

What's Moving on the Waterways?

Commodities Panel

***Waterways:
Return on Infrastructure Investment
Fourteenth Annual Waterways Symposium
November 9, 2017***

Charting the Course

▸ Barge Situation and Outlook, Ken Eriksen

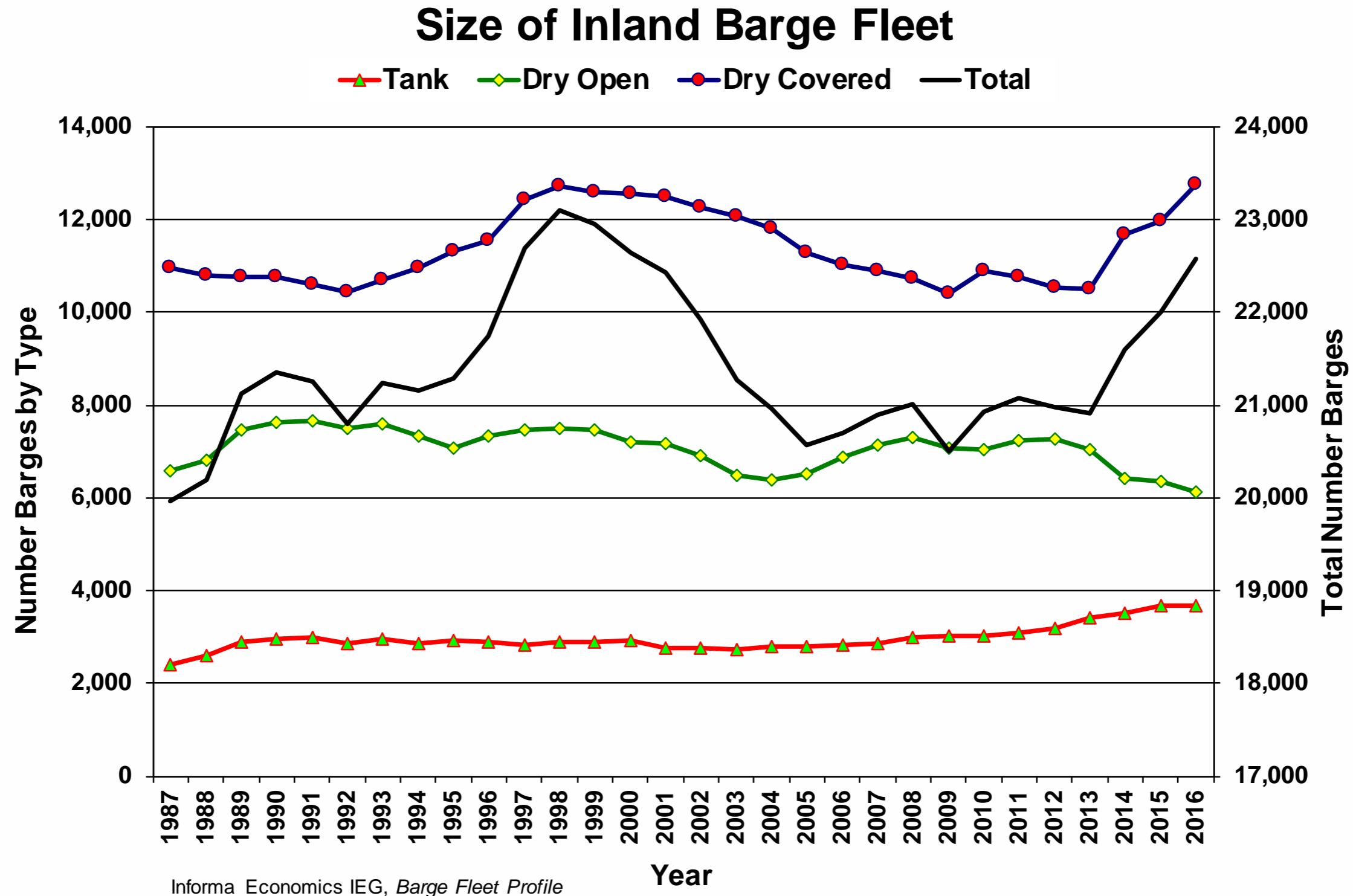
- Cement: Rob Innis, Director, Transportation Operations, LafargeHolcim
- Steel/Raw Materials: Jim Scharner, Director of Transportation, David J. Joseph Company
- Grain: Ross Edwards, Vice President, Gavilon Transportation
- Aggregate Materials: Edmund Redd, Vice President & General Manager, Southern Gulf Coast Division, Vulcan Materials

