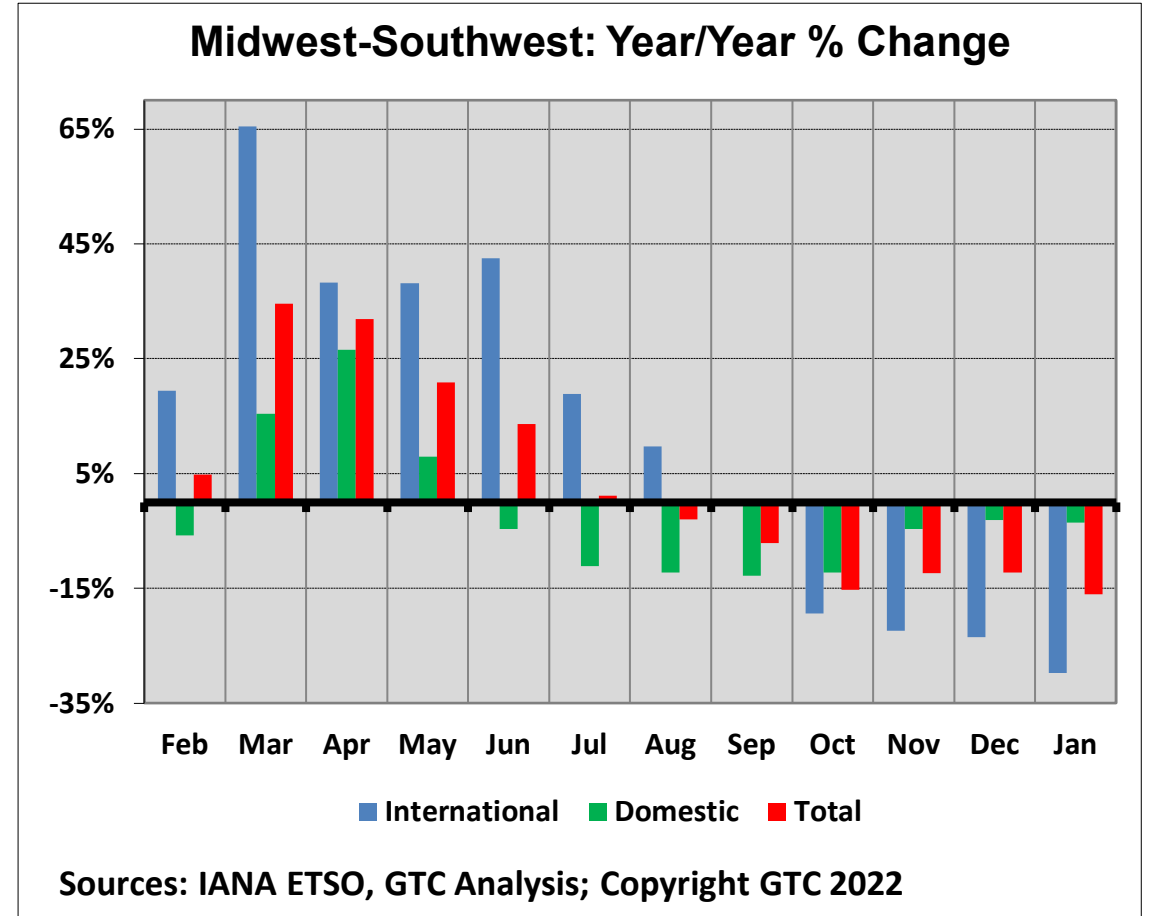
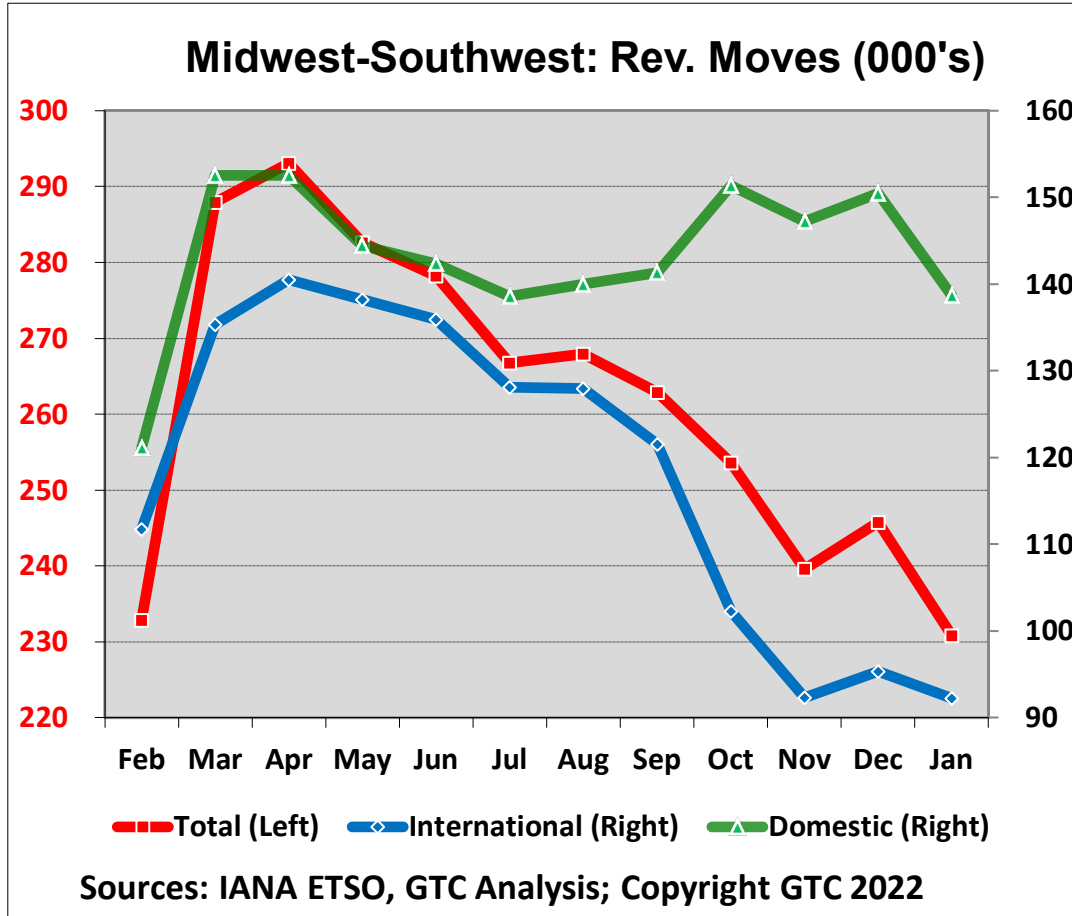
Sources: Port Reports, IHS PIERS Data, GTC Analysis

