

Surface Transportation Board – Rail Energy Transportation Advisory Committee Meeting

Performance Measures Subcommittee Update



October 2, 2014

Using EIA, AAR and individual railroad data sources, a data table is assimilated, and from it.....

Six coal-related dashboards, organized as follows:

1. Coal Production, Consumption, and Inventories Dashboard
2. Net Generation by Fuel Type Dashboard
3. Coal Exports Dashboard
4. Western Rail Coal Carloads Dashboard
5. Eastern Rail Coal Carloads Dashboard
6. Canadian Rail Coal Carloads Dashboard
7. Railroad Coal Train Speed Dashboard

Most dashboards have three sections:

- a. Left - historical and forecasted data (no forecasts of rail metrics)
- b. Middle - comparison for the most recent quarter (Q3 or Q4 as noted)
- c. Right - current YTD comparison versus the 5-year range

Performance Summary

Coal Production (2014 YTD vs 2013 YTD)

Appalachia:	Increased 3.4 million tons	(+2.5%)
Interior:	Increased 3.2 million tons	(+3.4%)
Western:	Decreased 6.8 million tons	(-2.5%)
Total Production:	Decreased 0.2 million tons	(-0.04%)

Coal Consumption (2014 YTD vs 2013 YTD)

Electricity/Power	Increased 16.3 million tons	(+3.9%)
Retail/Other	Increased 1.3 million tons	(+5.8%)
Met/Coke	Decreased 0.3 million tons	(-2.9%)
Total Consumption	Increased 31.1 million tons	(+3.5%)

Coal Exports (2014 YTD vs 2013 YTD)

Met Coal:	Decreased 2.7 million net tons	(-7.9%)
Steam Coal:	Decreased 7.8 million net tons	(-28%)
Total Exports:	Decreased 10 million net tons	(-17%)

Coal Production MM Tons				
2013 YTD	Appalachia	Interior	Western	Total
Q1	71.3	45	126.8	243.1
Q2	66.2	48.1	142.4	256.7
Sum:	137.5	93.1	269.2	499.8
2014 YTD	Appalachia	Interior	Western	Total
Q1	70.9	46.8	127.2	244.9
Q2	70	49.5	135.2	254.7
Sum:	140.9	96.3	262.4	499.6
Tonnage	3.4	3.2	-6.8	-0.2
Percent	2.47%	3.44%	-2.53%	-0.04%

Coal Consumption MM Tons				
2013 YTD	Electric Pwr	Other	Coke	Total
Q1	212	11.8	5.3	229.1
Q2	200.2	10.6	5.1	215.9
Sum:	412.2	22.4	10.4	445
2014 YTD	Electric Pwr	Other	Coke	Total
Q1	231.7	12.2	5	248.9
Q2	196.8	11.5	5.1	213.4
Sum:	428.5	23.7	10.1	462.3
Tonnage	16.3	1.3	-0.3	17.3
Percent	3.95%	5.80%	-2.88%	3.89%

Coal Exports MM Tons			
2013 YTD	Met	Steam	Total
Q1	18.2	13.7	31.8
Q2	16.1	13.3	29.4
Sum:	34.3	27	61.2
2014 YTD	Met	Steam	Total
Q1	16.9	10.9	27.7
Q2	14.7	8.3	23
Sum:	31.6	19.2	50.7
Tonnage	-2.7	-7.8	-10.5
Percent	-7.87%	-28.89%	-17.16%

Coal Inventories MM Tons				
2013 YTD	Electric Pwr	Bit	Sub-Bit	Total
Q1	171.5	81.8	88.7	342
Sum:	171.5	81.8	88.7	342
2014 YTD	Electric Pwr	Bit	Sub-Bit	Total
Q1	117.9	57	60.7	235.6
Sum:	117.9	57	60.7	235.6
Tonnage	-53.6	-24.8	-28	-106.4
Percent	-31.25%	-30.32%	-31.57%	-31.11%

Performance Summary

Railroad Carloads (CY 2013 estimate versus CY 2012)

