



NIT LEAGUE TRANSPORTATION SUMMIT

*Embrace the Future:
Developing Your
Transportation Survival Kit*

January 29-31, 2018 • InterContinental® Dallas





What is your main company type?

- Shipper
- 3PL/Brokerage
- Carrier
- Other

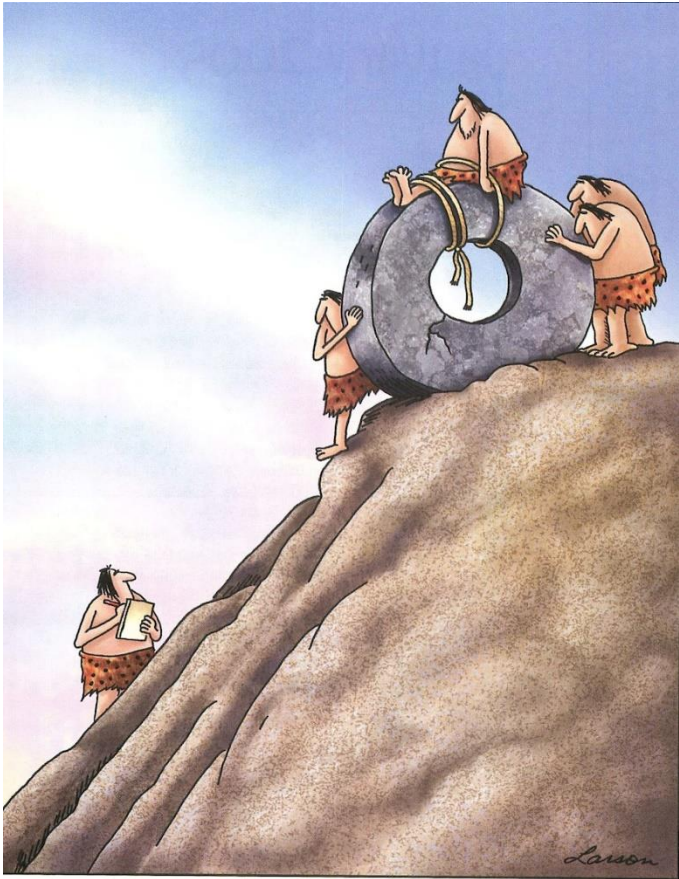


What are your feelings on how rates will change between 2017 and 2018?

- Up more than 10%
- Up 5-10%
- Up 1-5%
- Flat
- Down any percentage



Forecasting – A Real Look Into the Future Requires some look back to the past....



