



**Bob Costello**

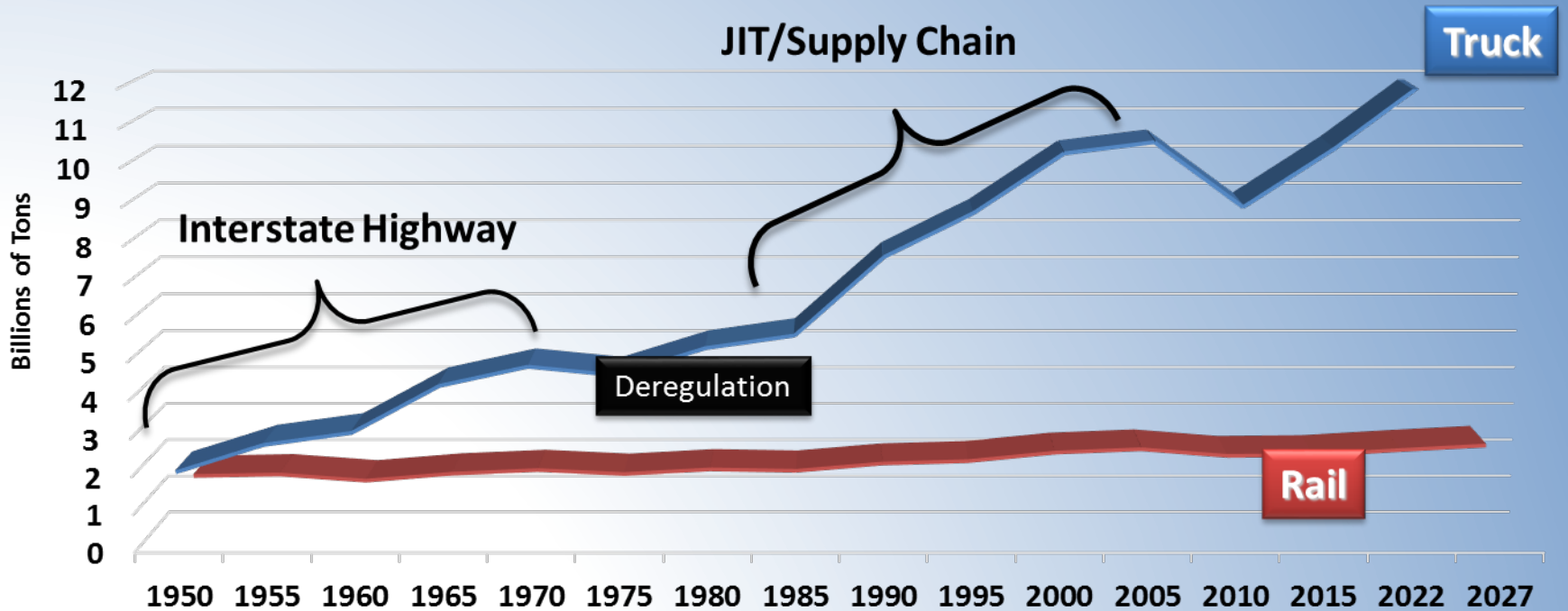
**Chief Economist & Senior Vice President  
American Trucking Associations**



