What do shippers expect after a recovery?

- Intermodal growth estimates far exceed other modes

- Intermodal is still a more economic alternative than over-the-road solutions, though the gap has narrowed considerably in recent months

- Fuel efficiency, improving service and lower costs are driving share gains despite aggressive over-the-road pricing and lower fuel prices

- Carriers with large intermodal franchises should continue to benefit from ‘over the road’ conversion

Congestion will get worse

Today

2020

Source: USDOT FHWA Freight Analysis Framework
Future demands require significant investment

Investment required by 2035

- Freight Rail: $135 Billion
- Passenger Rail: $198 Billion
- Highways: $5 Trillion

Source: Rail – 2007 AAR/Cambridge Study; Highway – 2007 DOT Surface Transportation Study
Vital Southeast solutions

Mutual Wins

**Partners:** Georgia, South Carolina, Florida, Alabama, CSX, SE Ports

**Investments:** $888m

**Start Date:** 2004

**Finish Date:** 2014

**Projects:** SE Expressway, Savannah ICTF, JAXPORT Expansion, Bessemer ICTF, Winter Haven ILC

Next Wave: 2014 and Beyond

- Charleston, SC
- Jasper County SC
- Mobile, Alabama
- Gulfport, Mississippi
- Tampa, Florida
- Port Manatee, Florida
- South Central Florida

Legend

- Key Route
- Trackage Rights
- Other Route
- Partnership Corridor
- Terminal
- New Terminal
- Planned Terminal
- ILC
Mutual Wins

**Partners:** Massachusetts, New York, New Jersey, Pennsylvania, NE Ports

**Investments:** $886m

**Start Date:** 2004

**Finish Date:** 2013

**Projects:** River Line Capacity Improvements, Express Rail, Liberty Corridor Clearances, MBTA Deal, Buffalo Terminal, Trenton Line Clearances

Next Wave: 2013 and Beyond

✓ **PANYNJ Greenville Intermodal Yard**
**Vital Mid-Atlantic solutions**

**Mutual Wins**

**Partners:** Ohio, Pennsylvania, Maryland, Virginia, North Carolina, Mid-Atlantic Ports

**Investments:** $858m

**Start Date:** 2007

**Finish Date:** 2014

**Projects:** NW Ohio, Pittsburgh, Chambersburg, BWI, National Gateway Clearances, APM Terminal Access, Charlotte Expansion, Louisville

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**Next Wave: 2014 and Beyond**

- **NC International Terminal**
- **Craney Island**
- **Suffolk, Virginia**
- **Seagirt**
- **Columbus**

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**Legend**

- Key Route
- Trackage Rights
- Other Route
- Partnership Corridor
- Terminal
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- Planned Terminal
- ILC
Northwest Ohio – Widespan Crane Operation

**Environment**
- Reduce carbon emissions
- Almost silent operations

**Network**
- Increase terminal throughput
- Connect more markets
- Reduce transit times

**Operations**
- Semi automatic operations
- Improves facility safety
- Reduce equipment maintenance
- Reduce fuel & labor expense

5 widespan cranes
8 working tracks
Two straddle lanes
One truck lane
5 container stacks (4 high)
18 block swap tracks

Evansville Western Railway, an affiliate of CSX, is the developer-operator of this NW Ohio facility.
The Future in action
The momentum continues

Northwest Ohio milestones

- Earthwork 98% complete
- 8 miles of track assembled
- Crane rail foundation is complete
- Operational mid-2011
An evolved network addresses new flows

- Cascadia
- Northern California
- Southern California
- Gulf Coast
- Midwest
- Northeast
- Atlanta – Research Triangle
- Florida

- Opportunities
- Western flows
- ILC