BNSF:	Increased 56,500 carloads	(+5.4%)
Union Pacific:	Increased 23,300 carloads	(+3.3%)
Kansas City Southern:	Decreased 2,200 carloads	(-3.1%)
Norfolk Southern:	Decreased 30,000 carloads	(-5.7%)
CSX Transportation:	Decreased 10,800 carloads	(-2.1%)
Canadian National:	Decreased 3,500 carloads	(-4.2%)
Canadian Pacific:	Increased 9,000 carloads	(+8.7%)
Total Carloads:	Increased 43,300 carloads	(+1.4%)

Car Originations / *KCS Receipts (000 Carloads)

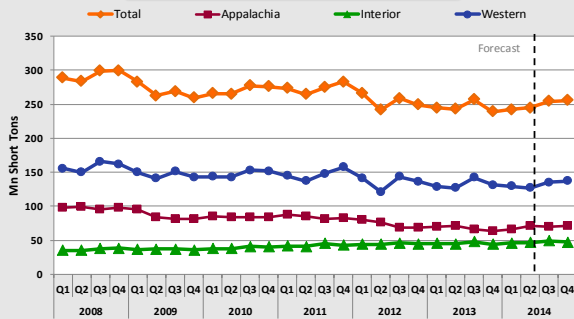
2013 YTD	BNSF	UP	*KCS	NS	CSX	CN	CP	Total
Q1	542	364	49	266	235	58	60	1,574
Q2	513	373	48	262	239	61	55	1,551
Sum:	1,055	737	97	528	474	119	115	3,125
2014 YTD	BNSF	UP	*KCS	NS	CSX	CN	CP	Total
Q1	565	388	48	229	218	53	60	1,561
Q2	547	373	46	269	246	61	65	1,607
Sum:	1,112	761	94	498	464	114	125	3,168
Carloads	57	24	-3	-30	-10	-5	10	43
Percent	5.4%	3.3%	-3.1%	-5.7%	-2.1%	-4.2%	8.7%	1.4%

Average Train Speeds (MPH)

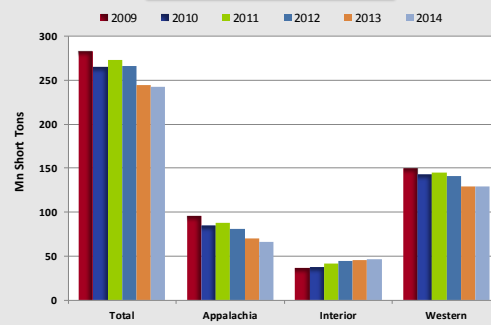
2013 YTD	BNSF	UP	*KCS	NS	CSX	CN	Avg
Q1	23.4	27.9	28.1	17.8	19.6	25.1	24
Q2	20.7	27.1	26.6	17.5	19.3	25.6	23
2014 YTD	BNSF	UP	*KCS	NS	CSX	CN	Avg
Q1	18.8	25.6	26	17.1	18.2	24.9	22
Q2	17.5	24.3	25.1	16.6	16.6	25.5	21

