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Intelligence



Trucking Update

Freight Focus Series

Graphs
Package



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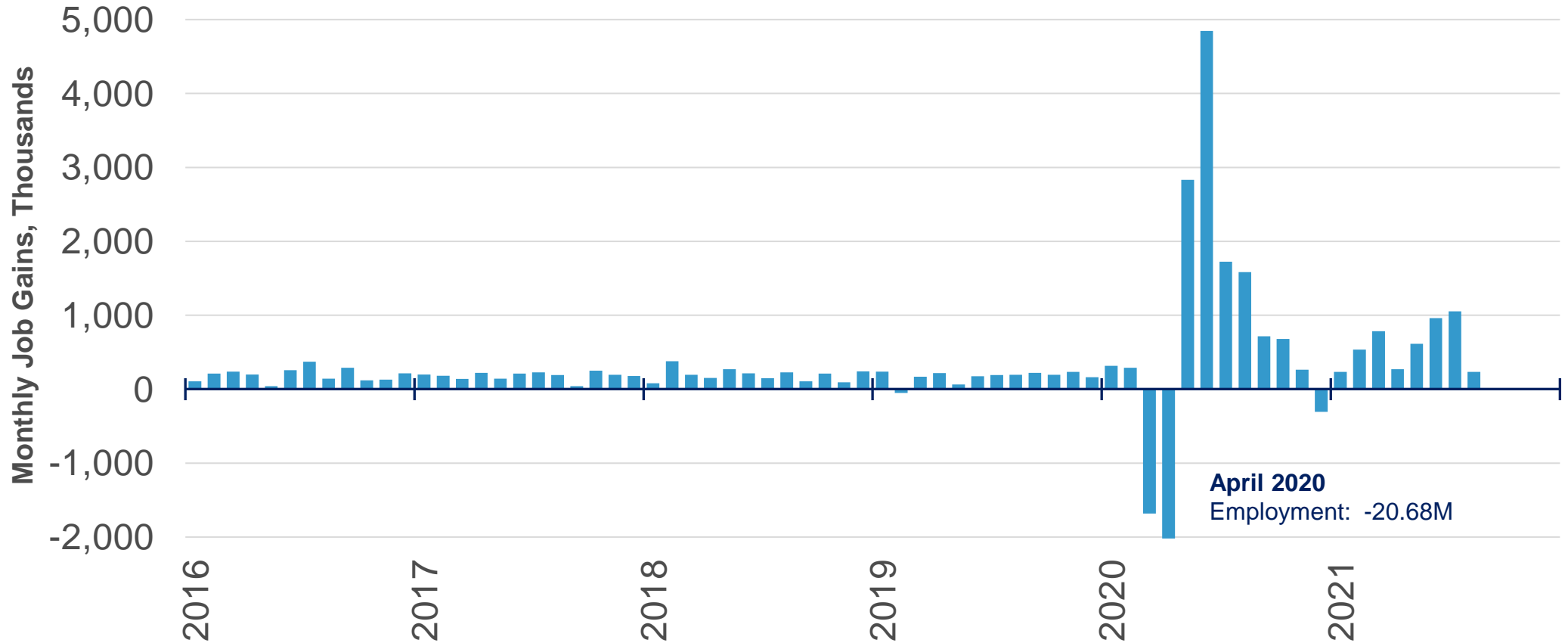
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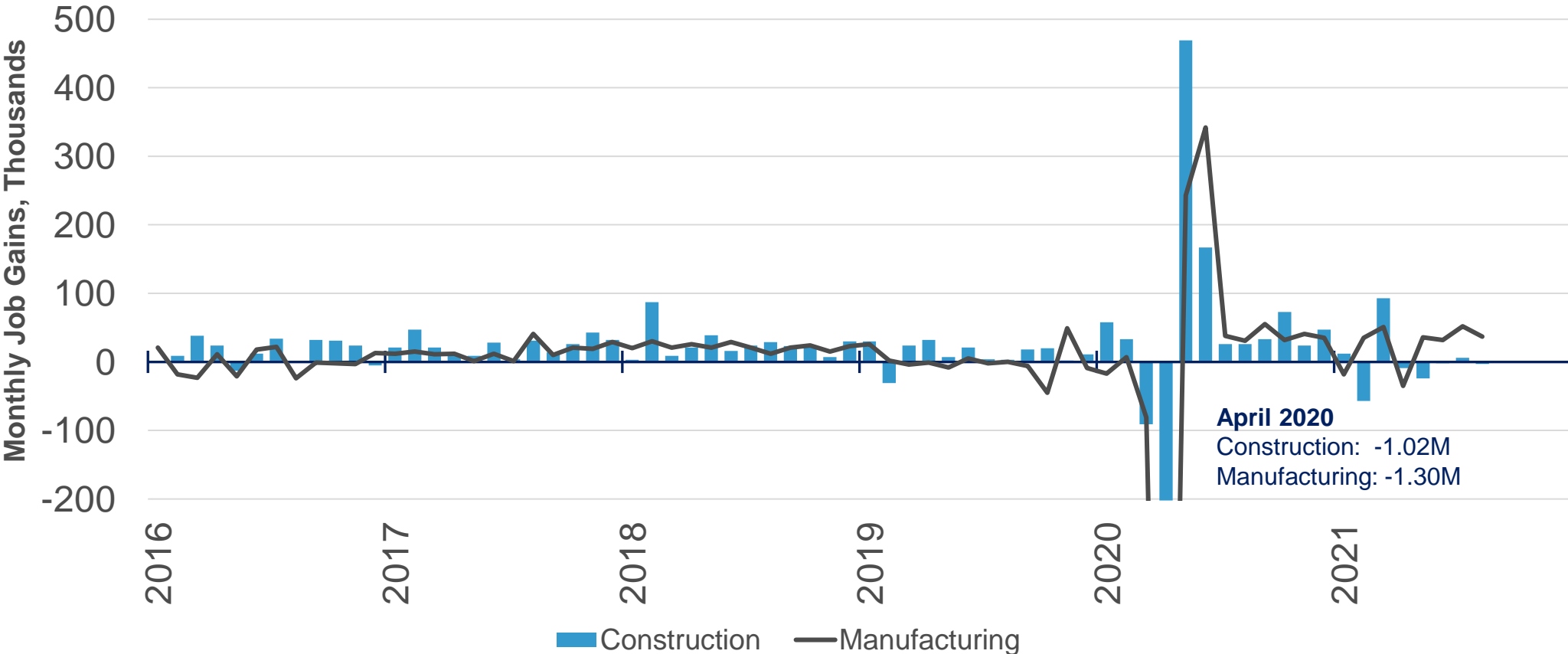