L.A./LONG BEACH SHOWED SOME IMPROVEMENT IN JANUARY – 1ST Y/Y GAIN IN FIVE MONTHS



Sources: Port Reports, IHS PIERS Data, GTC Analysis

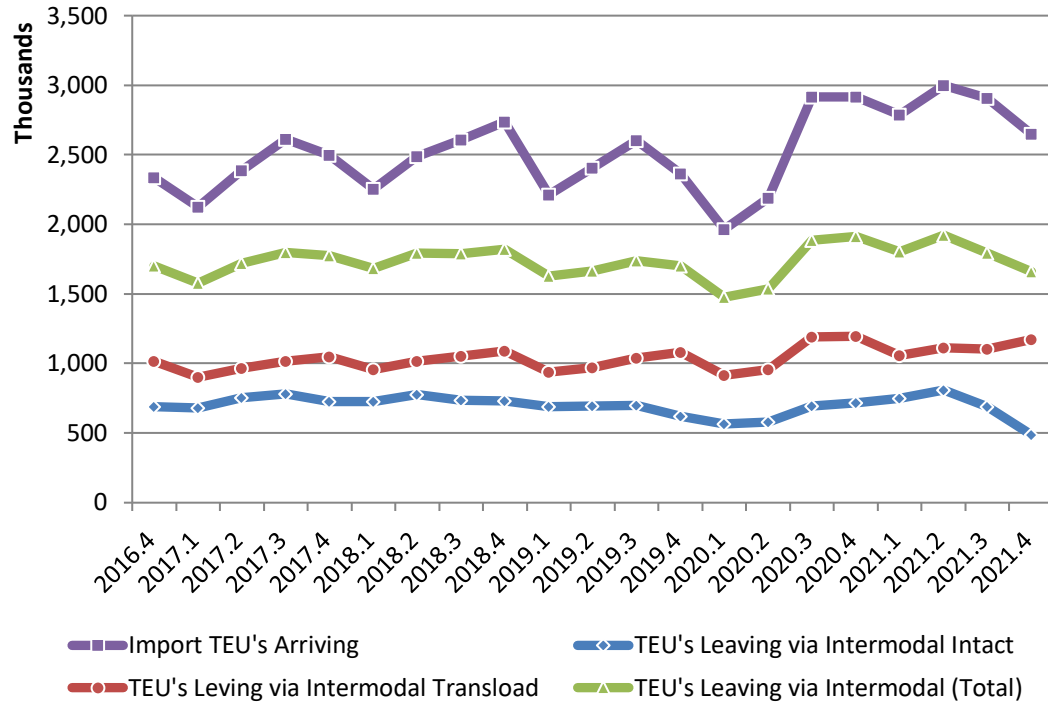
DESPITE IMPROVEMENT IN IMPORT TEUS PROCESSED BY L.A./L.B. IPI DID NOT RESPOND



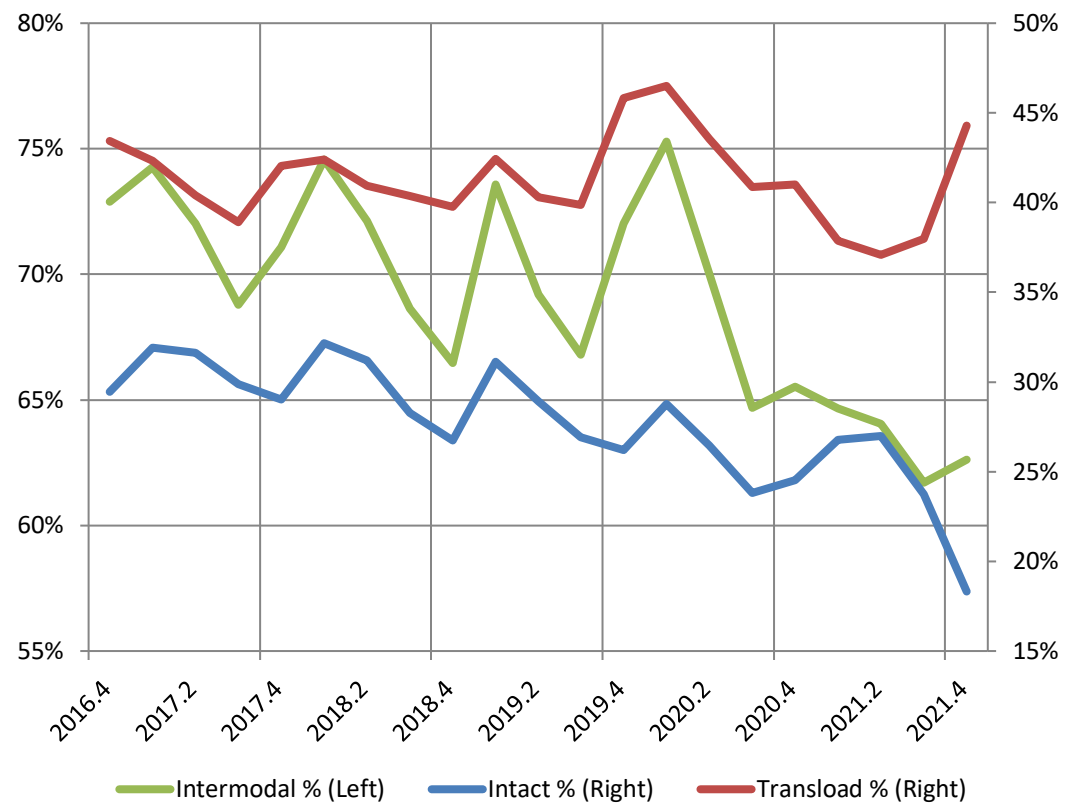
Sources: Port Reports, IHS PIERS Data, GTC Analysis

