
Looking for Love in a World of Topsy-Turvy Freight

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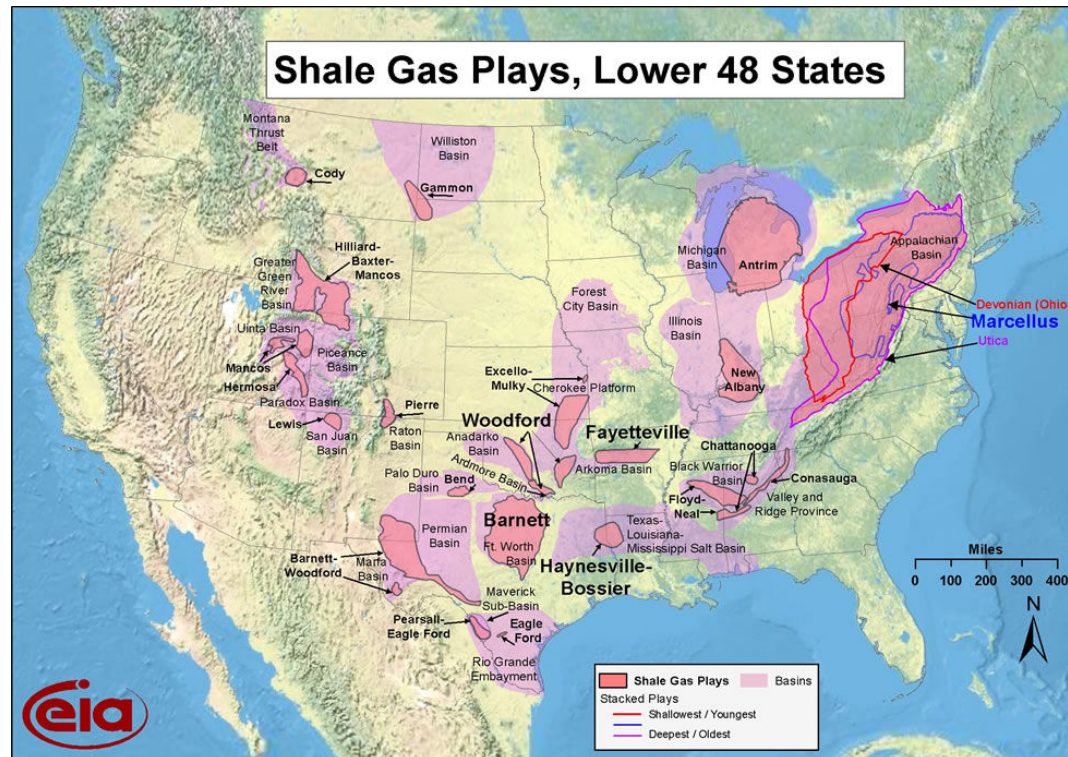
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*I'm not authorized by nobody
to say **NOTHIN'***