Historical Data Monthly

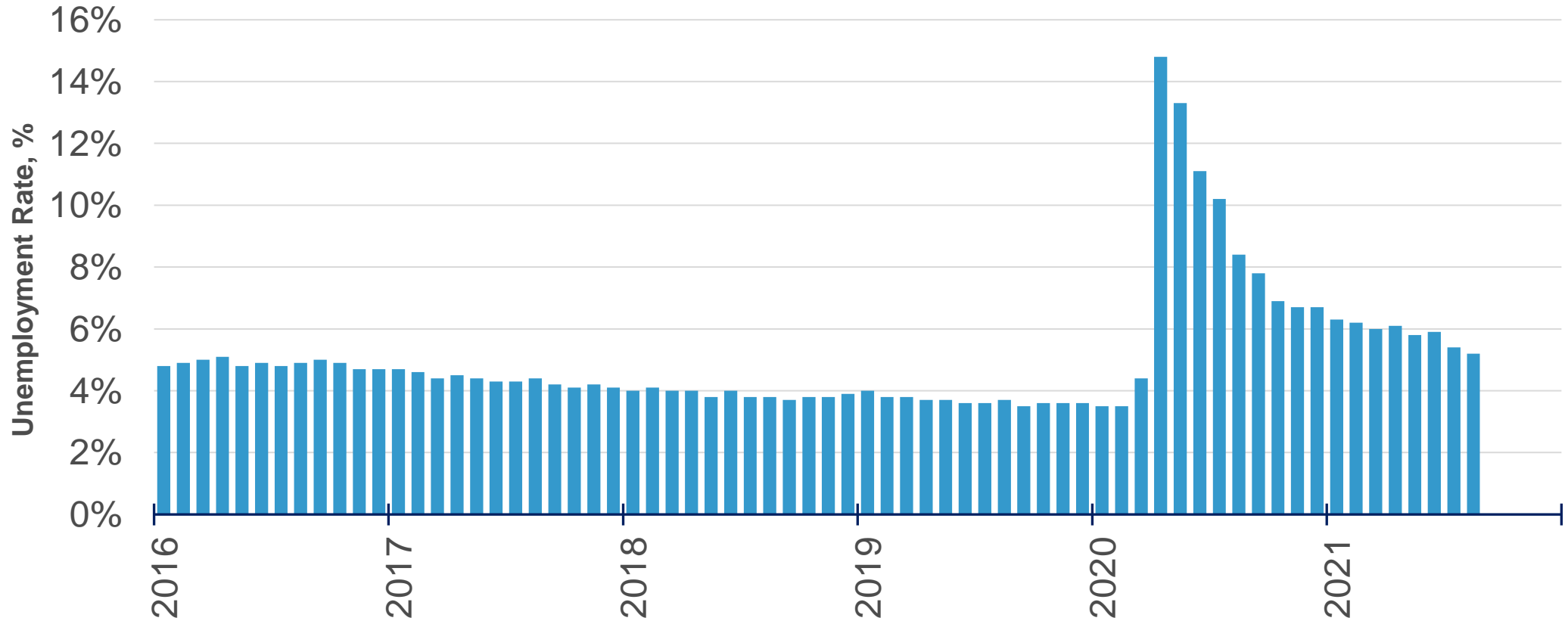
Employment: Total Payroll



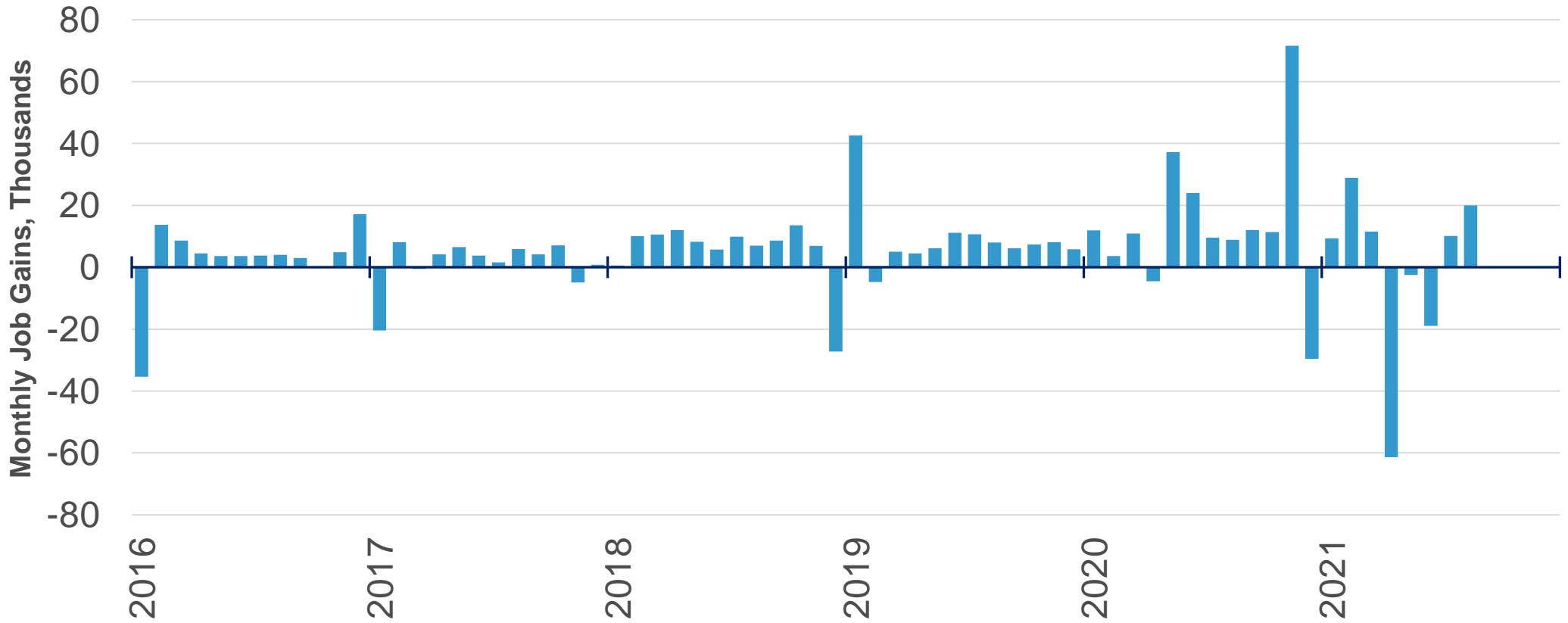
Employment: Construction & Manufacturing