**The Future of  
the Trucking Industry**



# Historical Tonnage by Mode



Sources: ATA & U.S. Freight Transportation Forecast to 2027 & ATA

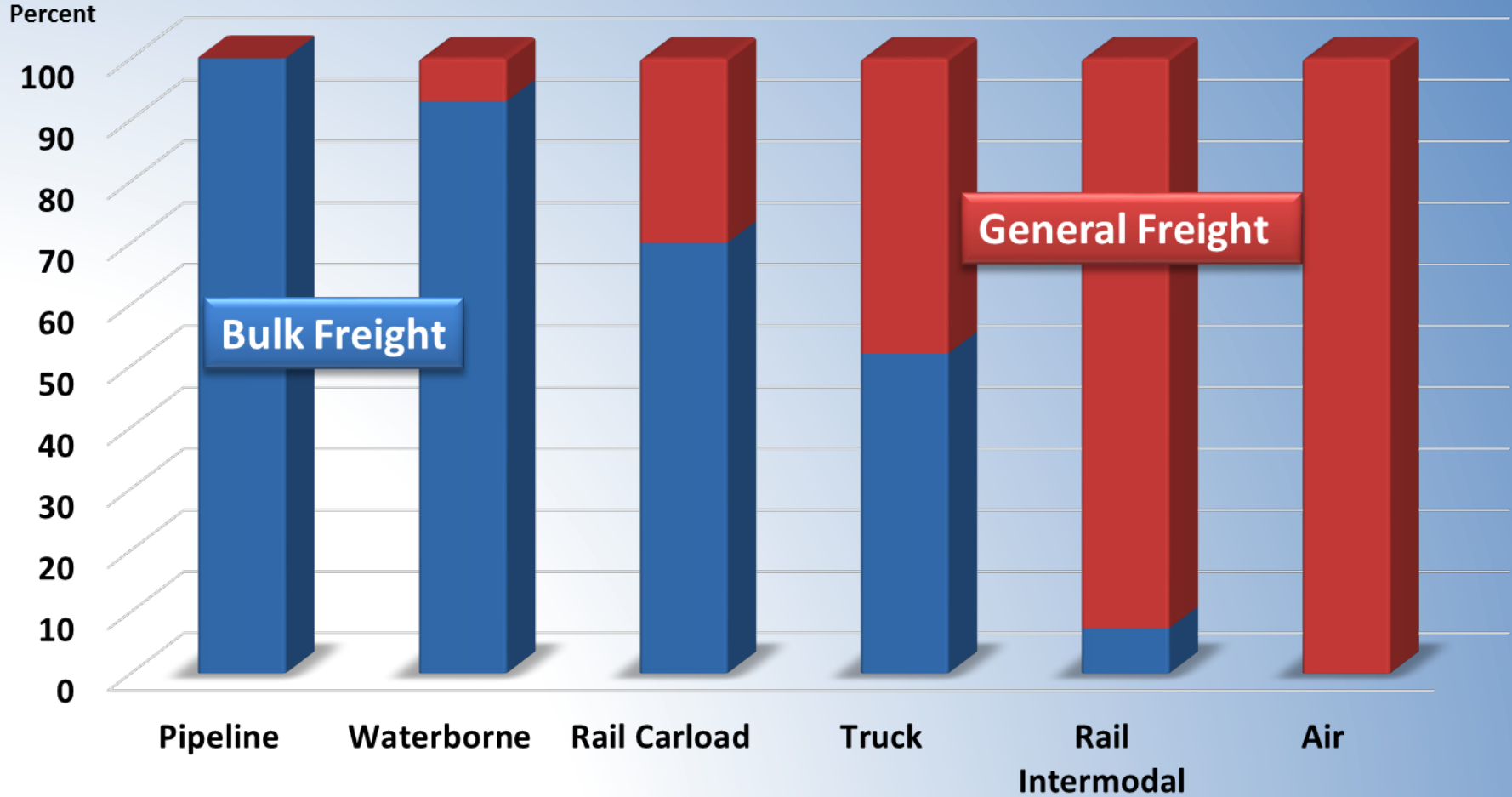


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# Distribution of Tonnage by Mode

