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Transportation in the New Economy Leveraging Resources, Building Linkages

Windsor Intermodal Conference

May 5, 2009

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Con-way Inc.

Con-way Today – who we are

- US\$5.0 Billion Industry Leader in Freight Transportation, Logistics
 - Con-way Freight
 - Con-way Truckload
 - Menlo Worldwide Logistics
- 22,000 employees worldwide
- 11,000 trucks, 32,000 trailers, 16 million sq ft warehouse space globally
 - 100,000 pickups and deliveries daily in N. America
 - 600 million miles annually moving freight on highways
- 1,100 employees in greater Michigan/Ontario area
 - 21 facilities
 - 500,000 coded customers in North America
- Founded in Ann Arbor 1983

Transportation in the New Economy

- What is transportation's role as a "new economy" emerges in the Detroit/Windsor/Toledo region?
 - Fundamental resource without which economy will not grow
 - Leading economic indicator as precursor to recovery
 - Critical link between all nodes of the supply chain
 - Connects supplies with factories, retailers with products
 - Source for thousands of stable, well-paying jobs
 - Provides millions in tax revenues to fund infrastructure
- In Short, transportation plays the same critical role it has in every economic cycle.
 - It's the foundation for growth

Sharing the inconvenient truth

- Transportation is the foundation of a functioning economy
- Dependencies for success –
 - Effective Infrastructure and linkages between modes
 - Roads, bridges, tunnels, ports, distribution, intermodal rail
 - Coordinated local, regional and national strategy
 - Vision and Leadership
 - Effective Collaboration (private/public)
 - Intelligent Investment, funding options
 - Targeted, common sense approach to prioritization, development
 - Businesses cannot shoulder the burden alone

Leveraging our natural assets to drive recovery

- Detroit/Windsor/Toledo region – tremendous natural assets, resources.
 - Good existing highway infrastructure
 - Excellent deep water port at Halifax
 - Well developed intermodal marshalling yards
 - Rail connections to every major US market, other ports
 - Major supplier base for manufacturing
 - Skilled, abundant local workforce
 - Extensive distribution resources
 - Excellent educational institutions
 - Proactive, business-supportive government

Opportunities and challenges

- Detroit/Windsor/Toledo has great opportunity to emerge as ‘success story’ in the next economic recover
- But we have challenges
 - Infrastructure needs some investment
 - Better linkages between ports, rail, intermodal, highways
 - Workforce retraining
 - Invest in our people to drive success in the new economy
 - More effective inter-regional planning, cooperation
 - Better planning, collaboration will improve investment return, accelerate project execution, provide more seamless network
 - Why TransLinkD can provide the platform

Opportunities and challenges

- National Security
- Existing infrastructure needs improvements to protect against security threats
 - Windsor-Detroit rely on one bridge, one tunnel as primary economic linkage connecting industrial plants
 - Nearest add'l connection is Blue Water Bridge between Sarnia, Pt. Huron
 - Threat from security perspective – what happens if attacked?
 - Consider additional infrastructure, two perspectives
 - Security redundancy
 - Flexibility, capacity for growth

Future state

- Where do we go from here?
- Consider establishing blue-ribbon commission to gather input, develop recommendations for master regional plan (TranslinkD)
 - Public/private cross-border partnership
 - Support resource complements official govt agencies
 - Identify, prioritize infrastructure needs
 - Targeted, strategic improvements we can make now to help region accelerate recovery
- Create Momentum for Change
 - Position Windsor-Detroit-Toledo as attractive, competitive strategic location with many advantages for global businesses

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THANK YOU

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