Early experiments in transportation





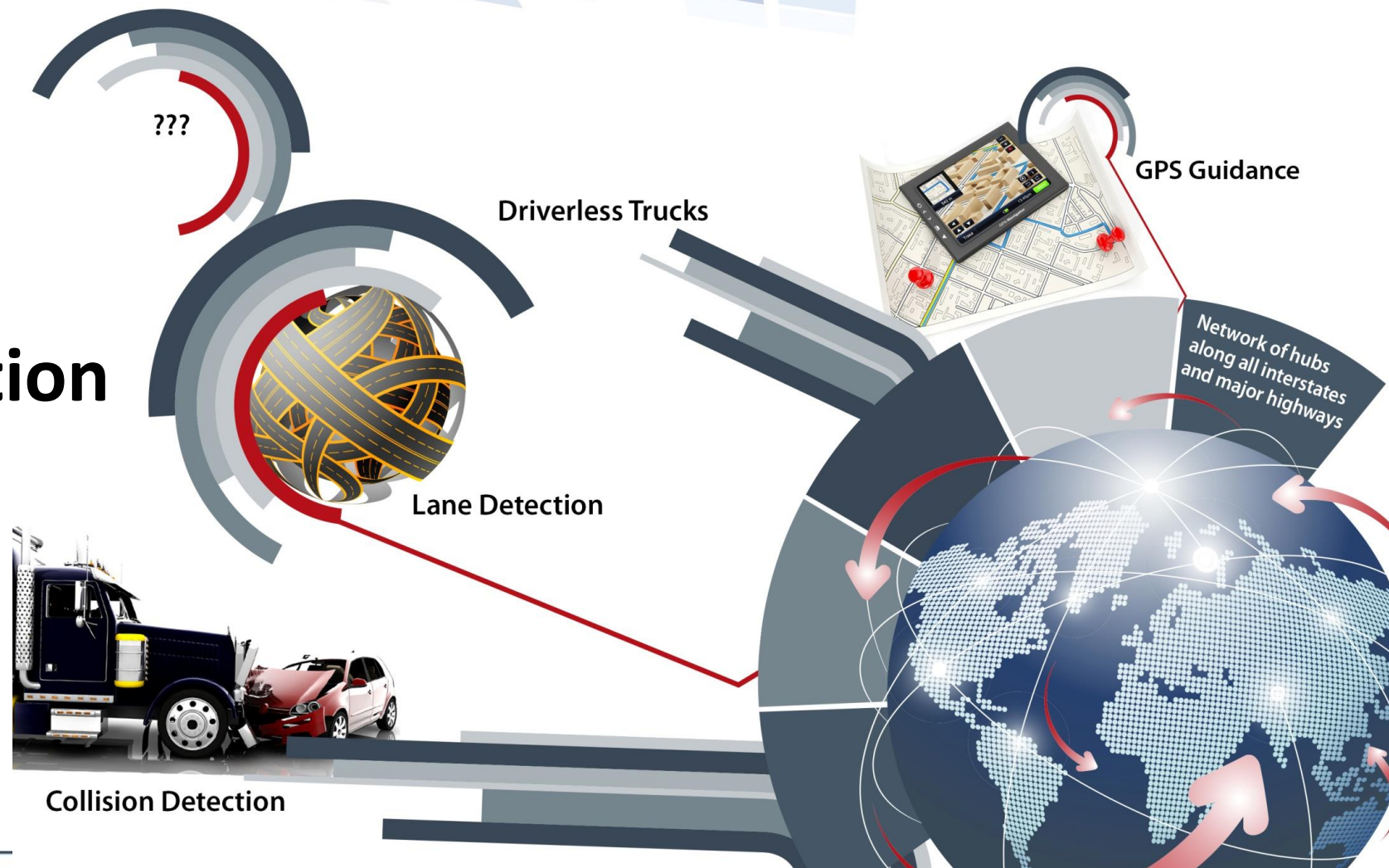
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Game Changers that are coming


