

Surface Transportation Board – Rail Energy Transportation Advisory Committee Meeting

Performance Measures Subcommittee Update



March 5, 2015

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 vs 2013)

Appalachia:	Decreased 1.3 million tons	(-0.4%)
Interior:	Increased 4.7 million tons	(+2.6%)
Western:	Increased 9.4 million tons	(+1.7%)
Total Production:	Increased 12.7 million tons	(+1.3%)

Coal Consumption (2014 vs 2013)

Electricity/Power	Decreased 4.1 million tons	(-0.5%)
Retail/Other	Decreased 0.6 million tons	(-1.3%)
Met/Coke	Decreased 1.1 million tons	(-5.1%)
Total Consumption	Decreased 5.8 million tons	(-0.6%)

Coal Exports (2014 vs 2013)

Met Coal:	Decreased 3 million net tons	(-4.6%)
Steam Coal:	Decreased 17 million net tons	(-33%)
Total Exports:	Decreased 20 million net tons	(-17%)

Coal Production MM Tons				
2013	Appalachia	Interior	Western	Total
Q1	70	45.5	129	244.5
Q2	71	45	126.9	242.9
Q3	66.7	48.2	142.4	257.3
Q4	63.8	44	131.3	239.2
Sum:	271.5	182.7	529.6	983.9
2014	Appalachia	Interior	Western	Total
Q1	67.5	46.3	131.4	245.2
Q2	69.7	44.8	131.4	245.8
Q3	67.5	49.3	138.5	255.3
Q4	65.6	47	137.7	250.3
Sum:	270.3	187.4	539	996.6
Tonnage	-1.2	4.7	9.4	12.7
Percent	-0.44%	2.57%	1.77%	1.29%

Coal Consumption MM Tons				
2013	Electric Pwr	Other	Coke	Total
Q1	212	11.8	5.3	229.1
Q2	200.2	10.8	5.5	216.5
Q3	237.3	10.8	5.4	253.5
Q4	208.9	11.9	5.3	226.1
Sum:	858.4	45.3	21.5	925.2
2014	Electric Pwr	Other	Coke	Total
Q1	231.7	12	4.8	248.5
Q2	196.8	10.9	5.1	212.8
Q3	231.4	10.8	5.2	247.4
Q4	194.4	11	5.3	210.7
Sum:	854.3	44.7	20.4	919.4
Tonnage	-4.1	-0.6	-1.1	-5.8
Percent	-0.48%	-1.32%	-5.12%	-0.63%

Coal Exports MM Tons			
2013	Met	Steam	Total
Q1	18.2	13.7	31.8
Q2	16.1	13.3	29.4
Q3	15.9	12.7	28.6
Q4	15.4	12.4	27.8
Sum:	65.6	52.1	117.6
2014	Met	Steam	Total
Q1	16.9	10.9	27.7
Q2	15.8	8.8	24.6
Q3	15.2	7.5	22.7
Q4	14.7	7.5	22.2
Sum:	62.6	34.7	97.2
Tonnage	-3	-17.4	-20.4
Percent	-4.57%	-33.40%	-17.35%

Coal Inventories MM Tons				
2013 YTD	Electric Pwr	Bit	Sub-Bit	Total
Q1	172	246	266	684
Q2	171	249	255	674
Q3	152	221	230	603
Sum:	494	716	751	1,961
2014 YTD	Electric Pwr	Bit	Sub-Bit	Total
Q1	118	171	182	471
Q2	133	184	194	511
Q3	124	181	171	476
Sum:	375	537	547	1,459
Tonnage	-119	-179	-204	-502
Percent	-24.1%	-25.1%	-27.1%	-25.6%

Performance Summary

Railroad Carloads (2014 estimate versus 2013)

