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# *Smoother* moves



## ***Transportation Research Forum***

**Tampa Florida**

**March 16, 2012**

# Trends and issues in the Container Transport Operations

## Agenda:

- **Pacer Overview**
- **Equipment Flows / Potential Impacts**
- **Chassis Landscape**
- **Drayage Capacity**

# Pacer International Overview

- Founded in 1997 through the acquisition of several logistics companies and the APL Linertrain which was renamed Pacer Stack train
- Headquartered in Dublin, OH
- 1,100 employees in our global operations
- Comprehensive transportation and logistics portfolio
- Best-in-class service delivery model
- Publically traded (PACR on NASDAQ) financially sound and positioned for growth

# Capacity & Control Across All Transport Modes

**Centralized Capacity Procurement and Contract Negotiation for all modes.**



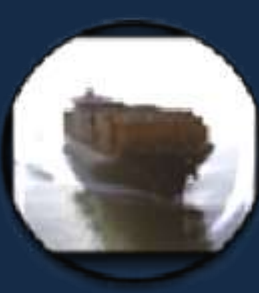
## **INTERMODAL**

- Access to 42% of the Domestic Equipment Fleet
- Over 100,000 mile rail network in North America
- Collaborative rail operations with all carriers



## **HIGHWAY**

- 3,000+ Truckload Carrier base
- 950+ Pacer Cartage owner operators
- 2,000 + additional dray carrier base
- MobilCom equipped



## **OCEAN/AIR**

- NVO Contracts with 20+ major ocean carriers
- IATA Licensed with full air carrier access
- OWL 360 for full shipment visibility
- RFI 360 for visibility & control



## **WAREHOUSING**

- Over 800,000 SQ FT of space
- 100+ trucks to cover pick and deliveries within Southern California
- WMS for inventory visibility



## **LOGISTICS MANAGEMENT**

- Load Control Center to manage customer's and Pacer's capacity throughout your network
- Complete dispatch control and shipment visibility

# Pacer Services Portfolio



## Intermodal Segment (\$1.1B)

- "Retail" (Door-to-Door)
- Automotive
- Ocean Carrier Services
- Drayage



## Logistics Segment (\$0.4B)

- International Import/Export
- Highway
- Warehouse, Port, & Transload Services
- Logistics Solutions

# Trends and issues in the Container Transport Operations

## Equipment Flows Potential Impact

### ➤ Trans Pacific Trade Lane:

- Land Bridge VS All Water Services
- Ancillary fees
- Labor Impacts
- East Coast Capacity

## Chassis Landscape

- **Ocean Carriers in / out of chassis**
- **Establishment of numerous chassis pools**
- **Equipment quality and age**



# Trends and issues in the Container Transport Operations

## Chassis Landscape

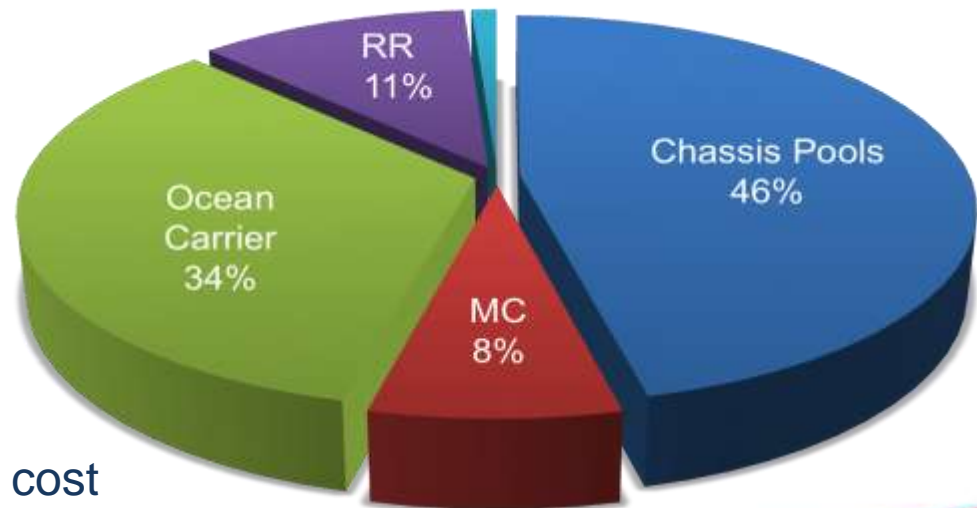
➤ Pools – Neutral / COOP / Ocean / Trucker