2015

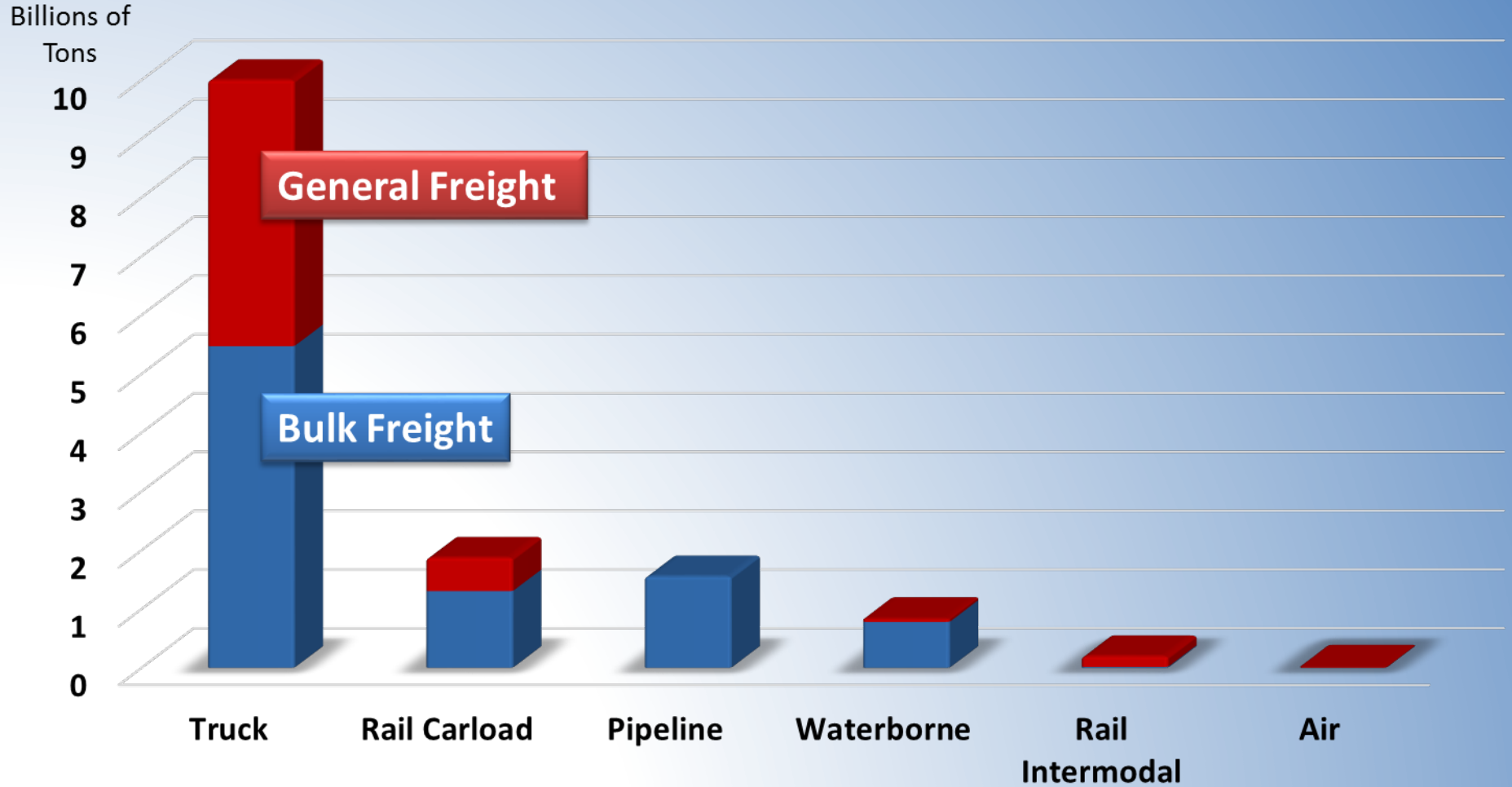


Source: U.S. Freight Transportation Forecast to 2027





# Tonnage by Mode - 2015

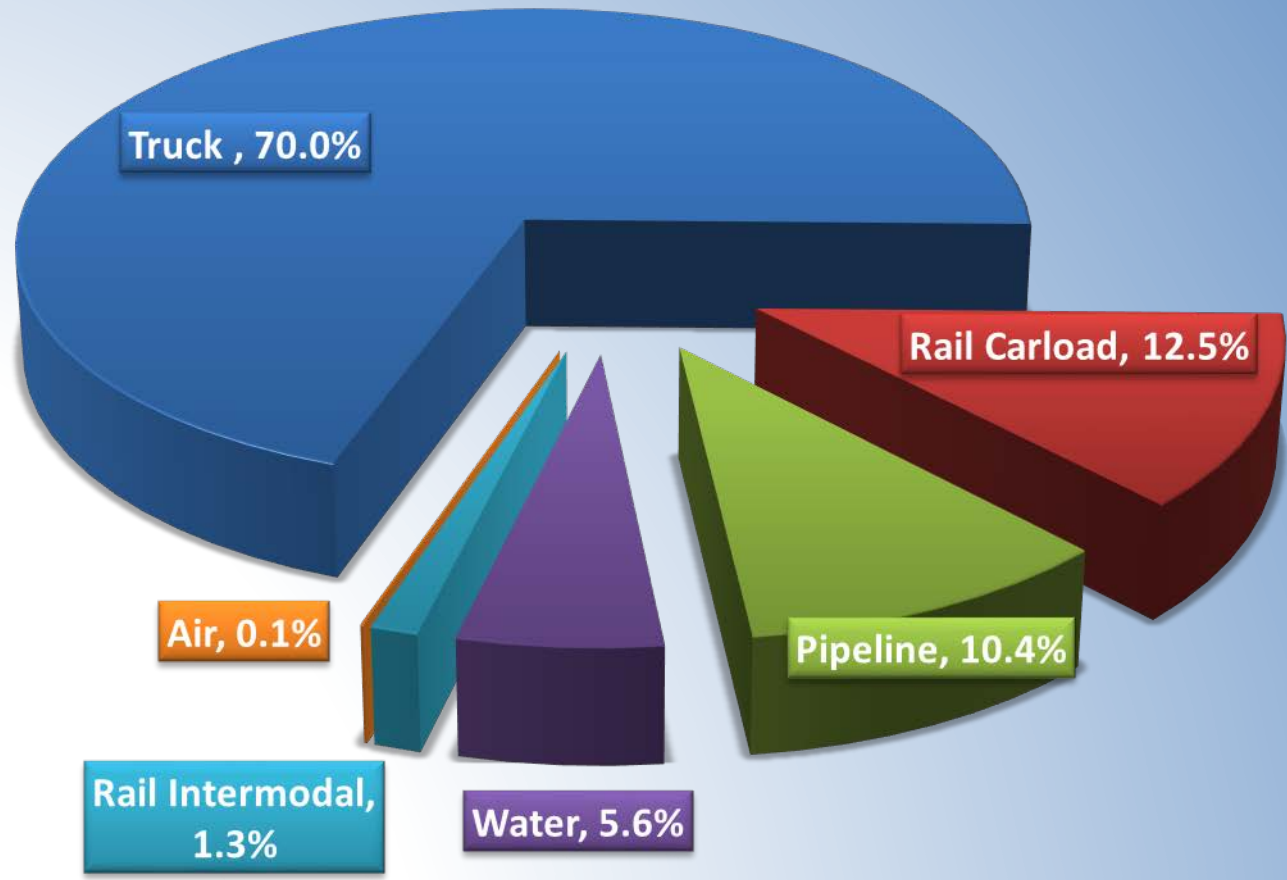