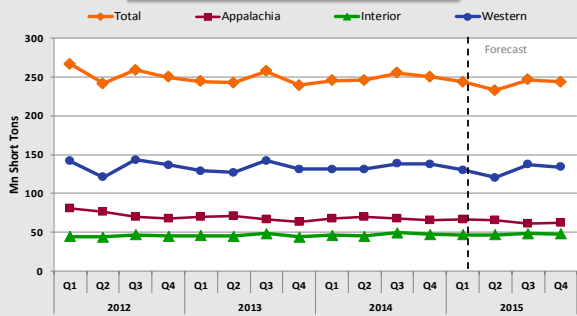
Burlington (BNSF):	Increased 51,000 carloads	(+2.3%)
Union Pacific:	Increased 62,000 carloads	(+4.1%)
Kansas City Southern:	Increased 1,000 carloads	(+0.4%)
Norfolk Southern:	Decreased 39,000 carloads	(-3.8%)
CSX Transportation:	Increased 14,000 carloads	(+1.5%)
Canadian National:	Decreased 4,000 carloads	(-1.7%)
Canadian Pacific:	Increased 10,000 carloads	(+4.3%)
Total Carloads:	Increased 96,000 carloads	(+1.5%)

Car Originations / *KCS Receipts (000 Carloads)								
2013	BNSF	UP	*KCS	NS	CSX	CN	CP	Total
Q1	542	364	49	266	235	57	60	1,573
Q2	513	373	48	262	239	61	55	1,552
Q3	592	419	57	252	230	59	65	1,673
Q4	556	370	41	241	221	57	60	1,546
Sum:	2,203	1526	195	1,021	925	233	240	6,343
2014	BNSF	UP	*KCS	NS	CSX	CN	CP	Total
Q1	565	388	48	229	218	53	60	1,561
Q2	547	373	46	270	246	61	65	1,607
Q3	557	414	54	248	231	58	59	1,623
Q4	585	414	47	235	245	57	67	1,649
Sum:	2,254	1589	195	982	939	229	250	6,439
Carloads	51	62	1	-39	14	-4	10	96
Percent	2.3%	4.1%	0.4%	-3.8%	1.5%	-1.7%	4.3%	1.5%

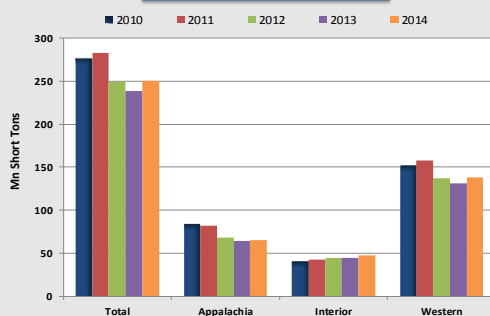
Average Train Speeds (MPH)							
2013	BNSF	UP	*KCS	NS	CSX	CN	Avg
Q1	23.4	27.9	28.1	17.8	19.6	25.1	23.7
Q2	20.7	27.1	26.6	17.5	19.3	25.6	22.8
Q3	19.9	27	24.6	17.8	19.4	26.4	22.5
Q4	18.86	26.3	27	18.1	19.8	25.5	22.6
2014	BNSF	UP	*KCS	NS	CSX	CN	Avg
Q1	18.8	25.6	26	17.1	18.2	24.9	21.8
Q2	17.5	24.3	25.1	16.6	16.6	25.5	20.9
Q3	17.3	23.8	24.4	16.3	17.6	25.9	20.9
Q4	17.9	24.4	24.9	15.8	17.4	25.4	21.0

