

Trucking & Freight... 2004 and Beyond

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- General Trucking/Freight Economics
- Trends & Strategic Issues
- Freight Planning 101

Understanding the Economics...

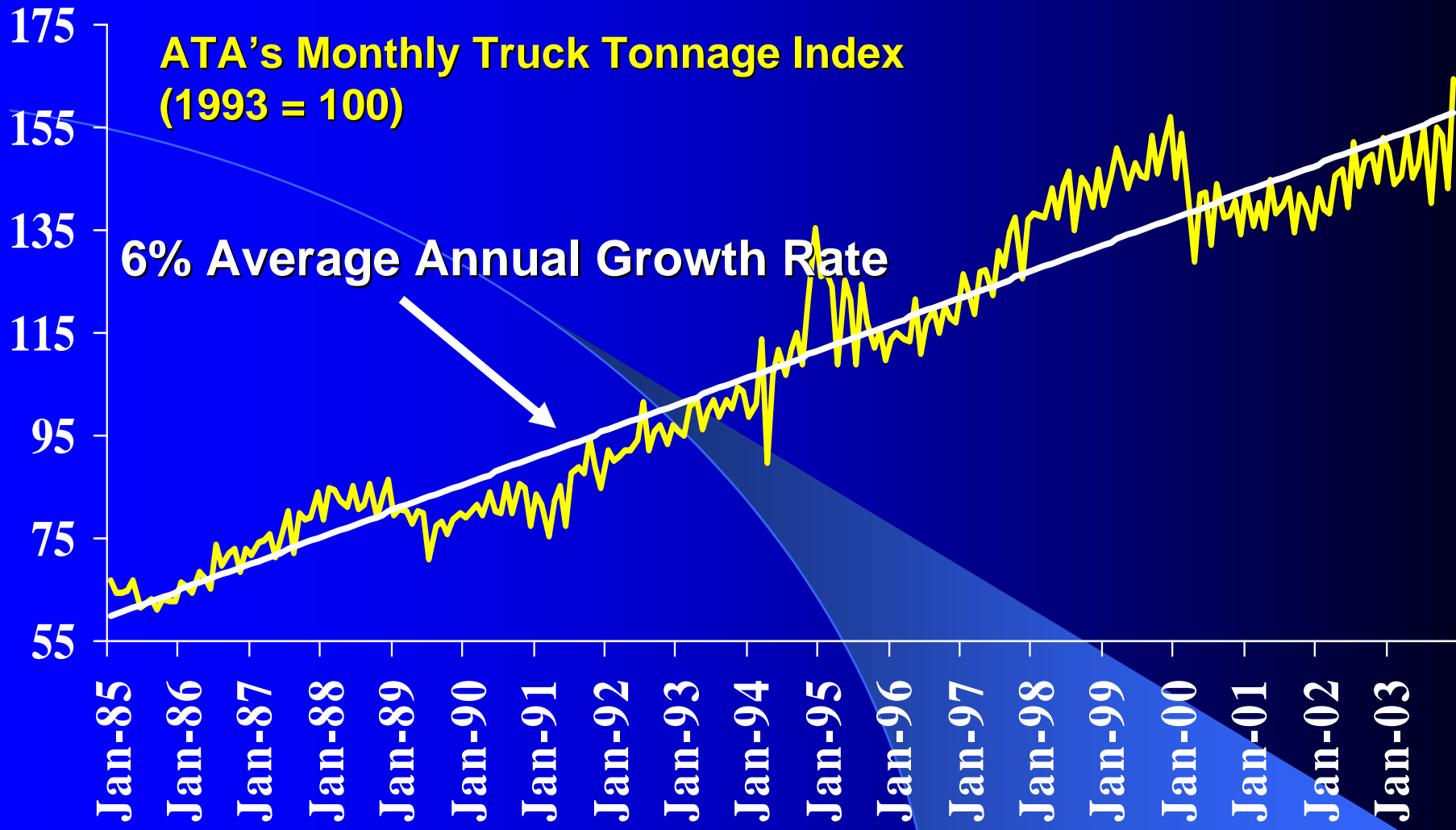
Manufacturing Productivity

(1992=100)