▸ Questions and Answers

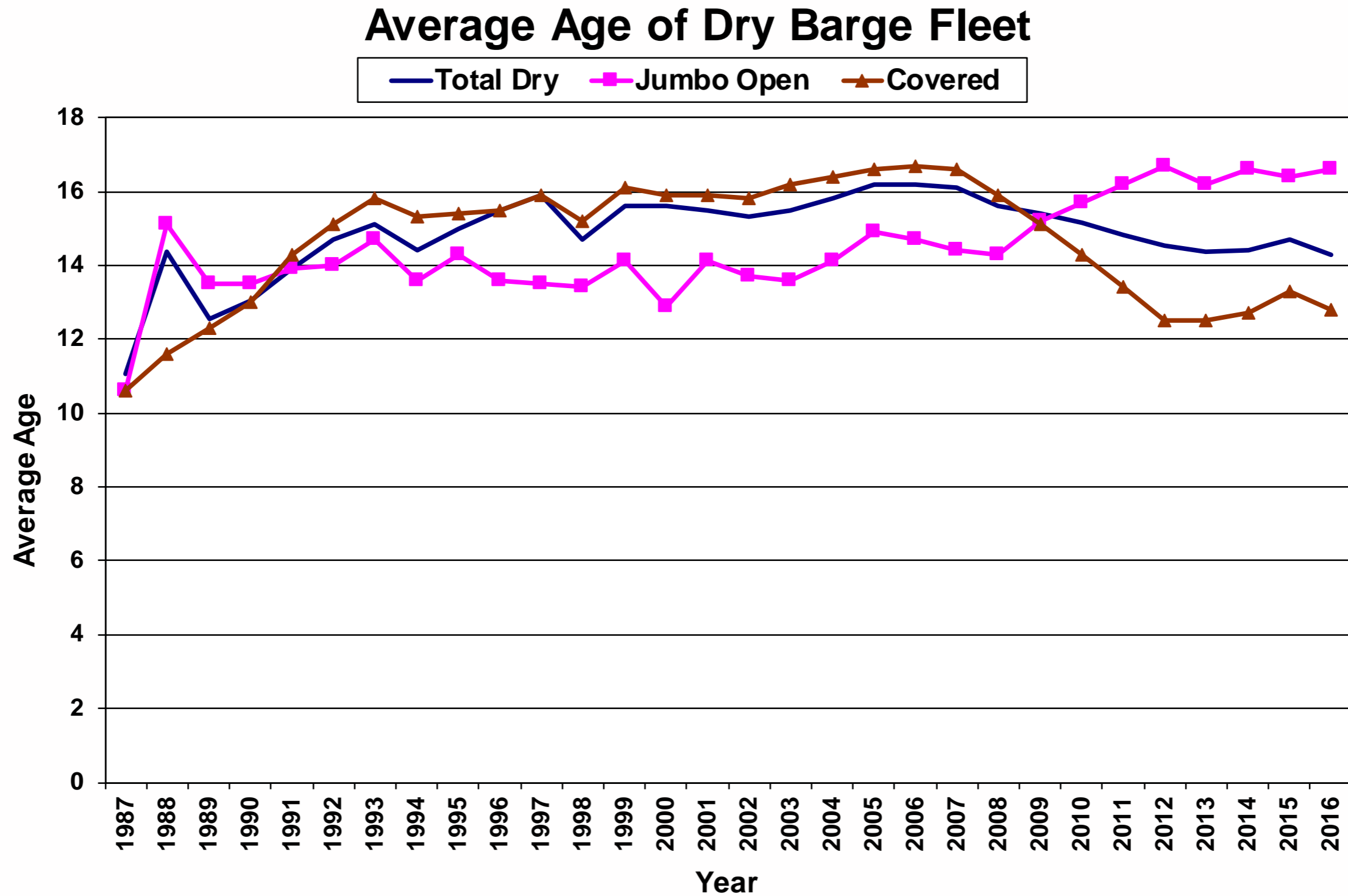
Barge Situation and Outlook



Broken Record, Records Broken: Barge Fleet Expanded in 2016 for Covered and Tank