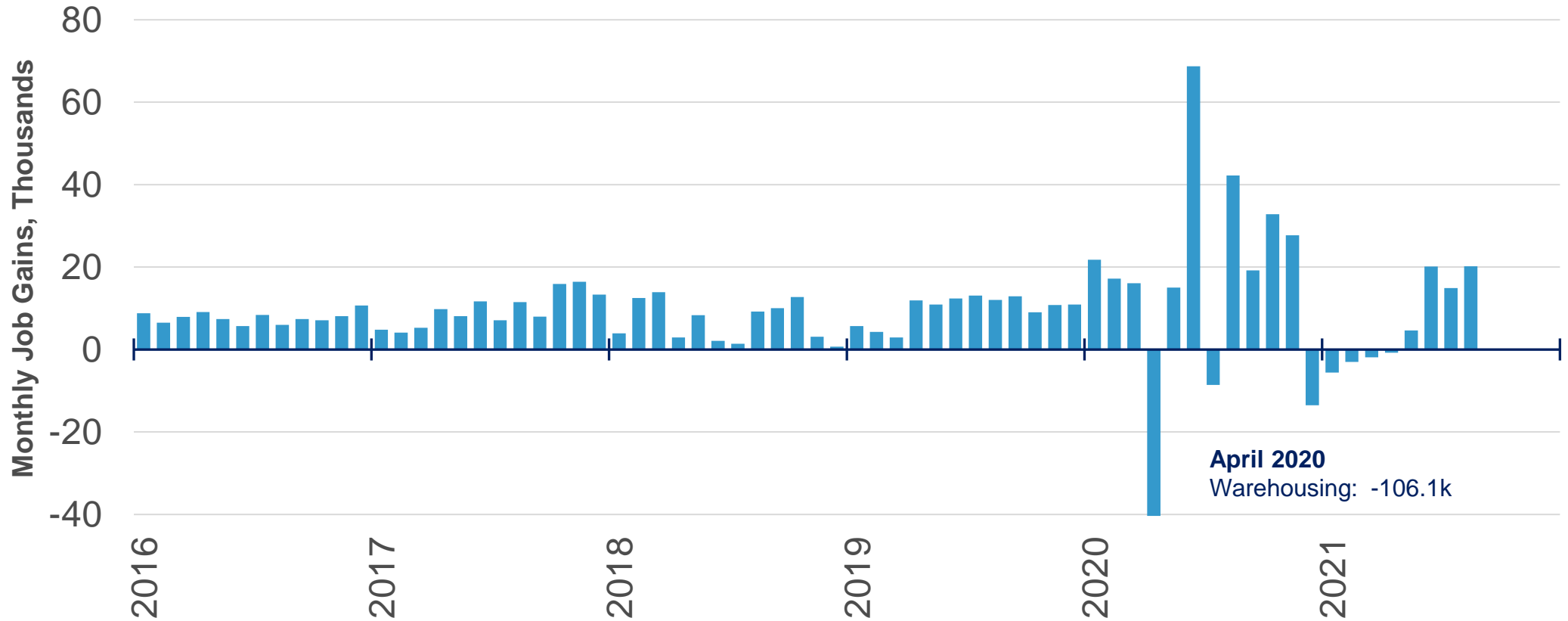
Employment: Unemployment Rate



Employment: Parcel/Courier

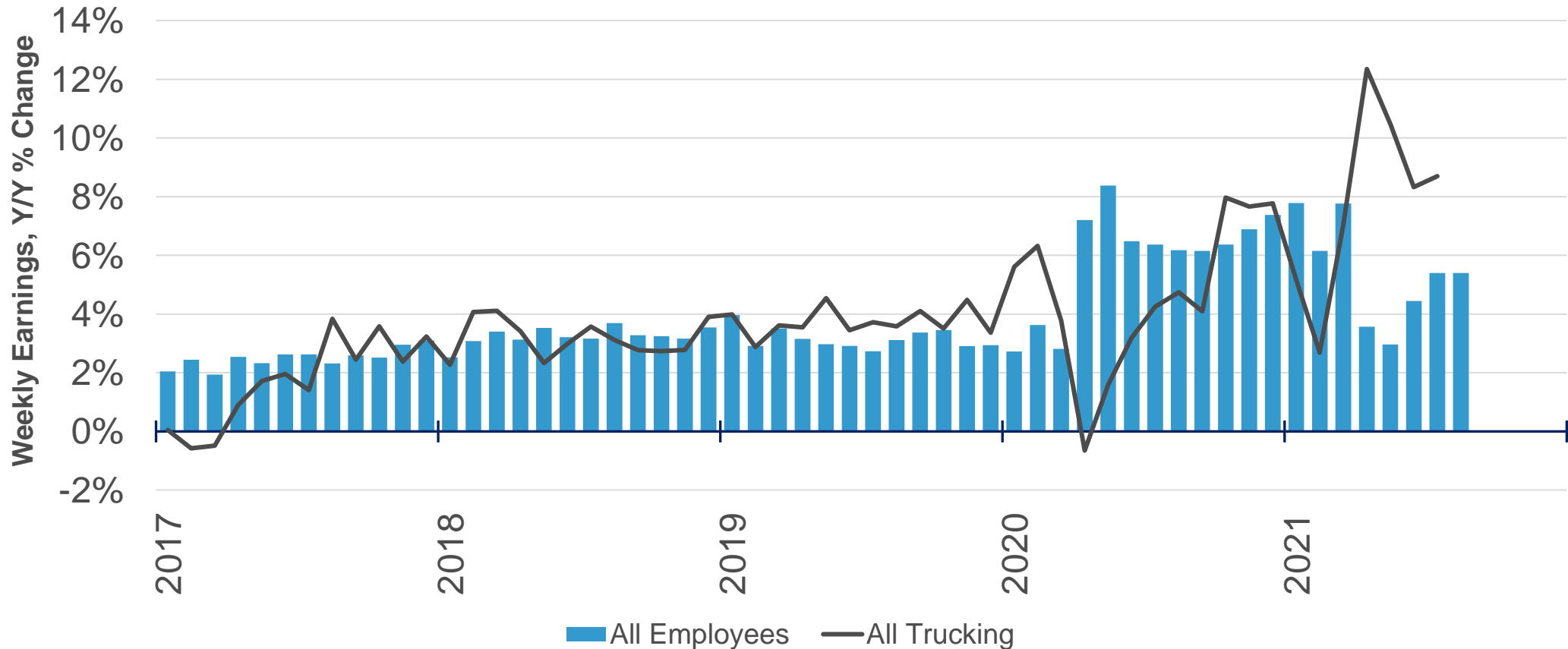


Employment: Warehousing

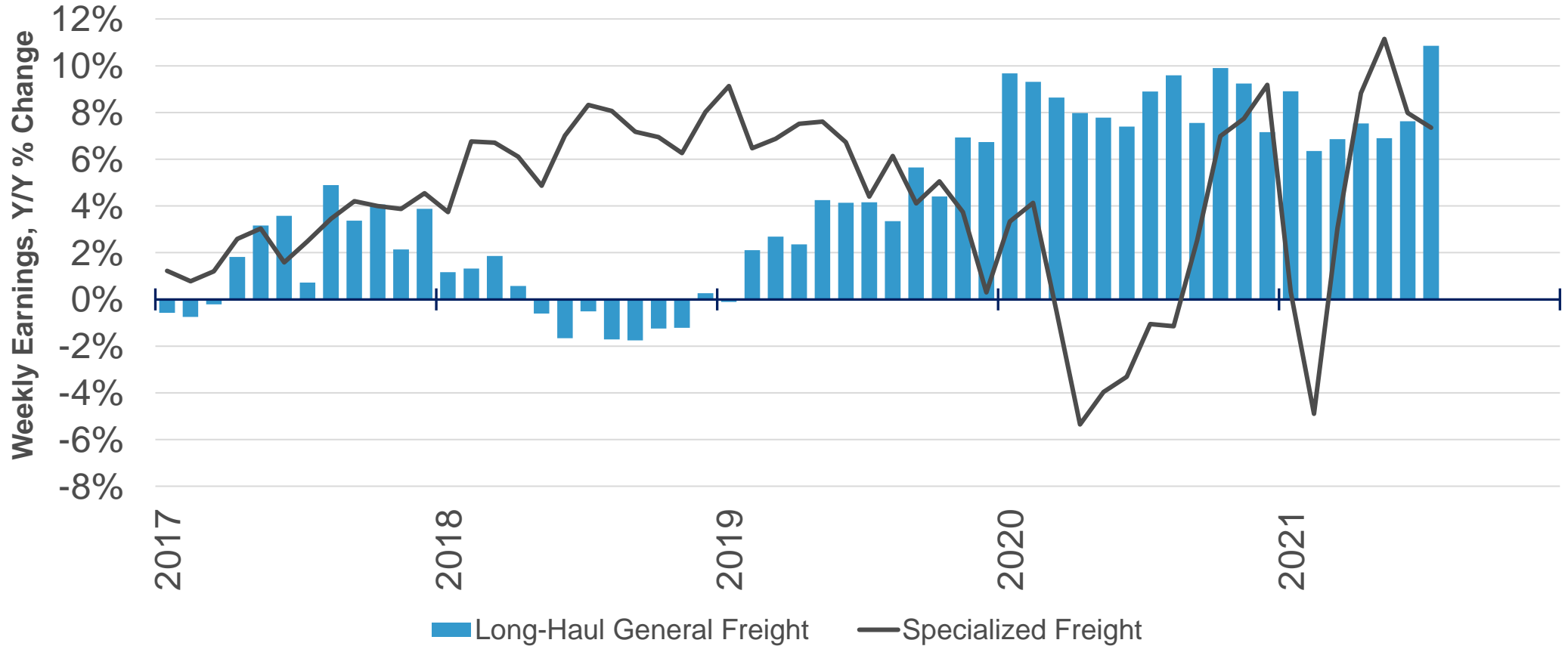


April 2020
Warehousing: -106.1k

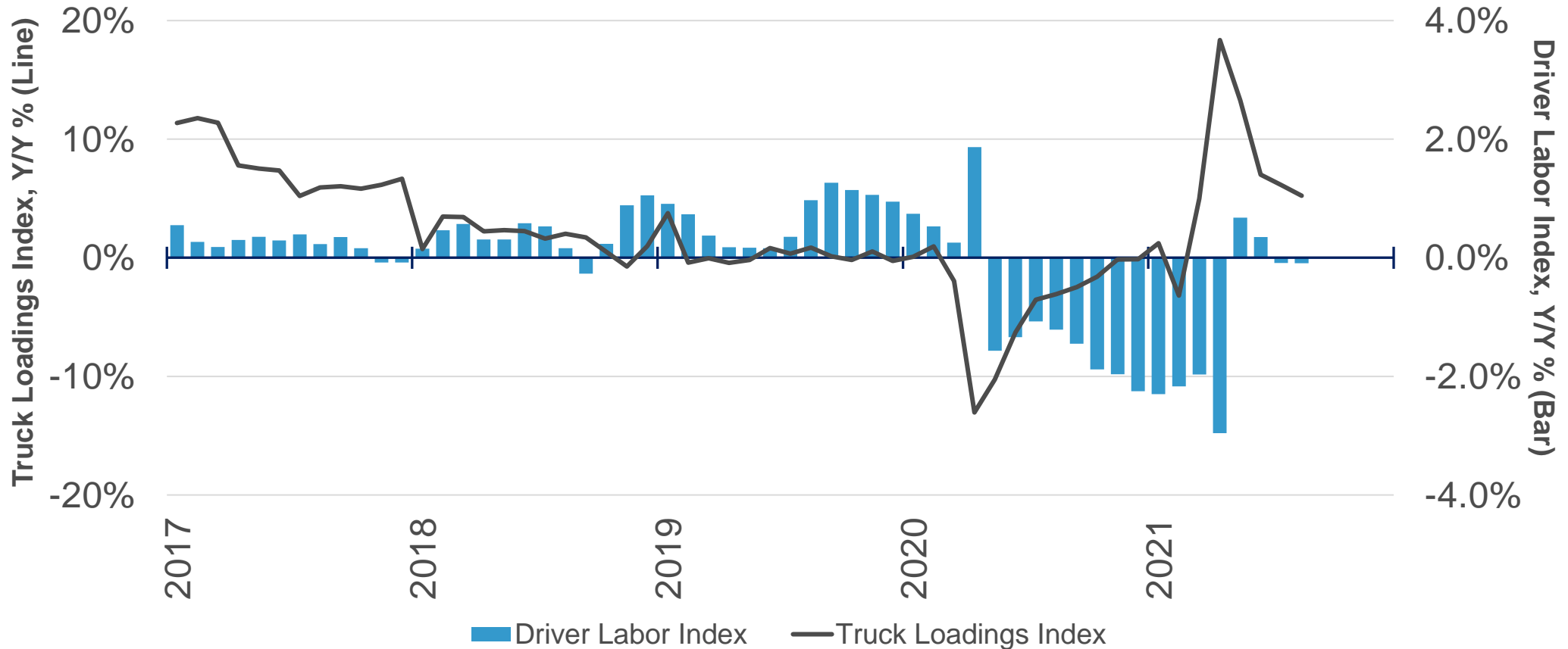
Weekly Earnings: Total vs Trucking



Weekly Earnings: Long-Haul TL vs Special



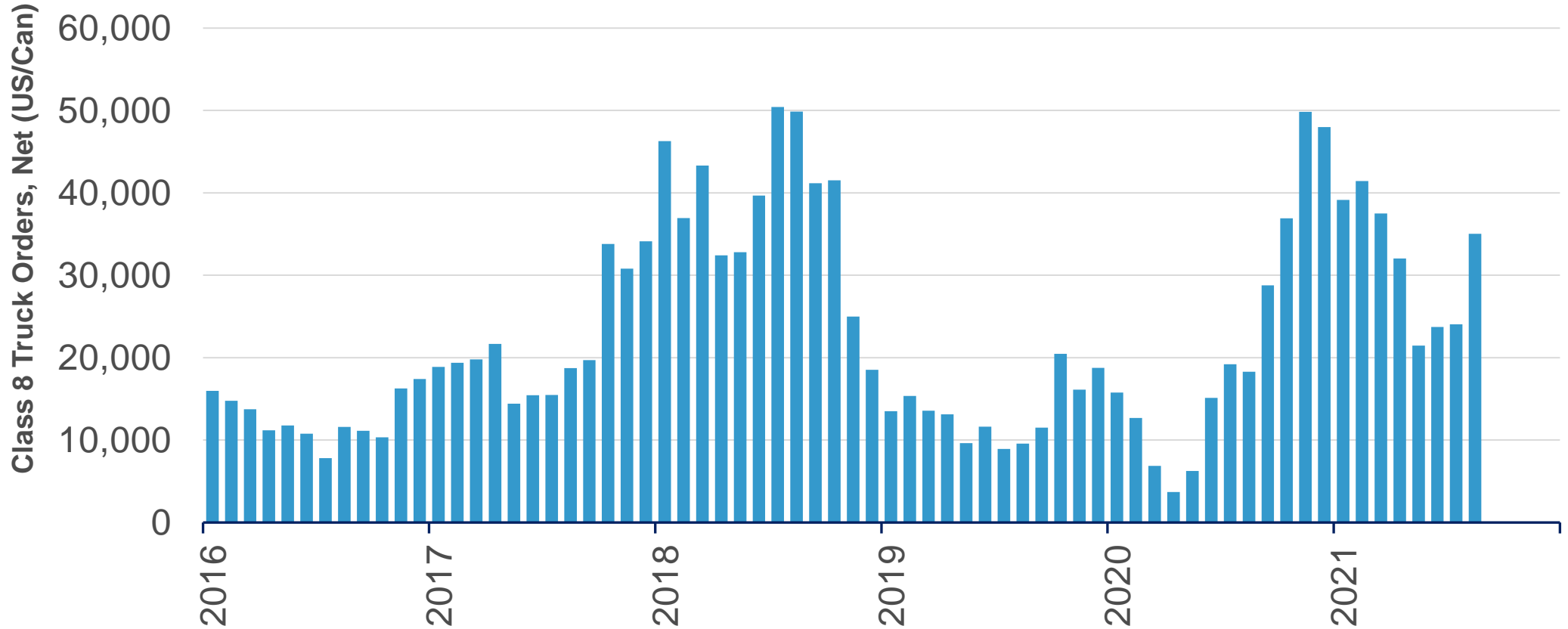
Driver Supply Vs. Truck Demand



