

BNSF Railway

Moving you Forward

Northwestern University
Transportation Center

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Moving You Forward

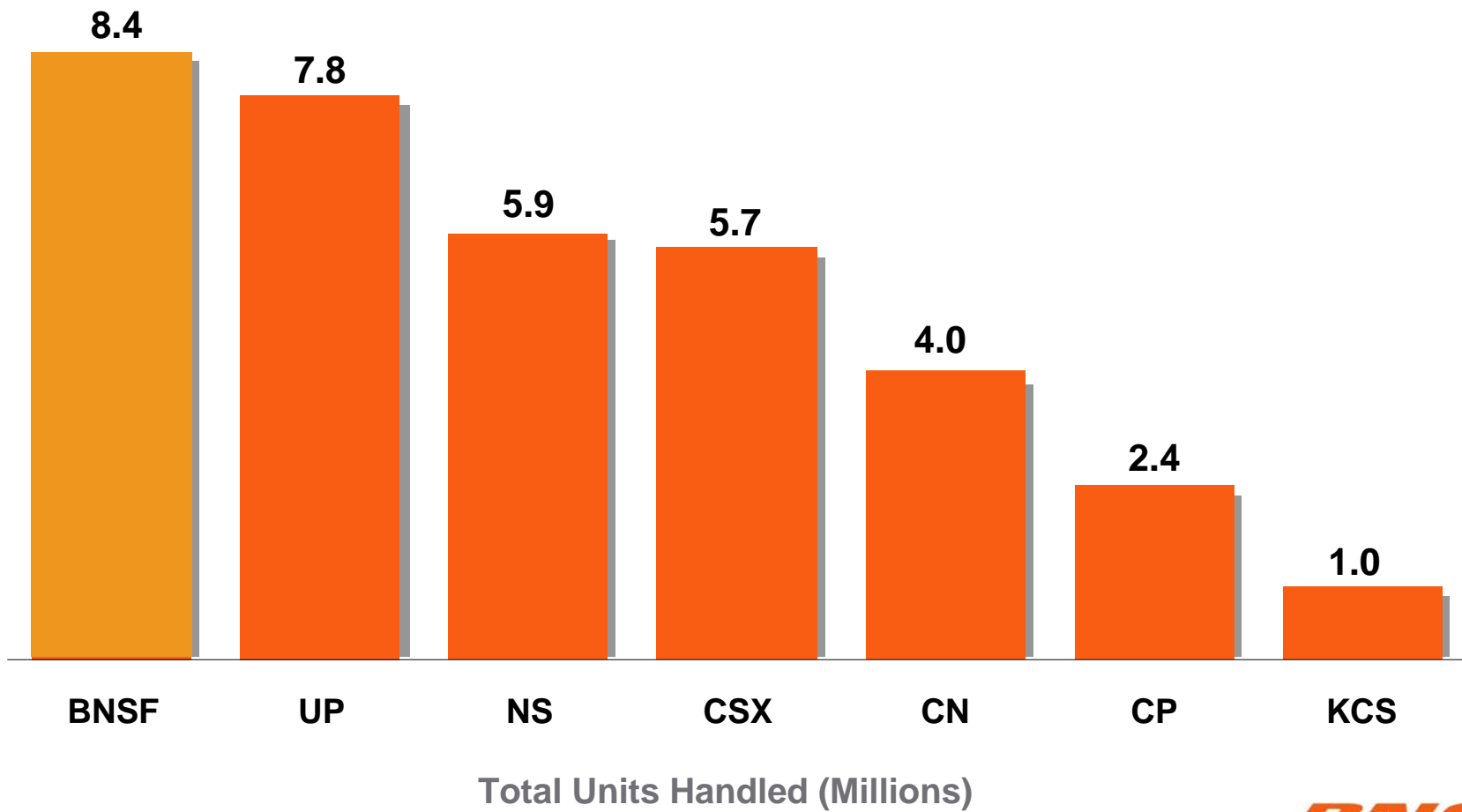


Logistics Parks

- Coverage
- Infrastructure Investments
- International Freight Demand
- Service Excellence
- Environmental Advantage