INTERNET TRUCKSTOP[®]
Scott Moscrip, CEO

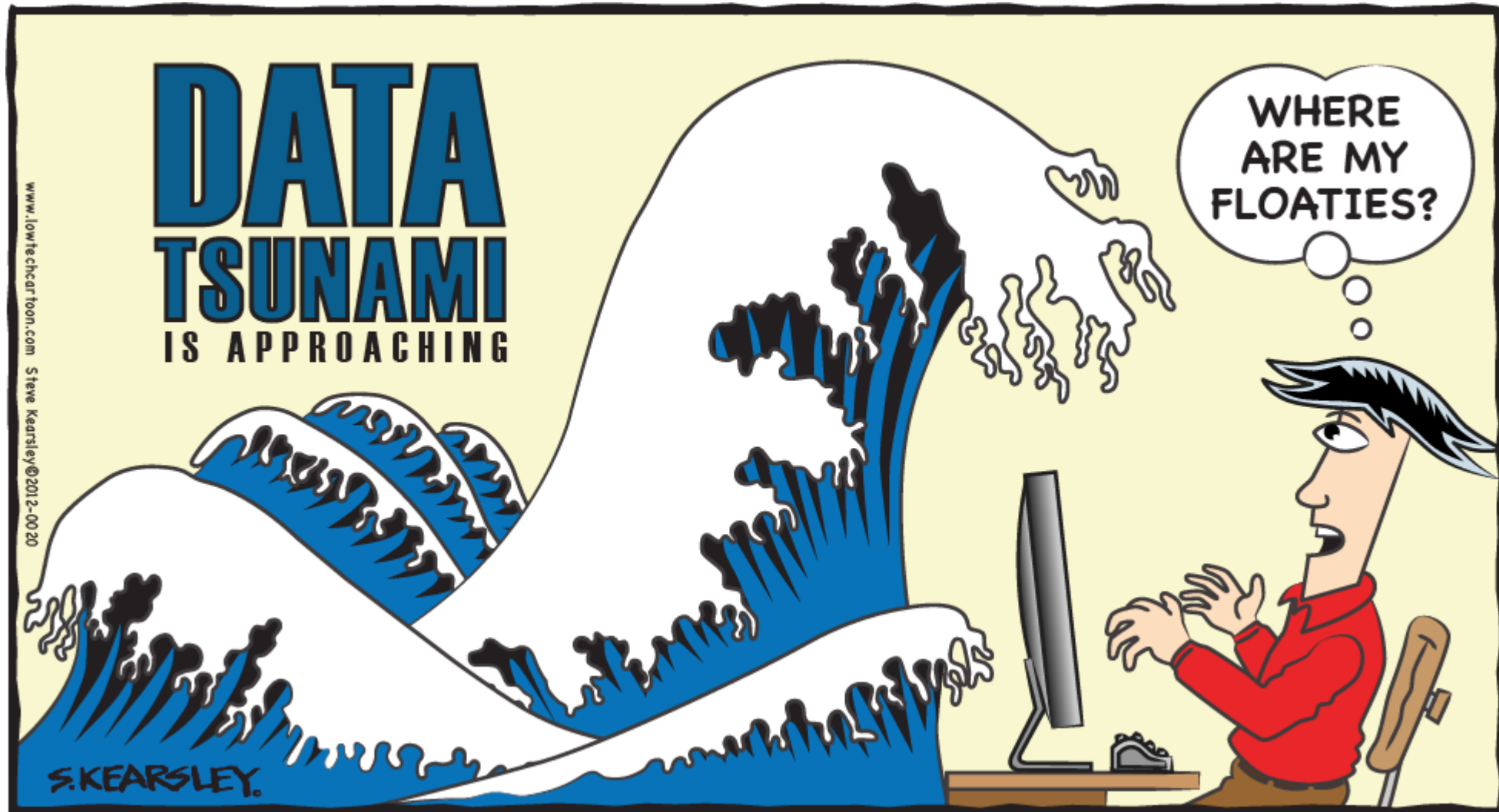
Slide from 2012 NITL Presentation