Data is seasonally adjusted

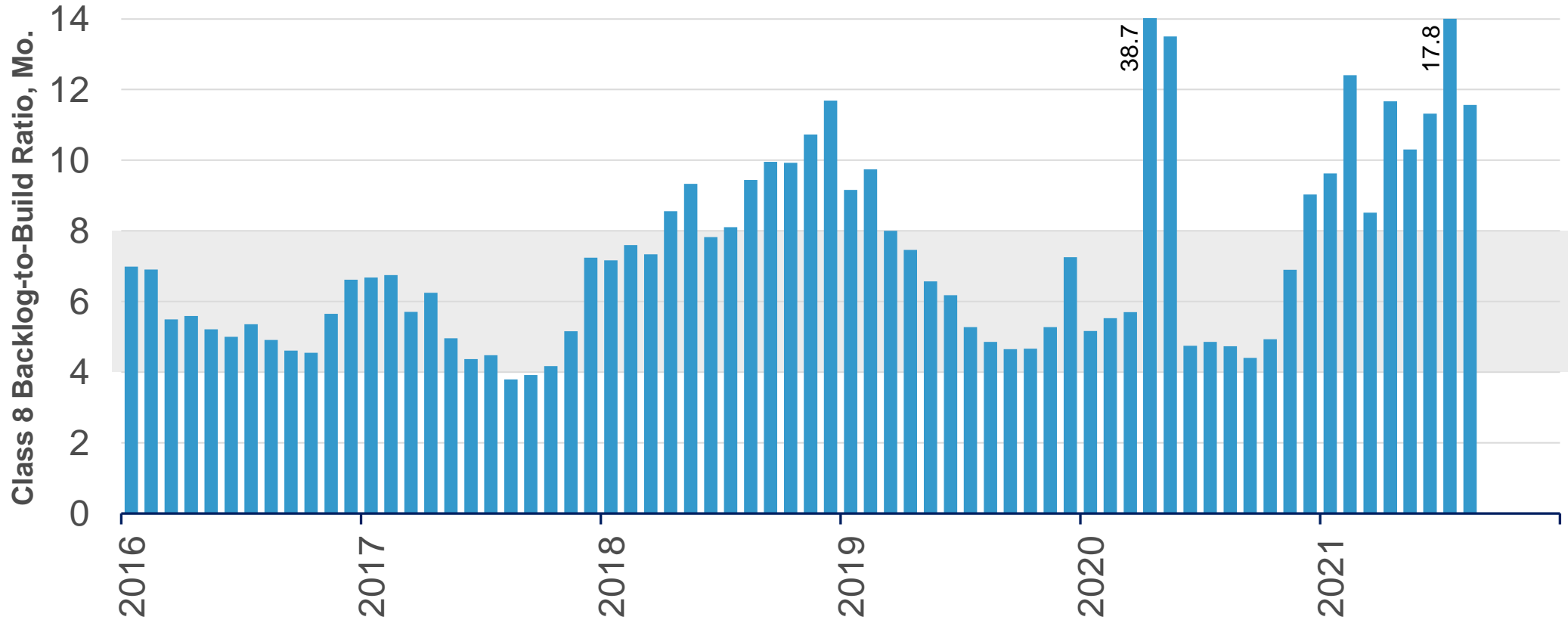
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New Truck Order Activity



New Truck Lead Time

Average Lead Time, Order-to-Build (Months)



Gray box indicates normal range.

Source: FTR | Transportation Intelligence™ Truck & Trailer Outlook, Copyright 2021, FTR

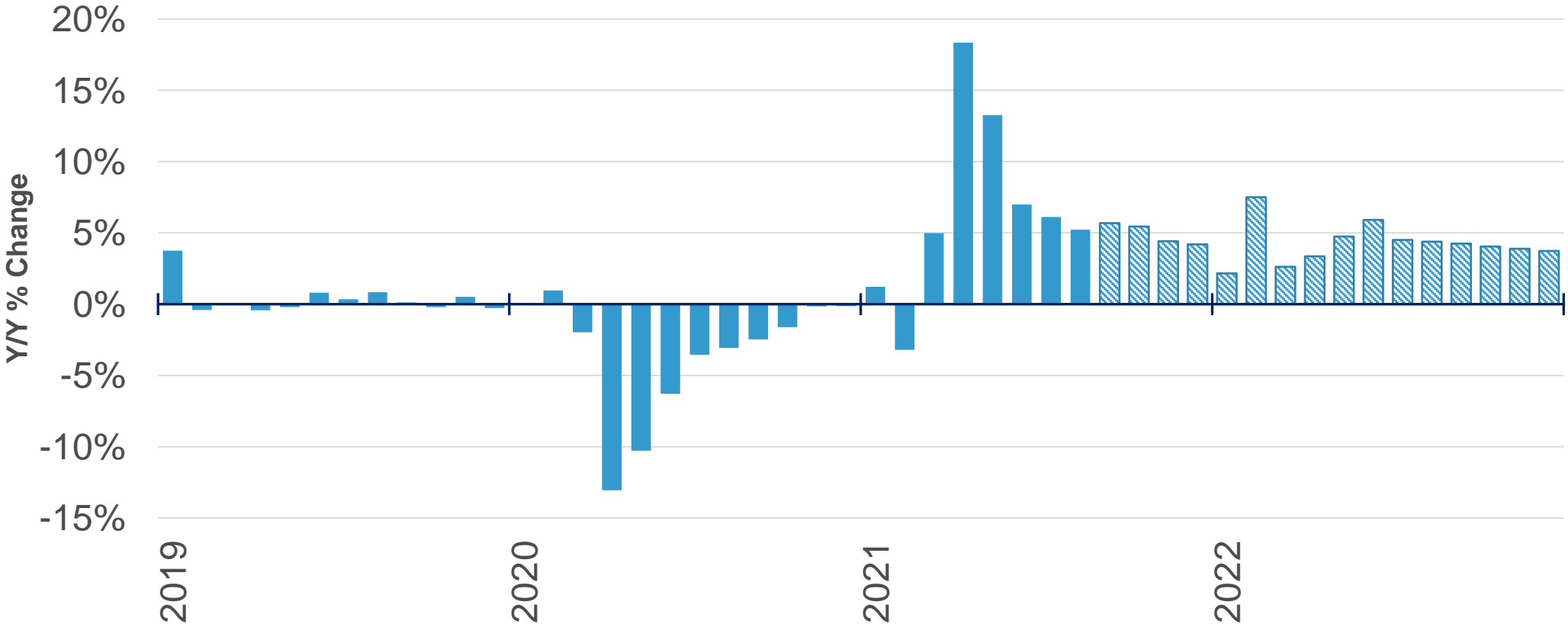
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Freight & Rate Outlooks Monthly