INTERMODAL SHARE OF SOCAL IMPORTS HAS DROPPED, MAINLY DUE TO A DECLINE IN IPI

California Imports and Intermodal Participation
TEU's per Calendar Quarter



% of Cal. Import TEU's Emerging via Intermodal



Sources: Port Reports, IHS PIERS Data, GTC Analysis



WHAT IN THE WORLD IS GOING ON WITH IPI?

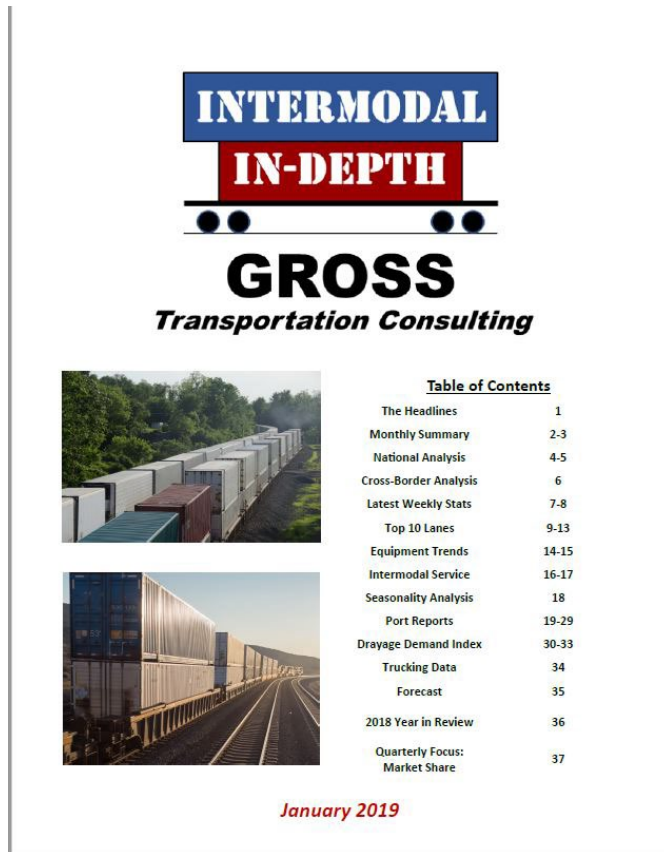
- Ocean carrier reluctance to let containers stray inland, using pricing to discourage IPI
- Intermodal transload capacity ceiling limiting its ability to fill the gap
- Need for capacity/speed forcing shift to truck
- West to east coast shift decreasing intermodal participation

Continued weakness in January points to first bullet as the main current driver

OUTLOOK

- 2022 will start to look more normal from a seasonal perspective
- Intermodal share losses are overdone, Domestic recovery to 2019 level likely.
- IPI will partially recover as OC container shortage eases but it won't come all the way back.
- West Coast will lose import share as mobile IPI-type cargo moves to other gateways.
- Transloading will stay strong, spread to other locales

INTERMODAL IN DEPTH



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Table of Contents

The Headlines	1
Monthly Summary	2-3
National Analysis	4-5
Cross-Border Analysis	6
Latest Weekly Stats	7-8
Top 10 Lanes	9-13
Equipment Trends	14-15
Intermodal Service	16-17
Seasonality Analysis	18
Port Reports	19-29
Drayage Demand Index	30-33
Trucking Data	34
Forecast	35
2018 Year in Review	36
Quarterly Focus: Market Share	37

January 2019

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Thanks! Questions?

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For: IANA

February 22, 2022

Q&A

Enter your questions
using the Q&A button



For more information about **IANA** data, including the
Volume Analyzer & ETSO Database

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