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Rate Forecasting

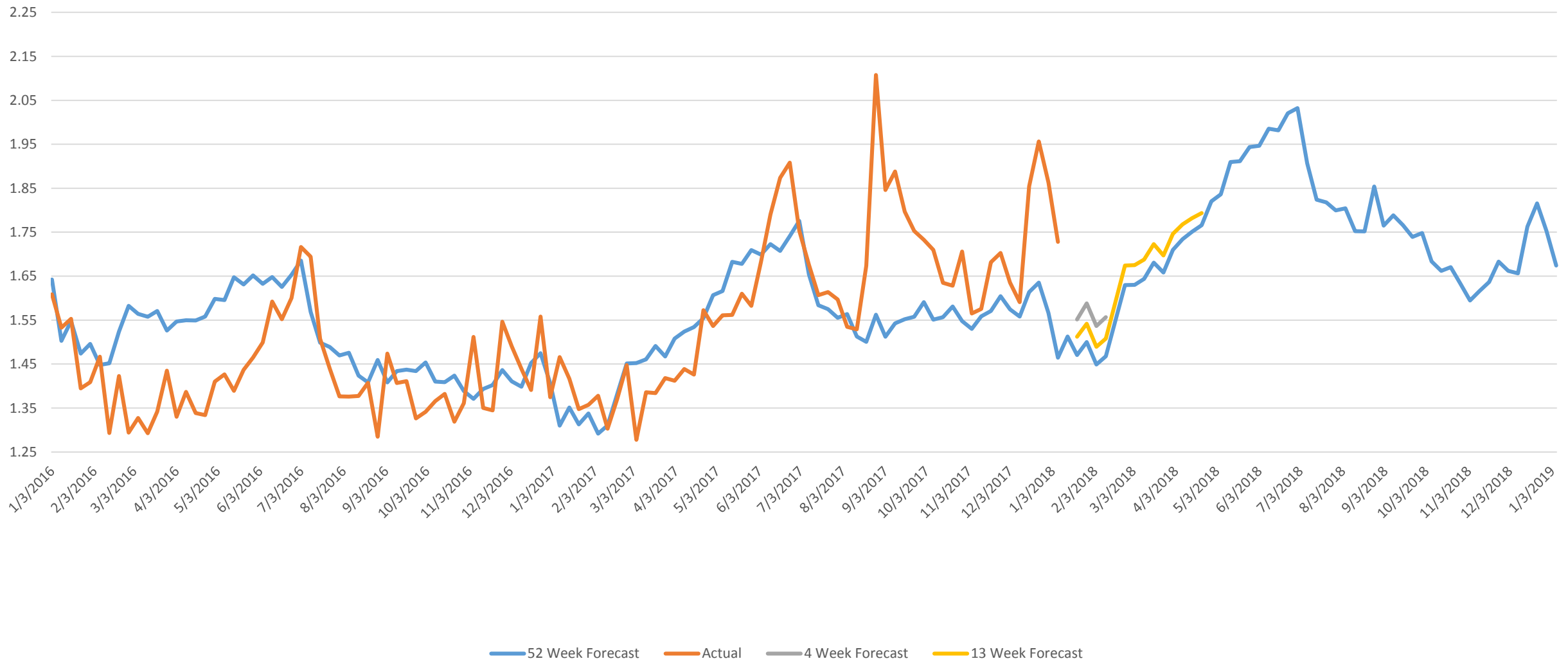
The Industry's 1st Lane-by-Lane Rate Forecast