Source: U.S. Freight Transportation Forecast to 2027





# Distribution of Tonnage by Mode: 2015



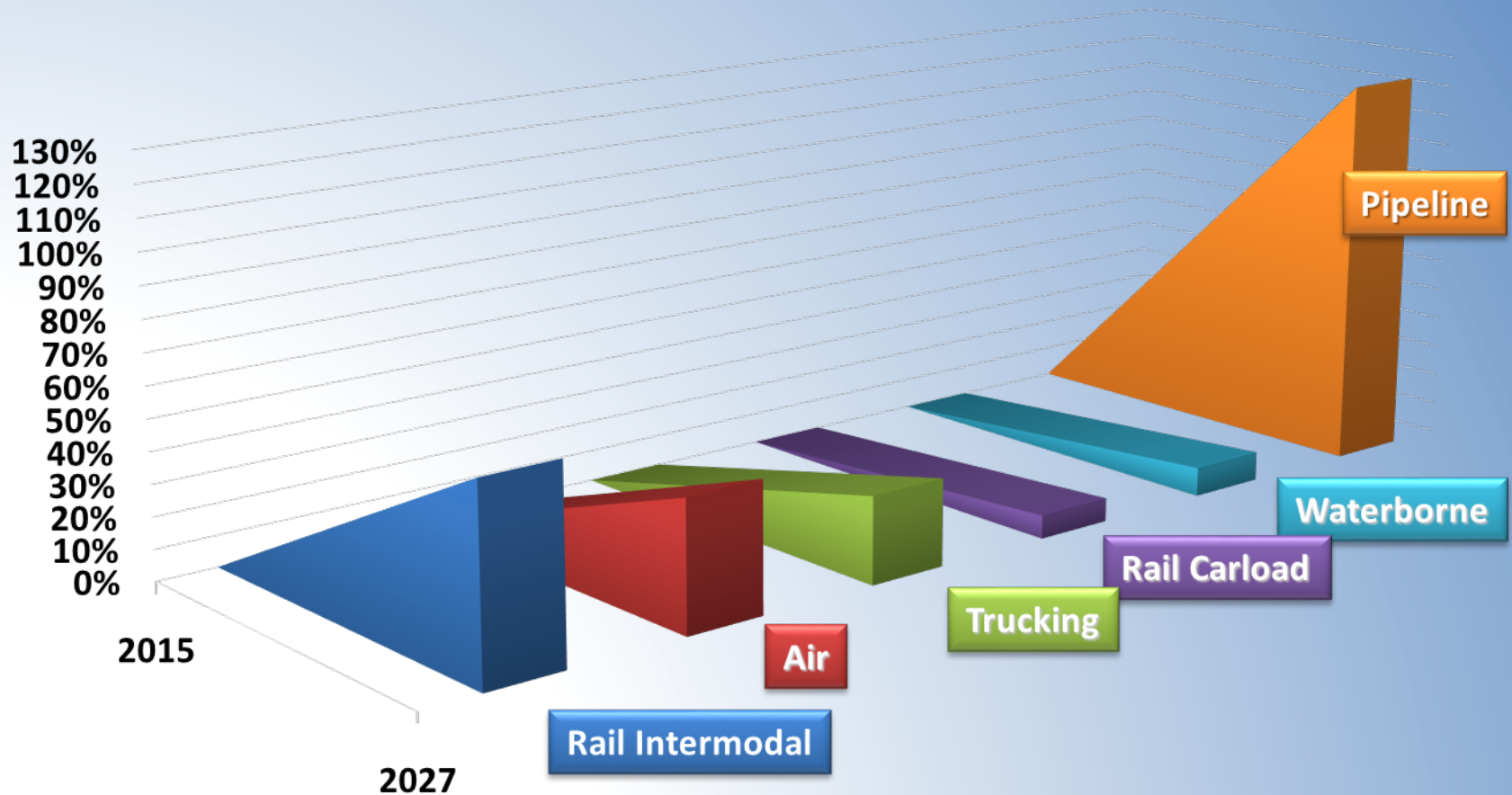
Source: U.S. Freight Transportation Forecast to 2027