Overview

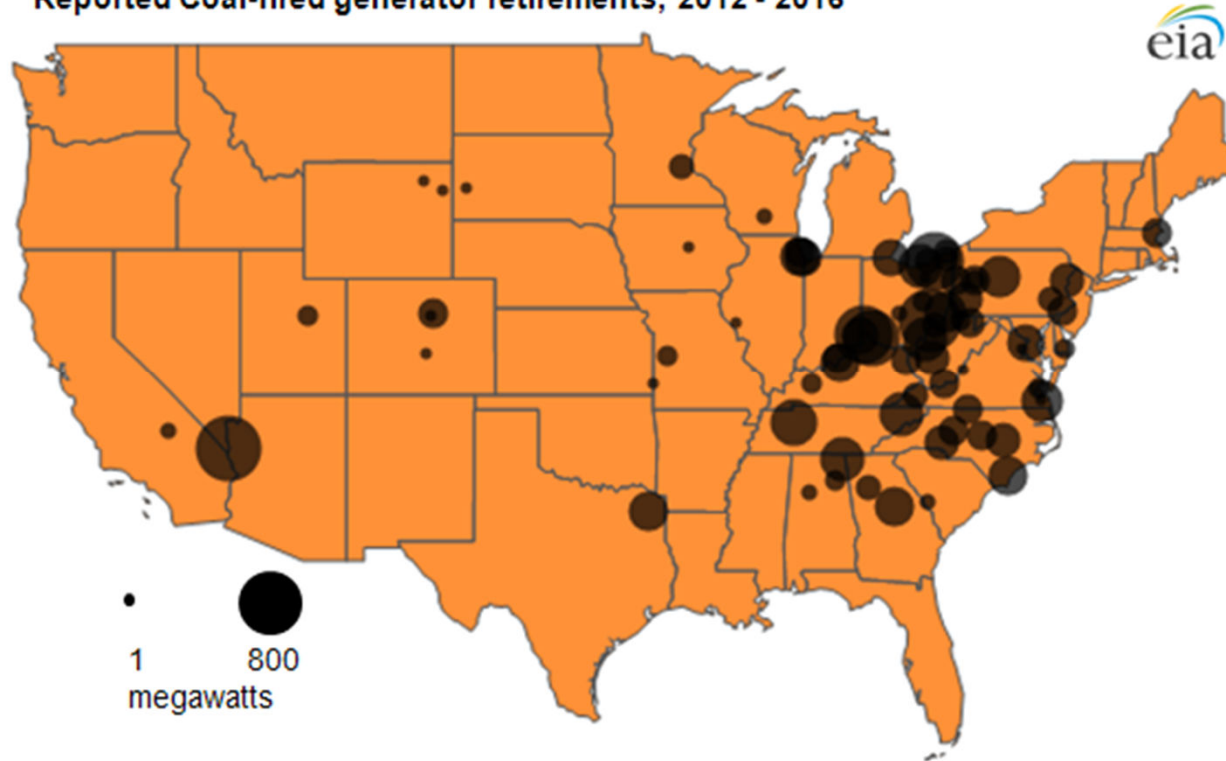
- The Ups and Downs of Fuels
 - Future Coal Traffic
 - Chemicals and Plastics
 - Crude By ~~Rail~~ Barge
- Living and Dying by the Chinese Sword
- Whatever Happened to Panama
- Closer to Home - Tennessee