U.S. COAL PRODUCTION, CONSUMPTION, AND INVENTORIES DASHBOARD

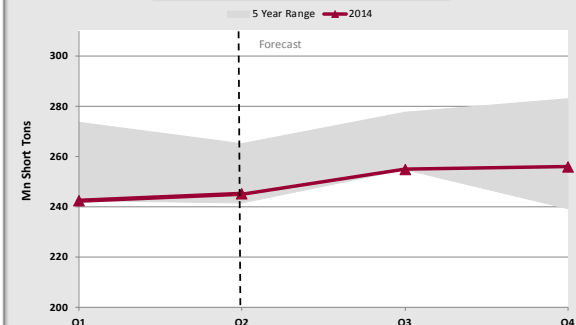
Historical and Forecasted Production



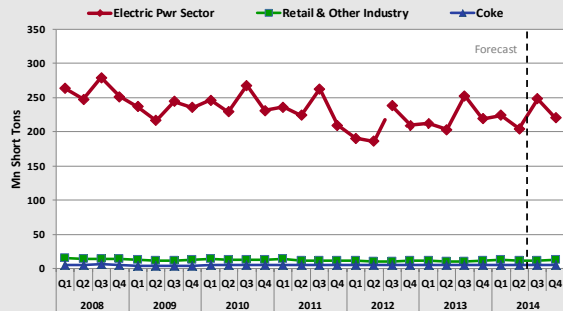
Q2 Production Comparison



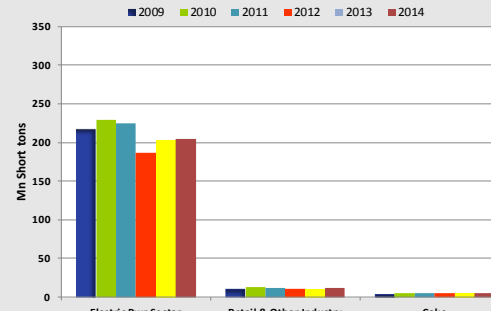
2014 Production vs 5-Year Range



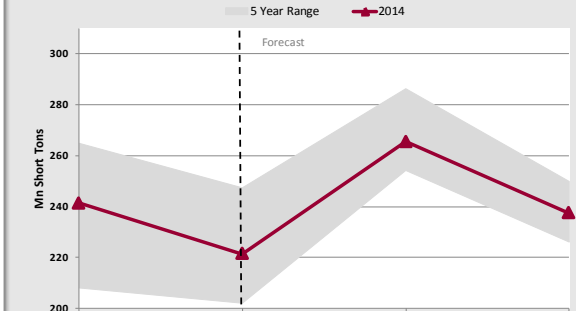
Historical and Forecasted Consumption



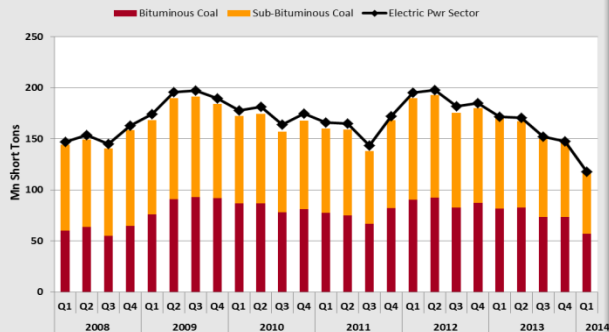
Q2 Consumption Comparison



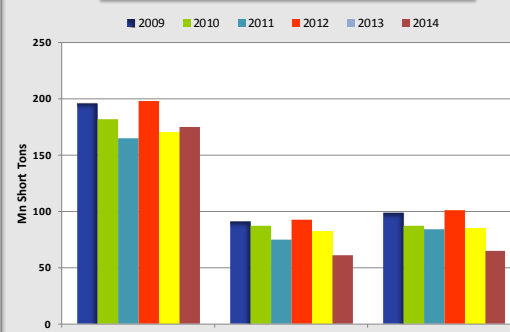
2014 Consumption vs 5-Year Range



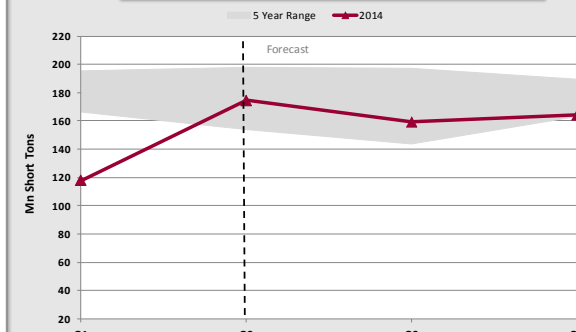
Historical and Forecasted End-of-Period Inventories



