



IANA

**INTERMODAL ASSOCIATION
OF NORTH AMERICA**

Intermodal Analyzed

With Larry Gross
Gross Transportation Consulting

June 30th 2020, 2:00 PM ET



Thank you to our *Gold* sponsors!



Housekeeping

- Audience will be muted
- A question & answer session will follow the presentation
- Submit questions at any time via the Questions pane in the Control Panel
- A recording of this webinar, including the slides, will be available in the near future



Our
Moderator

Hal Pollard
Director of Education
IANA





**Our
Guest**

**Larry Gross
Principle
Gross
Transportation
Consulting**

Hello!

Larry Gross:

President

Gross Transportation Consulting

516-455-8988

lgross@intermodalindepth.com

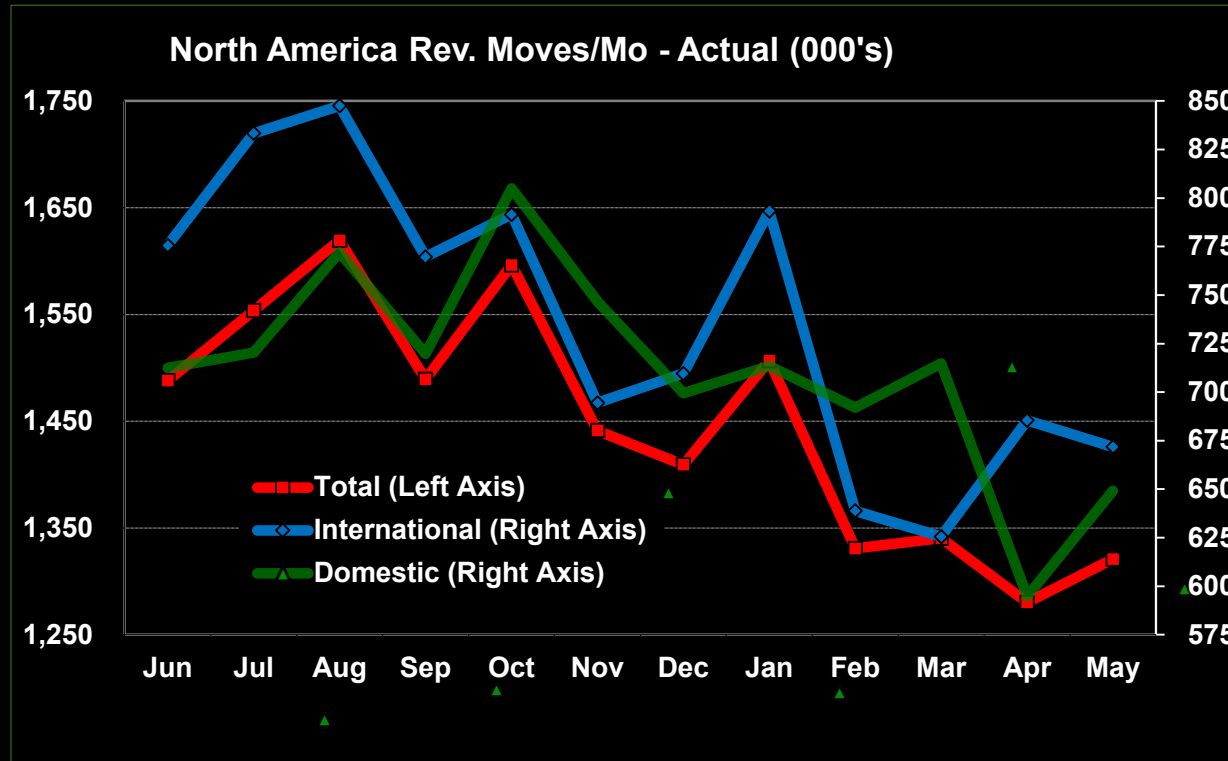
@Intermodalist

INTERMODAL ANALYZED

Intermodal Association of
North America

June 30, 2020

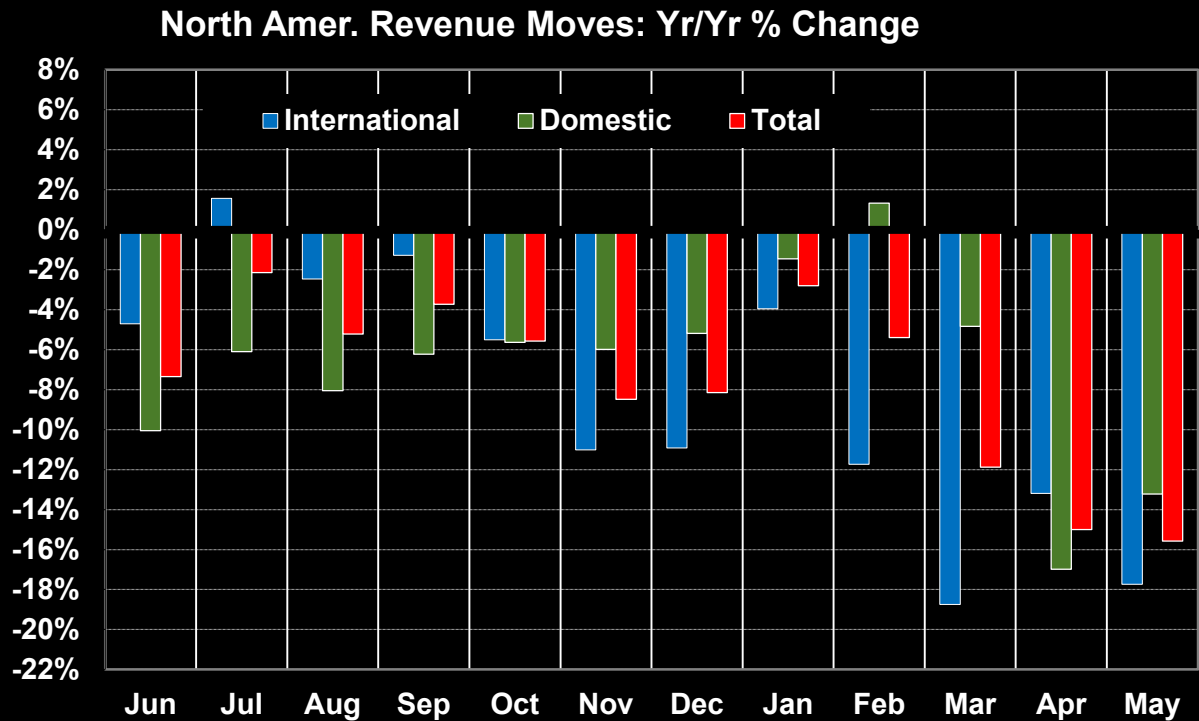
THE INTERMODAL PICTURE WAS MIXED IN MAY



Source: IANA ETSO, GTC Analysis

- Total intermodal and Domestic intermodal bottomed out in April
- International (IPI) bottomed out a month earlier

