STOP THE RAIL MERGER COALITION

August 24, 2026

The Honorable Donald J. Trump
President of the United States
The White House
Washington, DC 20500

Re: The Union Pacific-Norfolk Southern Merger Threatens the President's Base and the American Economy

Dear Mr. President:

On behalf of the Stop the Rail Merger Coalition, we write to urge your administration to oppose the proposed merger of Union Pacific and Norfolk Southern. Our coalition unites railroad operators, shippers, workers, and many other rail industry leaders. The growing coalition membership now includes the American Farm Bureau Federation, the Teamsters Rail Conference, the American Chemistry Council, the Agricultural Retailers Association, the Brotherhood of Railroad Signalmen, the Alliance for Chemical Distribution, The Fertilizer Institute, the National Industrial Transportation League, the Vinyl Institute, BNSF Railway, and CPKC. All told, the coalition represents a majority of railroad shippers and affected railroad workers across the United States.

The American railroad industry is unique in its role as the backbone of U.S. freight transportation because it connects vast agricultural, industrial, and energy-producing regions with domestic and international markets at a scale and reach that other transportation modes cannot match. Further, many bulk products cannot be moved in a timely, reasonable, and safe manner on any mode of transportation other than rail. Rail's combination of geographic reach, high capacity, efficiency, and integration with other modes of transportation makes the U.S. railroad system a critical foundation of the nation's economy, supply chains, and national defense. These factors, combined with an already highly consolidated freight railroad market, mean that the freight rail industry is governed differently from other industries, especially when it comes to reviewing mergers between two Class I railroads.

This merger, if approved, would place nearly half of the nation's rail traffic under the control of a single company. As a result, it would harm American farmers, domestic manufacturers, energy producers, and railroad workers, while driving up costs for consumers and putting critical supply chains at risk. This outcome runs contrary to your administration's economic agenda, and we do not believe it serves the American people who support your administration's goals.

Consolidating the country's freight network into fewer hands concentrates risk in a single operator, so that any disruption, whether from staffing shortfalls, service failures, or weather, ripples across the entire economy with no competitor able to absorb the shock. This is not a theoretical concern.

After the 1996 Union Pacific-Southern Pacific merger, the commitments made to preserve competition and reliability were not honored, and the network's service collapsed for years afterward. Competitors are still asking regulators to enforce promises made three decades ago that allowed that merger to move forward. In addition, Union Pacific has a history of promising benefits in merger proposals that have yet to be realized by shippers, especially carload shippers, who are represented in the coalition. Merger commitments are easy to make and extremely difficult to enforce once the damage is done, and there is no reason to expect this transaction would end differently.

The economic effects would be significant for our entire country and would fall hardest on those Americans you are fighting for. Given the nature of the rail network, a merged Union Pacific-Norfolk Southern network would eliminate competitive options that keep freight rates and service reductions in check, and without those checks, the costs of the merger, including the $85 billion purchase price, would be passed down the chain to the businesses and consumers at the end of it. American manufacturers, energy producers, and farmers would face the greatest risks from Union Pacific's heightened market power, and the increased cost and added service problems of moving grain, fertilizer, coal, and refined products would ultimately be reflected in the prices Americans pay for food, fuel, and everyday goods. The American Farm Bureau Federation has been direct on this point: farmers are already under considerable economic strain, and further rail consolidation would compress farm margins while raising food costs nationwide.

The operational risk compounds the economic one. Union Pacific and Norfolk Southern have promised their shareholders significant growth within the first three years of merging, which by necessity would require an accelerated effort to integrate two railroads that today rely on different and complex operating systems. Integrating two Class I networks of this scale is an enormous undertaking, and the Teamsters Rail Conference, which represents the majority of Union Pacific's and Norfolk Southern's unionized workforce, has stated plainly that the merged company has made no binding and enforceable commitments to the staffing levels needed to maintain reliability through that transition. A network of this size, without a firm workforce commitment behind it, is positioned for the kind of service breakdown that stalls shipments and strands goods, with the public and, ultimately, taxpayers left to absorb the consequences. And ultimately, workers face losing their jobs and economic lifelines.

The breadth of who stands to be harmed is instructive. This merger touches consumers and families, farmers, manufacturers, energy producers, and rail workers, along with a wide range of other industries and communities that depend on reliable rail service. That is not a narrow industry dispute. It is a broad cross-section of the American economy and of the coalition of voters who elected you President. Nearly 100 Members of Congress, along with many state legislative leaders, attorneys general, and agriculture secretaries from across the country, have sounded the alarm about this merger to the Surface Transportation Board.

The American people intuitively understand that further rail industry consolidation will not be good for competition and ultimately raise consumer prices, and early polling bears this out. A national survey conducted this year by McLaughlin & Associates found that nearly 71 percent of Americans oppose this merger once they understand its impact, while only 20 percent support it. A majority of voters believe it would raise the cost of shipping by rail, increase prices on everyday goods, and cost jobs. Sixty-eight percent believe the merged company would keep any cost savings for itself rather than pass them on to businesses or consumers. And notably, nearly 70 percent of Americans, across party lines, including Republicans, Democrats, and Independents, agree with Vice President Vance's own words that when one or two companies dominate an entire sector, it is bad for liberty and bad for prosperity. Fifty-four percent of voters say they are more likely to support a candidate who opposes this merger. This is not a partisan issue. It is one on which your supporters, and the broader public, are already aligned.

As proposed, the Union Pacific-Norfolk Southern merger does not meet the required high standard to improve service while strengthening and enhancing rail-to-rail competition and ultimately serving the American public. Therefore, we respectfully urge your administration to oppose it. We welcome the opportunity to brief your teams further on our coalition's concerns.

Respectfully,

Stop the Rail Merger Coalition
stoptherailmerger.com

American Farm Bureau Federation
Teamsters Rail Conference
American Chemistry Council
BNSF Railway
CPKC
Agricultural Retailers Association
Brotherhood of Railroad Signalmen
Alliance for Chemical Distribution
The Fertilizer Institute
National Industrial Transportation League
Vinyl Institute

CC: J.D. Vance, Vice President of the United States
Susie Wiles, Chief of Staff to the President
Kevin Hassett, Director, National Economic Council
Sean Duffy, Secretary of Transportation
Brooke Rollins, Secretary of Agriculture
Keith Sonderling, Acting Secretary of Labor