➤ Ocean Carrier provided equipment

➤ Shipper provided equipment via CCM

➤ International  
Chassis Pools

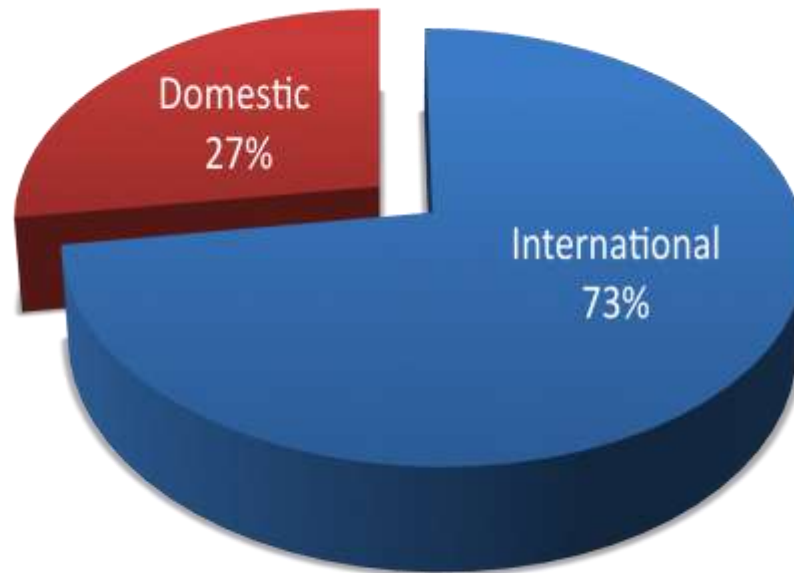
- Many different pools
- Street Complexity
- Unproductive time and cost