# Growth in Tonnage

Total Increase from 2015 to 2027



Source: *U.S. Freight Transportation Forecast to 2027*

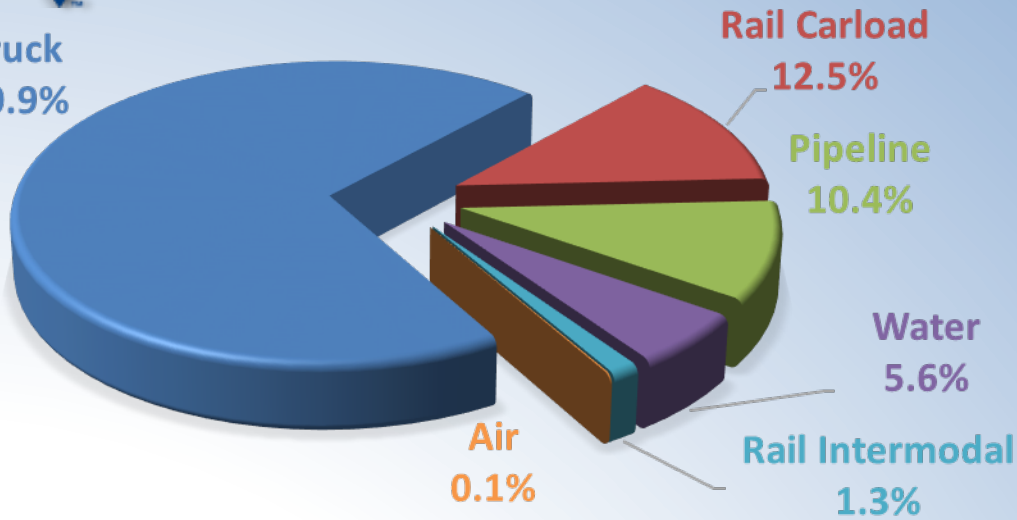


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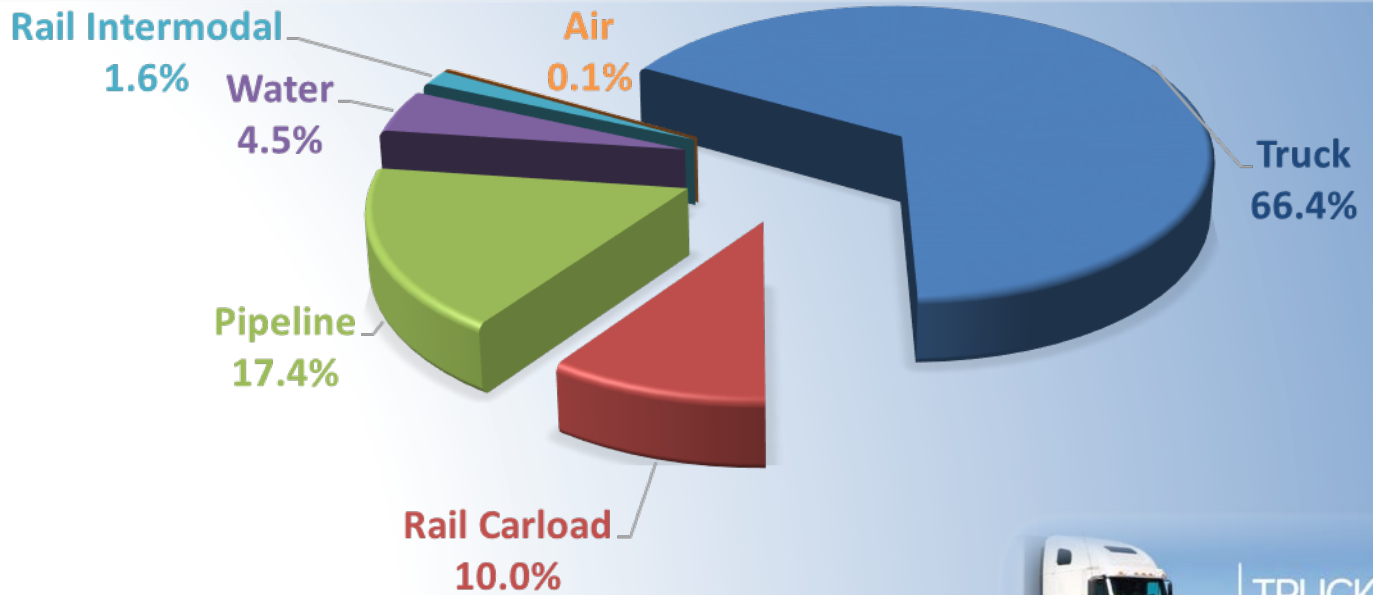