Topsy-Turvy – Natural Gas



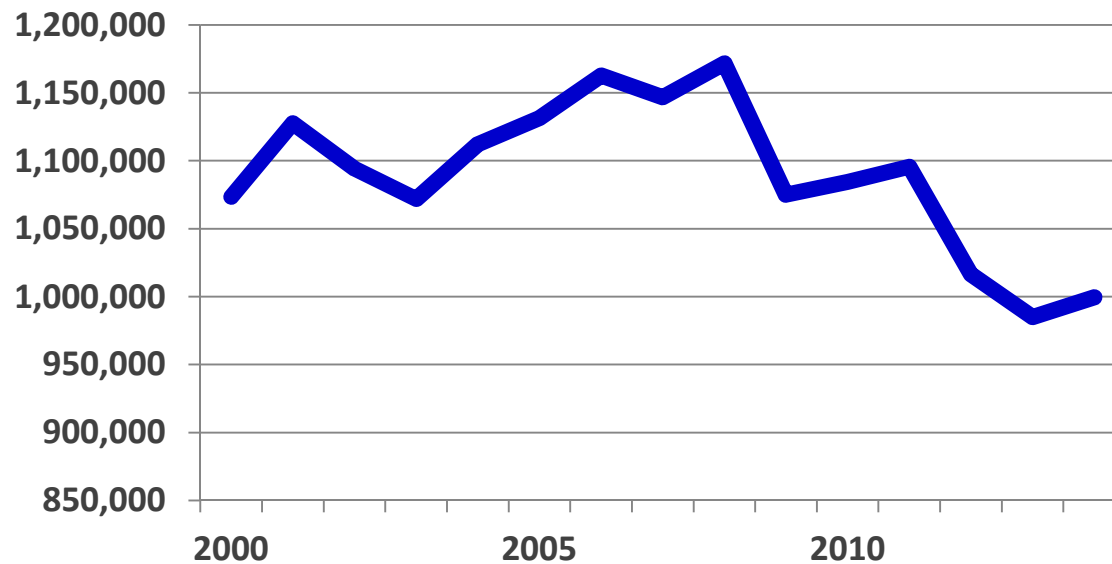
Topsy-Turvy – Steam Coal Use

Reported Coal-fired generator retirements, 2012 - 2016

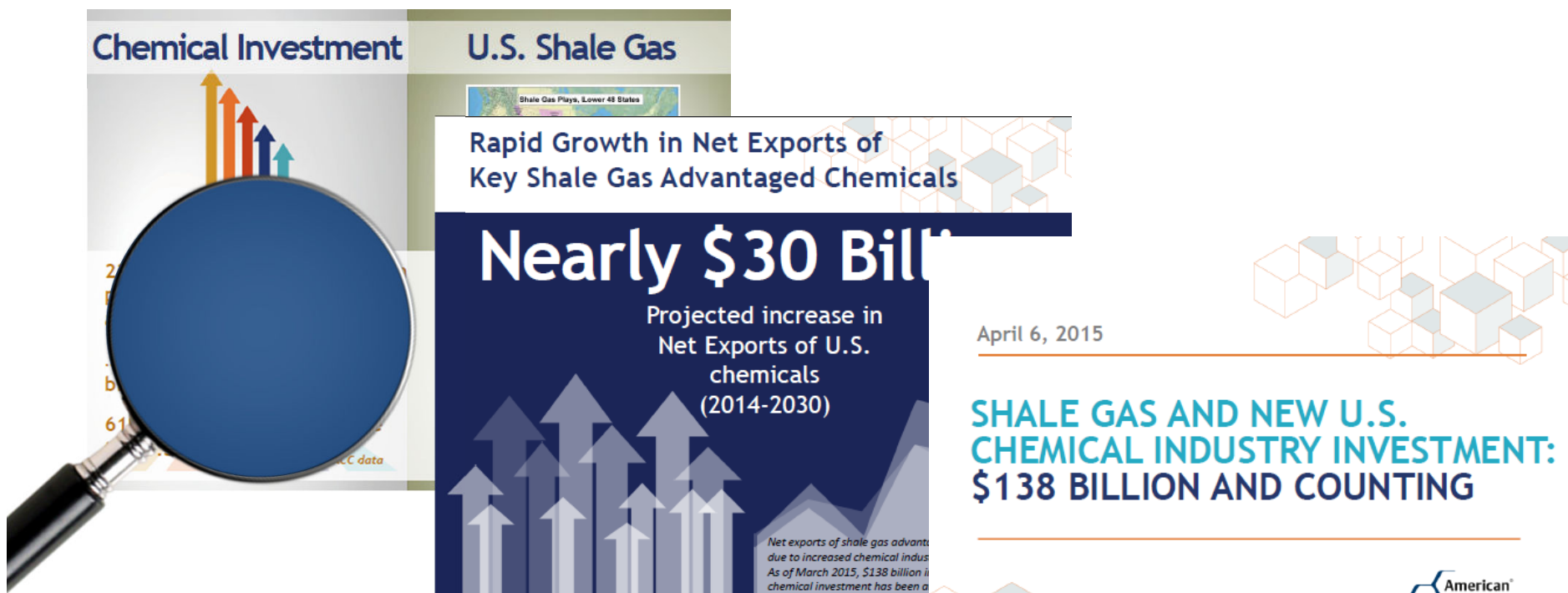


Topsy-Turvy – Coal Production

Total U.S. Coal Production
(Tons X 1,000)