Overview | Market Share

BNSF Moves One Fourth of ALL North American Rail Freight



Overview | Intermodal Importance

More Customers Depend on BNSF to Deliver Their Intermodal Freight

Western Railroads



Eastern Railroads

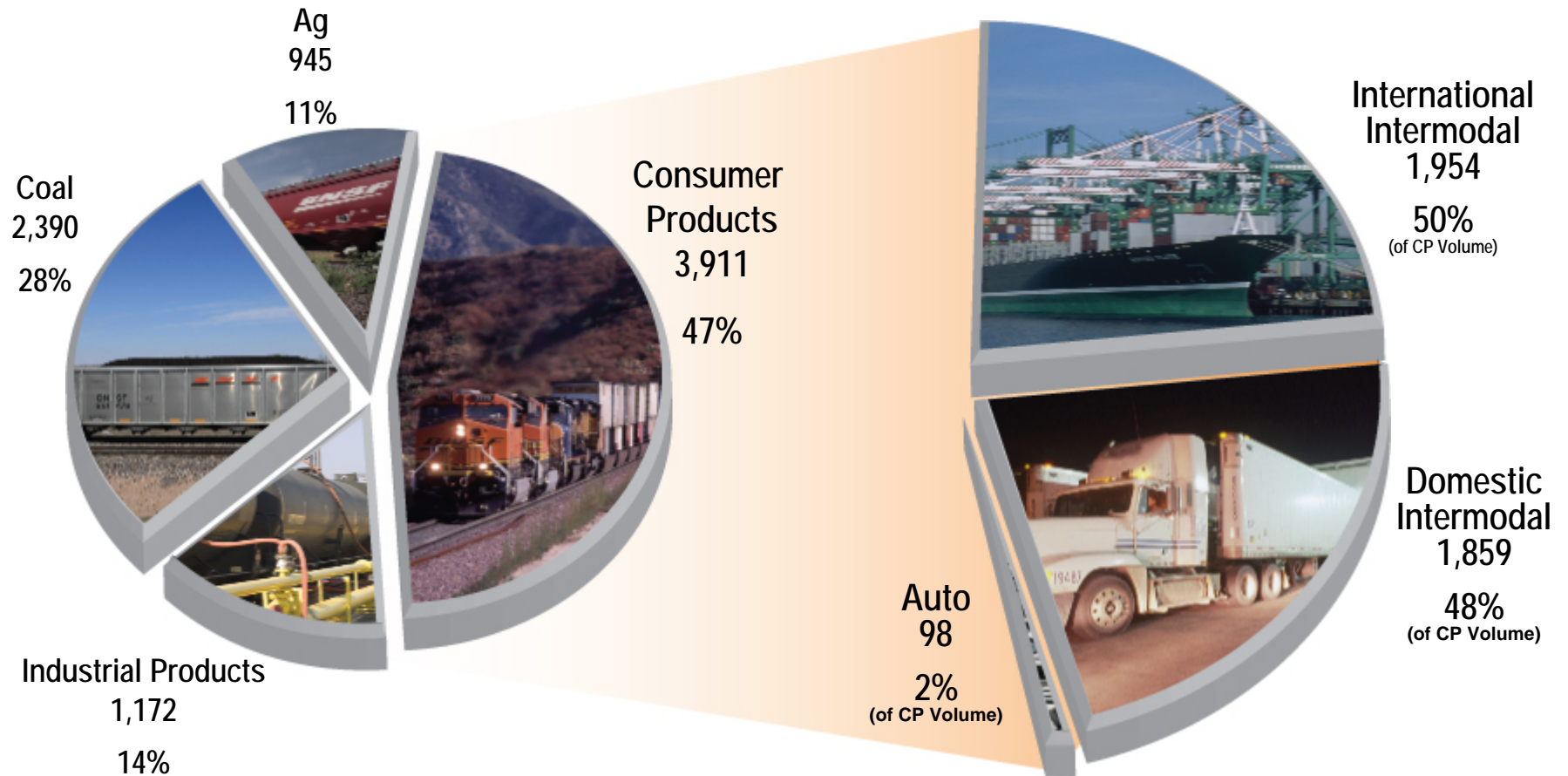


Intermodal as Percent of Volume (Full Year 2009)