Sources: Department of Labor & ATA

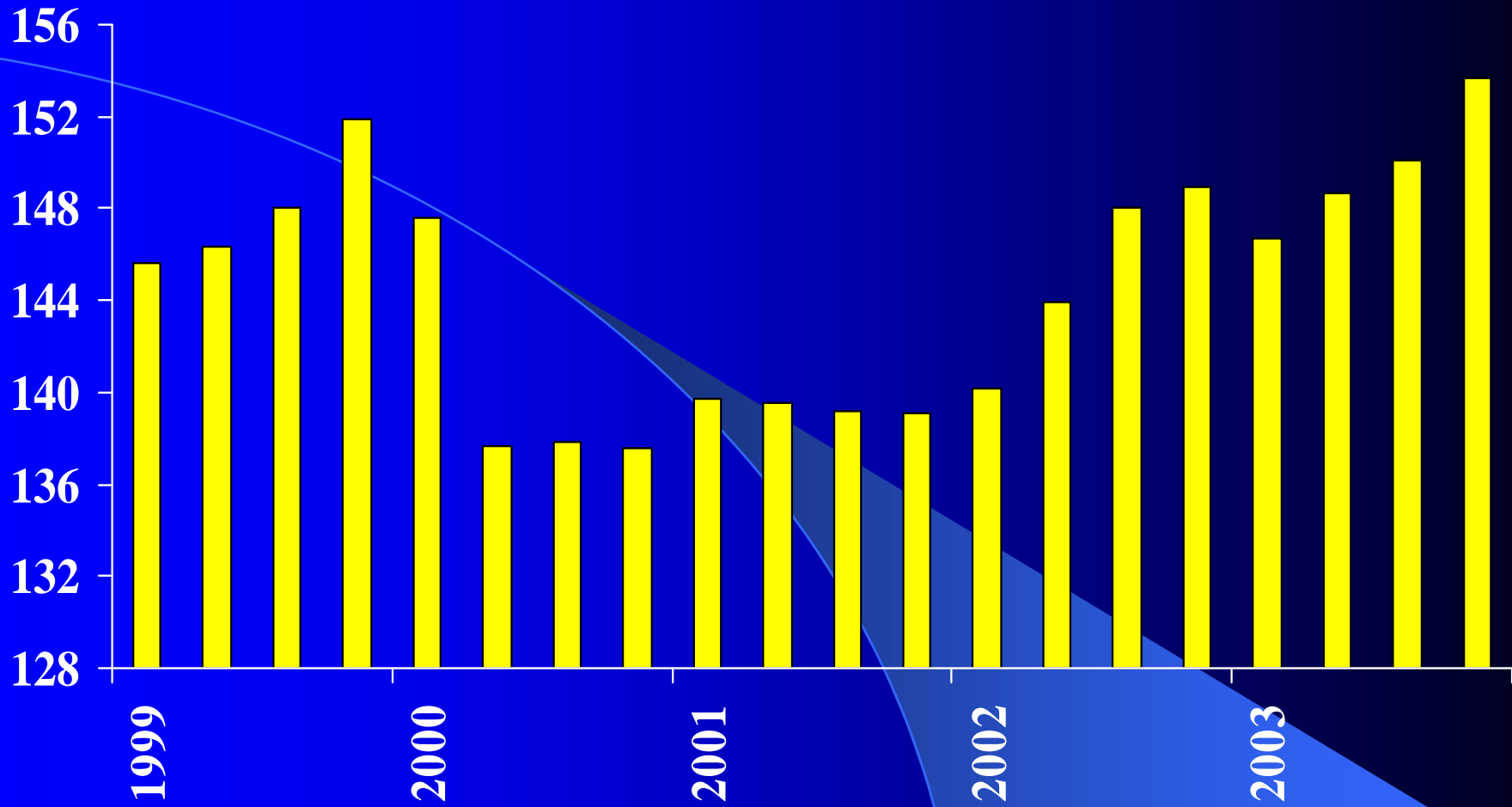
Trucking's Progress Since 1985



