

FIR Transportation Conference 2023 The Premier Forecasting Event of the Year

Conference Agenda



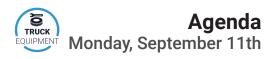


Sunday, September 10, 2023 Registration Opens & Reception

12:00 PM		•
1:00 PM		
2:00 PM		
3:00 PM	Registration Open 2:00 - 7:30 PM	
4:00 PM	-	
5:00 PM		
5:30 PM	-	
6:00 PM	-	Evening Reception 5:30 - 7:30 PM Grand Hall Bar, Union Station
7:00 PM 7:30 PM		







Monday, September 11, 2023 Truck Equipment

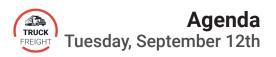
6:00 AM			
0.00 AM			
6:30 AM			
	Indy Canal Walk/Run		
7:00 AM	6:30 - 7:30 AM		
	-		
7:30 AM			
	Breakfast		
8:00 AM	7:30 - 8:45 AM 		Registration Open 7:30 AM - 7:30 PM
	-		Union Station Lobby
	-		
8:45 AM			
9:00 AM	Welcome	Jonathan Starks, FTR	
	The Economy and Its Impacts on the Commercial Vehicle Market	Avery Vise, FTR	
9:30 AM		Avery Vise, FTR	
	FTR's Outlook for the Class 8 Market		
	-	Eric Starks, FTR	
10:15 AM	Emissions Rules and the Commercial		
	Truck Industry	ler Truck North America	
11:00 AM	Networking Break		
11.00 AW	FTR's Outlook for the Trailer Market		
11:30 AM		Eric Starks, FTR	
	An Equity Analyst's Perspective on the		
12:00 PM	Class 8 Outlook	Matt Elkott, TD Cowen	
	Lunch Buffet		
1:00 PM			





1:00 PM		
	CV Keynote: Göran Nyberg, Navistar <i>Eric Starks, FTR</i> <i>Göran Nyberg, Navistar</i>	-
1:30 PM 2:00 PM	Update on North American Intermodal Equipment Market Eric Starks, FTR Sean Kenney, Hyundai Translead	-
2.0011	Used Trucks: When Will We See Stability?	
2:45 PM	Networking Break	
	Perspectives from Fleet Executives Avery Vise, FTR	-
3:30 PM	Kirk Altrichter, Kenan Advantage Group Stacy Earnhardt, Best Logistics Group	-
4:00 PM	FTR's Outlook for the Medium-Duty Truck Market Eric Starks, FTR	
		_
5:00 PM		_
5:30 PM		-
6:00 PM	Evening Reception 5:30 - 7:30 PM Grand Hall Bar, Union Station	
		Registration Open 7:30 AM - 7:30 PM Union Station Lobby
7:00 PM		
7:30 PM		

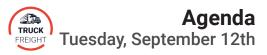




Tuesday, September 12, 2023 Truck Freight

6:00 AM		
6:30 AM	Indy Canal Walk/Run 6:30 - 7:30 AM	
7:30 AM	Breakfast 7:30 - 8:45 AM	Registration Open 7:30 AM - 5:30 PM Union Station Lobby
8:30 AM	-	
8:45 AM		
9:00 AM	Welcome Session Eric Starks, FTR	2
9:45 AM	Economic Outlook: Do We Finally Have Clarity? Jonathan Starks, FTF Eric Starks, FTF	
	The Road Ahead: FTR's Perspective on Truck FreightAvery Vise, FTF	R
10:30 AM	Networking Break	
11:00 AM	Dry Van Market: Finally a Smooth Ride? Avery Vise, FT John Bozec, Schneid David Perry, International Pape	ler T
11:30 AM	Refrigerated Market: Chill or Too Hot to Handle?Avery Vise, Fi Chris Kozak, Tyson Foo Chad England ,C. R. England	ods
12:00 PM	Flatbed Market: Outperforming Expectations? Avery Vise, FT Rob Roberson, Nuc Brad McDaniel, P&S Transportation	or
	- Lunch Buffet	
1:00 PM		





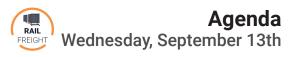
1:00 PM		
1:30 PM	- Truck Freight Keynote Eric Starks, FTR Rebecca Wlazlo, Crate & Barrel	
2:00 PM	Broker Perspectives:Avery Vise, FTRA View from the MiddleRobert Hooper, Atlantic LogisticsLiz Wayne, Able Transport Solutions	
	How Trucking Looks from Wall Street Avery Vise, FTR Bruce Chan, Stifel	
2:30 PM	Networking Break	
2:45 PM		
3:15 PM	Driverless Trucks: The Road Less Travelled By <i>Wilfried Aulbur, Roland Berger</i>	
5.1511	2033: A Trucking Odyssey Avery Vise, FTR	
4:00 PM	James Reed, Kodiak Noël Perry, Truckstop.com	
5:00 PM		Registration Open
		7:30 AM - 5:30 PM Union Station Lobby
5:30 PM		
	The Greenbrier Boxcar Bar	
6:00 PM	5:30 - 7:30 PM	
	The Indiana Rail Road Company	
7:00 PM		
7:30 PM		