THERE ARE SUBSTANTIAL DEFICITS VERSUS PRIOR YEAR ACROSS THE BOARD

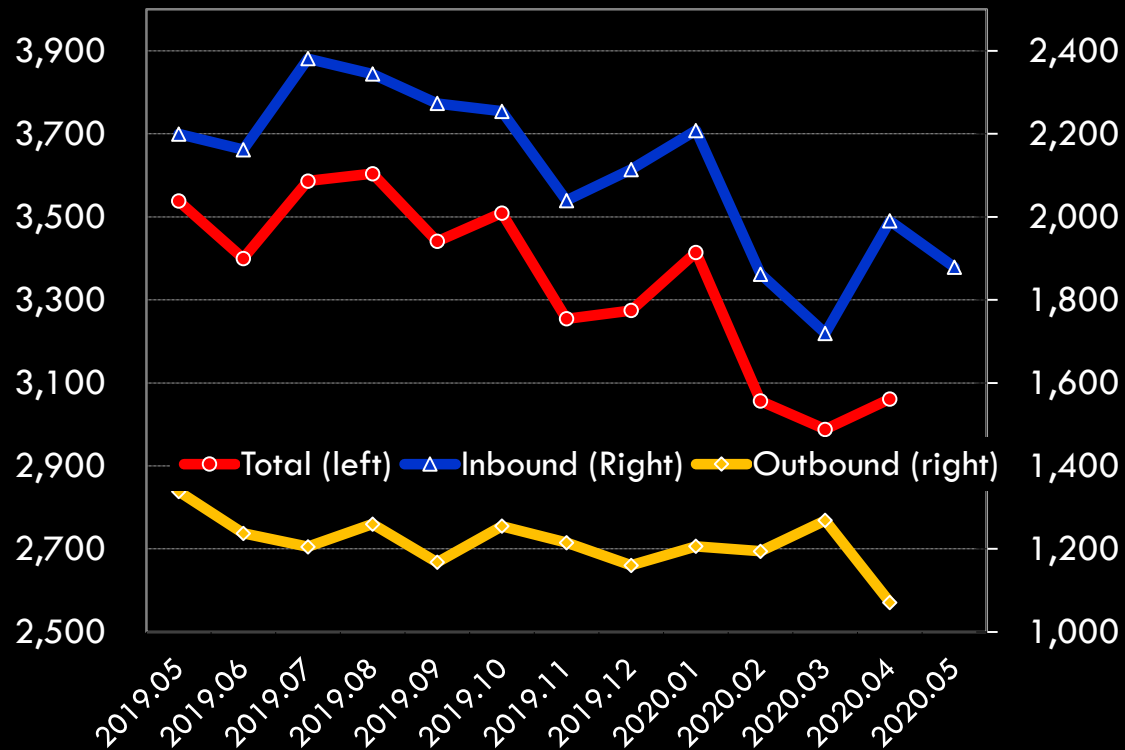


Source: IANA ETSO, GTC Analysis

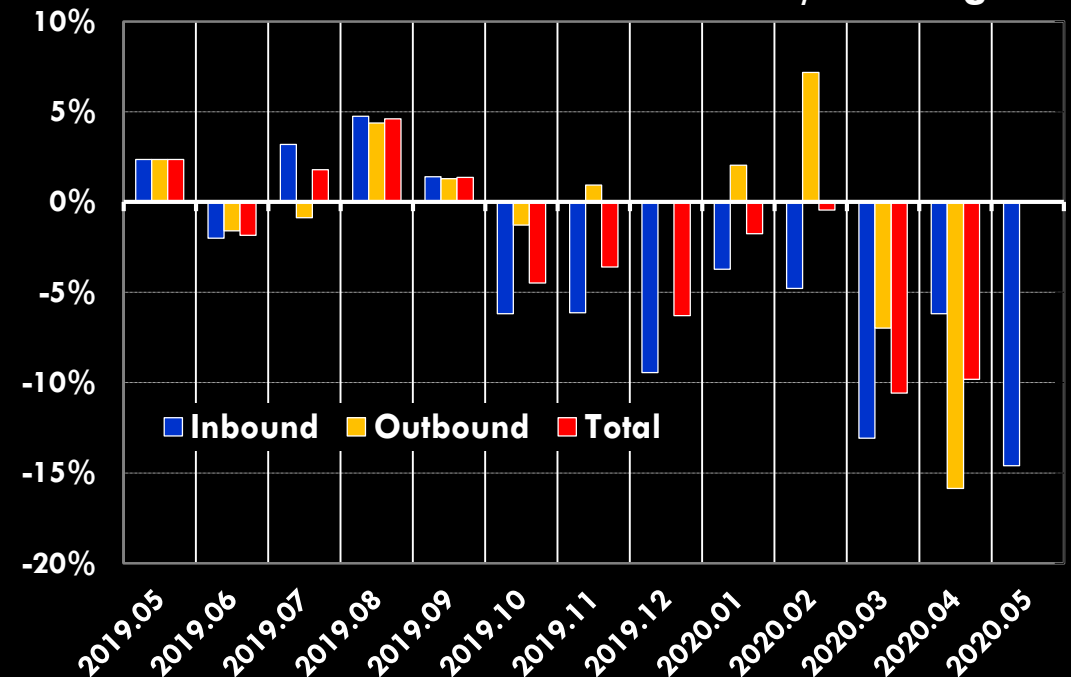
	M/M	Y/Y
International	-2.0%	-17.7%
Short Trailer	+13.1%	-12.0%
53' Trailer	+26.2%	-16.5%
Total Trailer	+22.0%	-15.2%
Private DC	+6.8%	-9.7%
Rail DC	+9.2%	-21.1%
Dom Con	+7.4%	-12.9%
Domestic	+9.1%	-13.2%
Total	+3.2%	-15.6%

IMPORTS RETREATED IN MAY EXPORTS PLUNGED IN APRIL

North America Loaded TEUs (000)

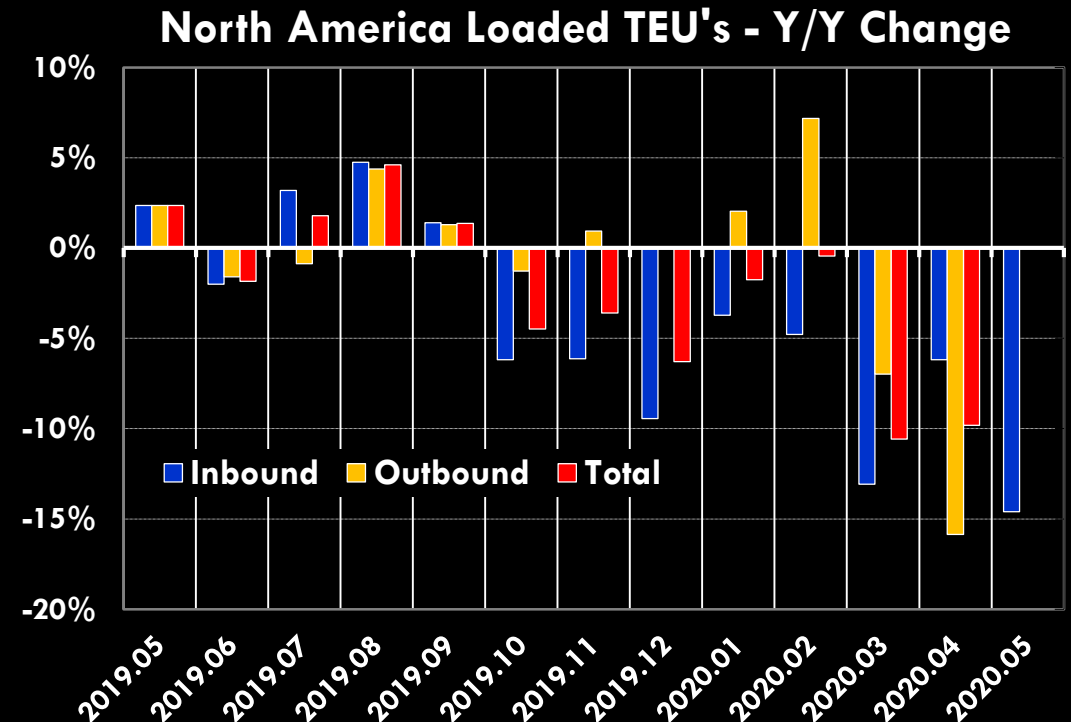
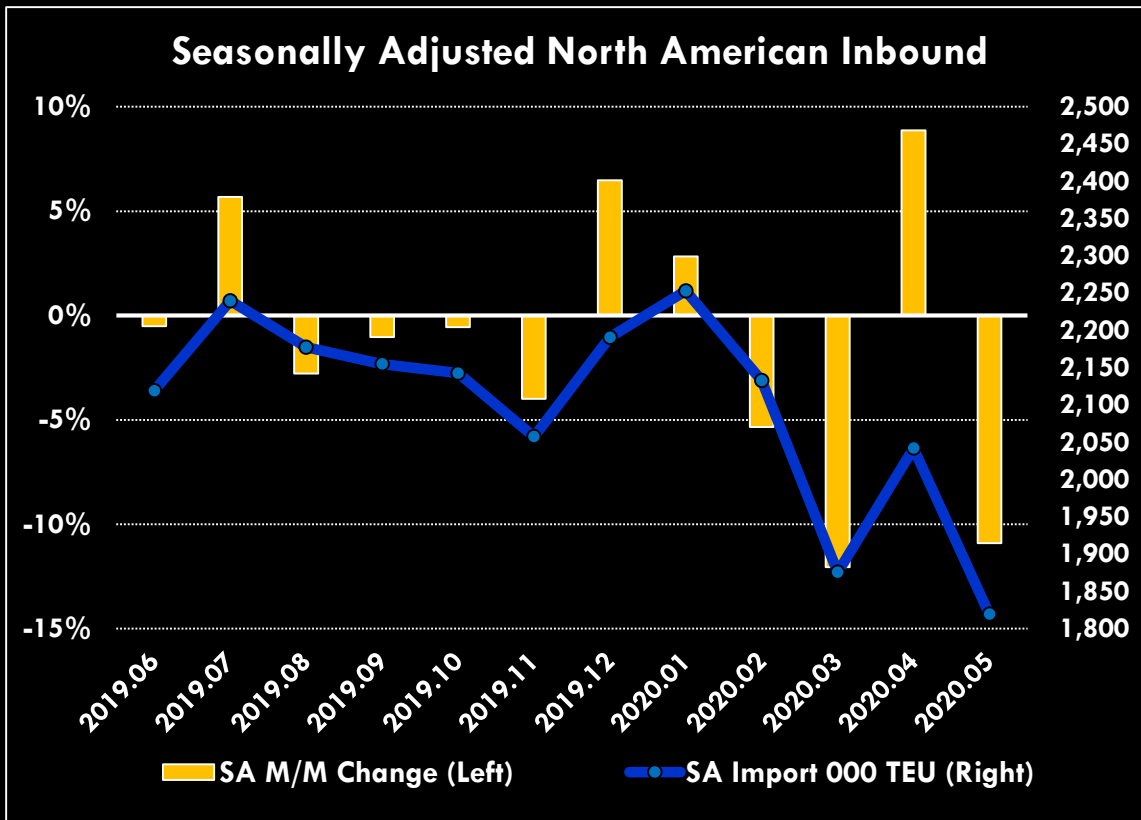