Source: American Trucking Associations

ATA's Monthly Truck Tonnage Index

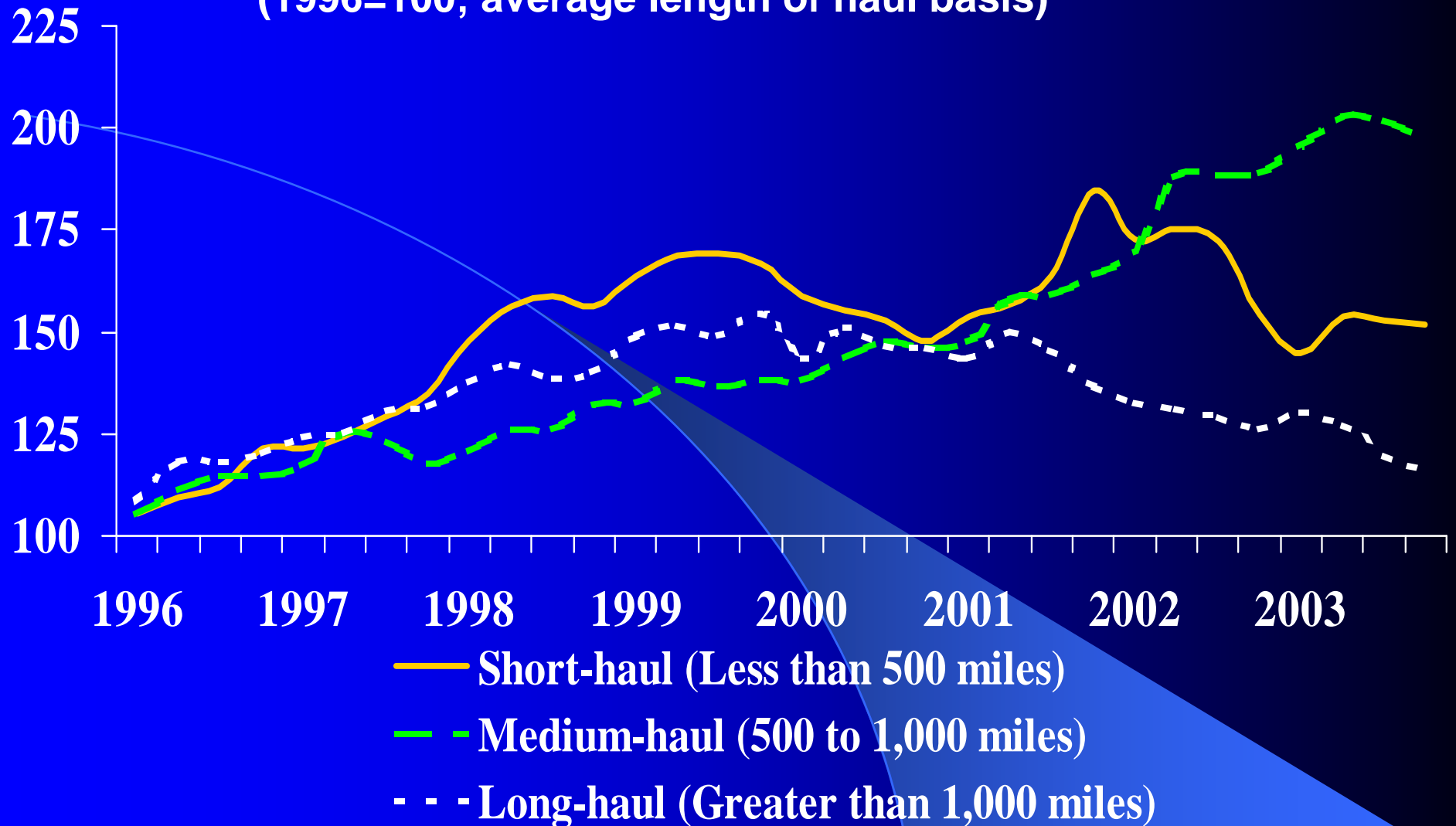
1993=100