# Distribution of Tonnage by Mode: 2015 vs 2027

Truck  
70.9%



2015

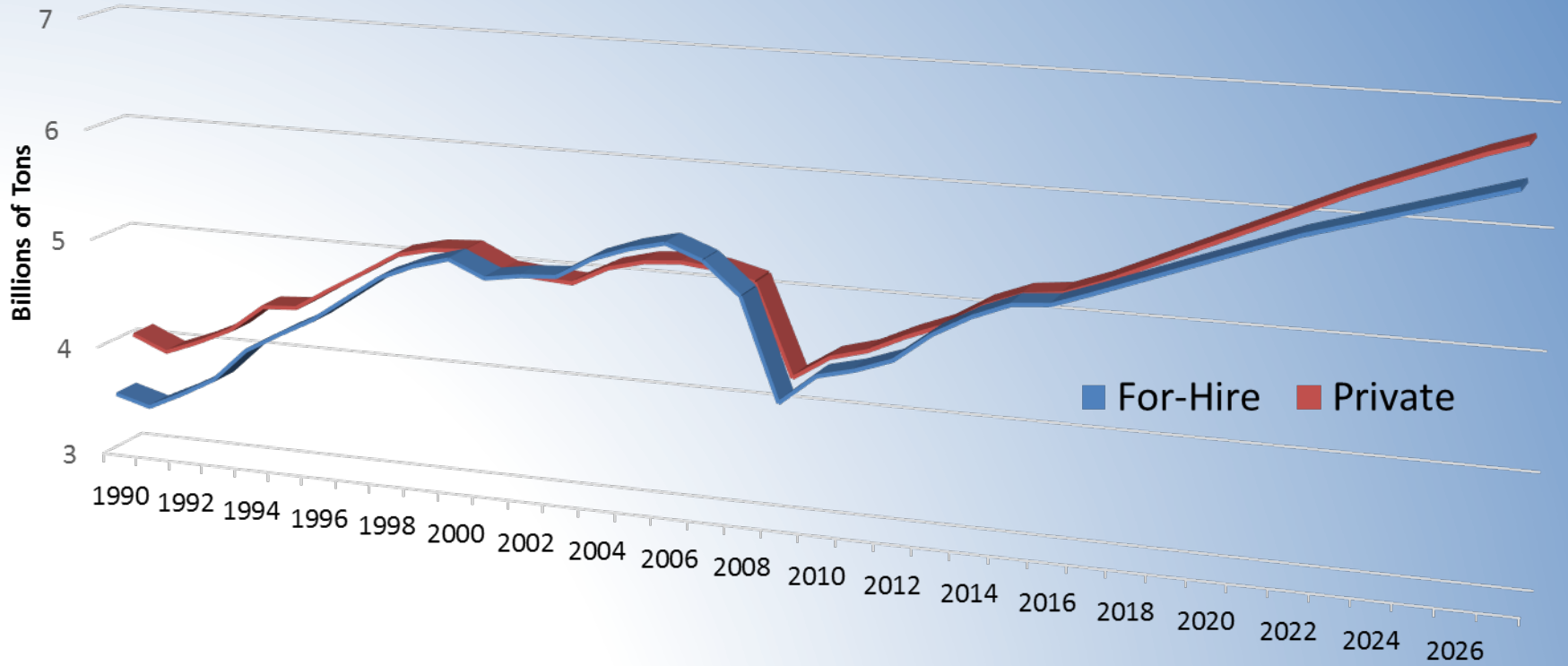


2027





# Tonnage by Mode



■ For-Hire ■ Private



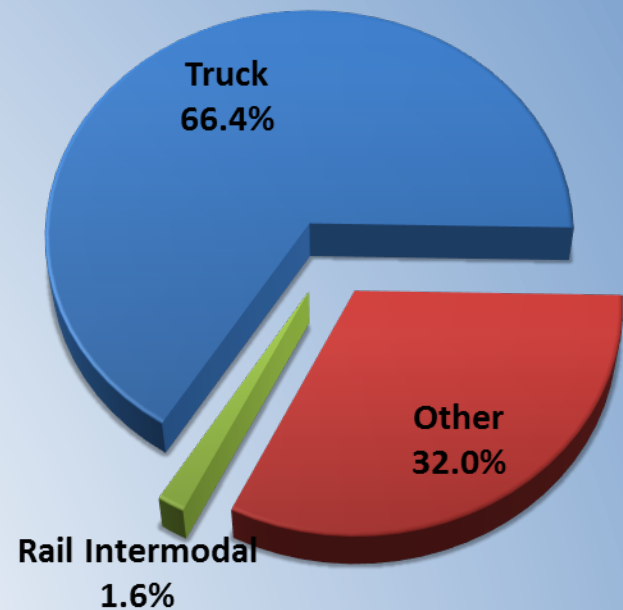
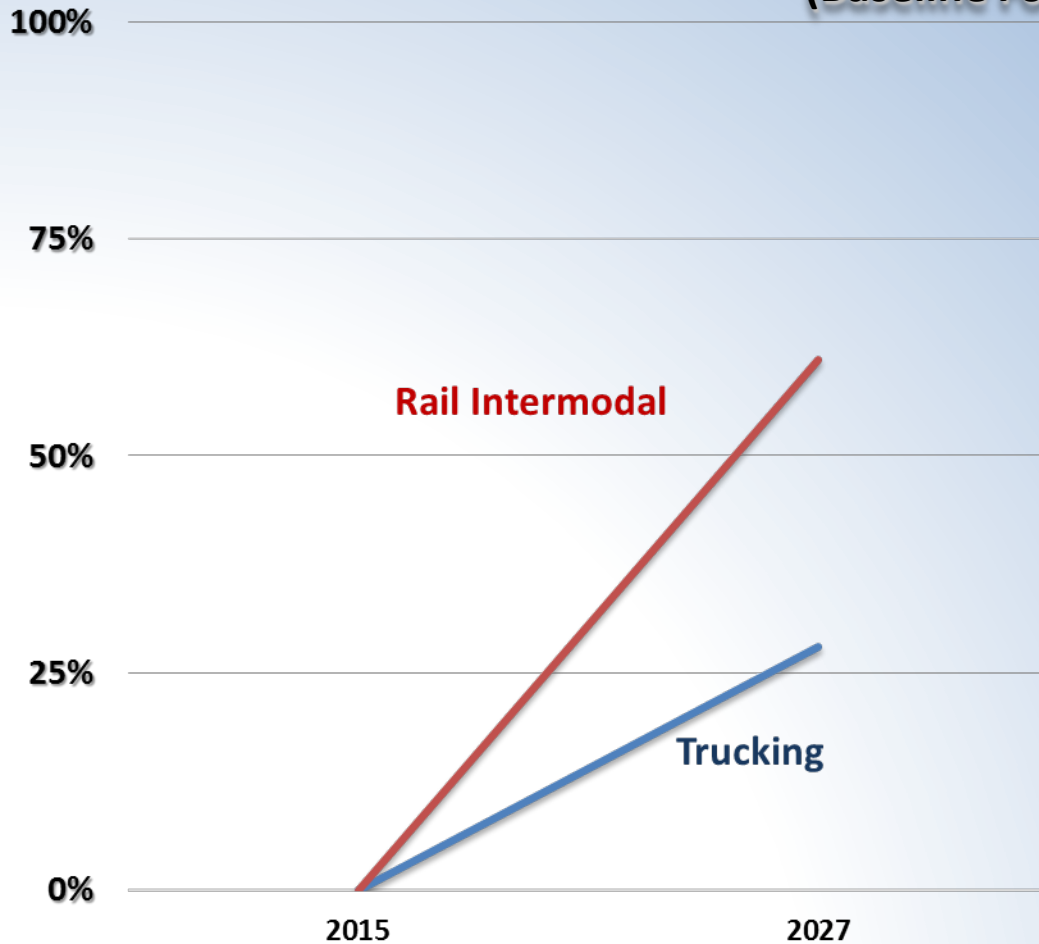
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# Tonnage Growth 2015 to 2027 & Market Share in 2027

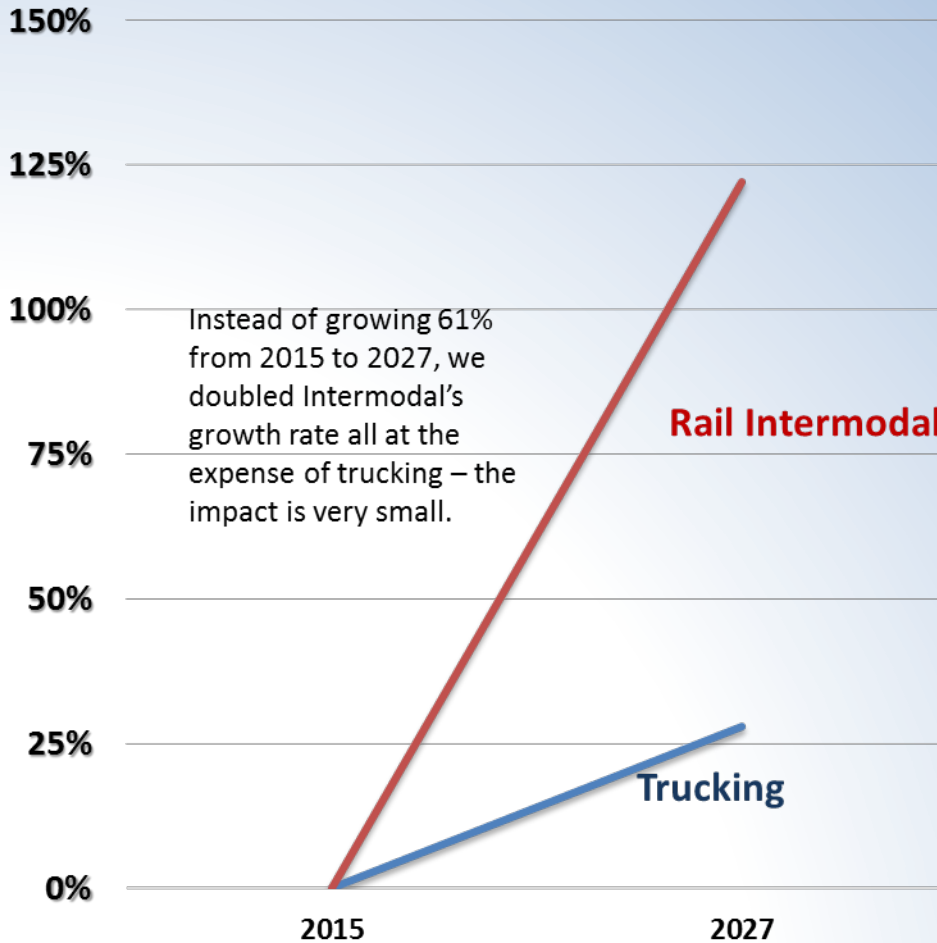
(Baseline Forecast)