North America Loaded TEU's - Y/Y Change



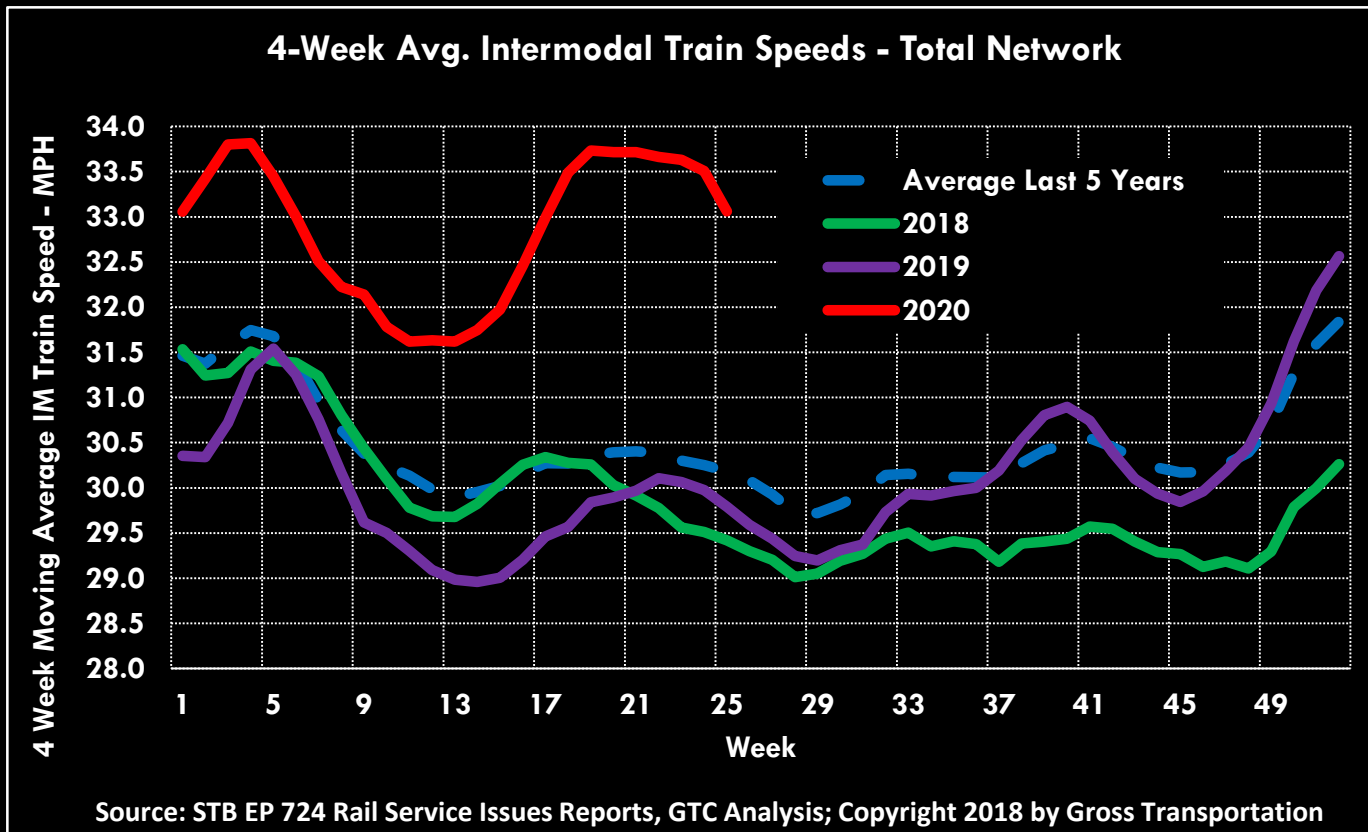
Source: Port Reports, IHS PIERS, GTC Analysis