Overview | Volume

Total units and % of total

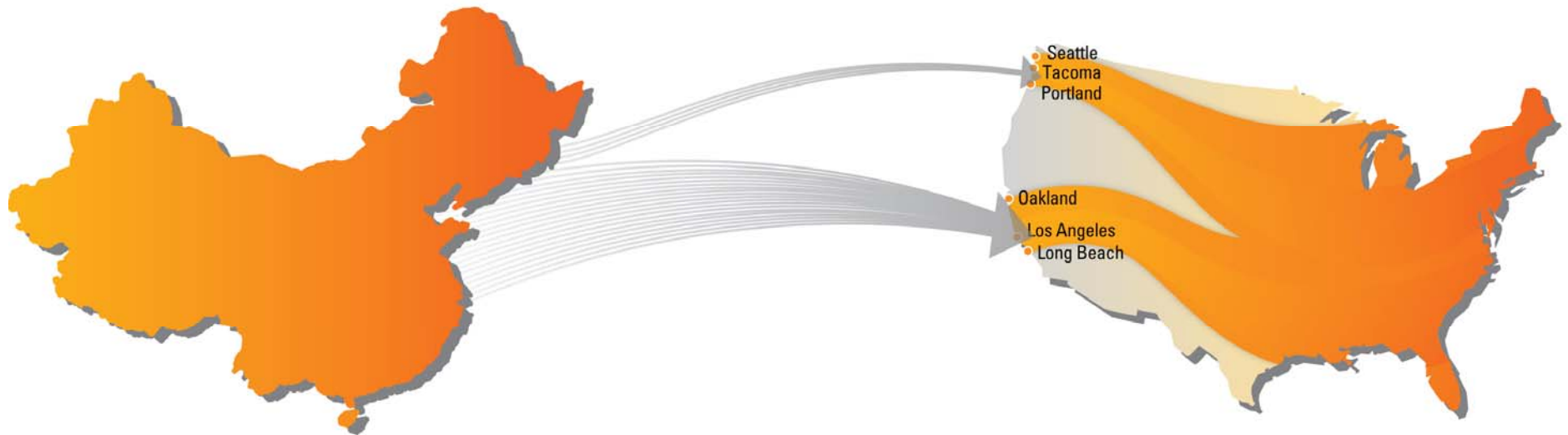
Thousands



2009 Total BNSF Volume 8,418

Coverage | Footprint

Over 110 weekly container vessel calls to 6 major West Coast Ports. Over 300 Eastbound Intermodal Train Departures per week

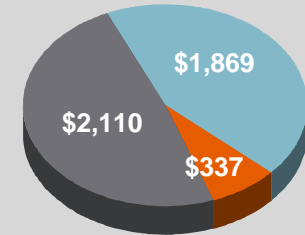


Coverage | Footprint



Infrastructure Investments | Int'l Intermodal

- **International business generates \$2B- \$3B in revenues at BNSF**
 - 14% of BNSF revenue in 2009
 - 47% of BNSF Intermodal revenue
- **BNSF has invested Billions of dollars to support international business**
 - Double/triple track primary routes between west coast ports and inland markets
 - Inland facilities and Logistics Parks (Chicago, Dallas/Fort Worth, Memphis, Kansas City, Atlanta)
 - West Coast intermodal facilities in PSW and PNW
- **We believe Asia and specifically China will continue to grow as a trade partner with the US**



■ Domestic Intermodal = \$2,110
■ International Intermodal = \$1,869
■ Auto = \$337