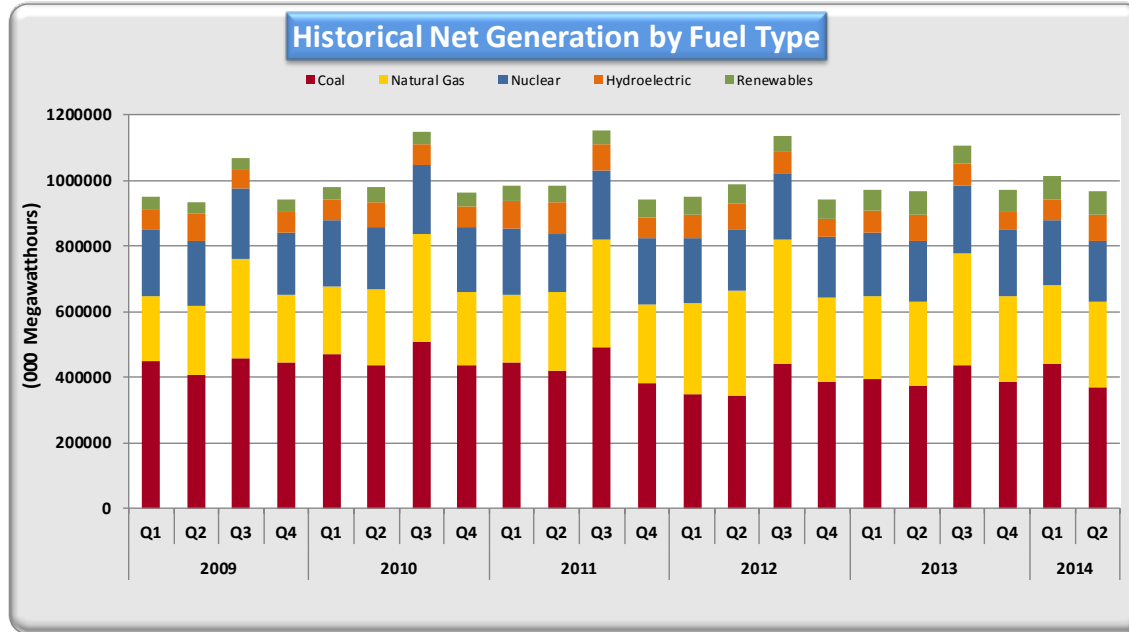
Q2 End-of-Period Inventories Comparison



2014 End-of-Period Inventories vs 5-Year Range



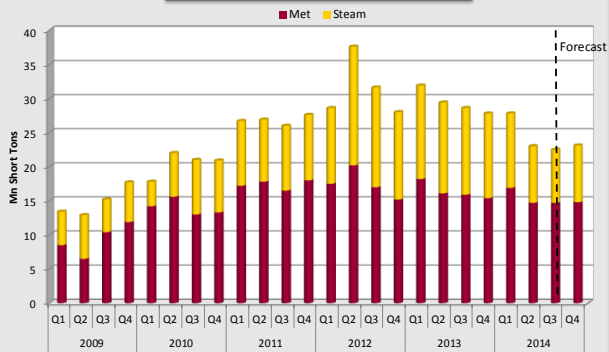
NET GENERATION BY FUEL TYPE DASHBOARD



Source Data: EIA

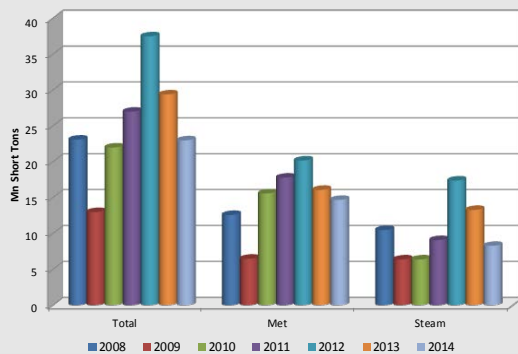
U.S. COAL EXPORTS DASHBOARD

Historical and Forecasted Exports

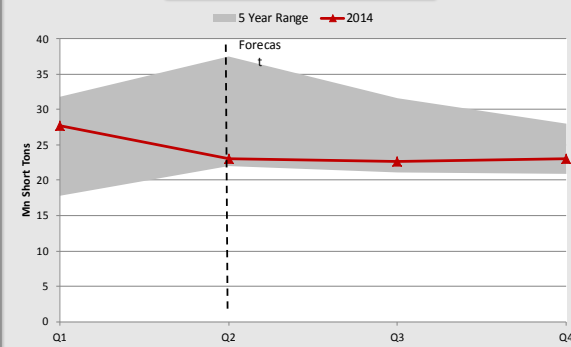


Source Data: EIA

Q2 Exports Comparison

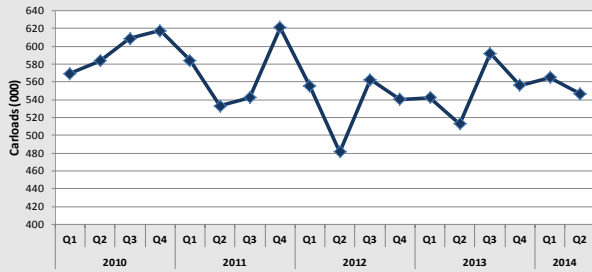


2014 Exports vs 5-Year Range