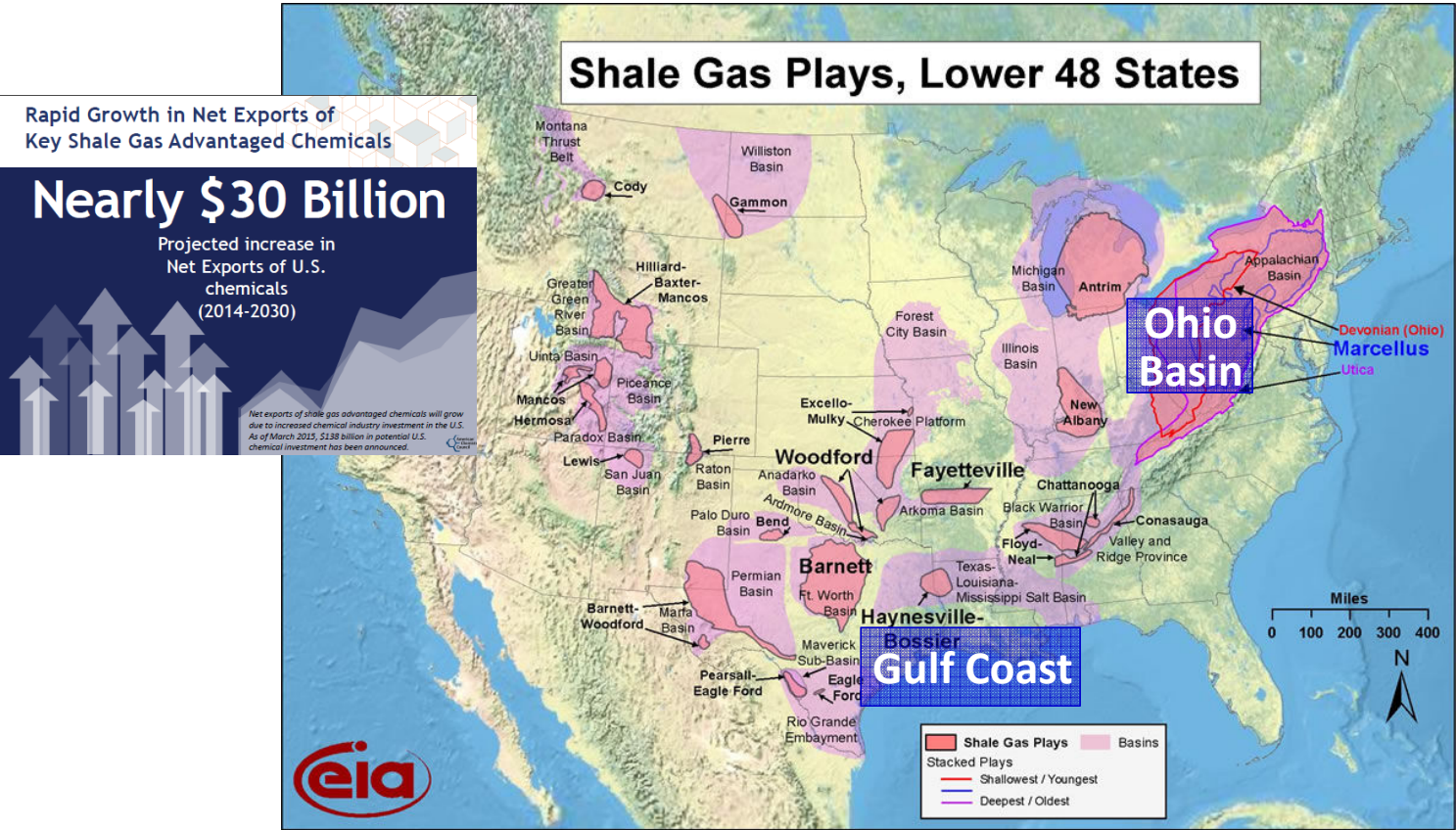


Topsy-Turvy – Chemicals and Plastics



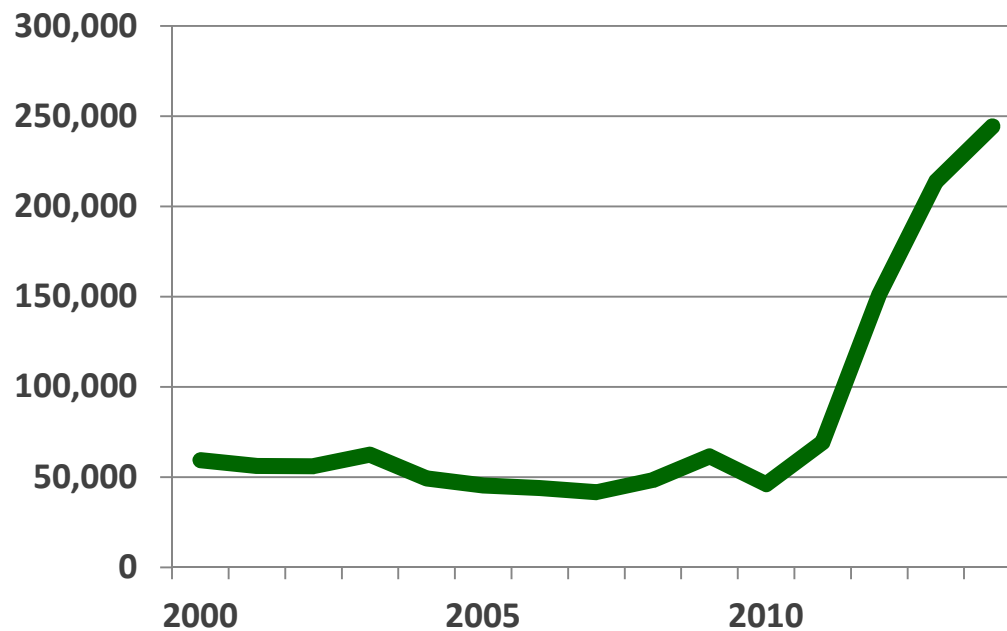
“226 projects and \$138 billion in potential capital investment announced as of March 2015”