Wednesday, September 13, 2023 Rail Freight

6:00 AM			
6:30 AM			
	Indy Canal Walk/Run 6:30 - 7:30 AM		
7:30 AM	Drashfast		-
	7:30 - 8:45 AM	Women in Transportation Meet & Greet 7:30 - 8:30 AM C+O, Union Station	Registration Open 7:30 AM - 7:30 PM Union Station Lobby
8:30 AM	-		-
8:45 AM	Welcome Session		-
9:00 AM	-	Jonathan Starks, FTR	-
	Economic Update: Have You E	ver Seen the Rain?	-
9:45 AM	_ Luisa Ferna	andez-Willey, Association of American Railroads	- - -
	Slow Growth: Will 2024 be like	2023? Todd Tranausky, FTR	-
10:30 AM	Networking Break		-
11:15 AM	Data Driving Decisions: How M Tech Can Help Shippers And C Pivot To Growth Together		-
	STB In Focus: Vital Decisions	from D.C.	-
12:30 PM	-	Todd Tranausky, FTR Karyn Booth, Thompson Hine LLP Bill Mullins, Baker & Miller	-
	Lunch Buffet		
1:00 PM			





1:00 PM		
1.00 F M	View from the Class I Suite: Norfolk Southern's Alan Shaw	Registration Open 7:30 AM - 7:30 PM
1:45 PM	Eric Starks, FTR Alan Shaw, Norfolk Southern Corp.	Union Station Lobby
1.45 PINI	A Deep Dive into the Grain Bin	-
	Todd Tranausky, FTR Glenn Smith, Fieldale Farms Corporation Nathan Schouvieller, Cargill	
2:45 PM	Networking Break	
2.45 F M	Knowledge is Power: Harnessing Data Through Technology	
3:15 PM	 John Schmitter, Railstate	-
	Intermodal: Measuring Actual Growth	
	- Todd Tranausky, FTR	-
4:00 PM	Phil Shook, Milestone Equipment Holdings, LLC	
		-
4:45 PM		-
5:00 PM		-
51001111		
5:30 PM		_
	Evening Reception	_
6:00 PM	- 5:30 - 7:30 PM	
	Grand Hall Bar, Union Station	-
		-
		-
7:00 PM		
7:30 PM		
7.30 F M		



Thursday, September 14, 2023 Rail Equipment

6:00 AM		
6:30 AM	Indy Canal Walk/Run	
	6:30 - 7:30 AM	
7 20 414		
7:30 AM	Breakfast	
	7:30 - 8:45 AM	Registration Open
		7:30 AM - 4:00 PM Union Station Lobby
8:45 AM	Misloomo Opposion	-
9:00 AM		Starks, FTR
	Railcar Equipment: View From the Top	-
9:45 AM	– Todd Trar Vince De Luca, Nation	nausky, FTR nal Steel Car
	The FTR Perspective on Rail Equipment	_
10:15 AM	Todd Trai	nausky, FTR
10:30 AM	Networking Break	
11:00 AM	Number for Demand Ross Corthell, Packaging Corporation	anausky, FTR on of America Vest, III, TTX
11:30 AM	Tank Cars: Adjusting toTodd TraiReplacement Level DemandDan AndersoKristin Dixon,	
12:00 PM	That Other Tank Car: A Deep Dive into the Acid Tank Car FleetChris Kei	rr, TrinityRail
12:00 PIVI	Lunch Buffet	-
1:00 PM		



1:00 PM	The Leasing Perspective: A Conversation Todd Tranausky, FTR About the Market Jeffrey Lytle, CIT Rail	Registration Open 7:30 AM - 4:00 PM
1:45 PM		Union Station Lobby
2:15 PM	Flat Car: Freight Demand Creates LimboTodd Tranausky, FTR Jay Carter, Greenbrier Companies David Nahass, Railroad Financial Corporation	
2:45 PM	The Regulatory World: Key Info for Equipment OwnersTodd Tranausky, FTR Donald Gill, Curry Rail Services Raymond Atkins, Sidley Austin LLP	
3:00 PM	Networking Break	
3:30 PM	Jumbo Covered Hoppers: What Inning Are We In?Todd Tranausky, FTR Robert Pickel, National Steel Car David Humphrey, Railinc	
4:00 PM	Large Covered Hoppers: The Ag Industry PerspectiveTodd Tranausky, FTR Monica Freeman, CHS, Inc. Glenn Smith, Fieldale Farms Corporation	