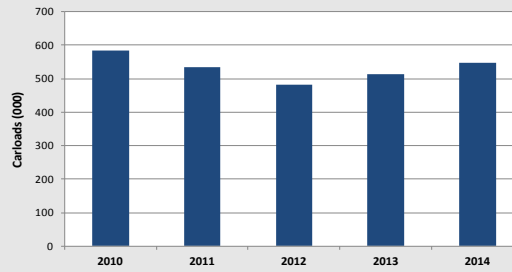


WESTERN RAILROAD COAL CARLOADS DASHBOARD

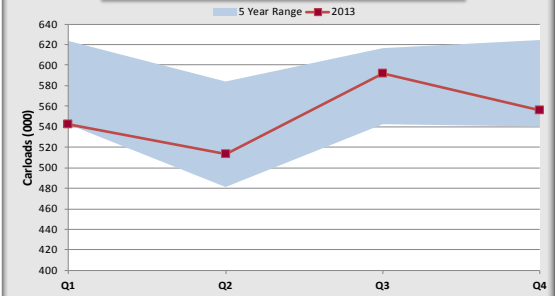
BNSF Historical Originations



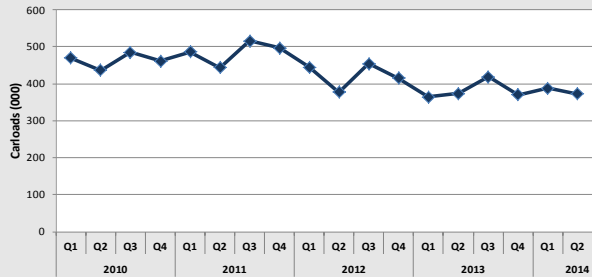
BNSF Q2 Originations Comparison



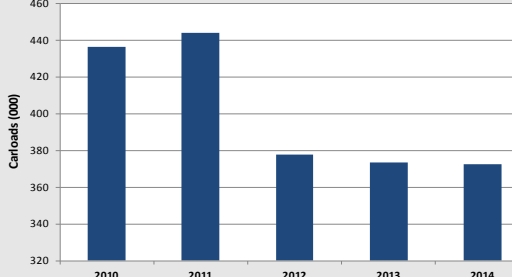
2013 BNSF Originations vs 5-Year Range



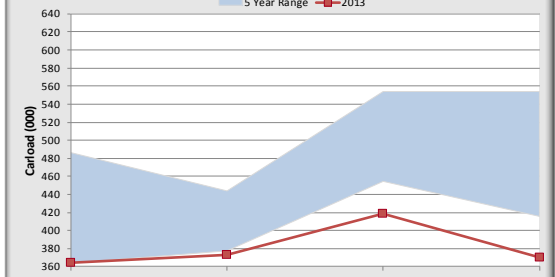
UP Historical Originations



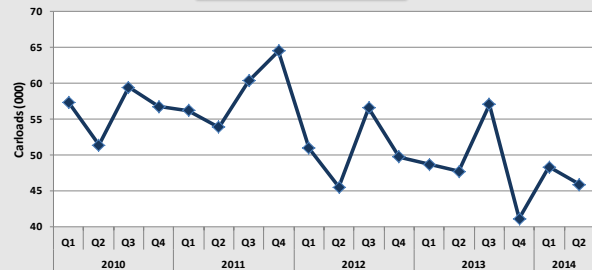
UP Q2 Originations Comparison



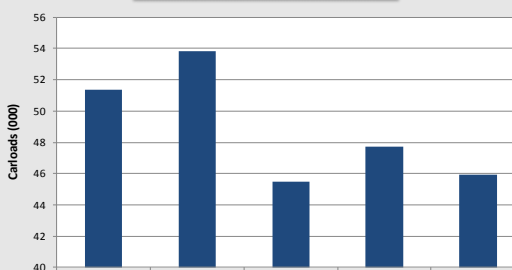
2013 UP Originations vs 5-Year Range