Forecast rates up to 52 weeks in advance





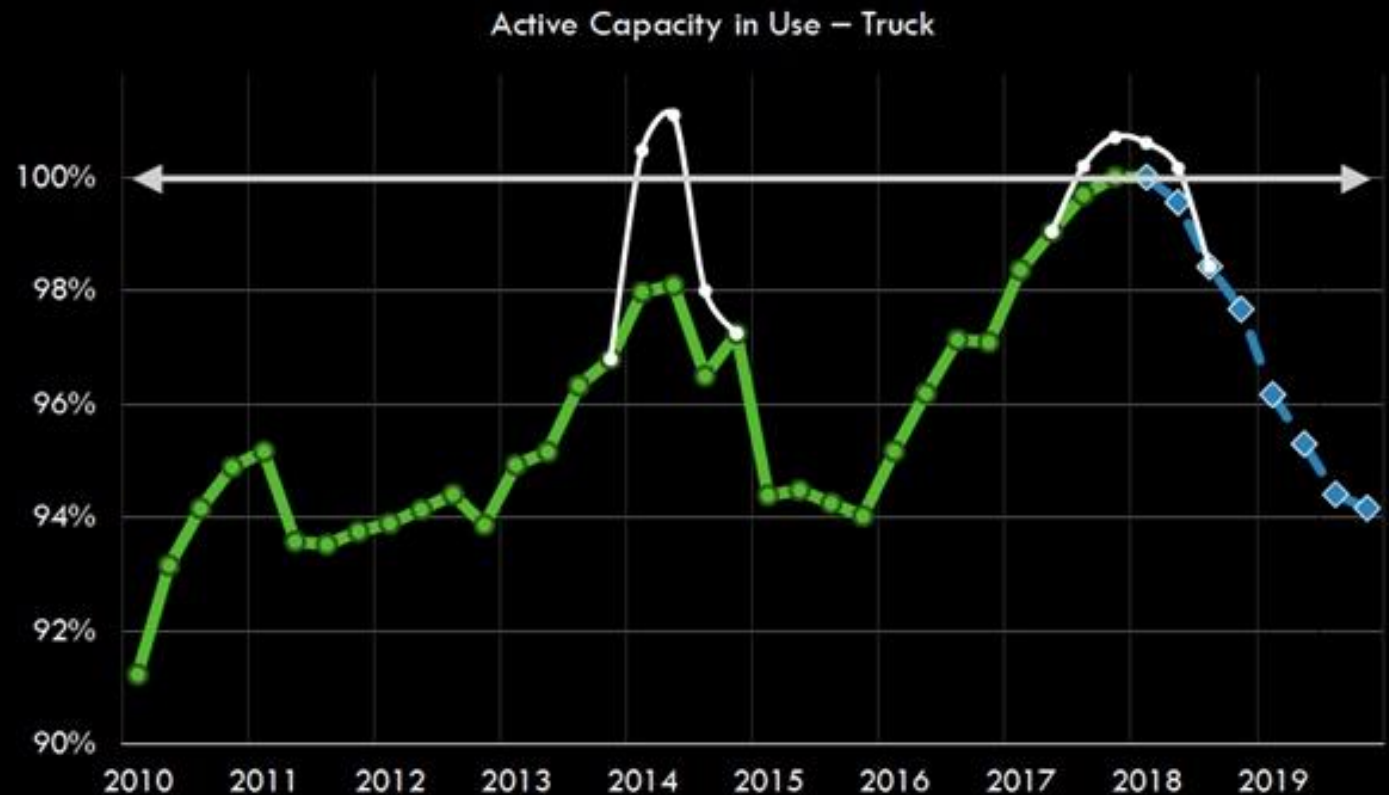
Georgia Van Freight Rate Forecast





It All Starts with Capacity

MARKET TIGHTNESS



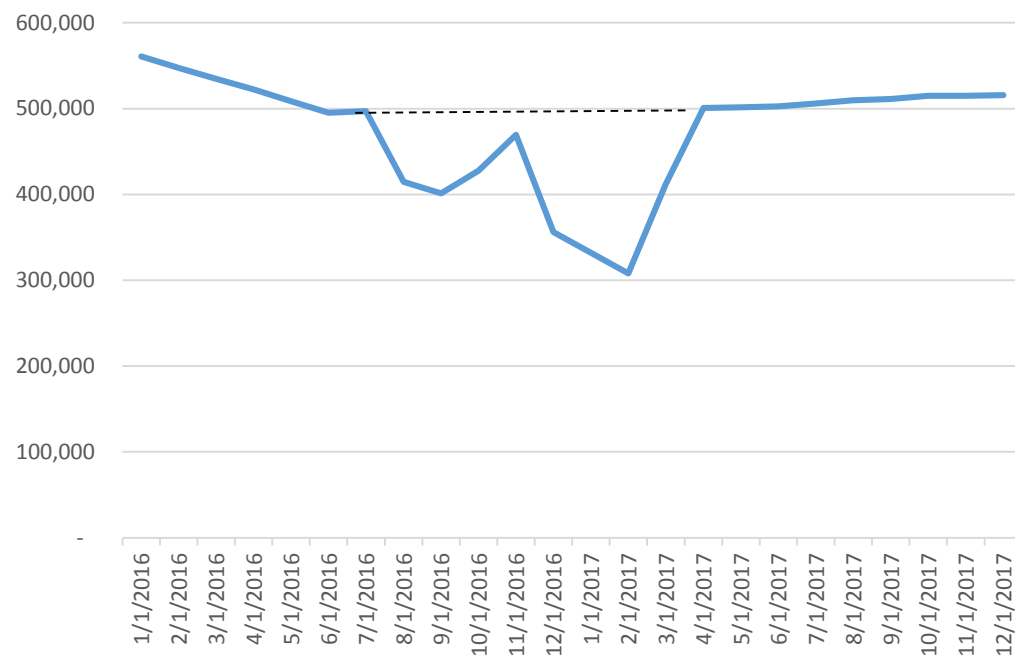
Source: FTR



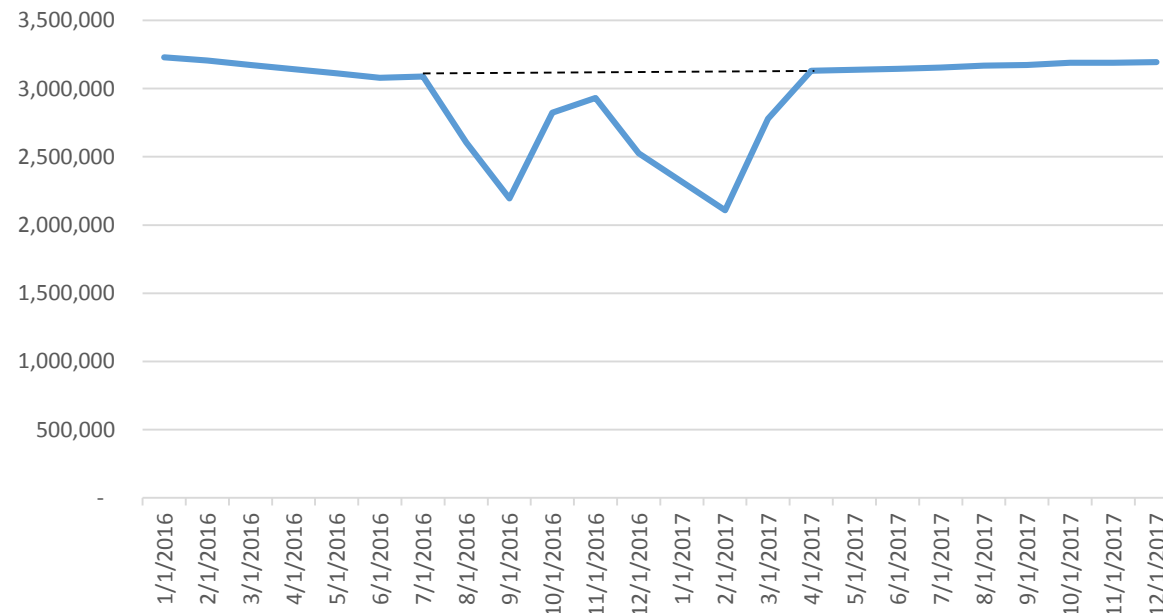
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Number of Interstate Carriers



Number of Power Units



	Fleets	Power Units	Drivers
9/1/2017	511,152	3,174,160	3,225,290
10/1/2017	514,977	3,188,982	3,236,293
11/1/2017	514,788	3,188,554	3,238,350
12/1/2017	515,772	3,194,044	3,243,981
	0.9038%	0.6264%	0.5795%



Size Matters!

	Fleets	1	2-10	10-100	100+
9/1/2017	523,903	250,685	222,913	45,970	4,335
10/1/2017	527,807	253,157	224,162	46,152	4,336
11/1/2017	527,576	252,932	224,154	46,144	4,346
12/1/2017	528,543	253,524	224,466	46,198	4,355