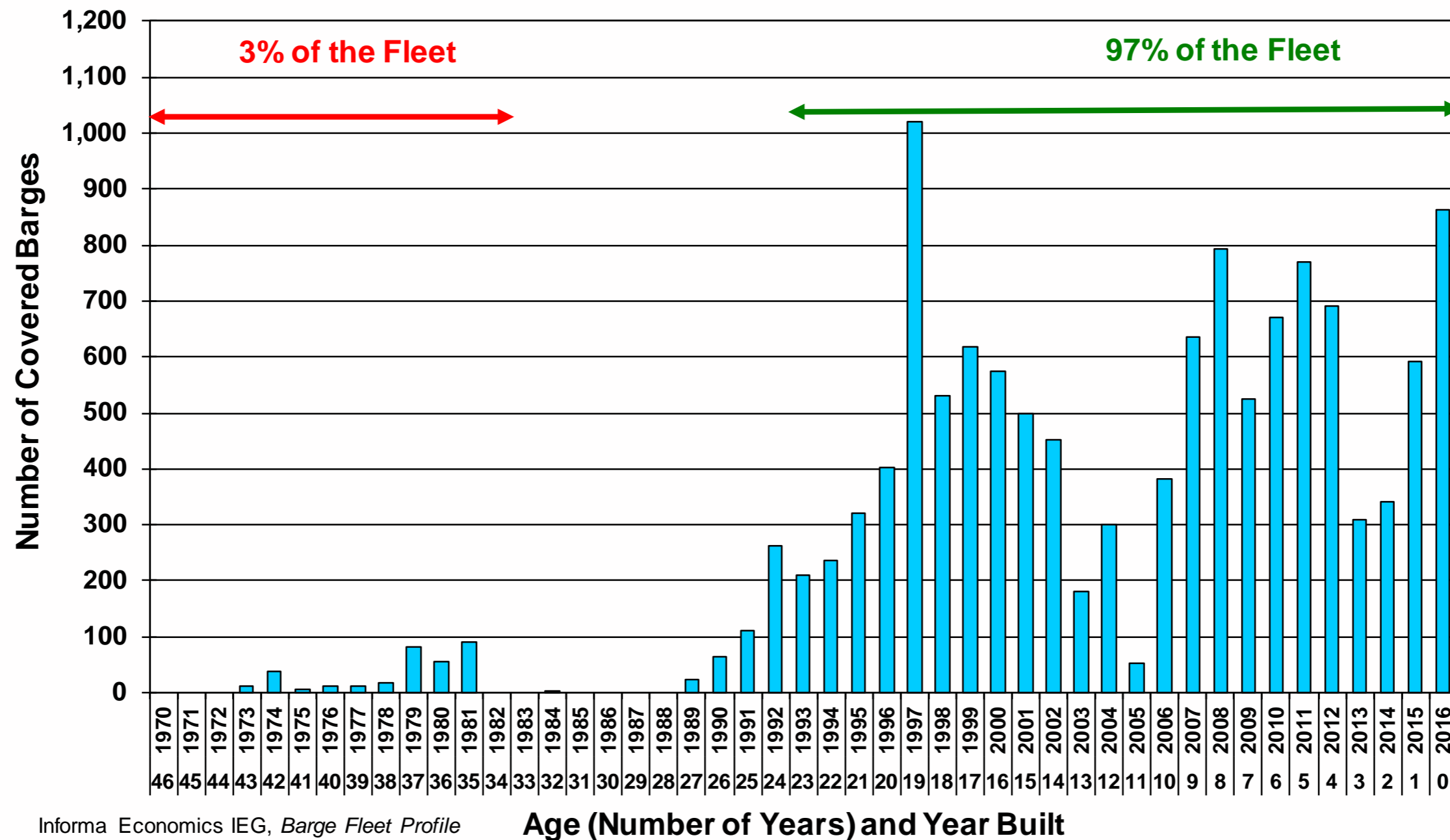


No One Likes to Tell their Age, but Covered Fleet Remains Youthful as Open Ages



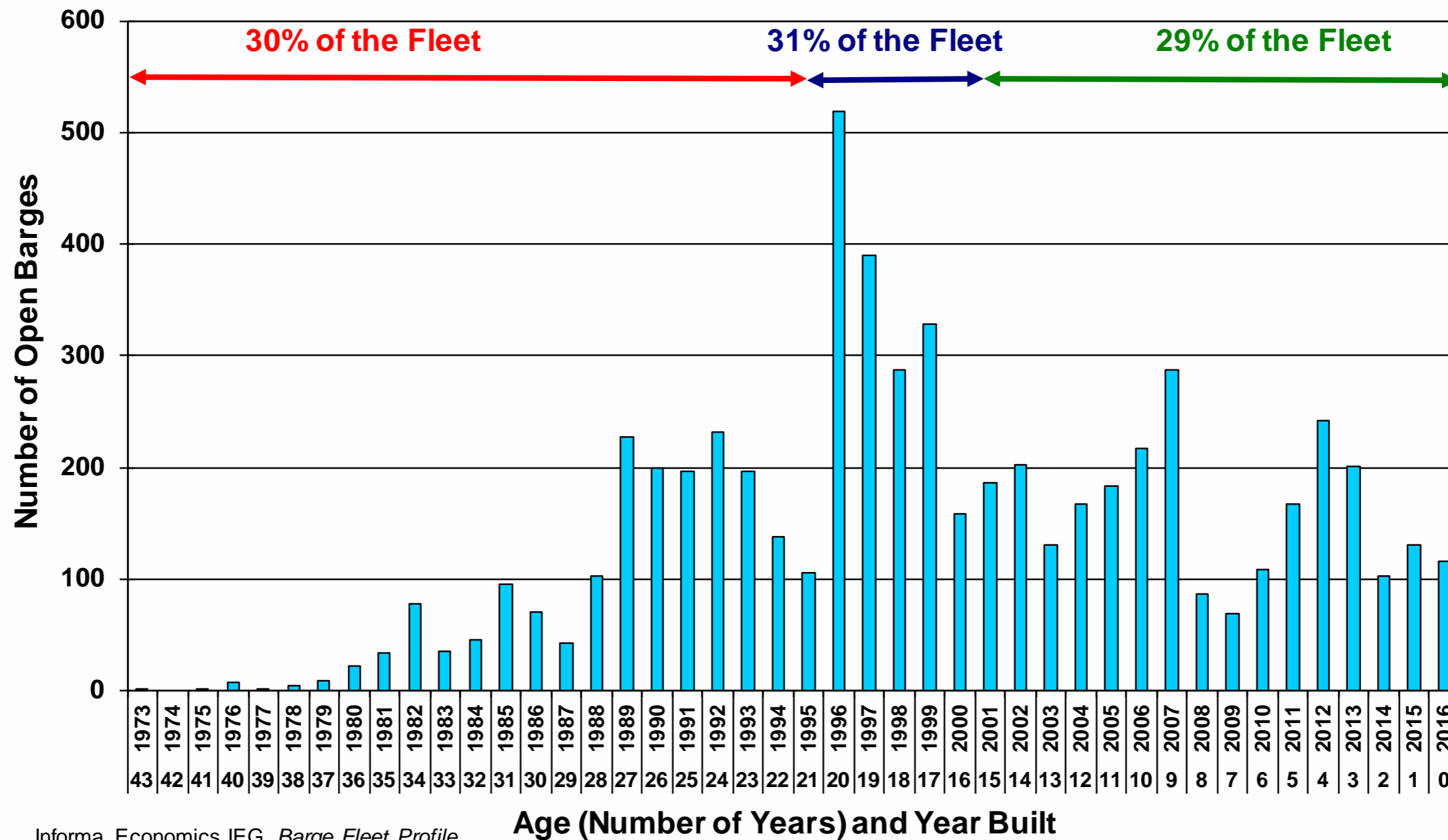
Hang-Over has Long Road Ahead: Retiring Covered Fleet Shows no Signs of Momentum for Several Years

Covered Barge Fleet in 2016 by Age



Hang-Over has Long Road Ahead: Retiring Open Fleet has Sizeable Portion of Fleet on Cusp of Retirement . . .