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

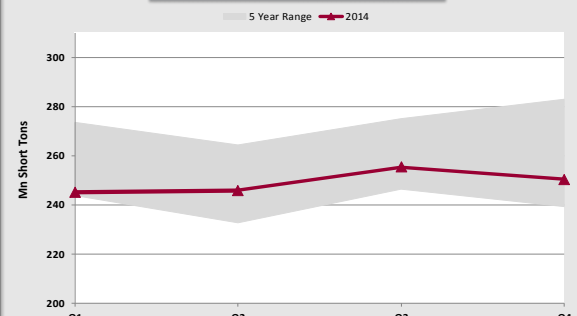
Historical and Forecasted Production



Q4 Production Comparison



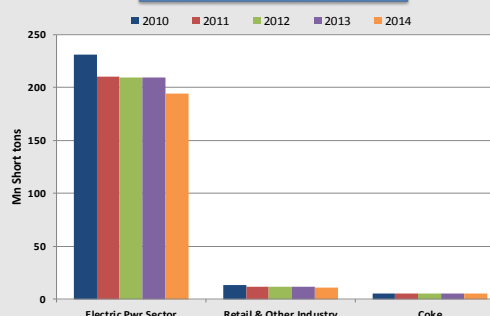
2014 Production vs 5-Year Range



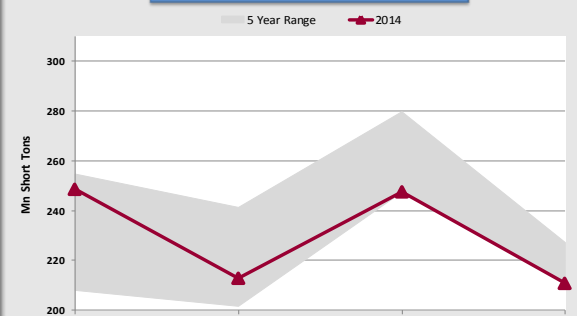
Historical and Forecasted Consumption



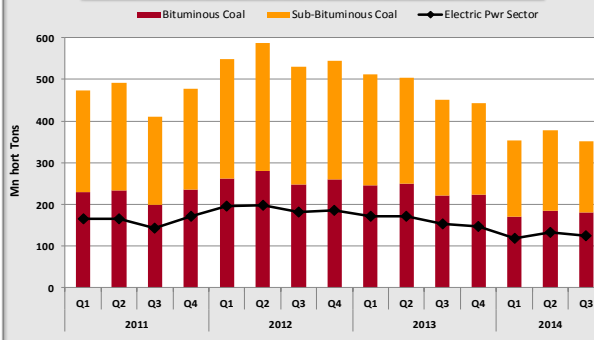
Q4 Consumption Comparison



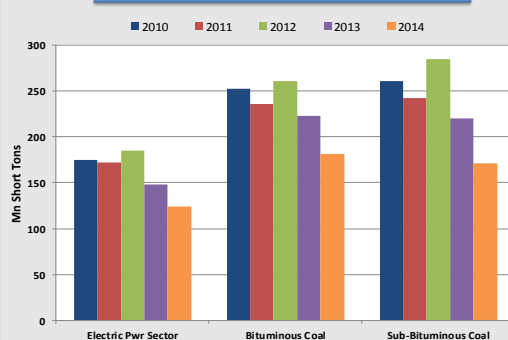
2014 Consumption vs 5-Year Range



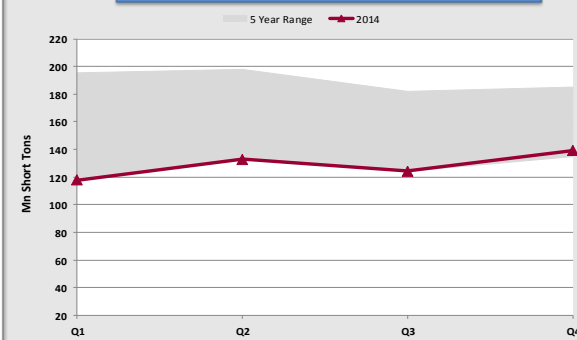
Historical and Forecasted End-of-Period Inventories