Truck Loadings Outlook



Data is seasonally adjusted

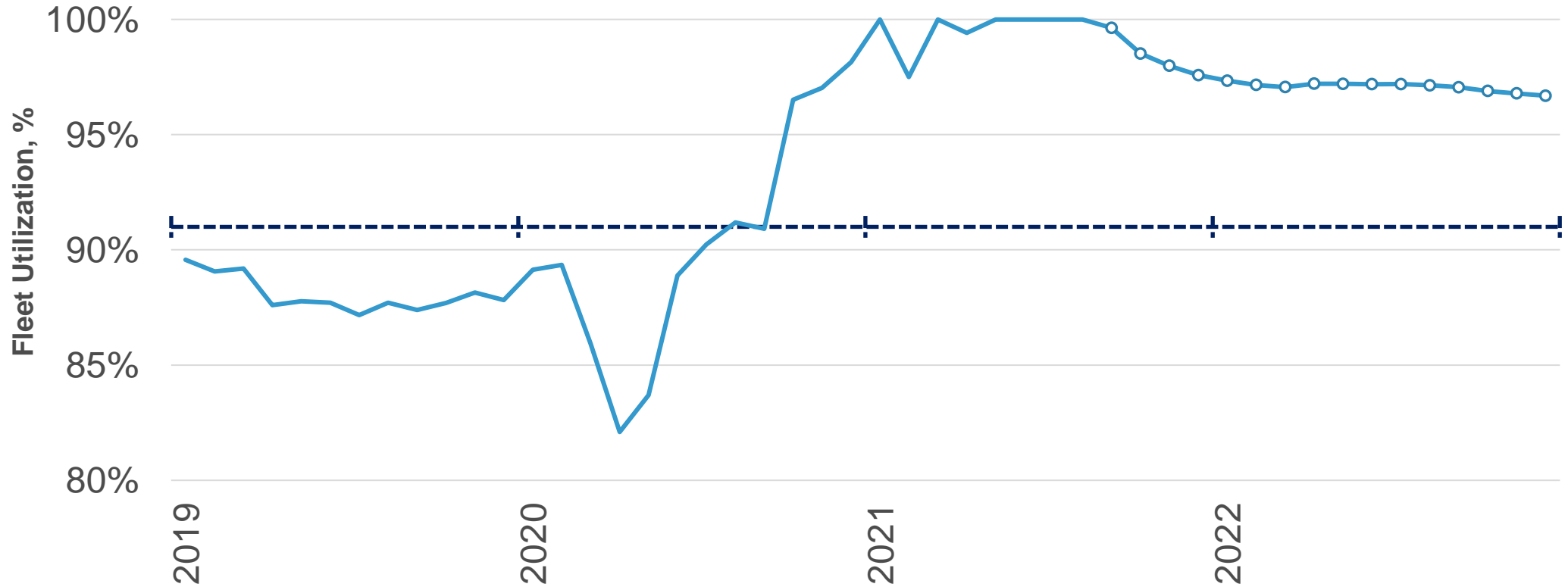
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Active Truck Utilization Outlook

Share of seated trucks actively engaged in freight hauling

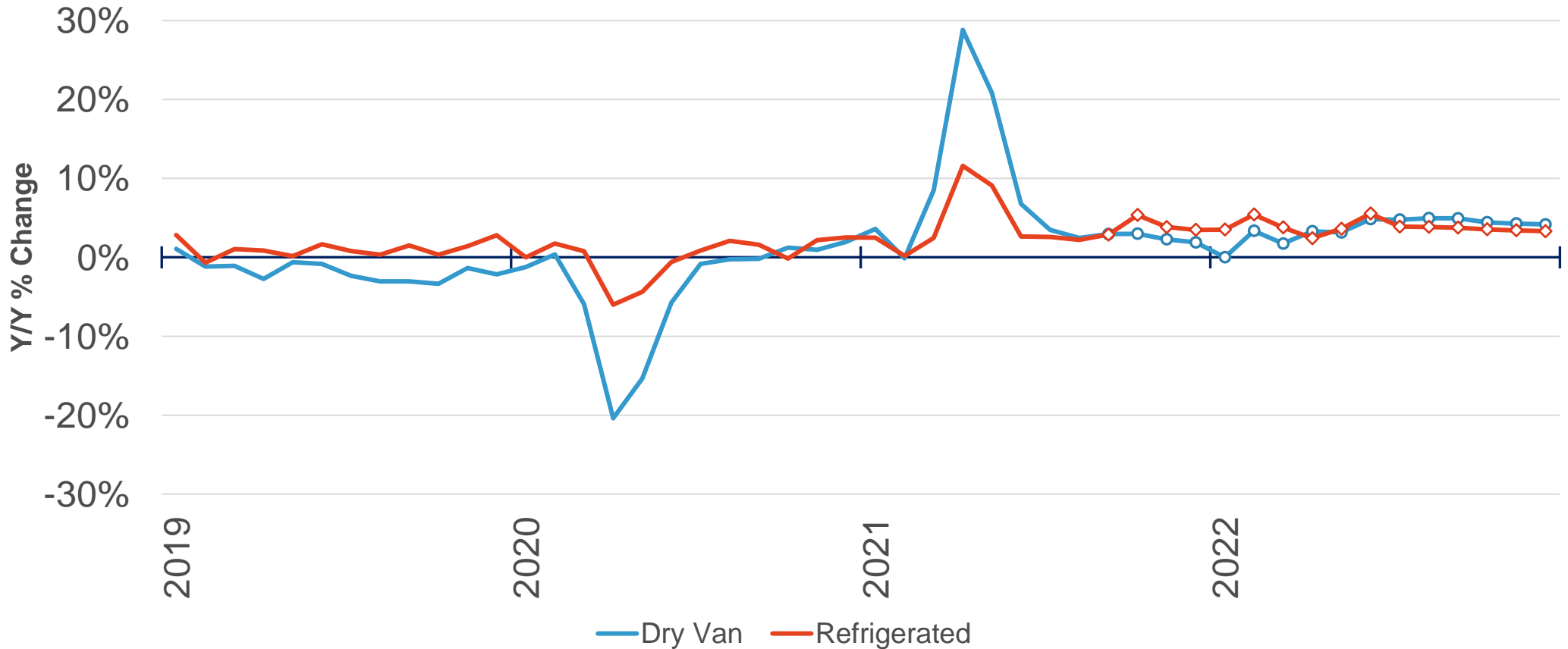


Dashed Line = 10-year average, data is seasonally adjusted

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Freight Outlook: Dry & Refrigerated



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Freight Outlook: Flatbed & Specialized