Source: American Trucking Associations

Truckload Loads

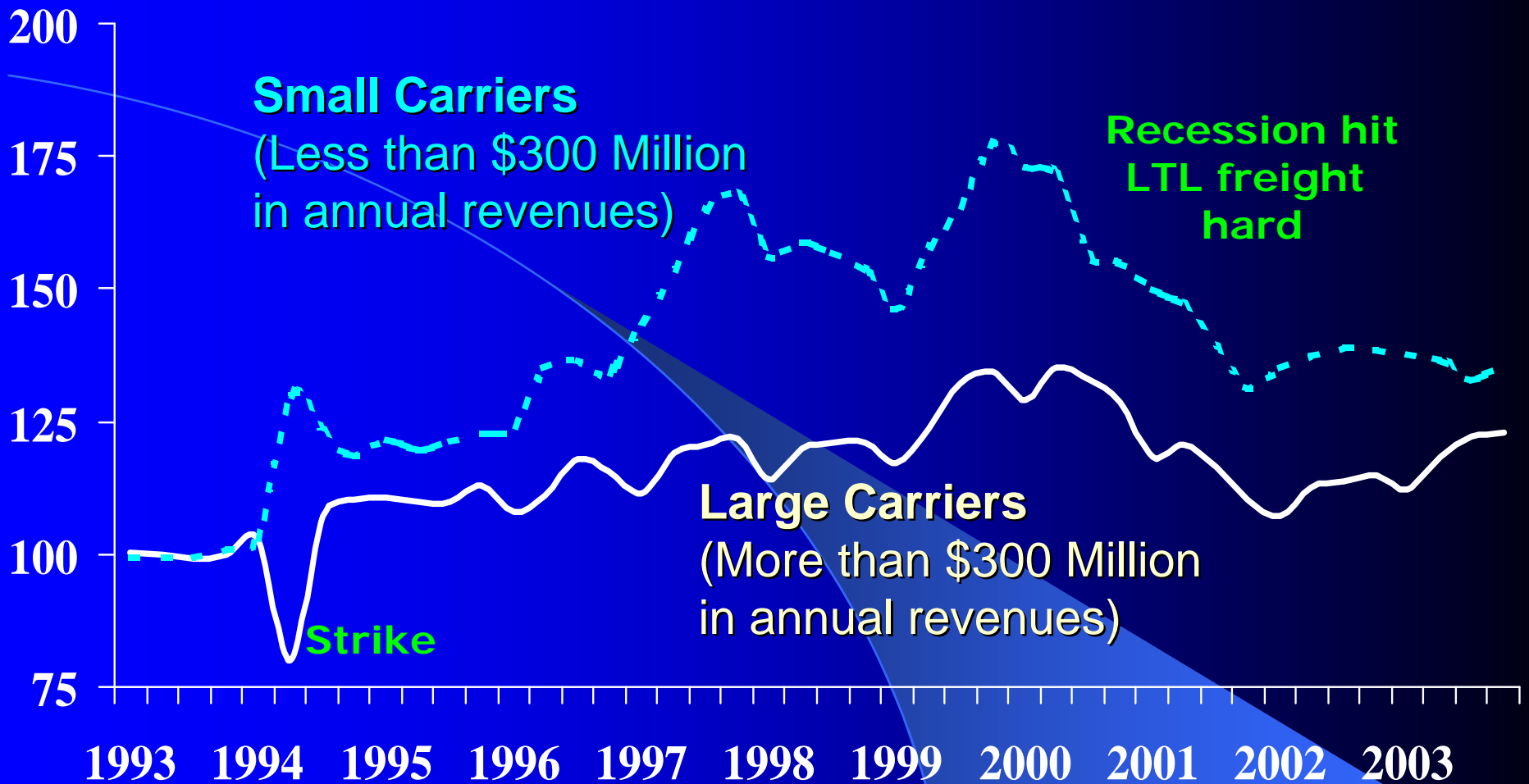
(1996=100; average length of haul basis)