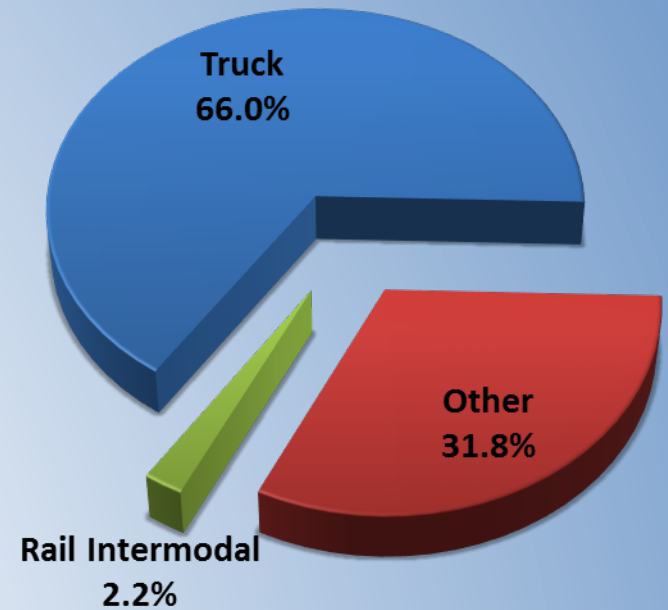


# Tonnage Growth 2015 to 2027 & Market Share in 2027

(Alternative Forecast #1)



Instead of growing 61% from 2015 to 2027, we doubled Intermodal's growth rate all at the expense of trucking – the impact is very small.