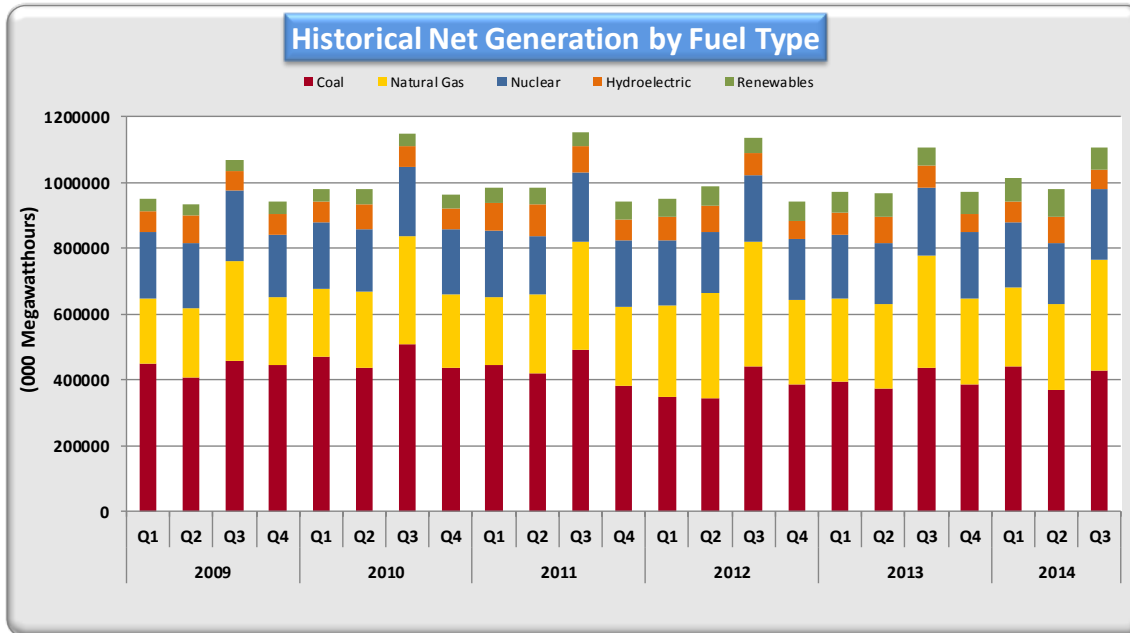
Q4 End-of-Period Inventories Comparison



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



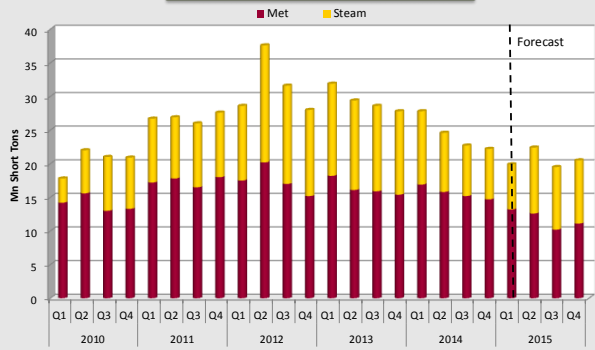
NET GENERATION BY FUEL TYPE DASHBOARD



Source Data: EIA

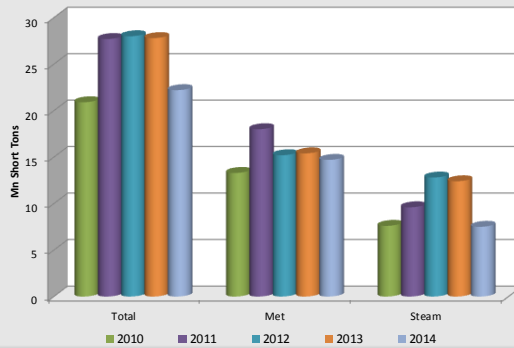
U.S. COAL EXPORTS DASHBOARD

Historical and Forecasted Exports

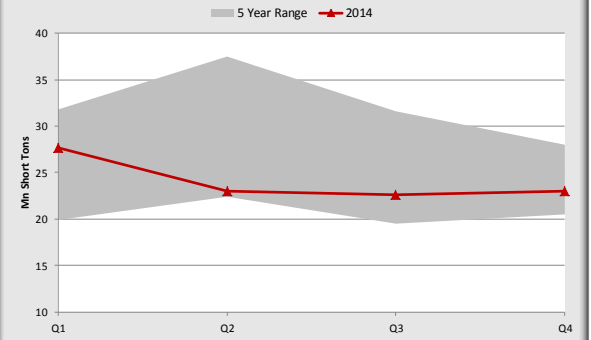


Source Data: EIA

Q4 Exports Comparison



2014 Exports vs 5-Year Range

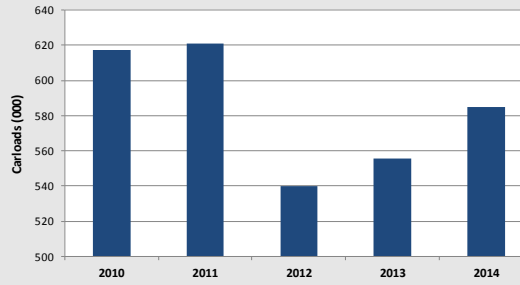