Source: ATA's Trucking Activity Report

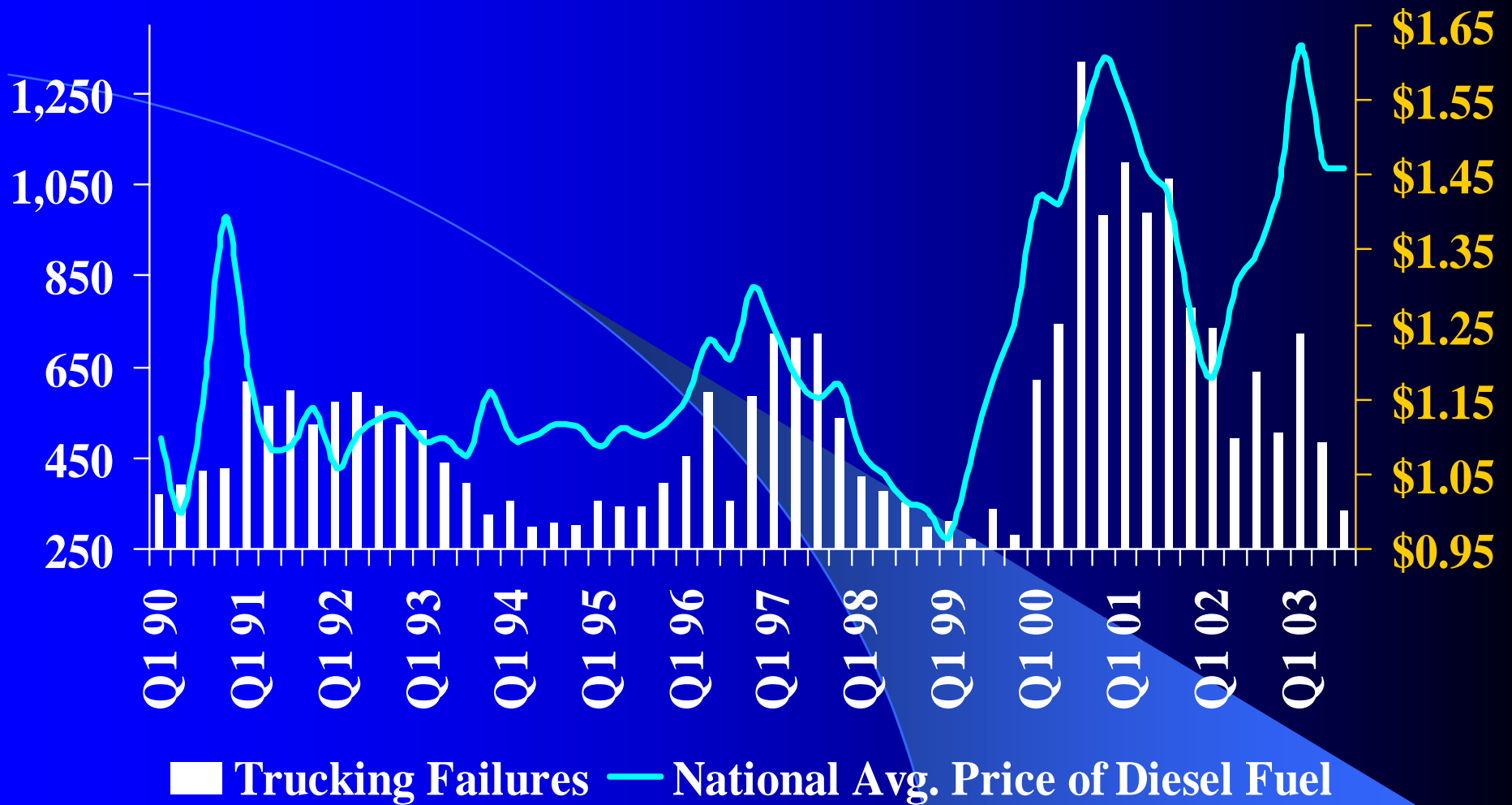
LTL Volumes

(1993=100)