MAY WAS THE WEAKEST MONTH YET FOR IMPORTS AFTER SEASONAL ADJUSTMENTS



Source: Port Reports, IHS PIERS, GTC Analysis

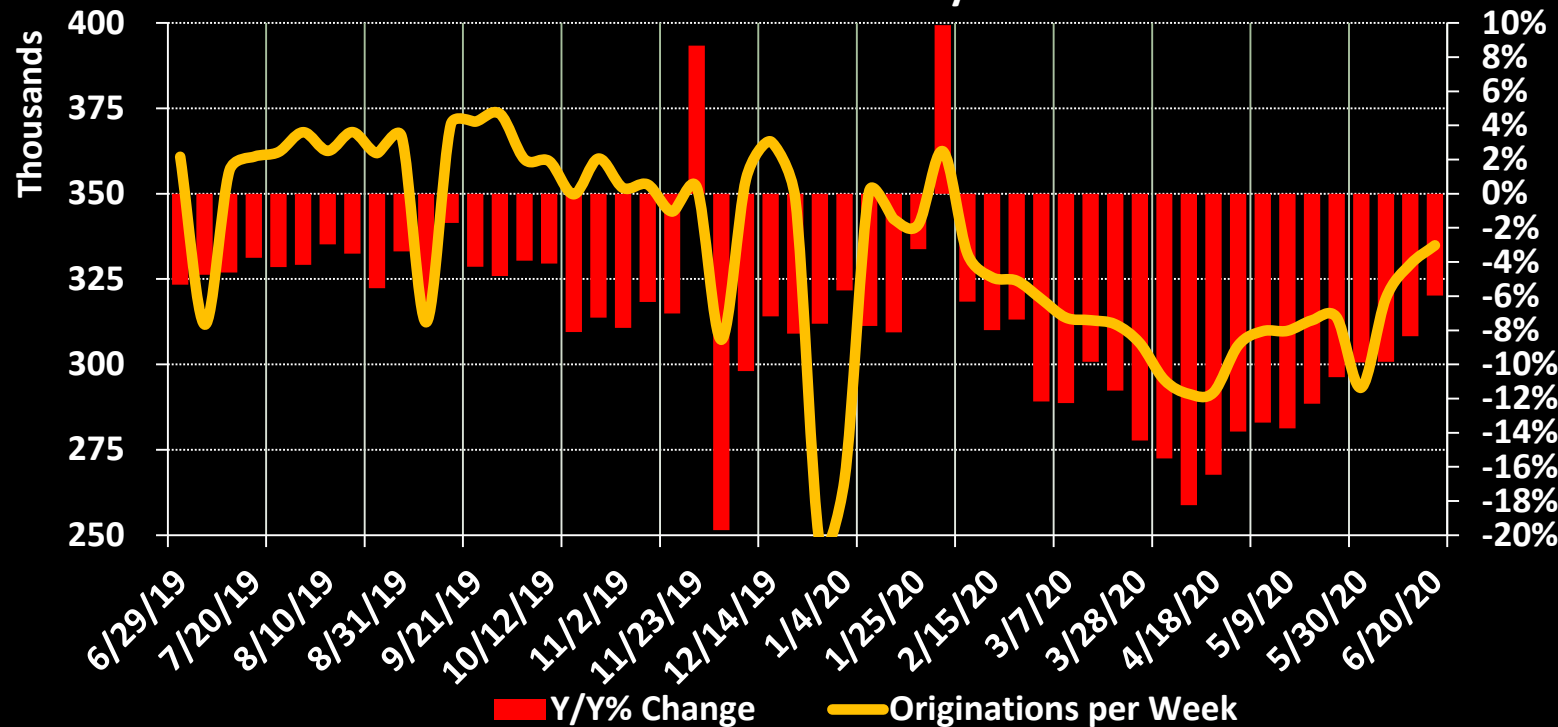
THE SERVICE PICTURE APPEARS TO BE EXCELLENT RIGHT NOW



- Average speed most recent week: 33.1 mph
- 9.5% better than 5-year average

INTERMODAL VOLUME HAS BEEN RECOVERING SINCE LATE APRIL

North America Total Intermodal Originations
Weekly



- Current weekly deficit: 21,000
- Average increase per week: 4,400

Source: AAR, GTC Analysis

MAKING AN “EDUCATED” FORECAST WHAT EDUCATION DO WE NEED?

MAKING AN “EDUCATED” FORECAST WHAT EDUCATION DO WE NEED?

1. A Public Health Epidemiology PhD

To answer the following questions:

- *What’s the virus going to do?*
- *Will re-opening the economy spark new outbreaks?*
- *Will there be a second wave. If so, when and how bad?*

MAKING AN “EDUCATED” FORECAST WHAT EDUCATION DO WE NEED?

2. A Masters Degree in Political Science

To answer the following questions:

- *How fast will the nation be re-opened?*
- *Will Federal support of the economy be continued? If so, how much, how long and in what form?*
- *Who will be in control of the Federal government 20 weeks from now?*

MAKING AN “EDUCATED” FORECAST WHAT EDUCATION DO WE NEED?

3. A Masters Degree in Sociology

To answer the following questions:

- Even when the economy is re-opened, will people feel comfortable enough to resume their normal lives?*
- How much will behaviors be changed and how long will the changes last?*

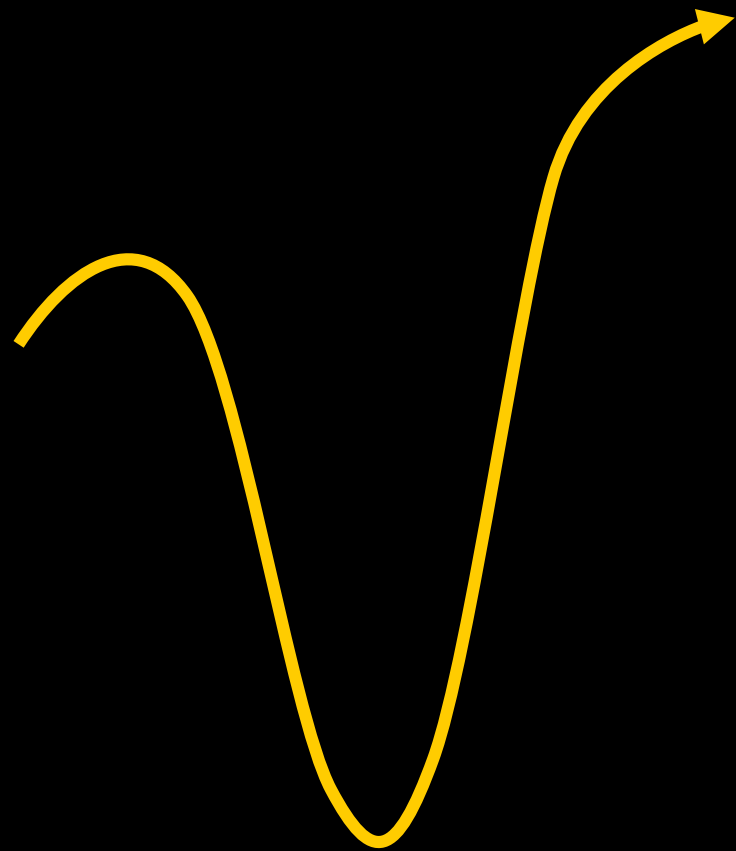
MAKING AN “EDUCATED” FORECAST WHAT EDUCATION DO WE NEED?

4. A PhD in Economics

To answer the following questions:

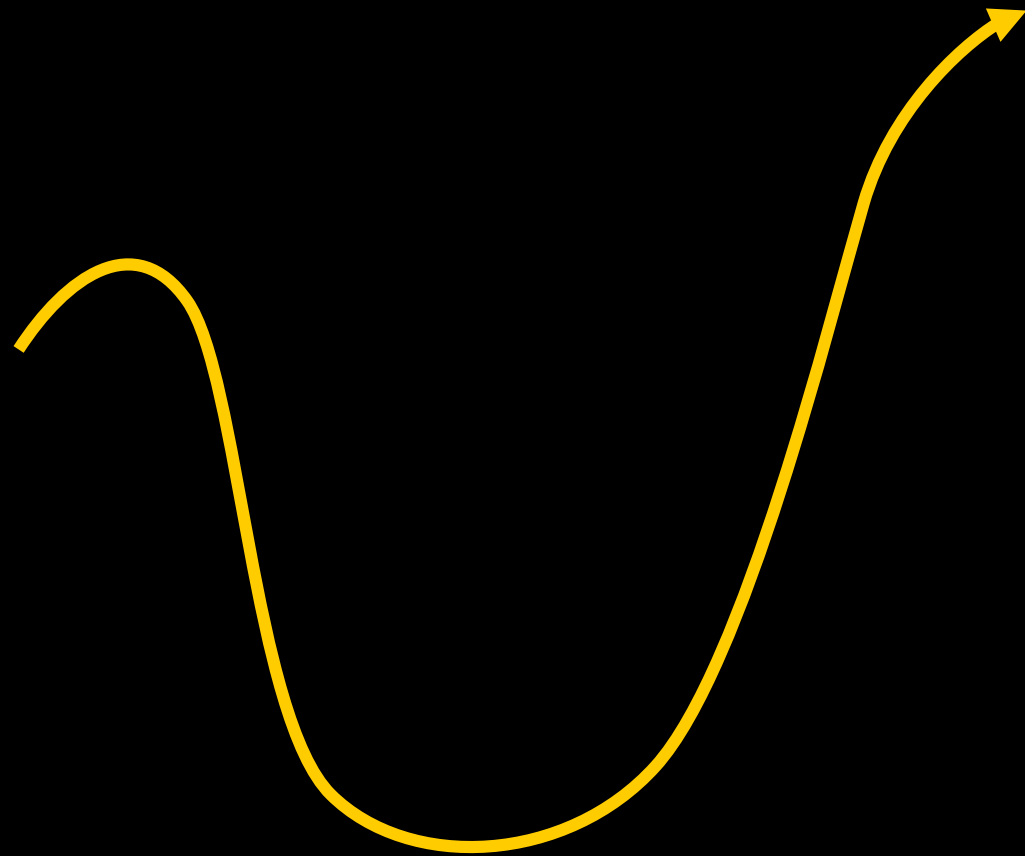
- *What happens when the economy emerges from a medically-induced coma?*
- *How much long-term damage has been done?*
- *What will the effects of lingering, unavoidable uncertainty be?*