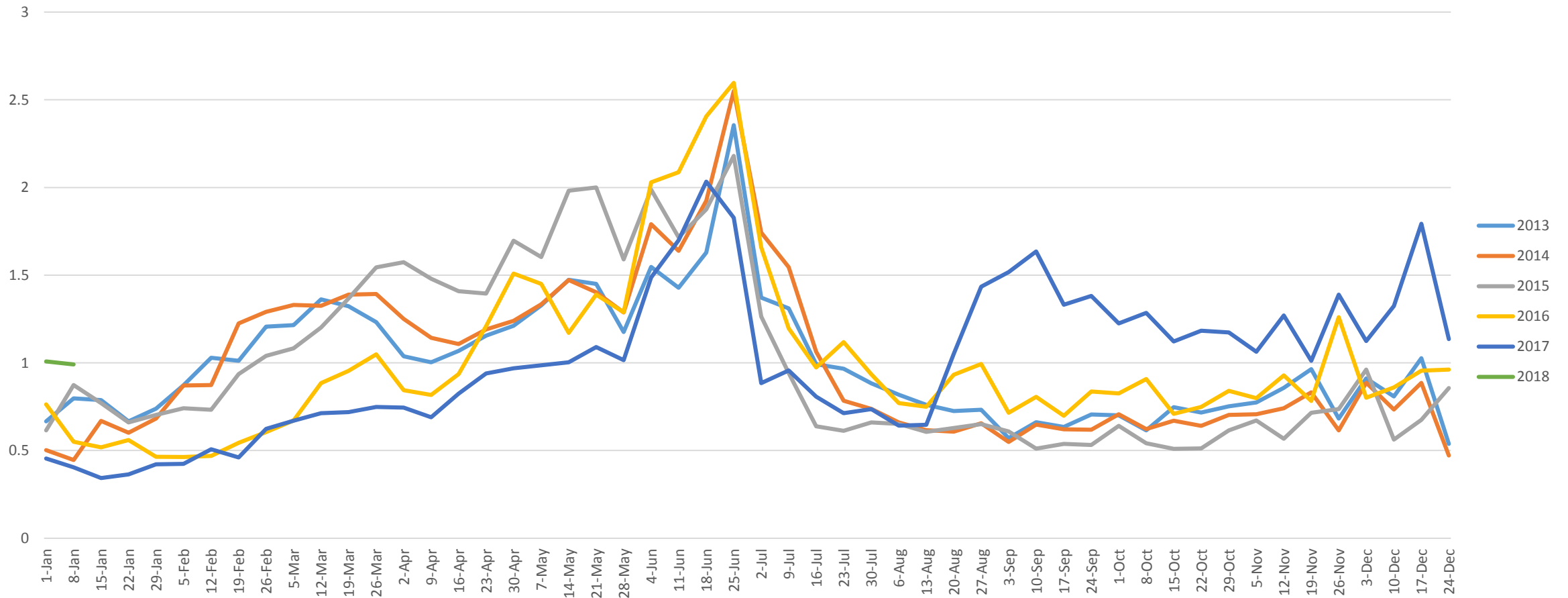


New Entrants: 6,720 per month

Exits: 4,487 per month

Seasonality and Disruptions

Georgia Van Freight Seasonality





What are the Carriers looking for?

- 154,480,168 Unique Freight Postings to System
- 778,365,572 Searches for Freight within the System with more than 300 Billion results returned.

		Front Haul	Back Haul	Interline
Owner	2016	17%	10%	73%
Operator	2017	17%	11%	72%
Small	2016	18%	12%	71%
Fleets	2017	17%	11%	71%
Large	2016	11%	8%	81%
Fleets	2017	10%	8%	83%

WE'VE DECIDED
TO TAKE BIG
DATA TO THE
NEXT LEVEL...



**HUMONGOUS
DATA**



Therefore, what Scott thinks....

- 1) Capacity will remain tight through the 1st half of the year
- 2) The ELD effect hasn't even hit us yet. Wait until enforcement really starts.
 - In Europe the introduction of ELDs had carriers go from 120,000km/yr to 100,000km/yr
- 3) As technology continues rolling out, large fleets will become mega fleets
- 4) As technology is forced on the carrier, shippers will be forced to pay a greater burden of the costs of loading, detention, etc.
- 5) In the short term, large fleets will do more drop and hook loads to gain better utilization of driver time.
- 6) As transportation costs increase more near shoring will occur.
- 7) It is another perfect storm: Capacity, Regulation, and Economic Growth
- 8) Rate Forecasting will help with the trends and give you some solid targets



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“Literally drowning in data”



What Questions do you have?

There is DATA to answer them!