# Trends and issues in the Container Transport Operations

## Chassis Landscape

- **Many different types of equipment**
  - INTL chassis versus Domestic chassis

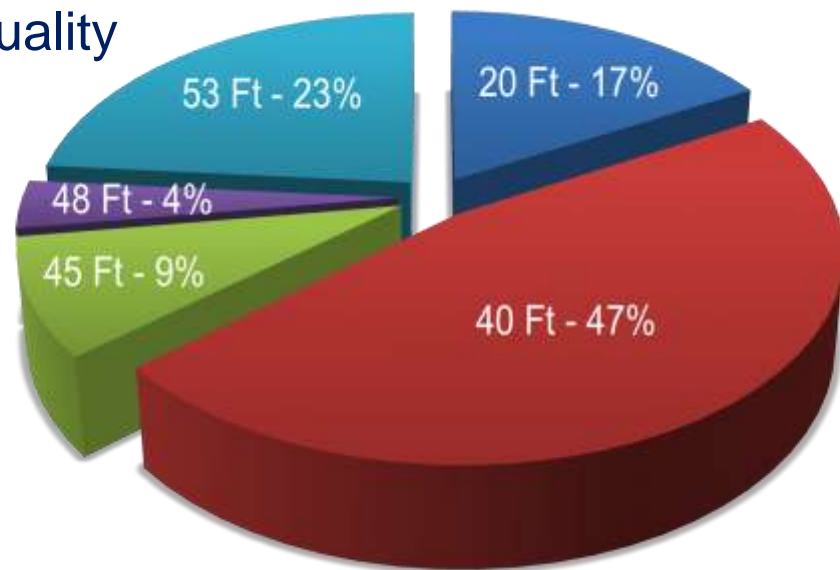


# Trends and issues in the Container Transport Operations

## Chassis Landscape

### ➤ International Chassis Fleet

- Many sizes and shapes
- Fleet age and quality

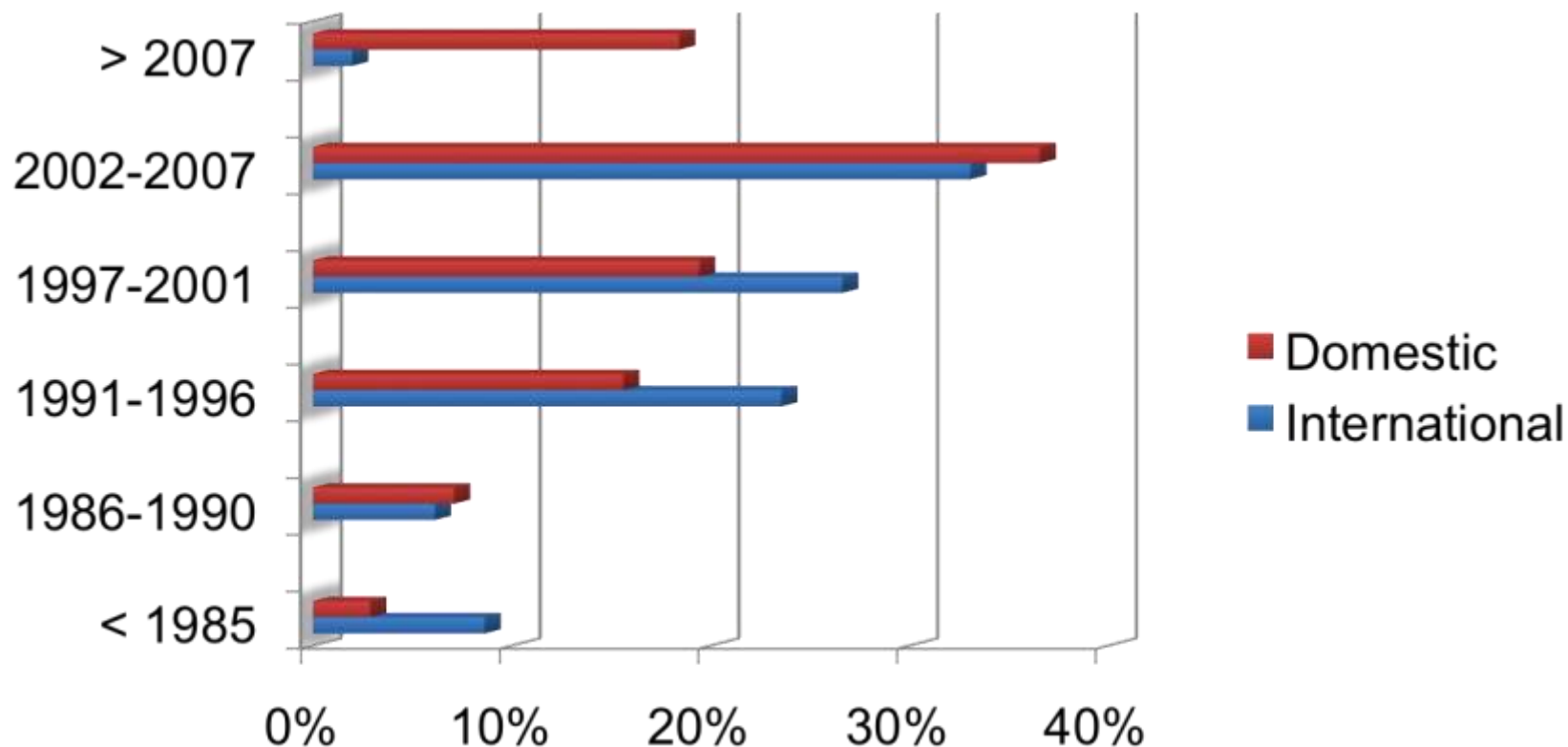


### ➤ Domestic Chassis Fleet

- More standard, less complexity
- Fleet age and quality

# Trends and issues in the Container Transport Operations

## Chassis Landscape Equipment Age



# Trends and issues in the Container Transport Operations

## Drayage Capacity

- **Owner Operator Model**
- **Driver Capacity**
- **Regulatory Impact**
- **Environmental Challenges**