WESTERN RAILROAD COAL CARLOADS DASHBOARD

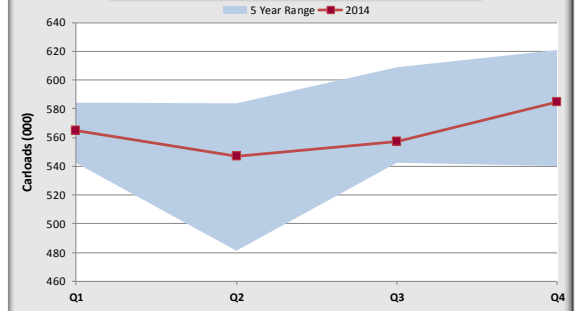
BNSF Historical Originations



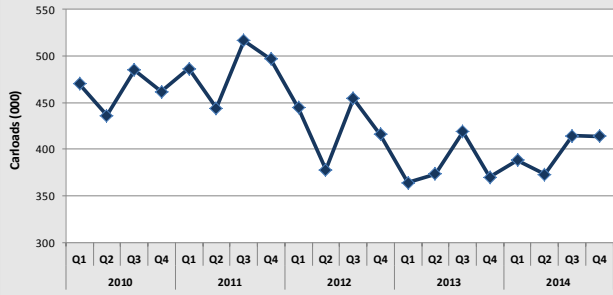
BNSF Q4 Originations Comparison



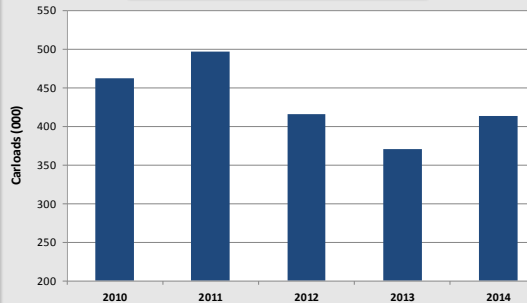
2014 BNSF Originations vs 5-Year Range



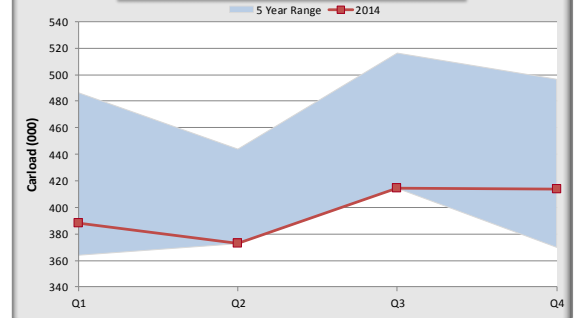
UP Historical Originations



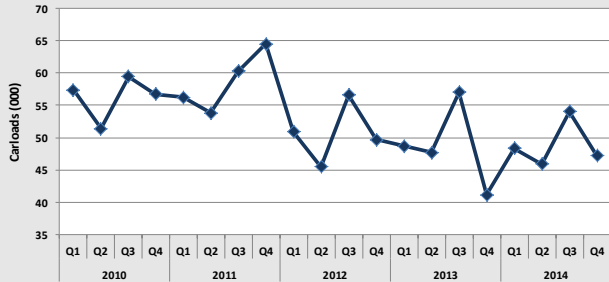
UP Q4 Originations Comparison



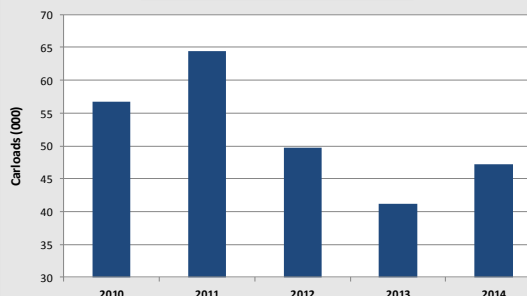
2014 UP Originations vs 5-Year Range