Infrastructure Investments | \$30 Billion in 12 yrs



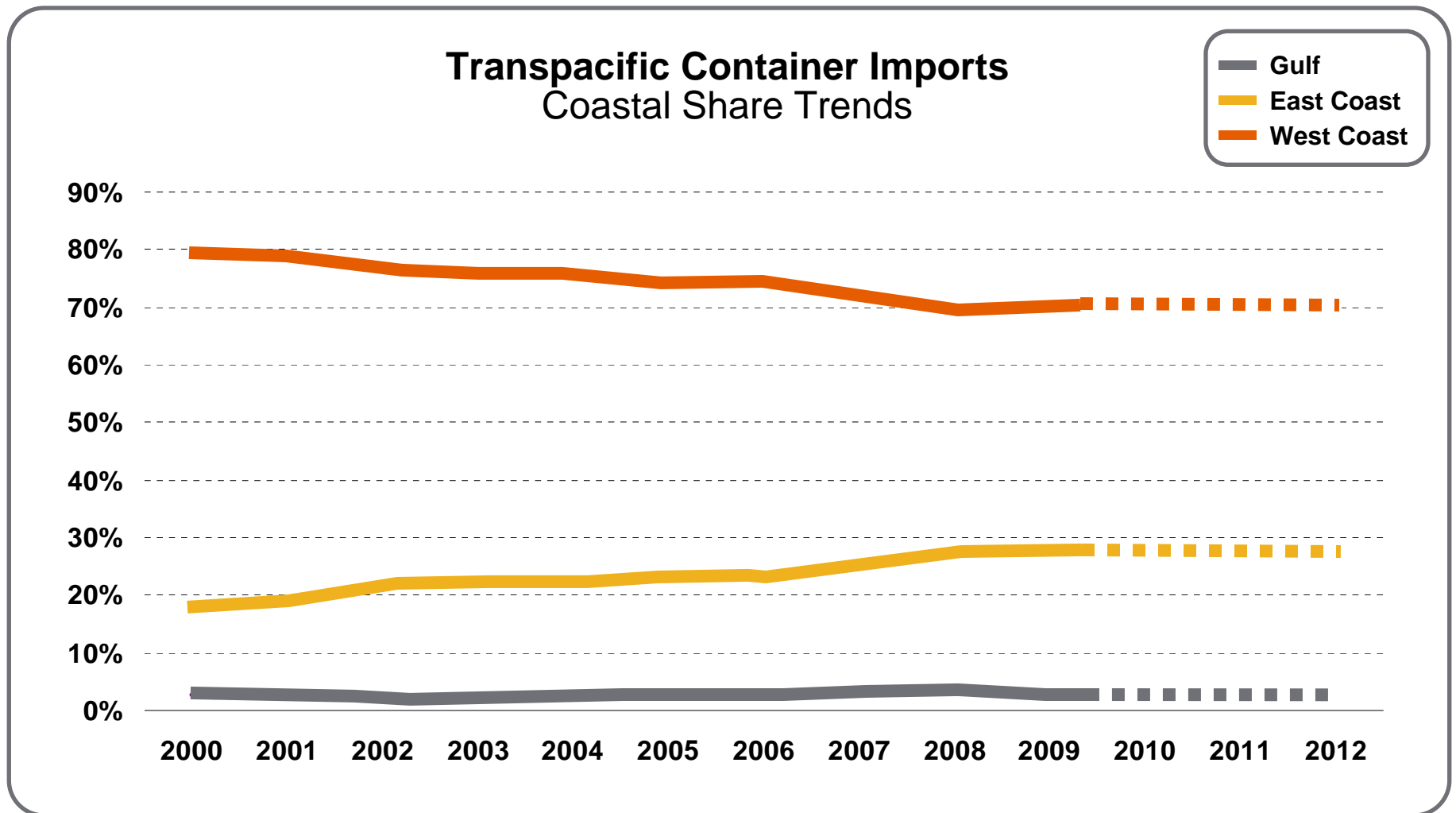
Infrastructure Investments | Logistics Park Chicago