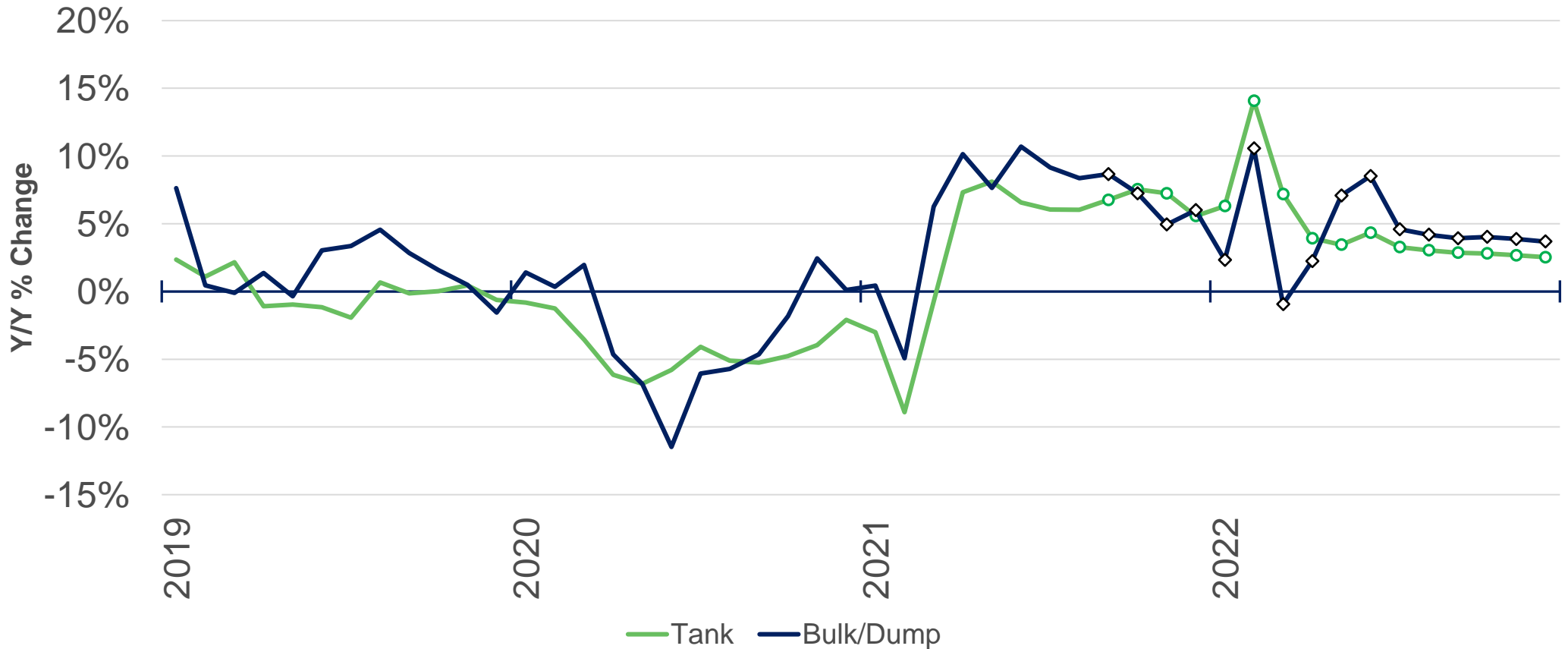


Data is seasonally adjusted

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Forecast

Freight Outlook: Tank vs Bulk/Dump

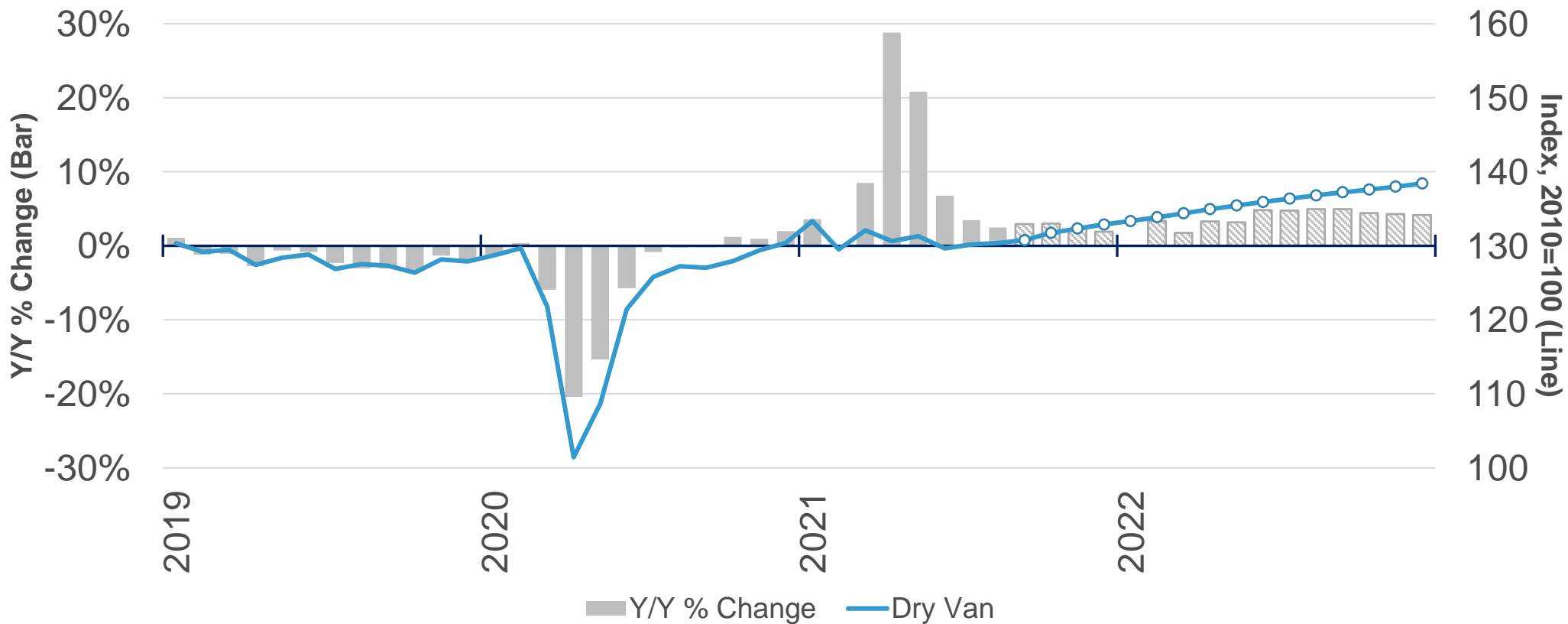


Data is seasonally adjusted

Source: FTR | Transportation Intelligence™ Copyright 2021 FTR

Forecast

Freight Outlook: Dry Van



Data is seasonally adjusted

Source: FTR | Transportation Intelligence™ Copyright 2021, FTR

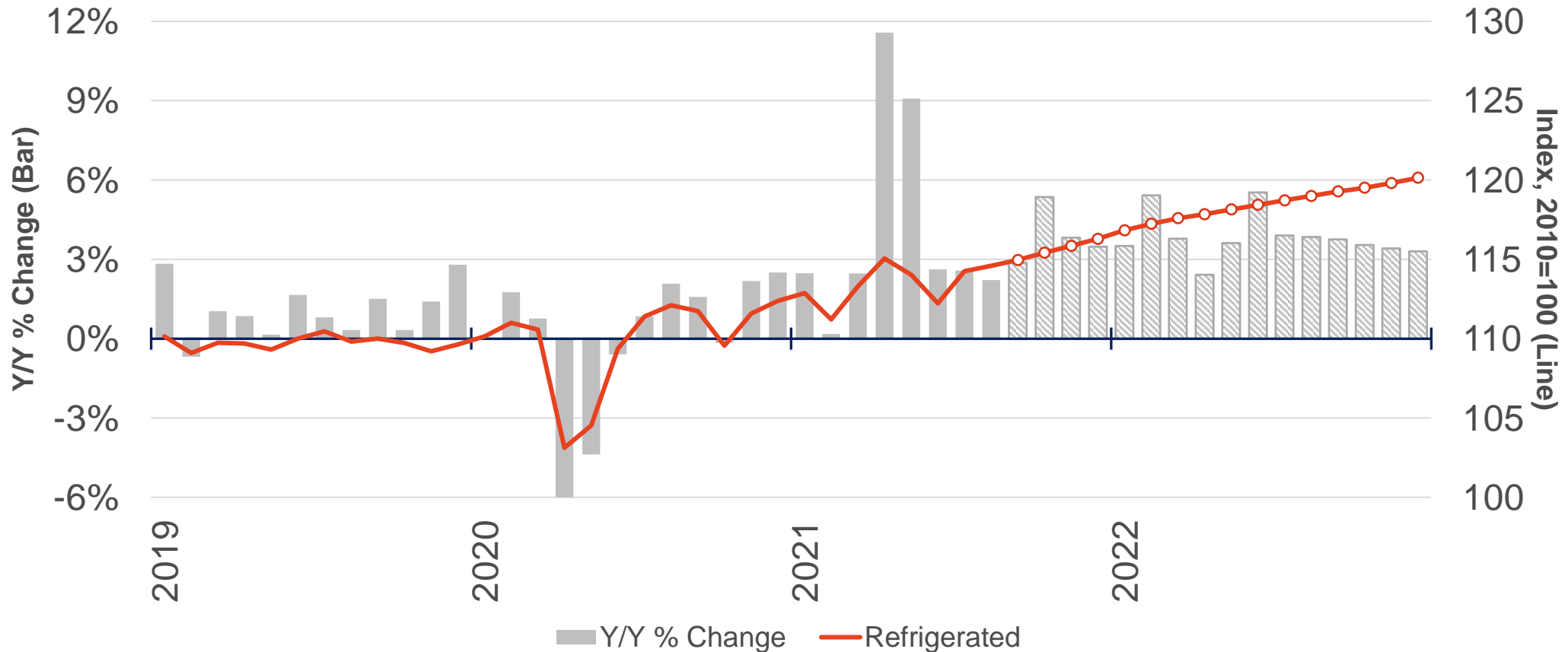
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Freight Outlook: Refrigerated