THE LEXICON OF THE DOWNTURN



The “V”

THE LEXICON OF THE DOWNTURN



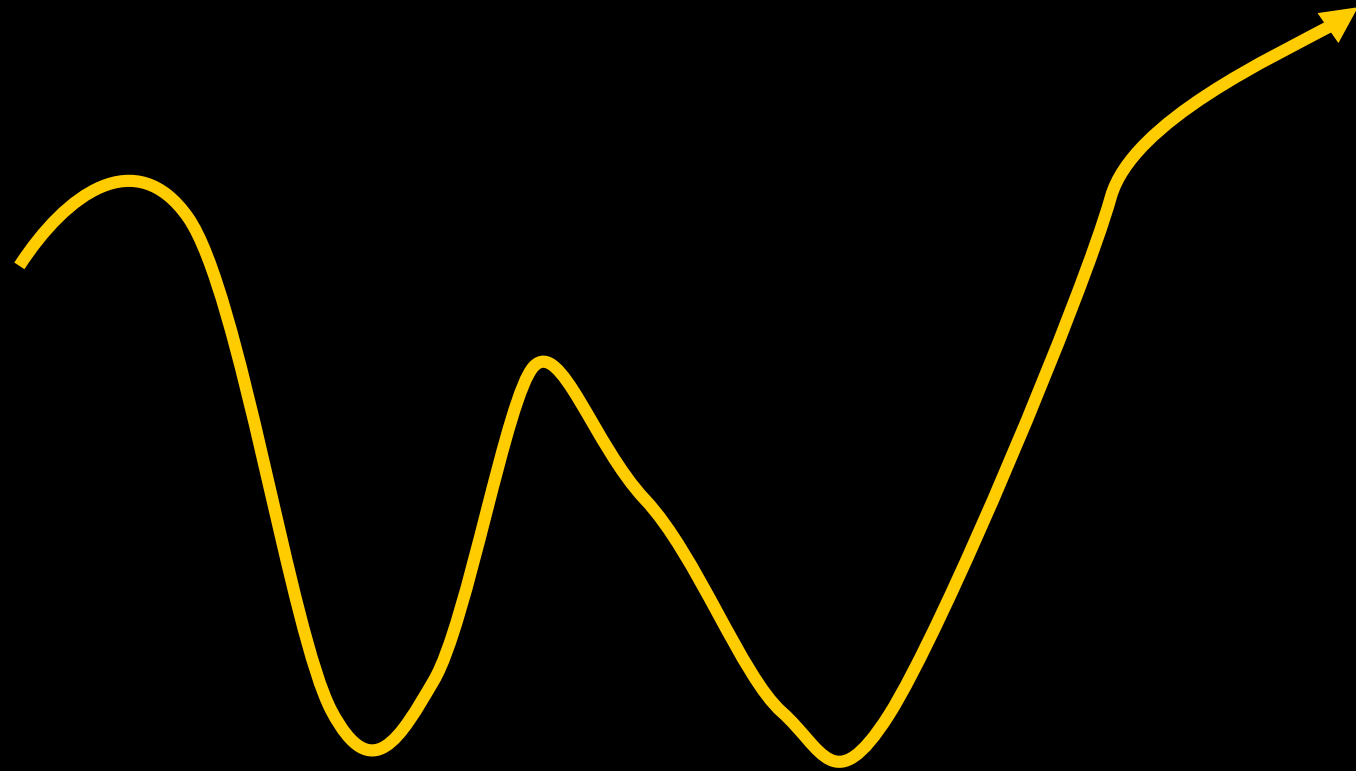
The “U”

THE LEXICON OF THE DOWNTURN

The “Big U”