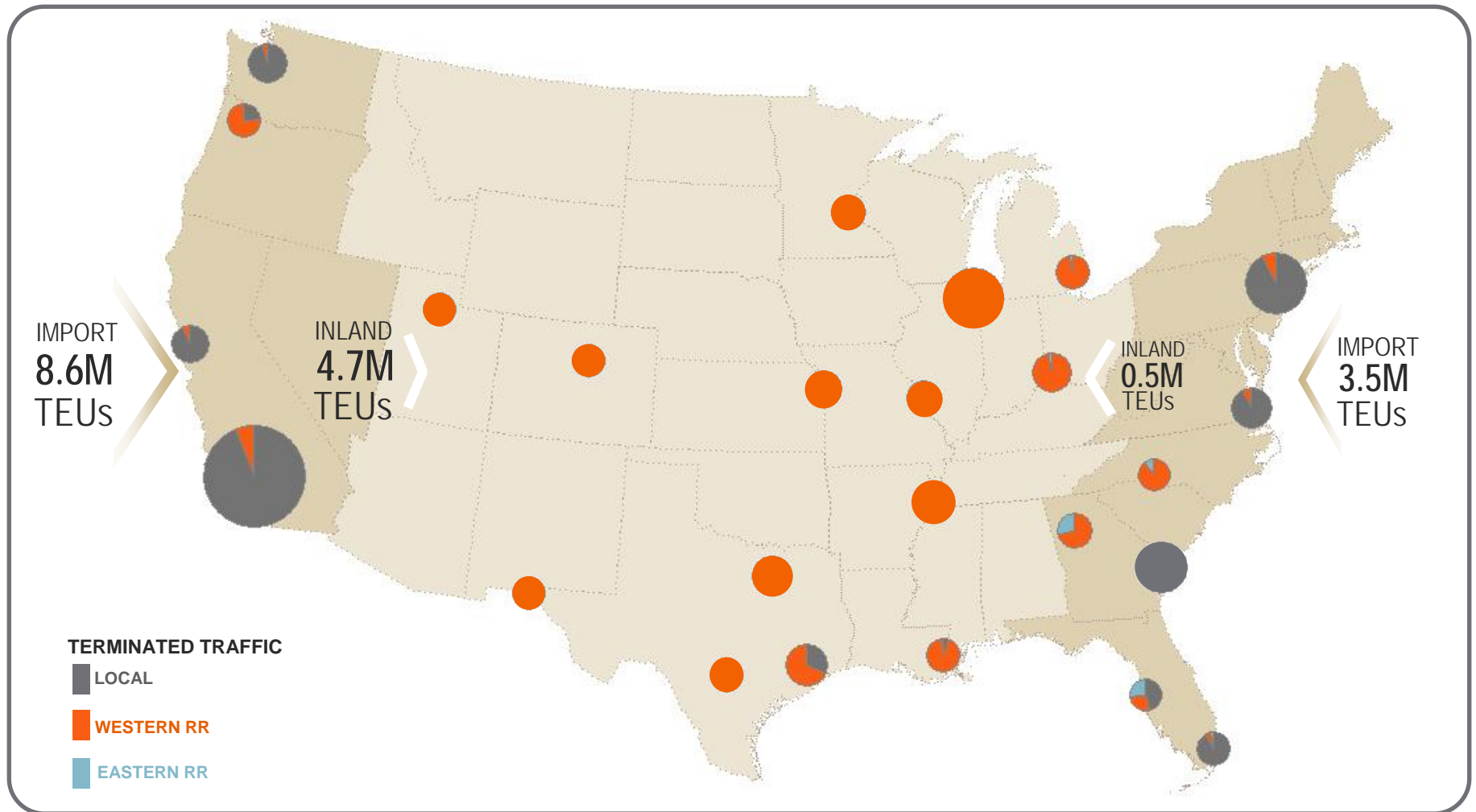
Infrastructure Investments | Memphis Intermodal Facility



International Freight Demand | Coastal Share Trends



International Freight Demand | Inland Markets



International Freight Demand | Summary

- **Transit via the WC is 7 - 10 days faster than all-water service**
- **East Coast markets require 2,000 more miles of transit to reach destination and inland markets require additional miles – Not Practical**
- **Extra miles burn more fuel, produce more carbon emissions**
- **East Coast routing requires at least 2 - 3 more vessels, millions of dollars more investment in vessels**
- **Panama Canal will increase transit fees to recover debt incurred for expansion**
- **East Coast ports will not be able to accommodate large vessels without significant dredging**
- **Most NY/NJ ports will not be able to accommodate larger vessels without addressing Bayonne Bridge clearance (\$2B+ project)**

Service Excellence | Customers



Service Excellence | Improvements

To best fit shipper needs, we added **105 new and enhanced services** impacting 80% of our total volume.

SERVICE IMPROVEMENTS

2009

Goal Enhancements	54
New Services	23

2010

Goal Enhancements:	29
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TOTAL: **105**

Premium COFC Service Improvements

<u>LANE (Domestic)</u>	<u>REDUCED</u>	<u>IMPACT</u>
Southern Cal – Chicago	8-10 hrs	4 th pm to 4 th am
Chicago – Southern Cal	7-8 hrs	4 th pm to 4 th am
Memphis – Southern Cal	6 hrs	4 th pm to 4 th am
Chicago – Portland	4 hrs	4 th am to Early am

Environmental Advantages | Intermodal

Contributing to the sustainability of those we serve

Increasing
Fuel
Efficiency

Improving
Air Quality

Reducing
Highway
Congestion

Conclusions

BNSF Railway is the Intermodal Expert

- **Providing extensive coverage to improve your supply chain**
 - **Investing for future growth**
 - **Delivering shipments consistently and reliably on-time**
 - **Committed to helping you meet your environmental goals**
-
- **What can we do to help you move forward today?**

