The Future of the Trucking Industry
Distribution of Tonnage by Mode
2015

Source: U.S. Freight Transportation Forecast to 2027
Tonnage by Mode - 2015

- **General Freight**
- **Bulk Freight**

**Source:** U.S. Freight Transportation Forecast to 2027
Distribution of Tonnage by Mode: 2015

- Truck, 70.0%
- Rail Carload, 12.5%
- Pipeline, 10.4%
- Water, 5.6%
- Rail Intermodal, 1.3%
- Air, 0.1%

Source: U.S. Freight Transportation Forecast to 2027
Distribution of Tonnage by Mode: 2015 vs 2027

Source: U.S. Freight Transportation Forecast to 2027
Tonnage by Mode

Sources: ATA & U.S. Freight Transportation Forecast to 2027 & ATA
Tonnage Growth 2015 to 2027 & Market Share in 2027
(Baseline Forecast)

Sources: ATA & U.S. Freight Transportation Forecast to 2027
Instead of growing 61% from 2015 to 2027, we doubled Intermodal’s growth rate all at the expense of trucking – the impact is very small.
Tonnage Growth 2015 to 2027 & Market Share in 2027 (Alternative Forecast #2)

Sources: ATA & U.S. Freight Transportation Forecast to 2027

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2015 Competitive Freight Among Truck and Rail Tonnage

- **Maximum** competitive freight is 1.2 billion tons in a total market (truck and rail only) of 12.6 billion tons, or less than 10%. Competitive freight includes all freight traveling at least 500 miles, but excludes coal tonnage. There is a significant amount of time definite freight in this category that really isn’t competitive, but it is included. So in reality, the competitive market is even smaller than suggested here.

**Billions of Tons**

- Non-Competitive Truck, **9.8**
- Competitive Rail Freight, **0.5**
- Competitive Truck Freight, **0.7**
- Non-Competitive Rail, **1.6**

FACT: Trucks and Trains Compete on a Very Limited Basis

Source: ATA Analysis based on Commodity Flow Survey (US Census Bureau) data and US Freight Transportation Forecast to 2027
Autonomous Commercial Vehicles
Thanks!

@ATAEconBob