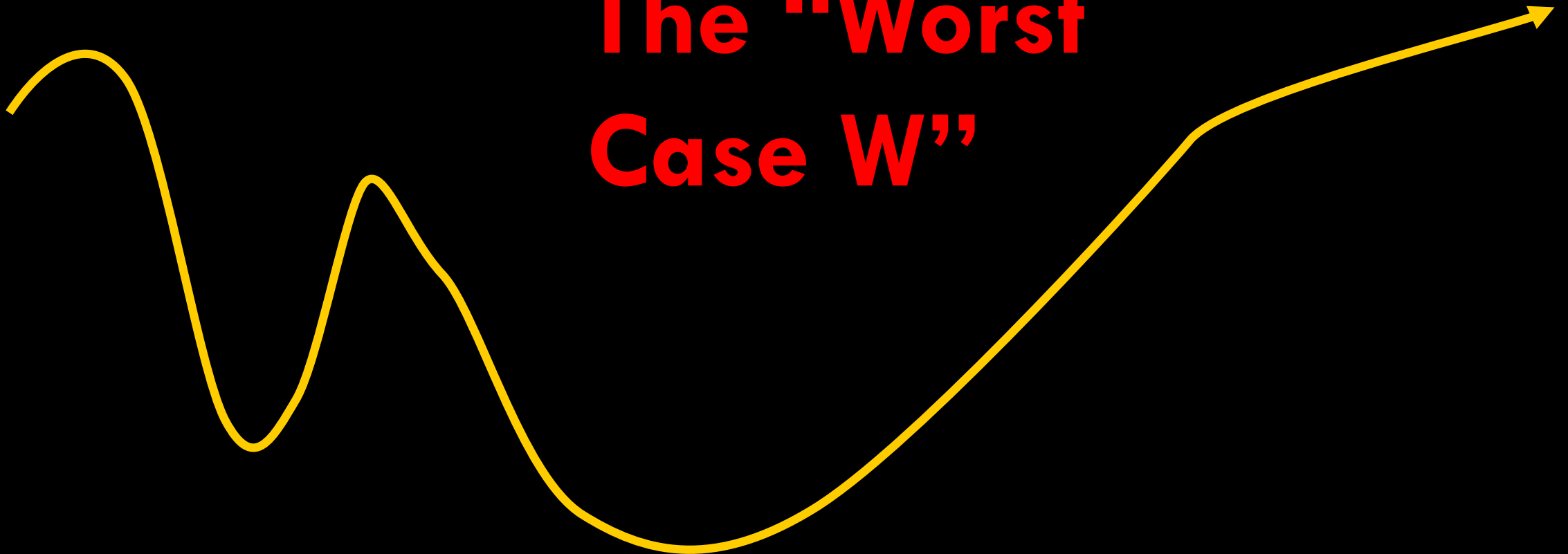
THE LEXICON OF THE DOWNTURN



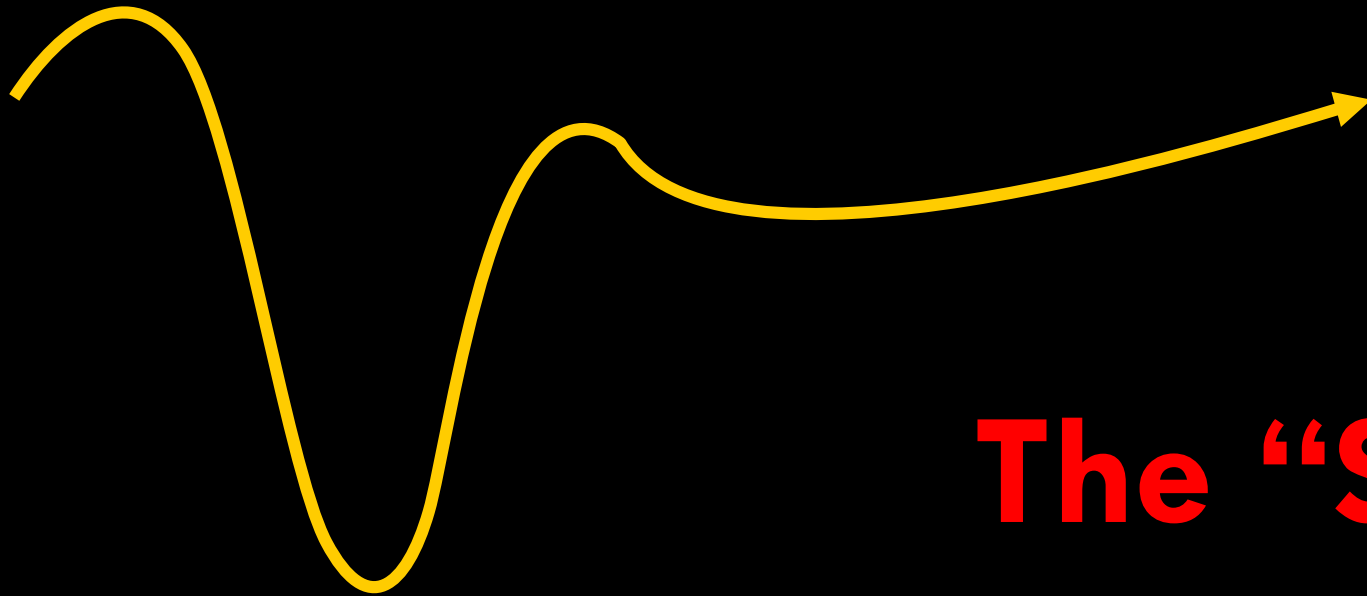
The “W”

THE LEXICON OF THE DOWNTURN

**The “Worst
Case W”**



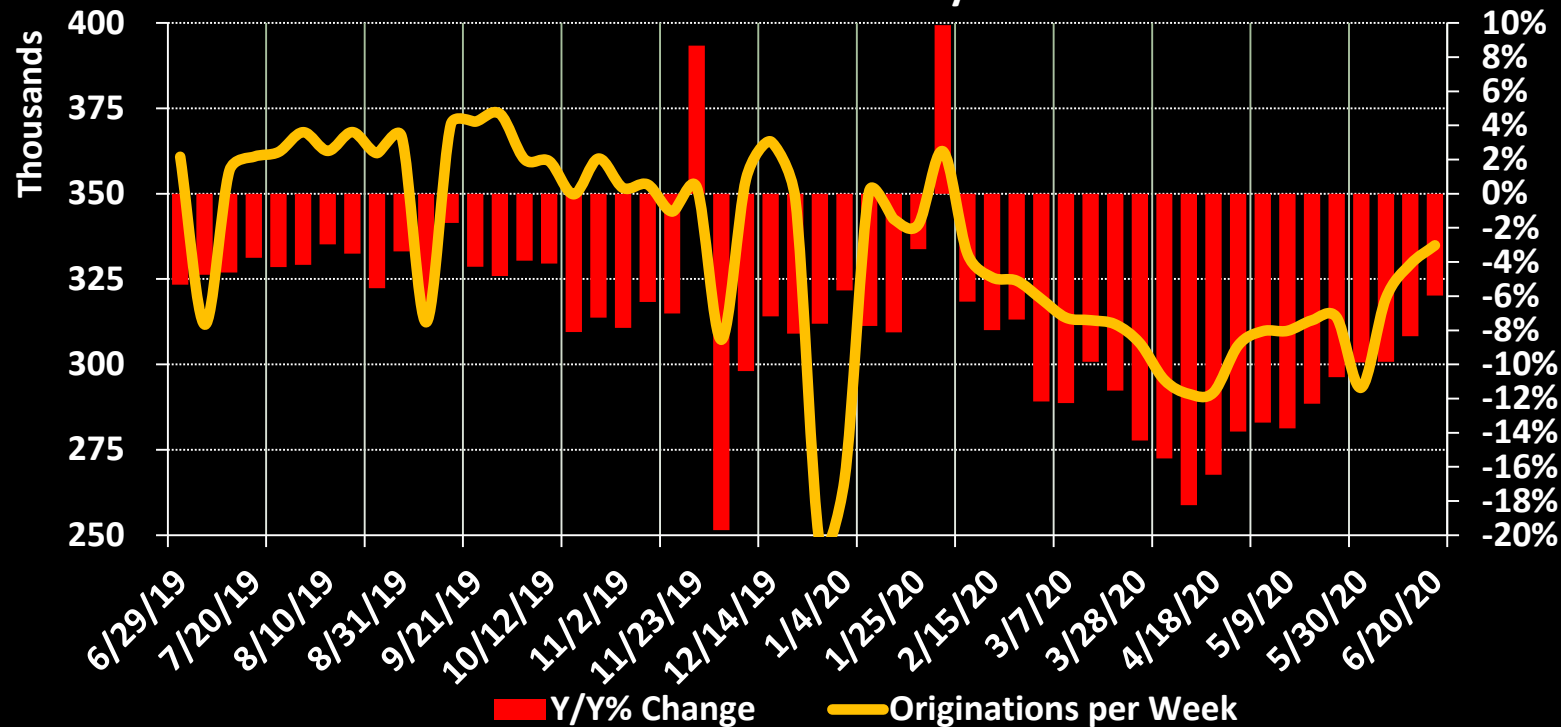
THE LEXICON OF THE DOWNTURN



The “Square Root”