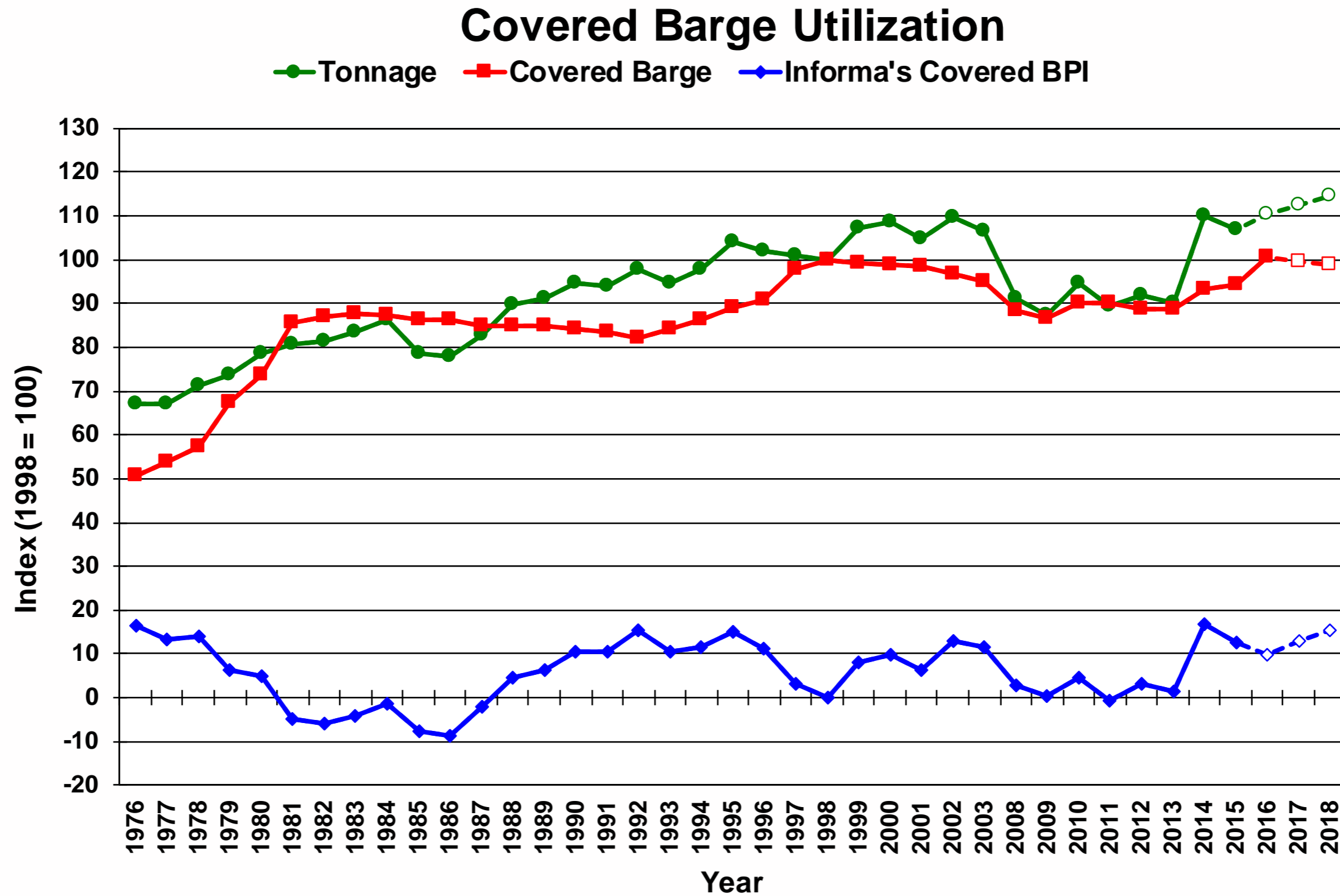
Open Barge Fleet in 2016 by Age



Informa Economics IEG, *Barge Fleet Profile*

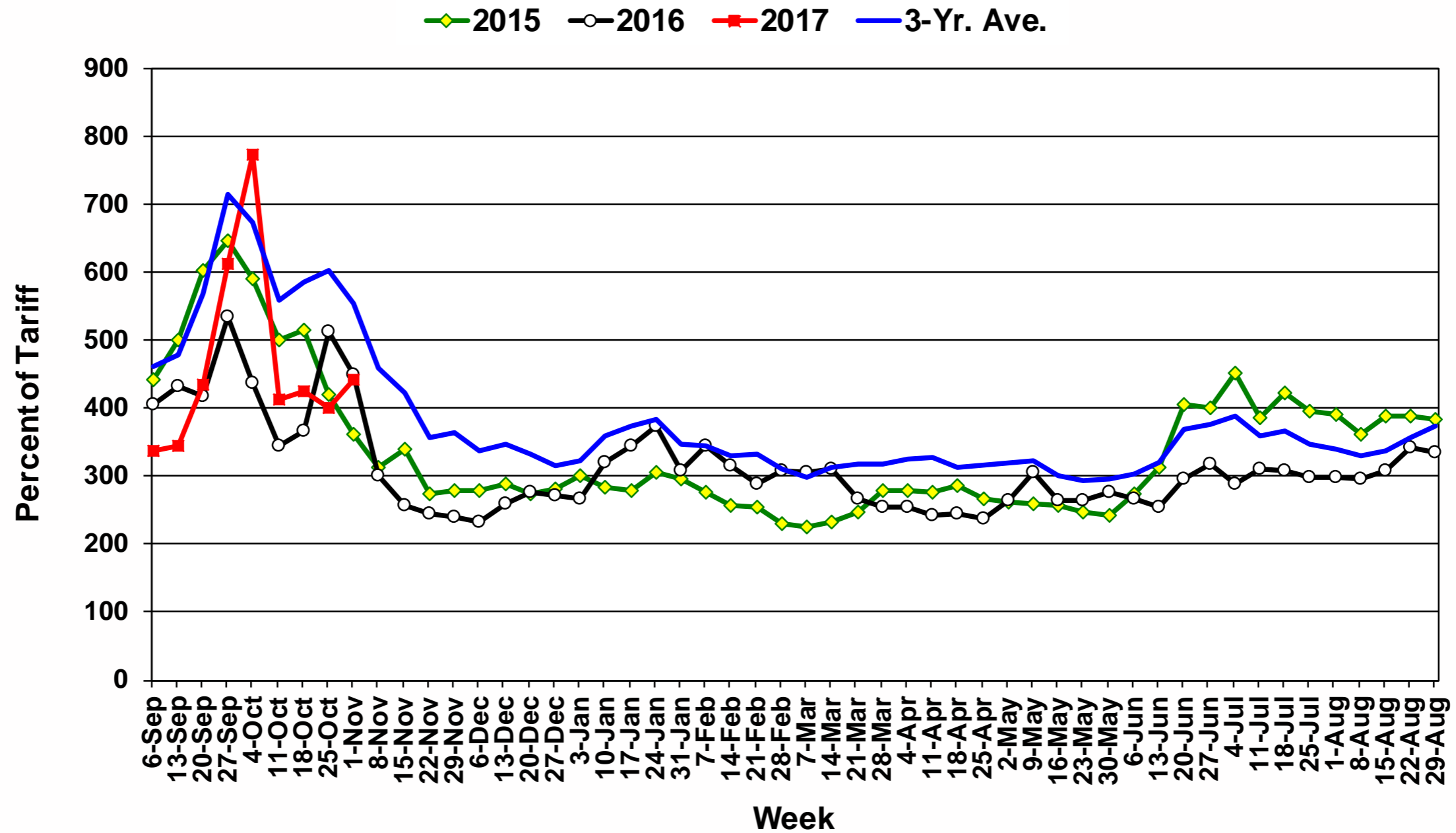
Age (Number of Years) and Year Built

Covered Barge Fleet Pressure to Firm as Demand Rises, Especially on Strong Crop Exports