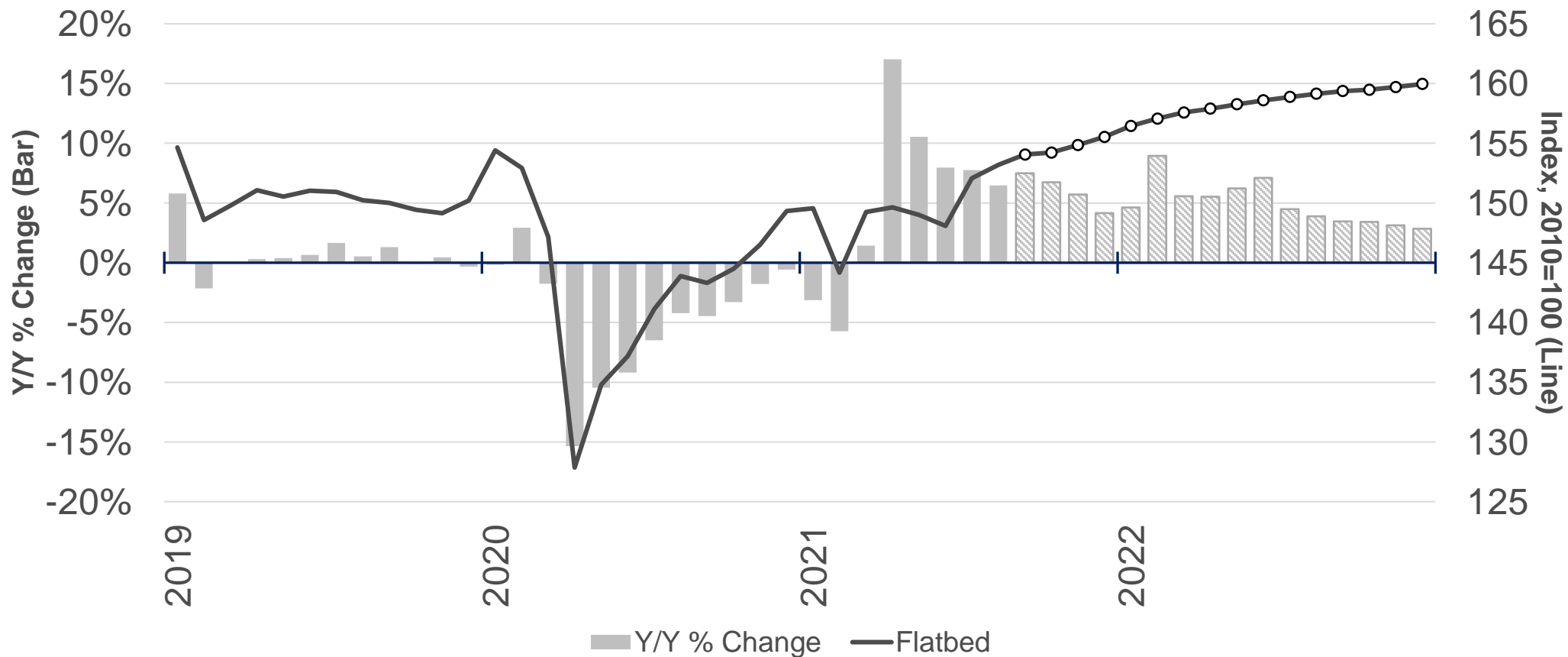
Data is seasonally adjusted

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Freight Outlook: Flatbed



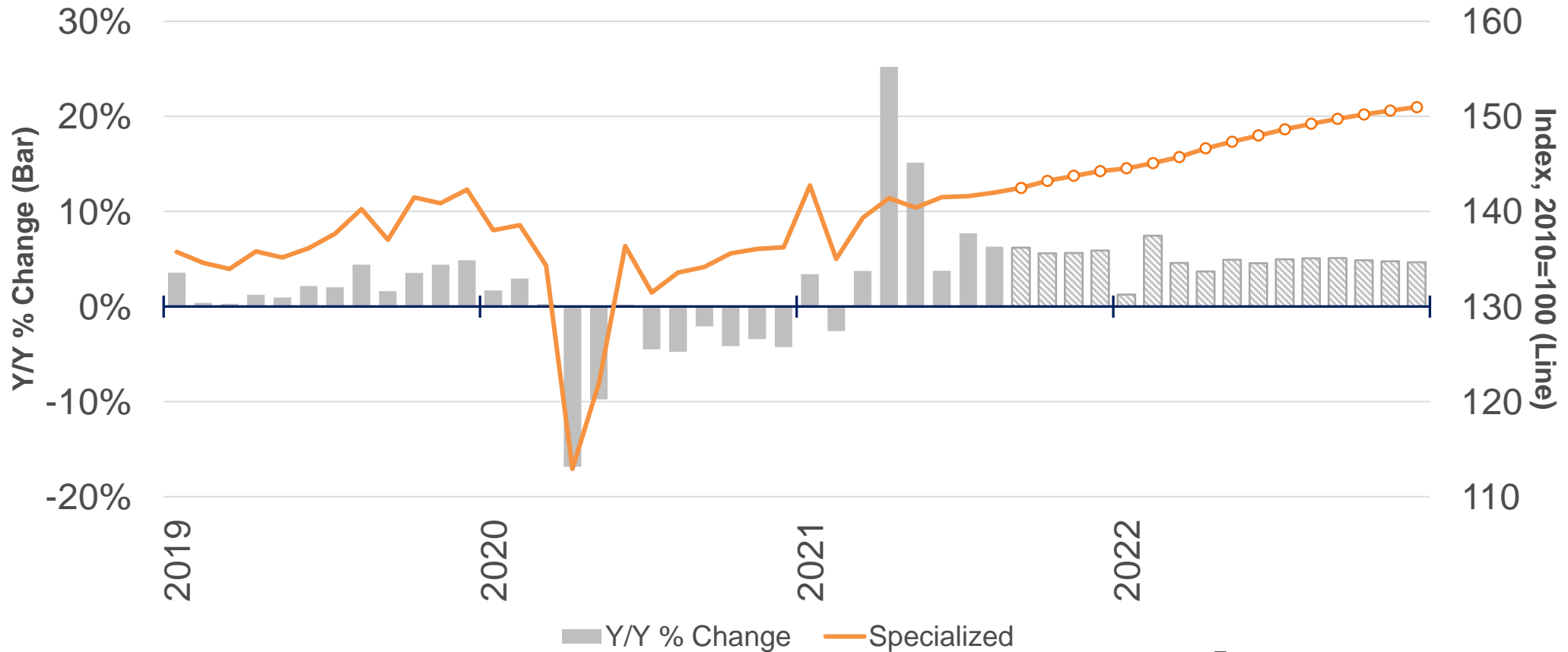
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Freight Outlook: Specialized



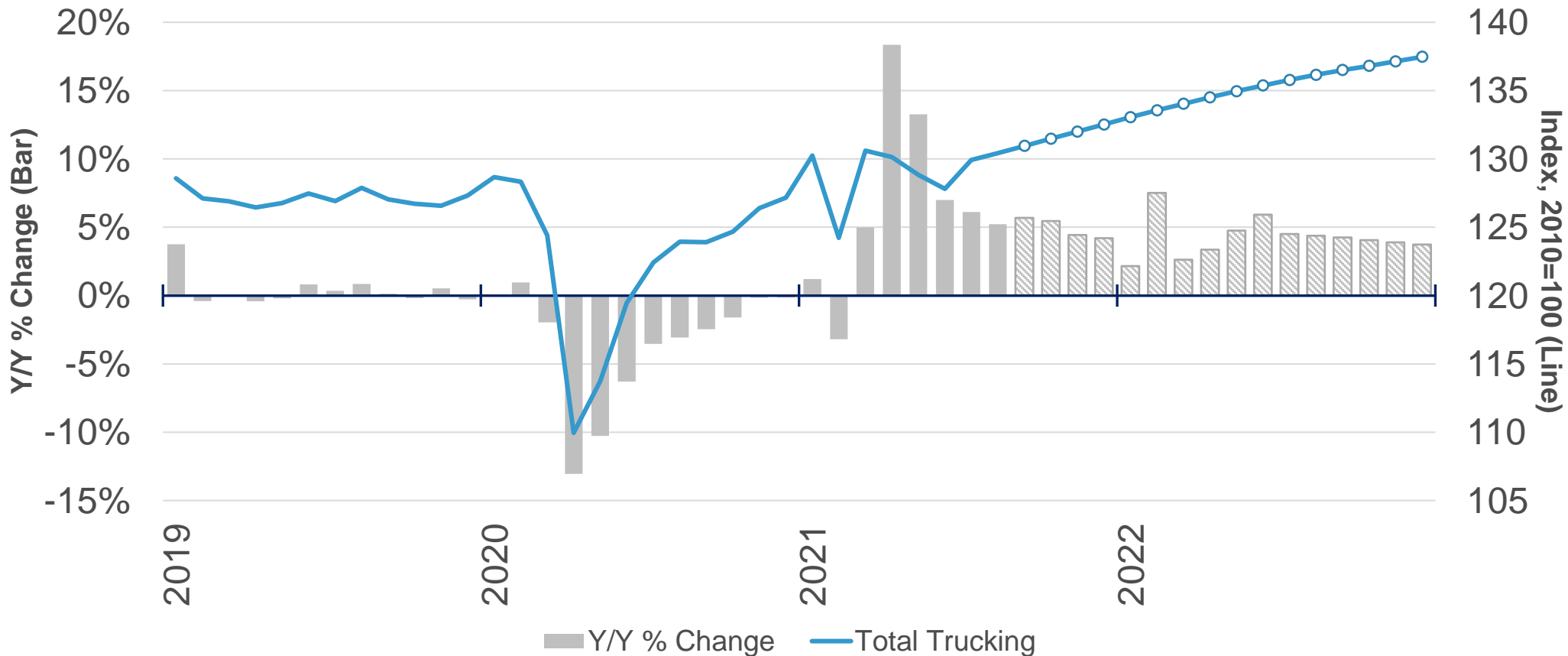
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Freight Outlook: Total Trucking