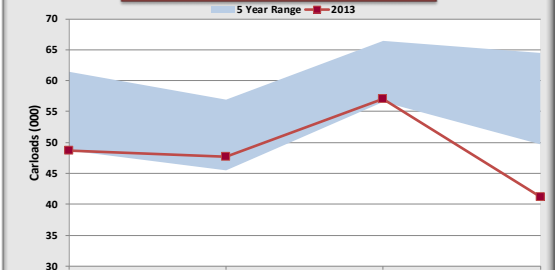
KCS Historical Receipts



KCS Q2 Receipts Comparison



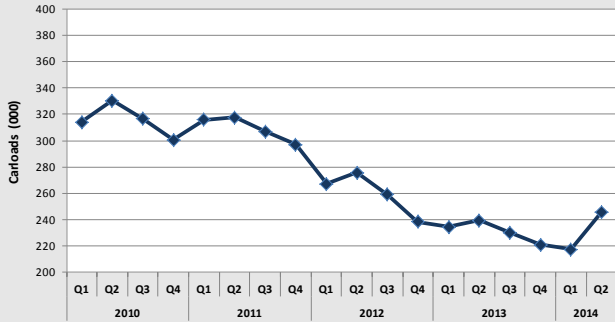
2013 KCS Receipts vs 5-Year Range



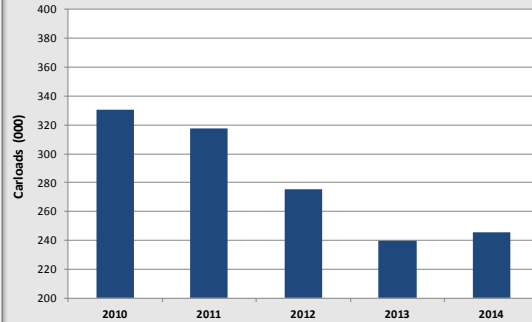
Source Data: AAR, BNSF, UP, KCS

EASTERN RAILROAD COAL CARLOADS DASHBOARD

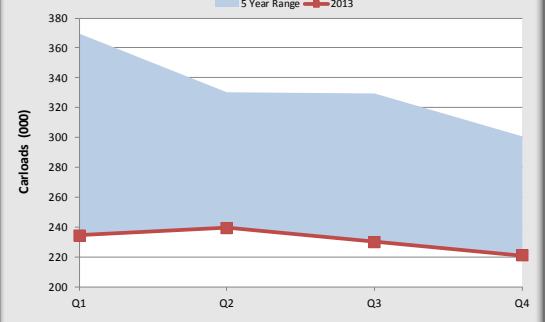
CSX Historical Originations



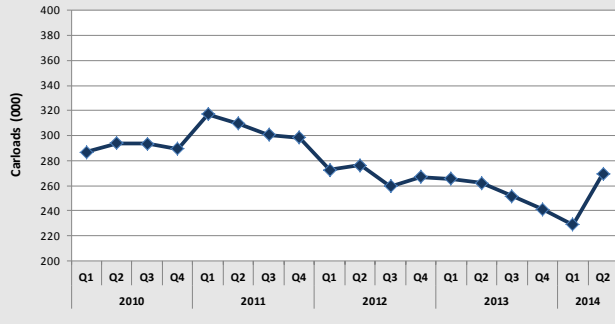
CSX Q2 Originations Comparison



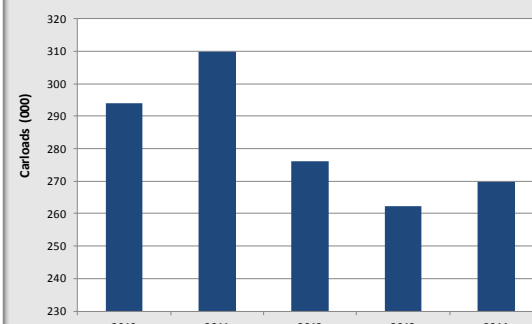
