

JARRETT SUPPLY CHAIN REPORT



MARKET

- The Cass Freight Index, which measures overall North American freight volumes and expenditures, reported shipment counts fell 7.3% month over month (m/m) in December, and are down 6.5% year over year (y/y). Freight expenditures fell 2.6% m/m, and were down 3.4% y/y. ([Cass Information Systems January 2025](#))
- U.S. dockworkers and shipping companies reached a tentative labor deal, capping a contentious contract battle that drew attention from President Biden and President-elect Donald Trump and averting a strike at major ports that threatened to rattle the U.S. economy. ([WSJ January 2025](#))
- FedEx announced it will move forward with a plan to spin off its LTL unit, FedEx Freight, into a separately traded public company. FedEx will comprise the company's legacy air, ground and parcel segments, which generated \$78 billion in revenue in its recent fiscal year ended May 31. The new business will house FedEx Freight, which is the largest LTL carrier in the U.S. with nearly \$10 billion in annual revenue. ([FreightWaves December 2024](#))
- The average price of diesel fuel in the U. S. fell for the ninth consecutive week to \$3.602/gallon on Jan 13. It is down 6.8% y/y. ([US EIA January 2025](#))

Less-than-Truckload (LTL)

- A federal bankruptcy judge approved Estes Express Lines' and R+L Carriers' acquisitions of a dozen more Yellow Corp. terminals for a combined \$192.5 million last month. ([TruckingDive January 2025](#))
- Pitt Ohio Transportation Group's purchase of Sutton Transport, was officially completed on Jan. 1. Sutton, with 13 terminals across eight states, will bolster the 10-state network of Dohrn Transfer, a separate Pitt Ohio company that has its headquarters in Rock Island, Illinois. ([JOC January 2025](#))
- Dynamic pricing tools are allowing less-than-truckload (LTL) shippers and brokers, especially smaller ones, to connect with LTL carriers looking for new sources of freight. Spot quotes used to be limited to large LTL shipments weighing a minimum of

4,000 or 5,000 pounds, but in recent years carriers have expanded the use of those quoting methods to price transactional business from brokers, 3PLs, freight forwarders and small shippers. ([JOC January 2025](#))

- Roadrunner announced Jan. 13 a blanket rate hike for the first time since 2021. A 6.9% general rate increase across multiple tariff codes will go into effect Jan 15. ([FreightWaves January 2025](#))

TRUCKLOAD (TL)

- The average length of haul for a truckload has plummeted in recent months, averaging nearly 8% shorter year over year to start 2025. The data suggests the shrinking load lengths are being driven by simultaneous growth in demand for loads moving less than 100 miles and shrinking demand for loads moving more than 450 miles. ([FreightWaves January 2025](#))
- U.S. Class 8 retail sales closed out 2024 by trending below year-ago levels. Sales in December decreased 4.3% to 22,383 units from 23,390 during December 2023, but they did increase 13.9% on a month-to-month basis from 19,658 units sold in November. ([TransportTopics January 2025](#))
- The largest U.S. load board provider DAT Freight & Analytics said it has acquired Trucker Tools LLC, one of the most prominent U.S. suppliers of visibility, booking and freight matching software vendor to truckload freight brokers. The acquisition, terms of which were not disclosed, gives DAT access to execution-oriented tools and carrier location information for the hundreds of thousands of drivers that have downloaded the Trucker Tools mobile app. ([JOC December 2025](#))
- U.S. truckload rates increased slightly in December when compared to November. Dry van spot rates rose 0.1% m/m, and are up 0.5% y/y. Flatbed spot rates were flat m/m, and are up 0.8% y/y. The number of spot loads posted in December increased 17.3% m/m, and are up 23.3% y/y. ([DAT Freight & Analytics January 2025](#))

PARCEL

- DHL Supply Chain has acquired returns-service provider Inmar Supply Chain Solutions, a division of Winston-Salem, N.C.-based retail-services company Inmar Intelligence. The deal extends DHL's reach into the business of managing returned merchandise that has become a significant wing of the retail market. ([WSJ January 2025](#))

- UPS has completed an acquisition of Frigo-Trans and its sister company BPL, a leader in healthcare logistics solutions across Europe. Terms of the deal were not disclosed. In a news release, the company said it is looking to enhance the end-to-end capabilities for UPS Healthcare customers, which have seen rising demand for temperature-controlled and time-critical logistics solutions on a global scale. ([FreightWaves January 2025](#))

INTERNATIONAL

- The Ocean Alliance of COSCO Shipping, OOCL, Evergreen Line and CMA CGM has unveiled its new shipping network, expanding direct coverage of both the Asia-Europe and trans-Pacific trades from April. ([JOC January 2025](#))
- Mexican President Claudia Sheinbaum has issued a decree that effectively ended the popular “border-skipping” strategy many U.S. e-commerce sellers used to avoid tariffs on Chinese goods. This decision, which was announced on Dec. 19 and took effect immediately, primarily targets apparel imports and is set to have far-reaching consequences for the industry. ([FreightWaves December 2025](#))
- The Drewery WCI Composite index, which measures the bi-weekly ocean freight rate movements of 40-ft. containers in seven major maritime lanes, was \$3,986 per 40-ft. container on Jan 9. It is up 28.8% over the past 10 weeks. ([Drewery January 2025](#))