Topsy-Turvy – Chemicals and Plastics



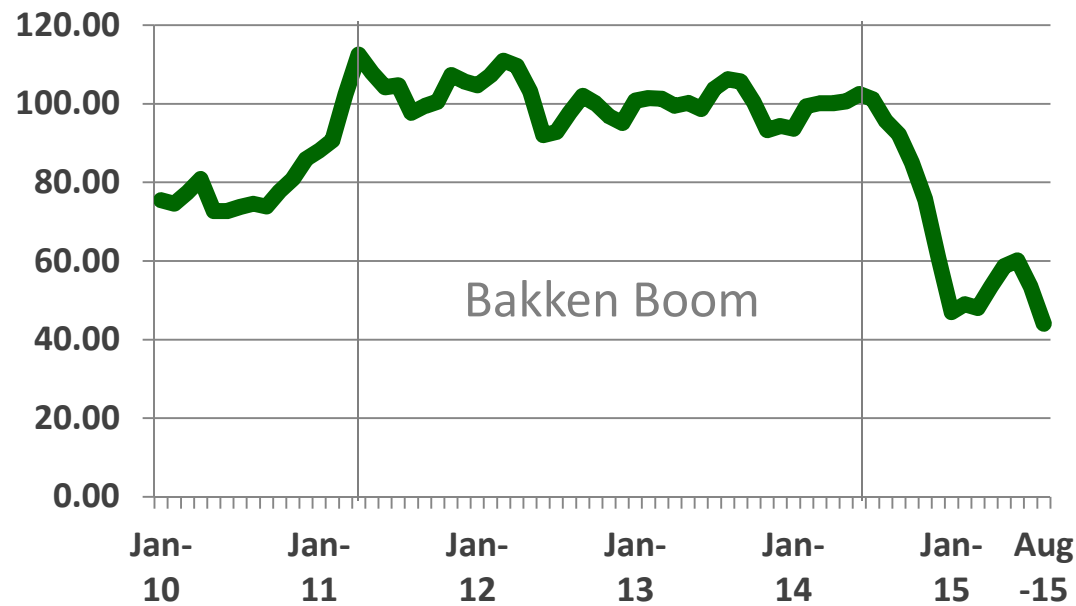
Topsy-Turvy – Crude By ...

Crude Oil Deliveries by Barge
(Barrels X 1,000)



Topsy-Turvy – Crude By ...