2013 CSX Originations vs 5-Year Range



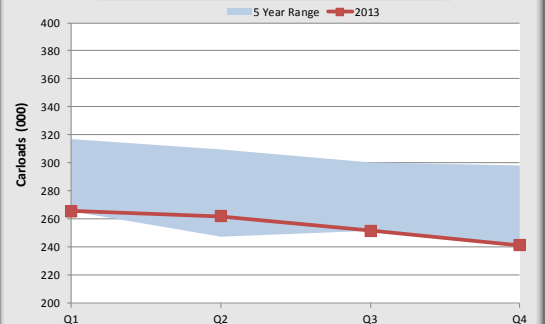
NS Historical Originations



NS Q2 Originations Comparison



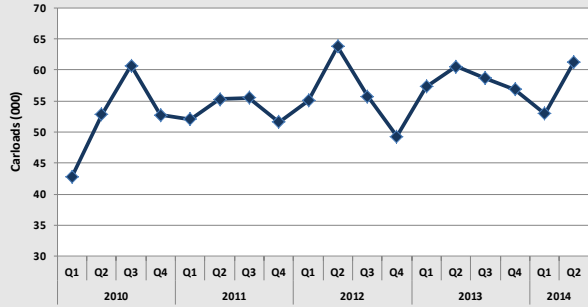
2013 NS Originations vs 5-Year Range



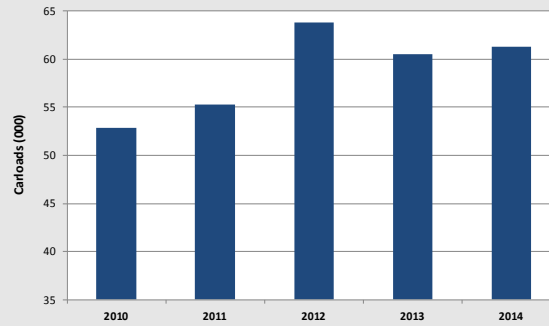
Source data: AAR, CSX, NS

CANADIAN RAILROAD COAL CARLOADS DASHBOARD

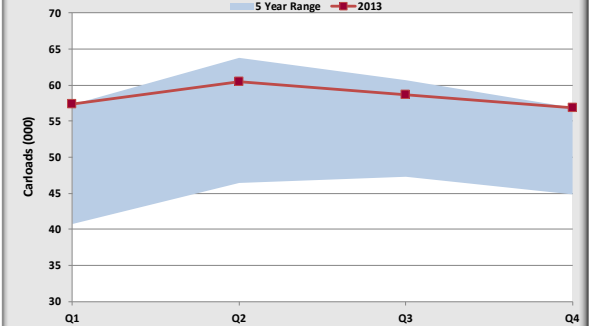
CN Historical Originations



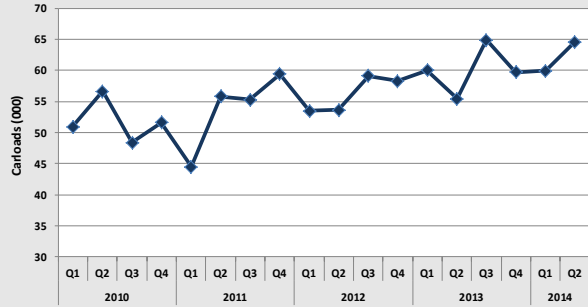
CN Q2 Originations Comparison



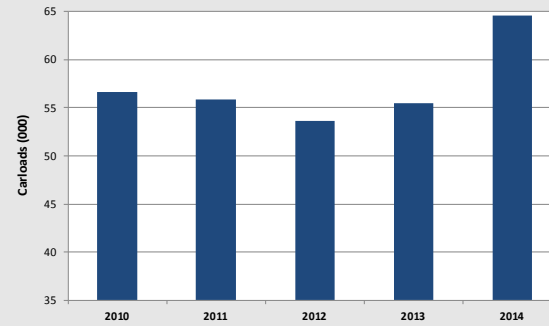