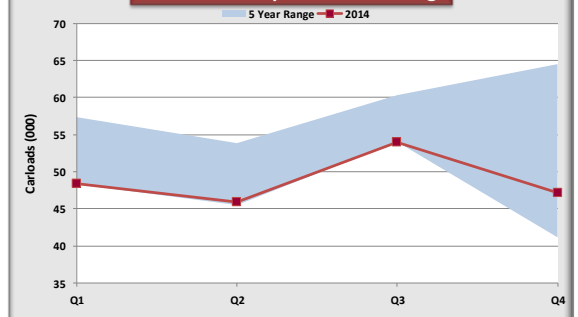
KCS Historical Receipts



KCS Q4 Receipts Comparison



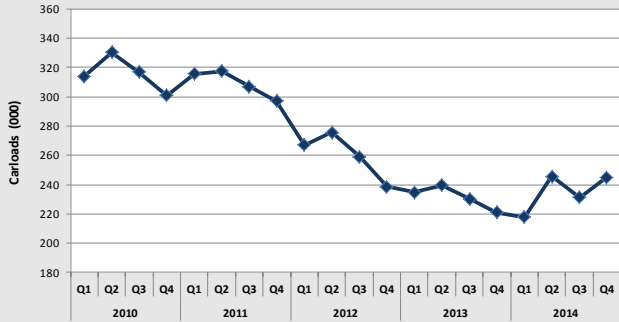
2014 KCS Receipts vs 5-Year Range



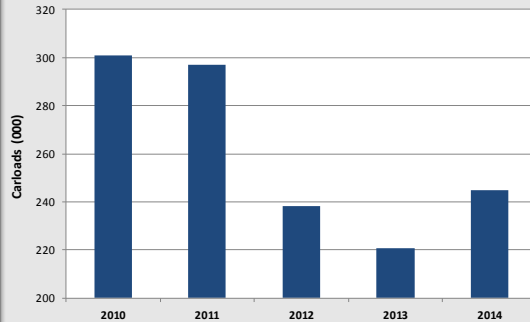
Source Data: AAR, BNSF, UP, KCS

EASTERN RAILROAD COAL CARLOADS DASHBOARD

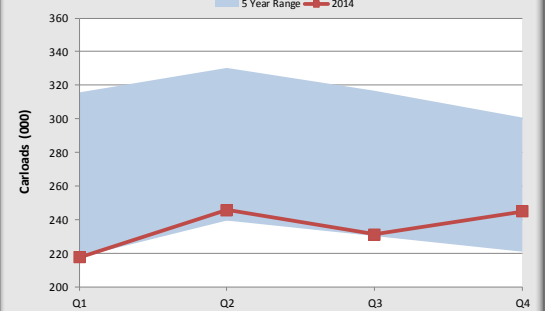
CSX Historical Originations



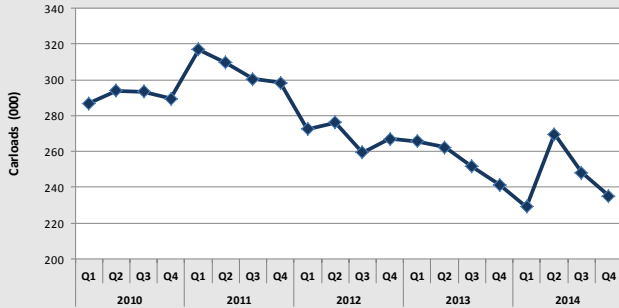
CSX Q4 Originations Comparison



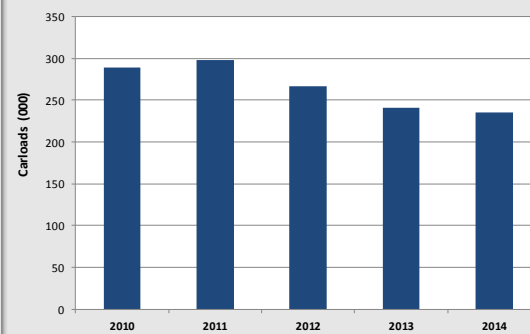
2014 CSX Originations vs 5-Year Range