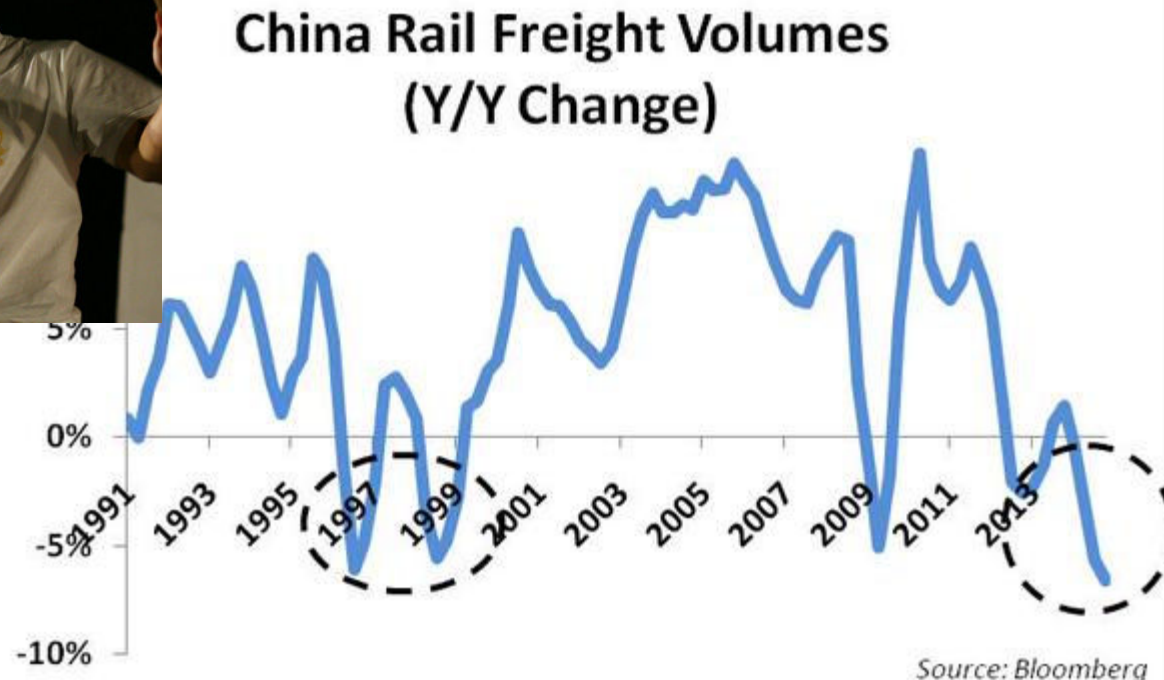
Refiner Crude Acquisition Prices
(Nominal \$ Per Barrel)



Topsy-Turvy – Chinese Influence



*Emerging Economies
Heavily Leveraged
To Supply Chinese
Basic Goods*



Topsy-Turvy – Panama Improvements



Topsy-Turvy – Closer to Home

- Regional Economy Is Robust and Growing
- National / International Influences Uncertain
- Chickamauga Lock and the Upper Tennessee
- TVA, Pickwick, and the Tenn-Tom
- What's On the Waterway Now

Topsy-Turvy – Closer to Home

ORIGIN	DESTINATION	COMMODITY	2013 TONS
Tennessee	Ohio	Coal	5,273,481
Tennessee	Tennessee	Coal	3,094,360
Tennessee	Tennessee	Sand, Gravel, Salt	1,621,956
Tennessee	LWR Miss	Food & Products	1,498,477
Tennessee	MID Miss	Unknown (Scrap)	1,473,125
GIW-W	Tennessee	Chem. Excl. Fertilizer	1,163,979
Ohio	Tennessee	Unknown)Scrap)	1,132,133
Tennessee	LWR Miss	Sand, Gravel, Salt	986,255
GIW-W	Tennessee	Sand, Gravel, Salt	887,776
Tennessee	Mobile	Coal	747,427
Ohio	Tennessee	Sand, Gravel, Salt	713,172
UPR Miss	Tennessee	Food & Products	669,455
LWR Miss	Tennessee	Chem. Excl. Fertilizer	641,538
LWR Miss	Tennessee	Primary Metal Prod.	589,047

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