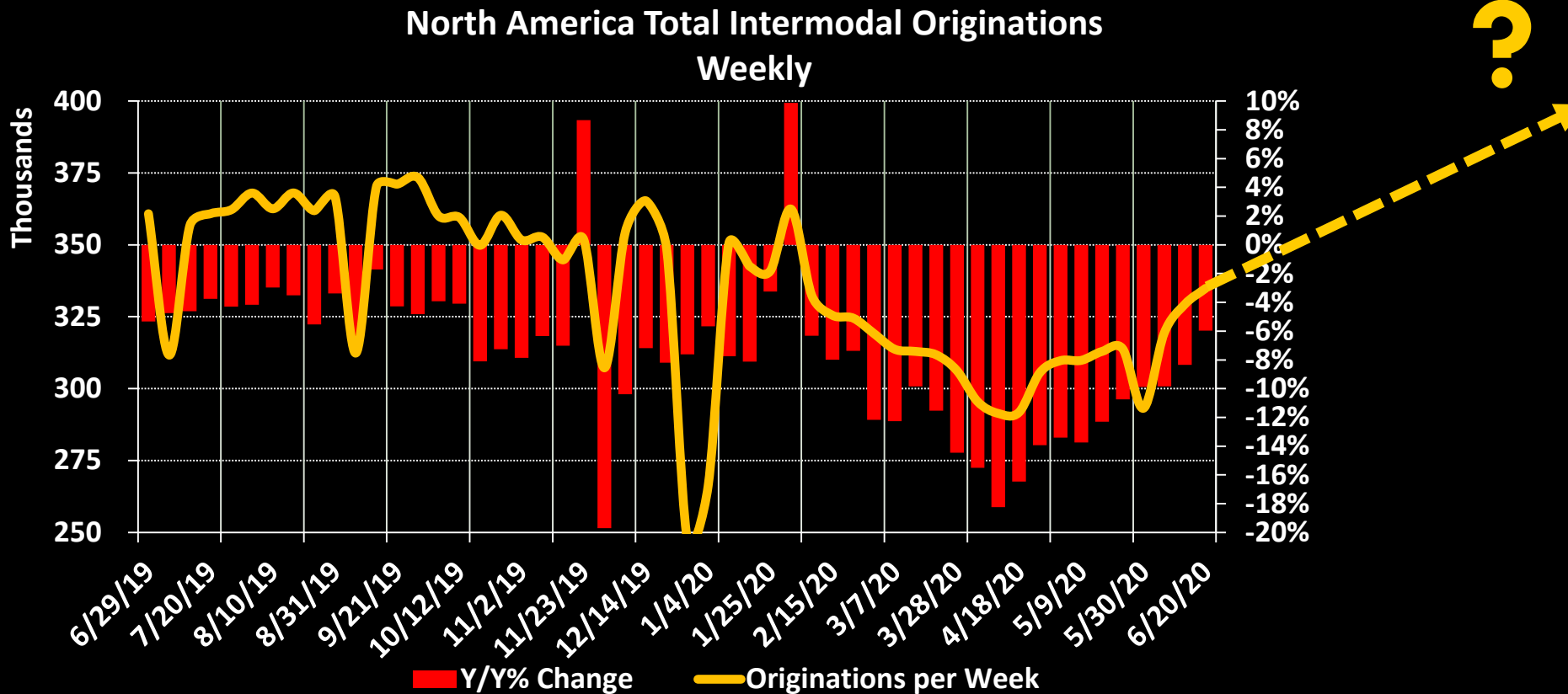
INTERMODAL VOLUME HAS BEEN RECOVERING SINCE LATE APRIL

North America Total Intermodal Originations
Weekly



Source: AAR, GTC Analysis

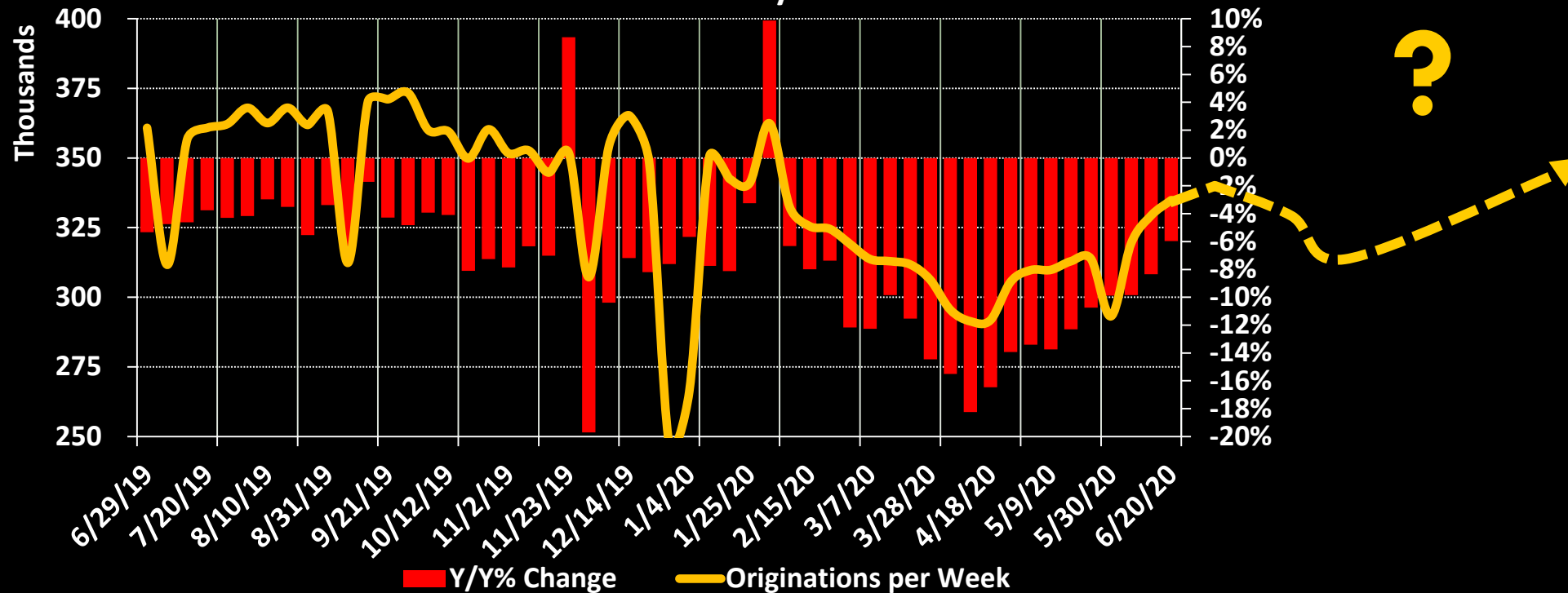
WHERE TO FROM HERE?



Source: AAR, GTC Analysis

WHERE TO FROM HERE?

North America Total Intermodal Originations
Weekly

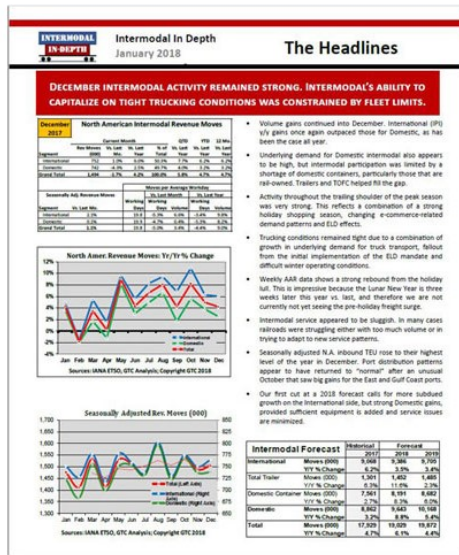


Source: AAR, GTC Analysis

NEW GTC/IANA DATA BUNDLE OFFER

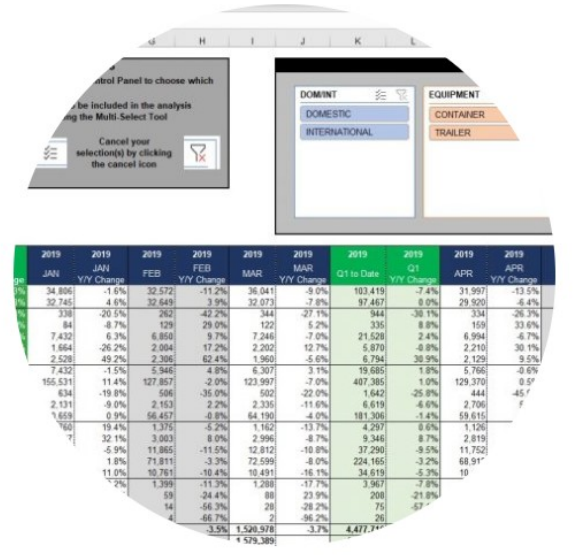
Intermodal In Depth is a monthly analytical report that summarizes the latest trends

Drawing from a variety of data sources, Intermodal In Depth provides a timely and detailed look at the key drivers of the North American intermodal sector. More than just data, Intermodal In Depth goes deep to analyze what the data means, providing the reader with a thorough understanding of the current state of Intermodal. All the information and analysis presented in one convenient package.



The Intermodal Volume Analyzer puts detailed data on equipment flows at your fingertips

Gross Transportation Consulting has teamed up with the Intermodal Association of North America to produce a powerful database tool for understanding detailed equipment flows by type throughout North America. Obtain the information you need on region-to-region flows by equipment type at the push of a button.