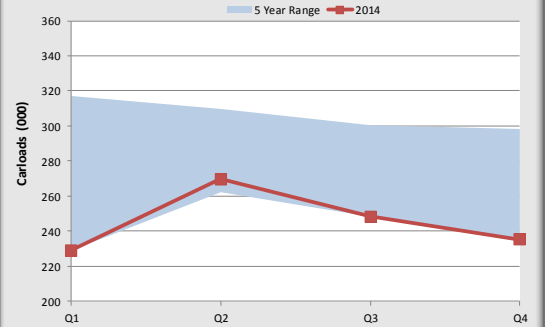
NS Historical Originations



NS Q4 Originations Comparison



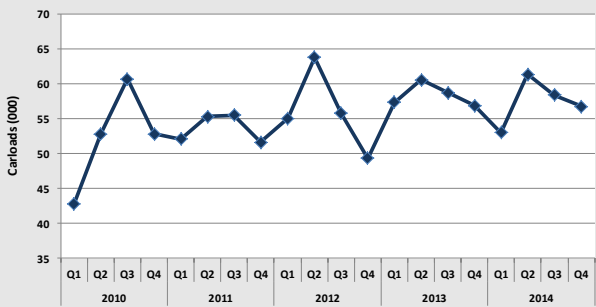
2014 NS Originations vs 5-Year Range



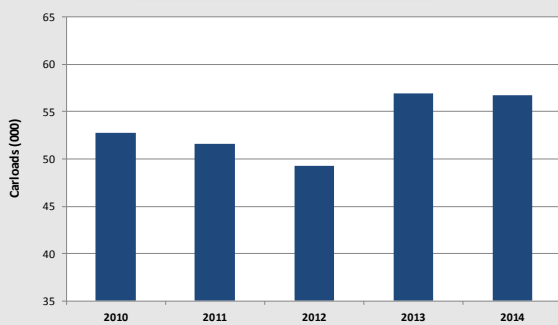
Source data: AAR, CSX, NS

CANADIAN RAILROAD COAL CARLOADS DASHBOARD

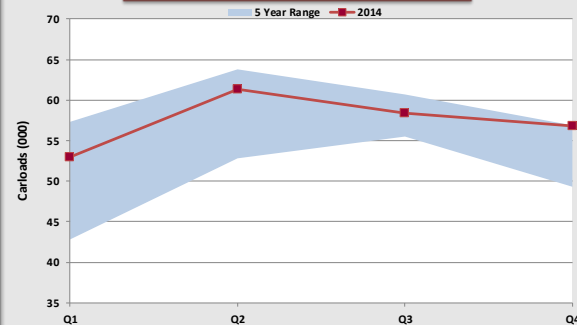
CN Historical Originations



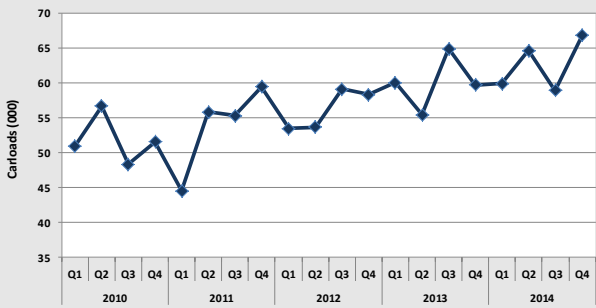
CN Q4 Originations Comparison



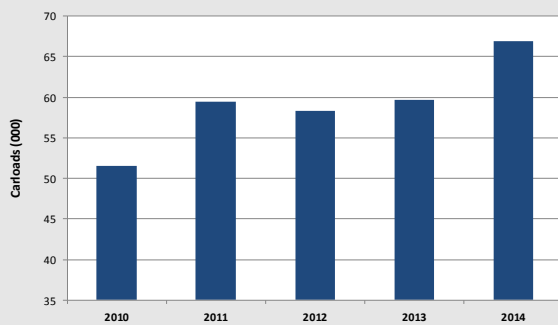