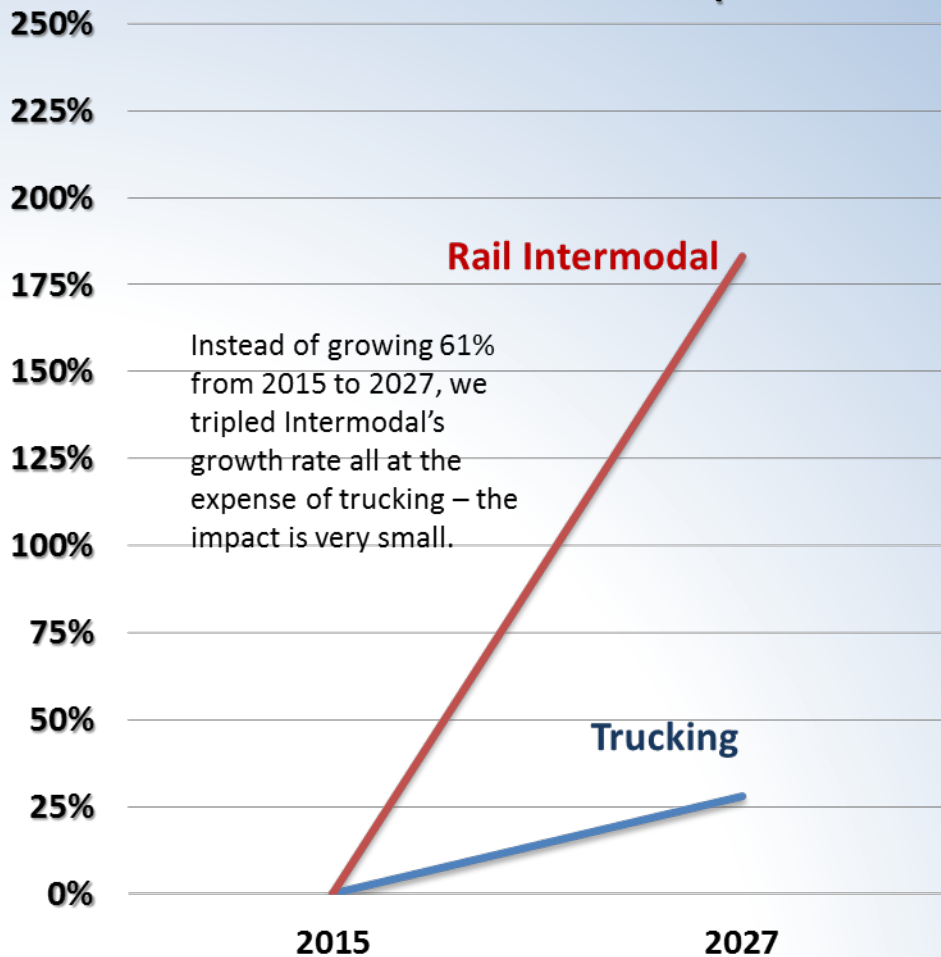


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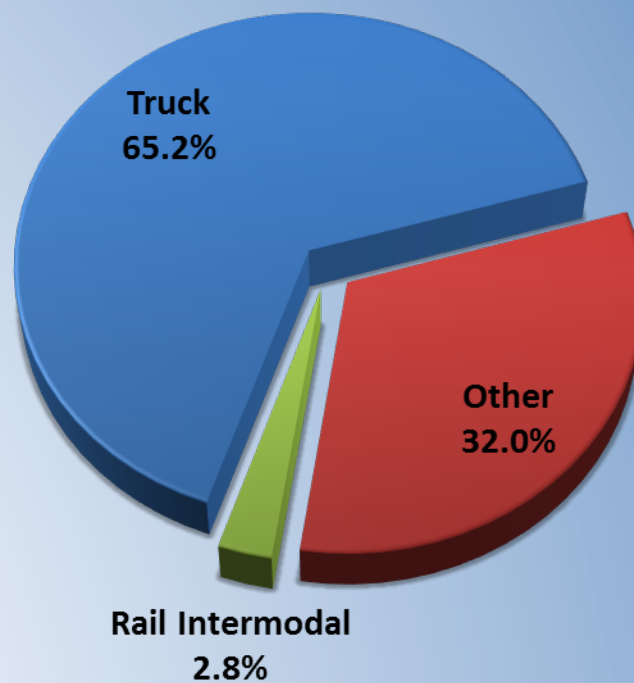


# Tonnage Growth 2015 to 2027 & Market Share in 2027

(Alternative Forecast #2)



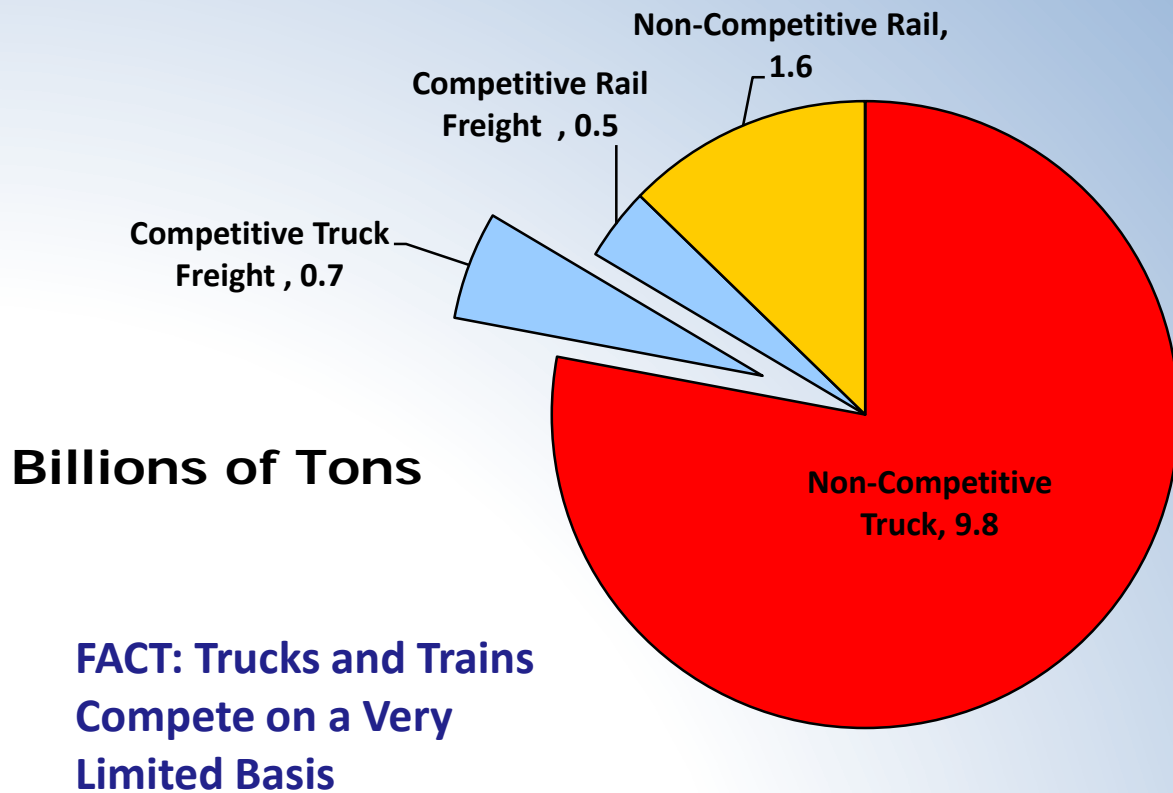
Instead of growing 61% from 2015 to 2027, we tripled Intermodal's growth rate all at the expense of trucking – the impact is very small.



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# 2015 Competitive Freight Among Truck and Rail Tonnage



• **Maximum** competitive freight is 1.2 billion tons in a total market (truck and rail only) of 12.6 billion tons, or less than 10%. Competitive freight includes all freight traveling at least 500 miles, but excludes coal tonnage. **There is a significant amount of time definite freight in this category that really isn't competitive, but it is included.** So in reality, the competitive market is even smaller than suggested here.

Source: ATA Analysis based on Commodity Flow Survey (US Census Bureau) data and US Freight Transportation Forecast to 2027



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# Autonomous Commercial Vehicles



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**Thanks!**

**@ATAEconBob**