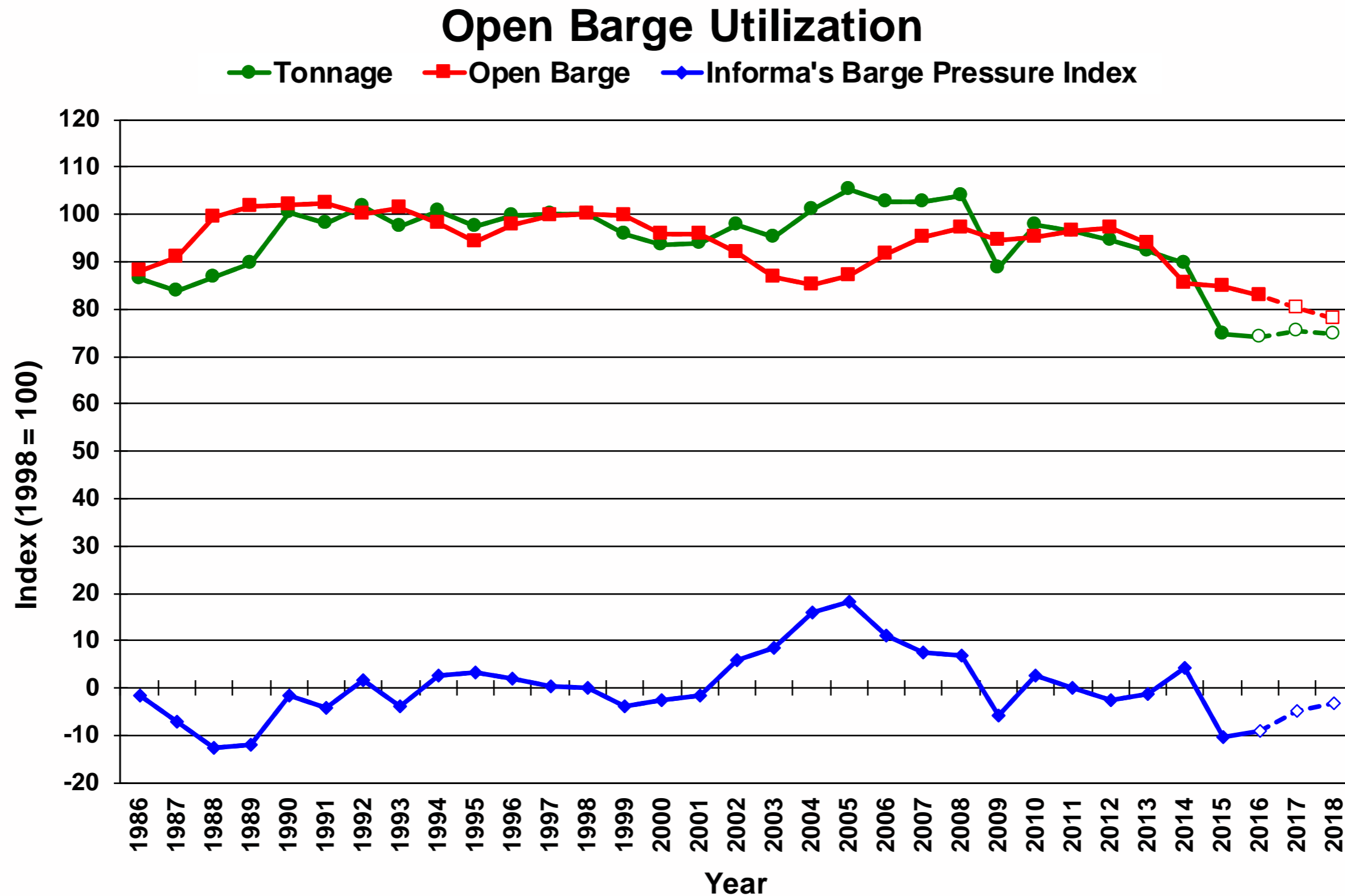


Barge Freight Rates have Difficulty Finding and Sustaining Upward Momentum

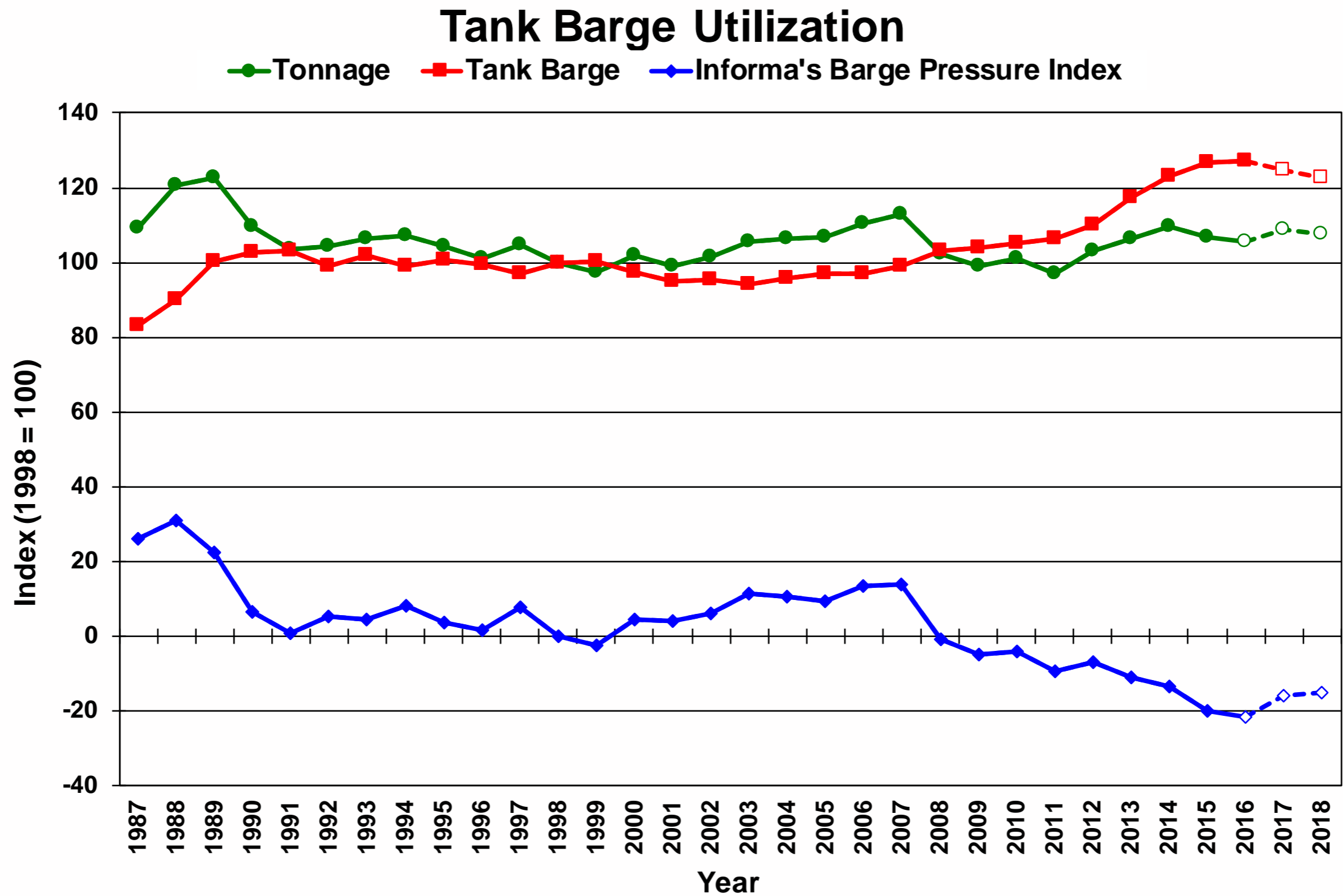
Illinois River Barge Freight Rate (percent of tariff) by Crop Year (Sep/Aug)



Barge Open Fleet more than Adequate, but Coal Volumes Stabilizing



Barge Tank Fleet Adequate, but Varies by Equipment Type



Charting the Course

▸ Barge Situation and Outlook, Ken Eriksen

- Cement: Rob Innis, Director, Transportation Operations, LafargeHolcim
- Steel/Raw Materials: Jim Scharner, Director of Transportation, David J. Joseph Company
- Grain: Ross Edwards, Vice President, Gavilon Transportation
- Aggregate Materials: Edmund Redd, Vice President & General Manager, Southern Gulf Coast Division, Vulcan Materials

▸ Questions and Answers

Questions?



@InformaEcon

@keriksen



www.BargeFleet.com



Informa Economics IEG
775 Ridge Lake Blvd
Suite 400
Memphis, TN 38120

- 📞 +1 901 202 4600
- ✉ info@informa.com
- 🌐 www.agribusinessintelligence.com
- 🌐 www.bargefleet.com