2014 CN Originations vs 5-Year Range



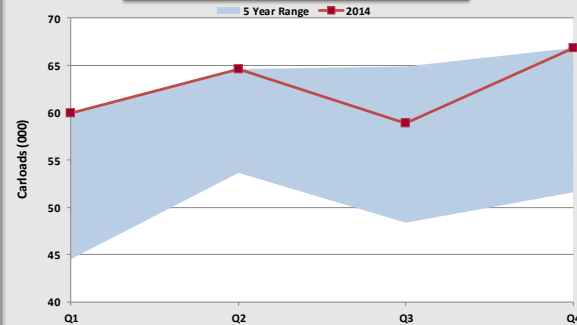
CP Historical Originations



CP Q4 Originations Comparison



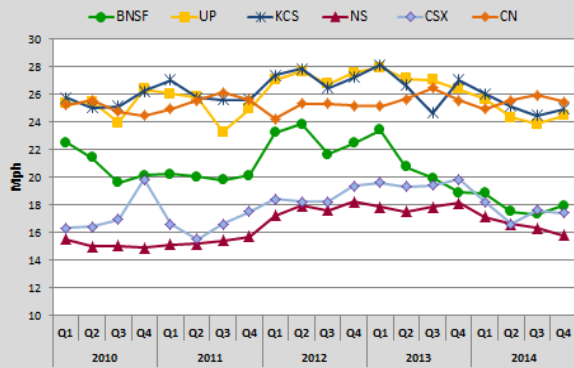
2014 CP Originations vs 5-Year Range



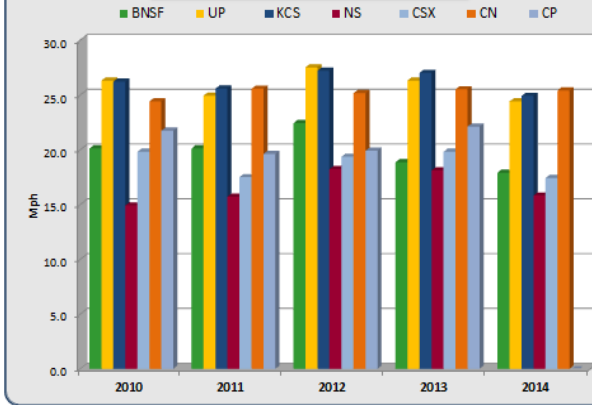
Source Data: AAR, CN, CP

RAILROAD COAL TRAIN SPEED DASHBOARD

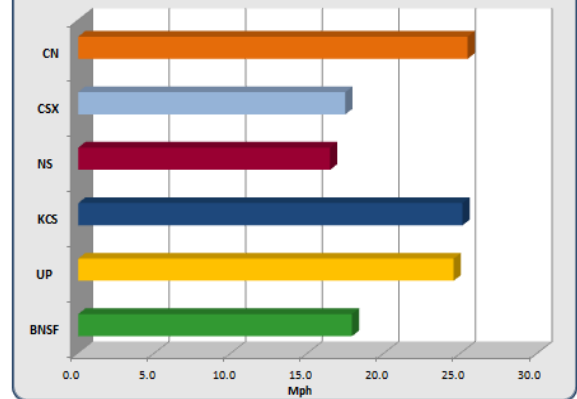
Historical Coal Train Speed



Q4 Coal Train Speed Comparison



2014 Average Coal Train Speeds



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