Source: ATA's Trucking Activity Report

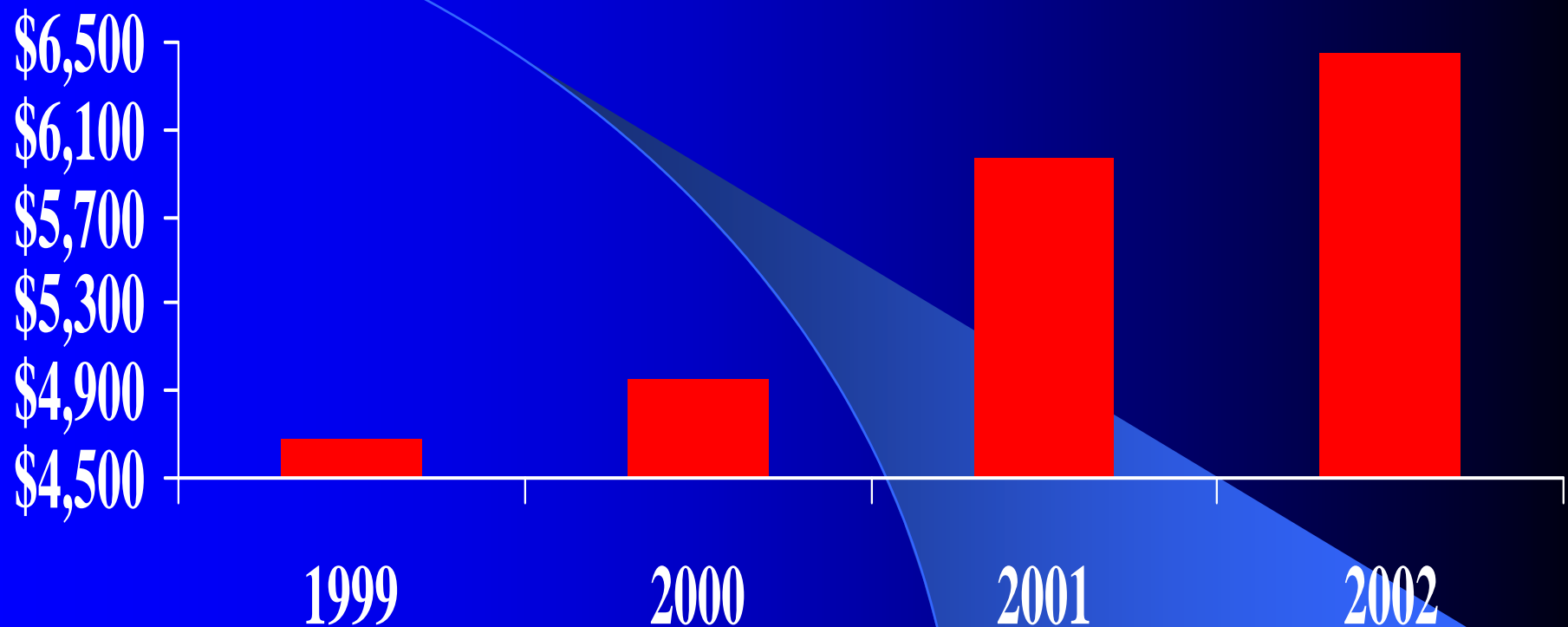
Higher Diesel Prices Lead To More Trucking Failures