Subscribe to:

■ Intermodal in Depth

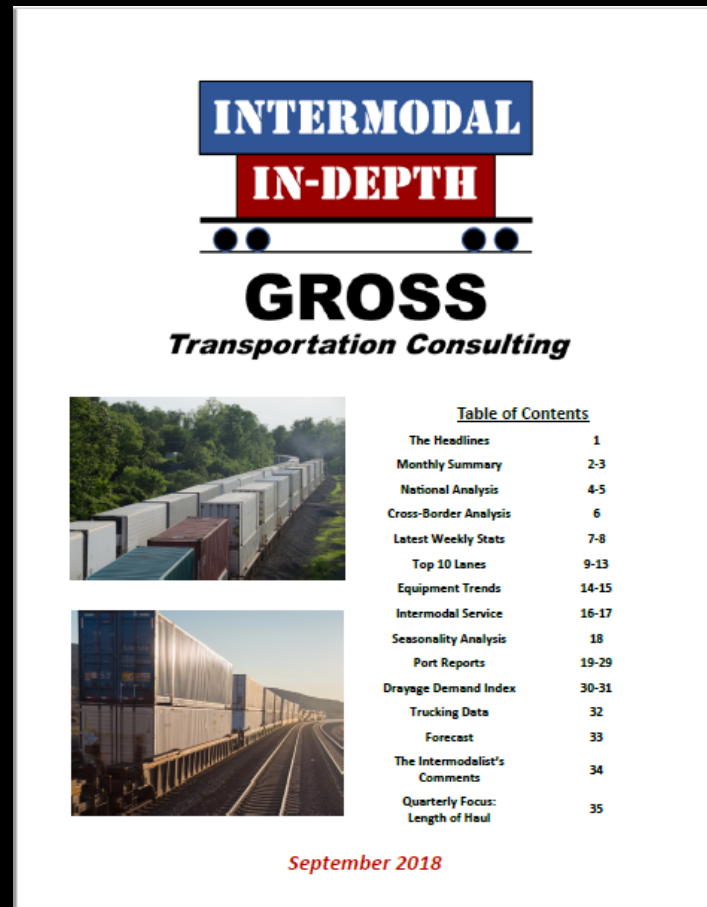
+

■ New IANA Intermodal Volume Analyzer

Save 20% on both!

www.IntermodalInDepth.com

INTERMODAL IN DEPTH



INTERMODAL
IN-DEPTH

GROSS
Transportation Consulting

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	30-31
Trucking Data	32
Forecast	33
The Intermodalist's Comments	34
Quarterly Focus: Length of Haul	35

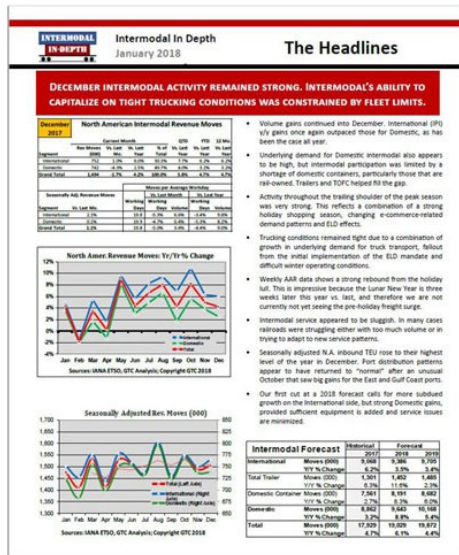
September 2018

- Monthly deep dive into the intermodal sector
- Brings together data from a variety of sources to compile a complete picture
- Monthly forecast by equipment type
- Weekly Flash Updates
- www.IntermodalinDepth.com

NEW GTC/IANA DATA BUNDLE OFFER

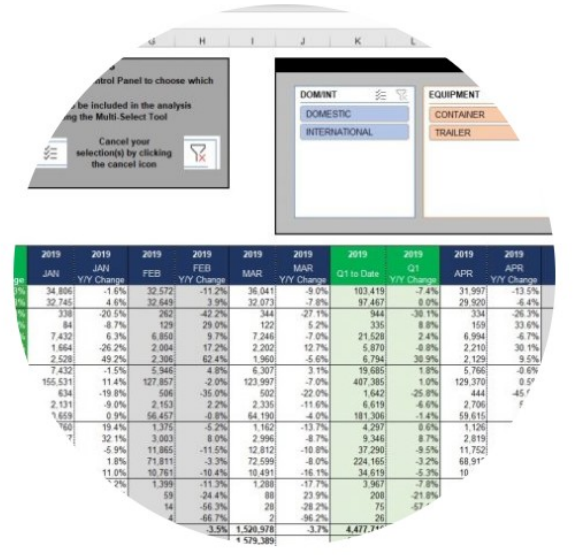
Intermodal In Depth is a monthly analytical report that summarizes the latest trends

Drawing from a variety of data sources, Intermodal In Depth provides a timely and detailed look at the key drivers of the North American intermodal sector. More than just data, Intermodal In Depth goes deep to analyze what the data means, providing the reader with a thorough understanding of the current state of Intermodal. All the information and analysis presented in one convenient package.



The Intermodal Volume Analyzer puts detailed data on equipment flows at your fingertips

Gross Transportation Consulting has teamed up with the Intermodal Association of North America to produce a powerful database tool for understanding detailed equipment flows by type throughout North America. Obtain the information you need on region-to-region flows by equipment type at the push of a button.



Subscribe to:

- Intermodal in Depth

+

- New IANA Intermodal Volume Analyzer

Save 20% on both!

www.IntermodalInDepth.com

Thanks! Questions?

Larry Gross:

President

Gross Transportation Consulting

516-455-8988

lgross@intermodalindepth.com

@Intermodalist

INTERMODAL ANALYZED

Intermodal Association of
North America

June 30, 2020

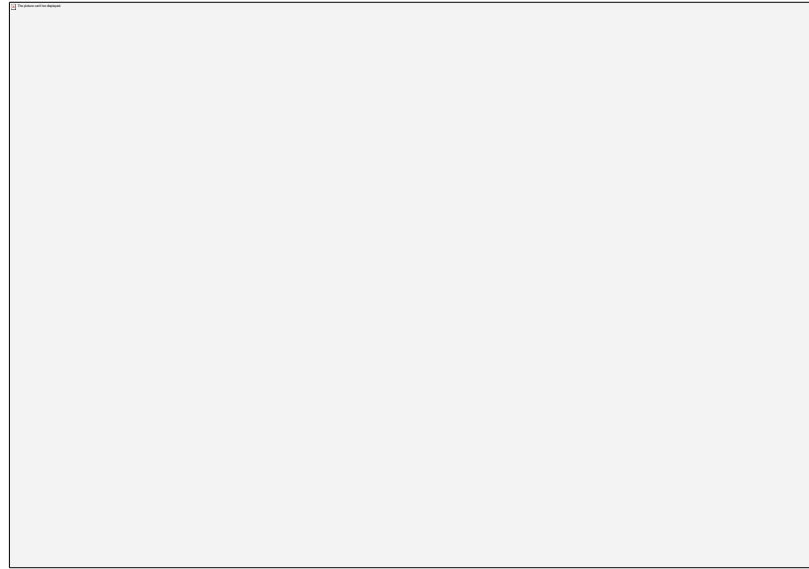
Q&A

Please type your questions
in the control panel



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

And now:



Visit: intermodal.org/resource-center/data-statistics
or e-mail us at: **info@intermodal.org**

Intermodal Analyzed

Join us for the entire series:

- July 28th 2:00pm ET
- September 29th 2:00pm ET
- October 27th 2:00pm ET

Register for all our webinars:

intermodal.org/education/business-intermodal-continues-program

Thank you to our *Gold* sponsors!



© 2020 Intermodal Association of North America. This presentation was produced for the use of IANA members and may not be reproduced, re-distributed or passed to any other person or published in whole or in part for any purpose without the prior consent of IANA. IANA, 11785 Beltsville Drive, Calverton, MD 20705-4048.



IANA
INTERMODAL ASSOCIATION
OF NORTH AMERICA™