2013 CN Originations vs 5-Year Range



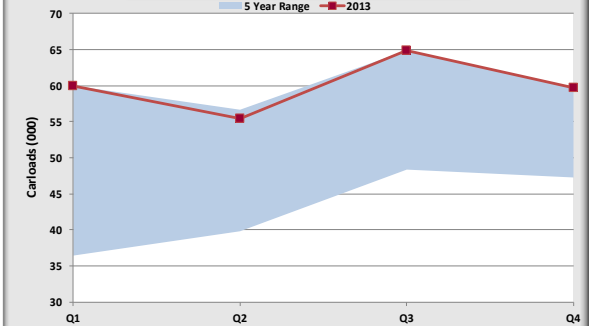
CP Historical Originations



CP Q2 Originations Comparison



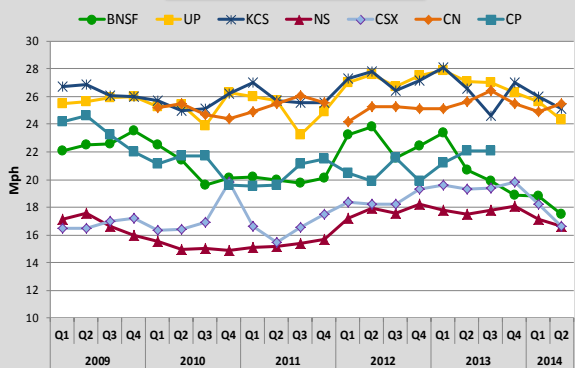
2013 CP Originations vs 5-Year Range



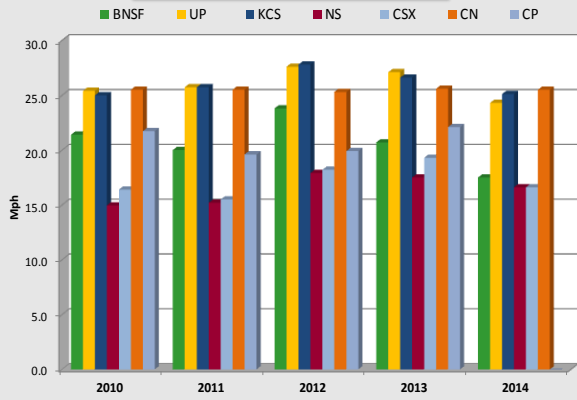
Source Data: AAR, CN, CP

RAILROAD COAL TRAIN SPEED DASHBOARD

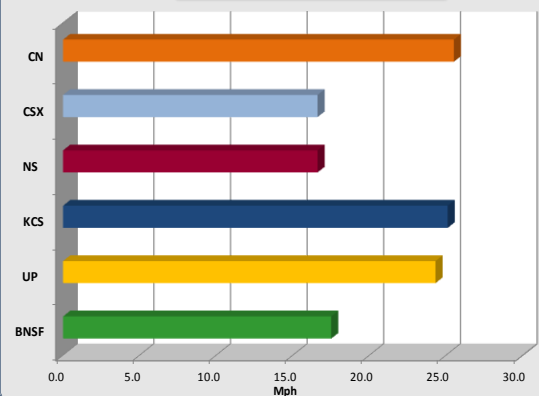
Historical Coal Train Speed



Q2 Coal Train Speed Comparison



2014 YTD Coal Train Speeds



Source Data: AAR, BNSF, UP, KCS, NS, CSX, CN, CP