Sources: A.G. Edwards & ATA

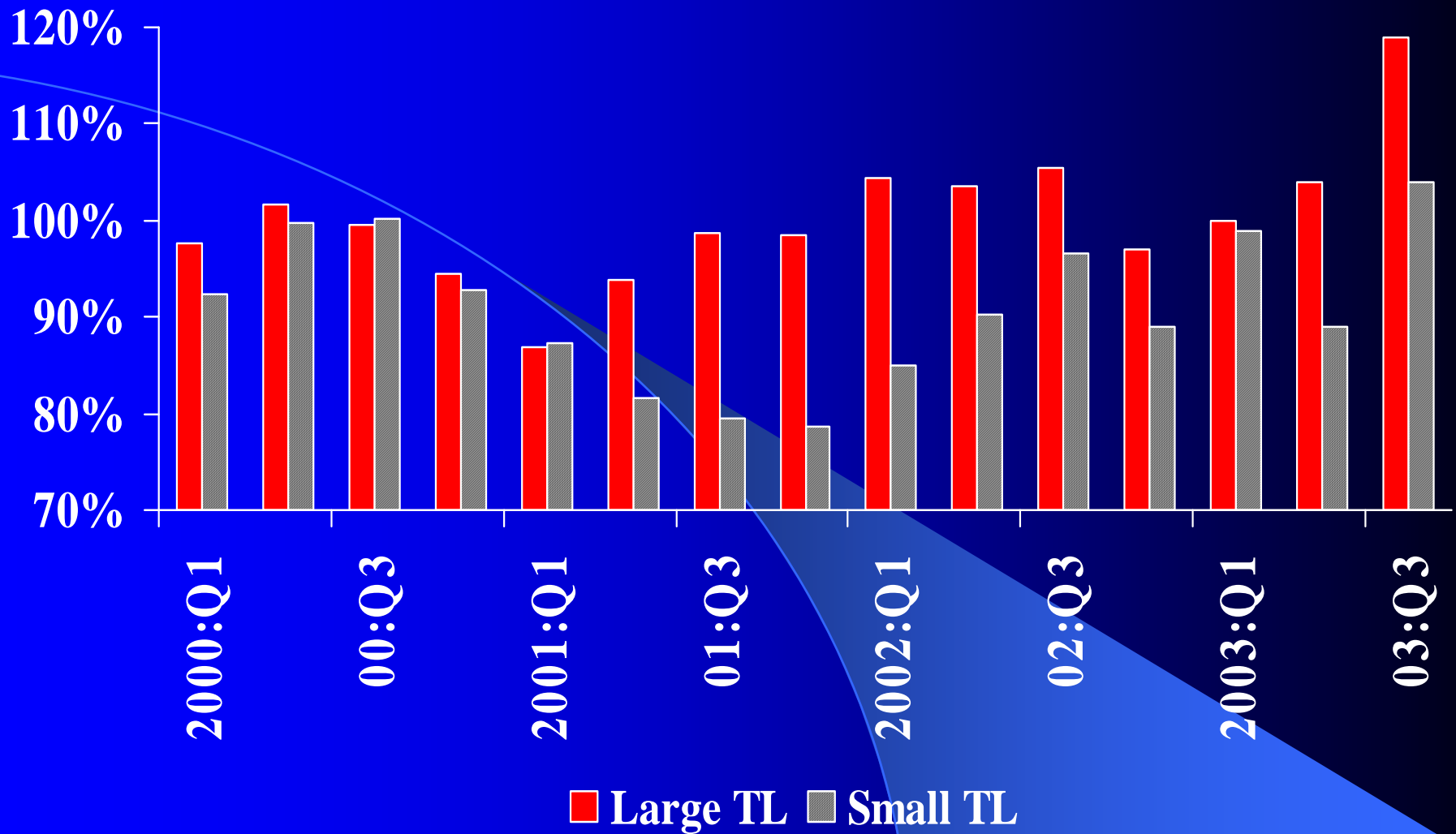
Insurance Cost per Truck

Data based on publicly held truckload carriers which disclose this information.



Truckload Driver Turnover

(Quarterly Annualized Rates)



Trucking Trends & Strategic Issues

Industry Snapshot: Freight Movement

- Total Tonnage Moved:

2002 - 8.88 Billion Tons

2008 - 10.1 Billion Tons

... A 13.7% increase in 6 years.

- Trucks carry 67.9% of total domestic tonnage in the U.S.

Industry Snapshot: Revenue

- Total Revenue:

2002 - \$585.3 Billion

2008 - \$745.0 Billion

... A 27.2% increase in 6 years.

- Trucking revenue represents 86.5% of all freight revenue

Industry Snapshot: Firms, Employment & Equipment

- 610,000 Interstate for-Hire Carriers
- Total Employment:
 - 10.1 million employees
 - 3.2 million truck drivers (CDL)
- 2.6 Million Class 8 Trucks; 4.9 Million Trailers

Strategic Issues

- Taxes and User Fees

- 2003 Annual Taxes Paid on 5-Axle Semi:

- State- \$4,567

- Federal - \$6,139

- TOTAL - \$10,706

- New User Fees – SAFETEA & FAST Lanes

Strategic Issues

- Congestion
 - Problematic but solutions may be worse
 - Tolls
 - Truck Bans
- Security Costs??
 - US Patriot Act
 - Truck Tracking
 - Port Systems
- Shipper-Carrier Relationships

Freight Planning 101

MPO Planning Opportunities

- MPO Representation
 - Mirrors Transit Representation
 - Reflects HTF Contributions
 - Mode-Neutral
- Policy Plans
 - Should be freight-friendly and economically rational

MPO Planning Opportunities

- TIP
 - Should be identified & developed by industry process
- UPWP
 - Don't Rationalize Freight Projects
- STIP
 - Must be (and usually is) integrated & seamless with corridors/borders

QUESTIONS?

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