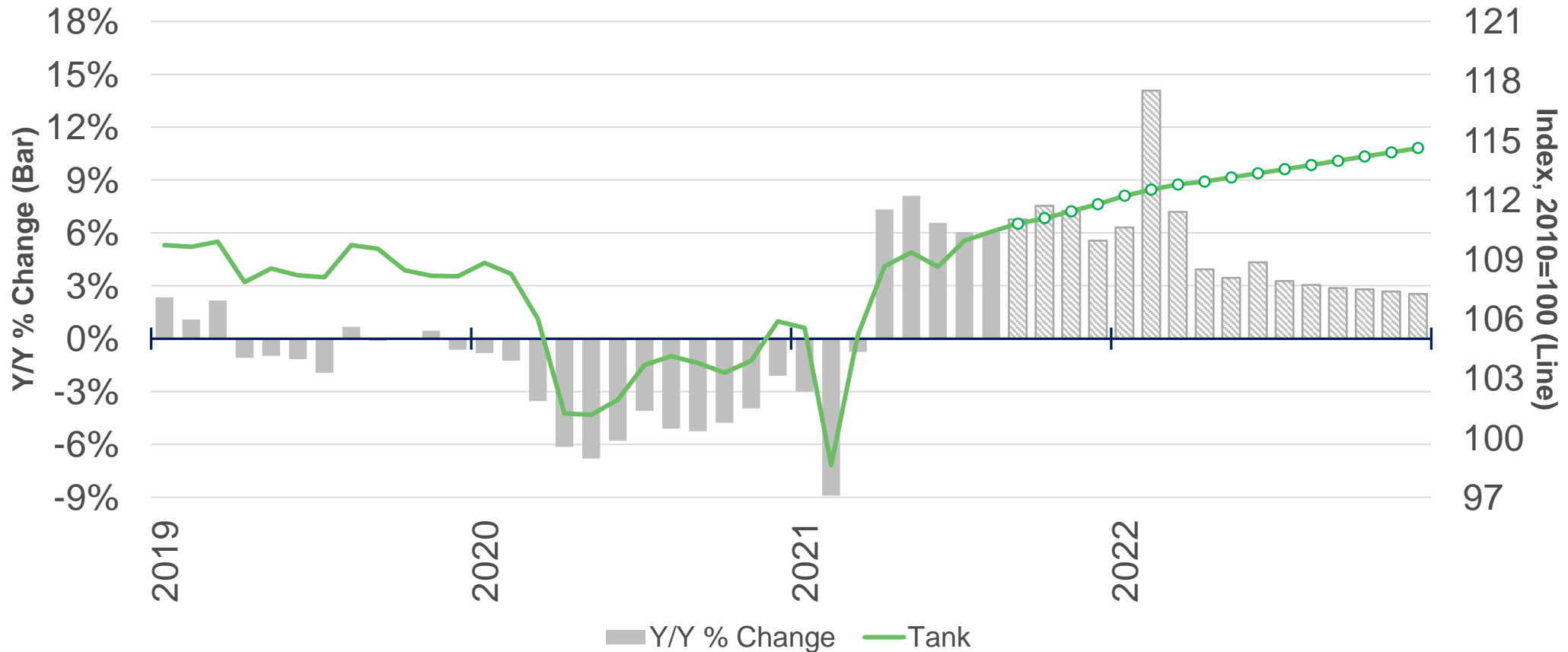
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Freight Outlook: Tank



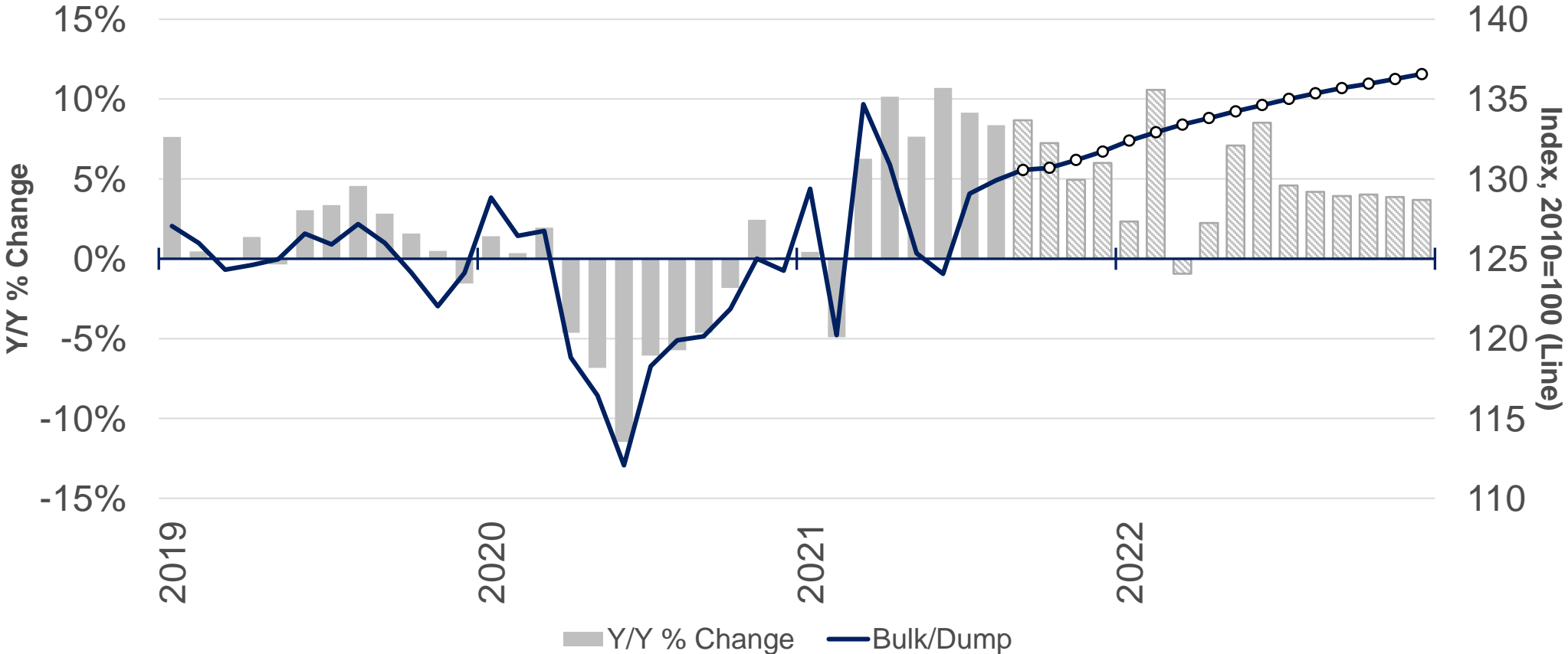
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Freight Outlook: Bulk/Dump

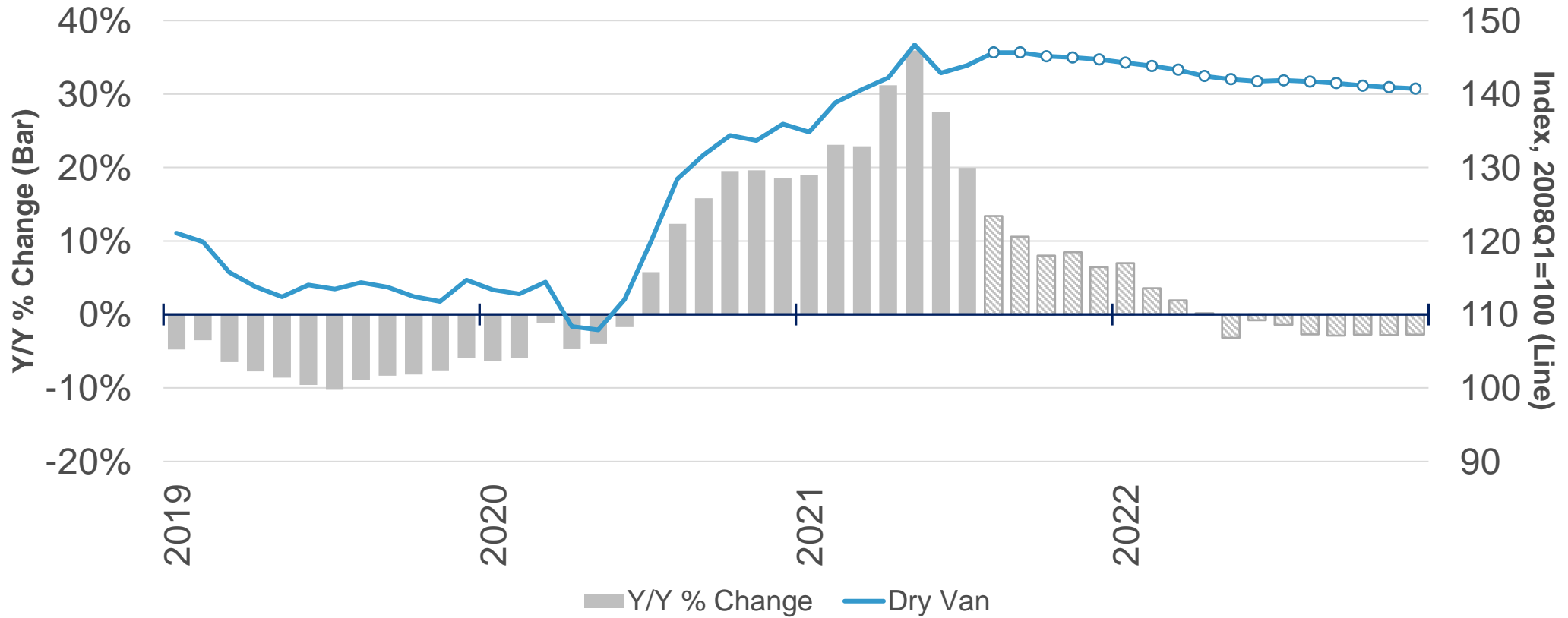


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Rate Outlook: Dry Van



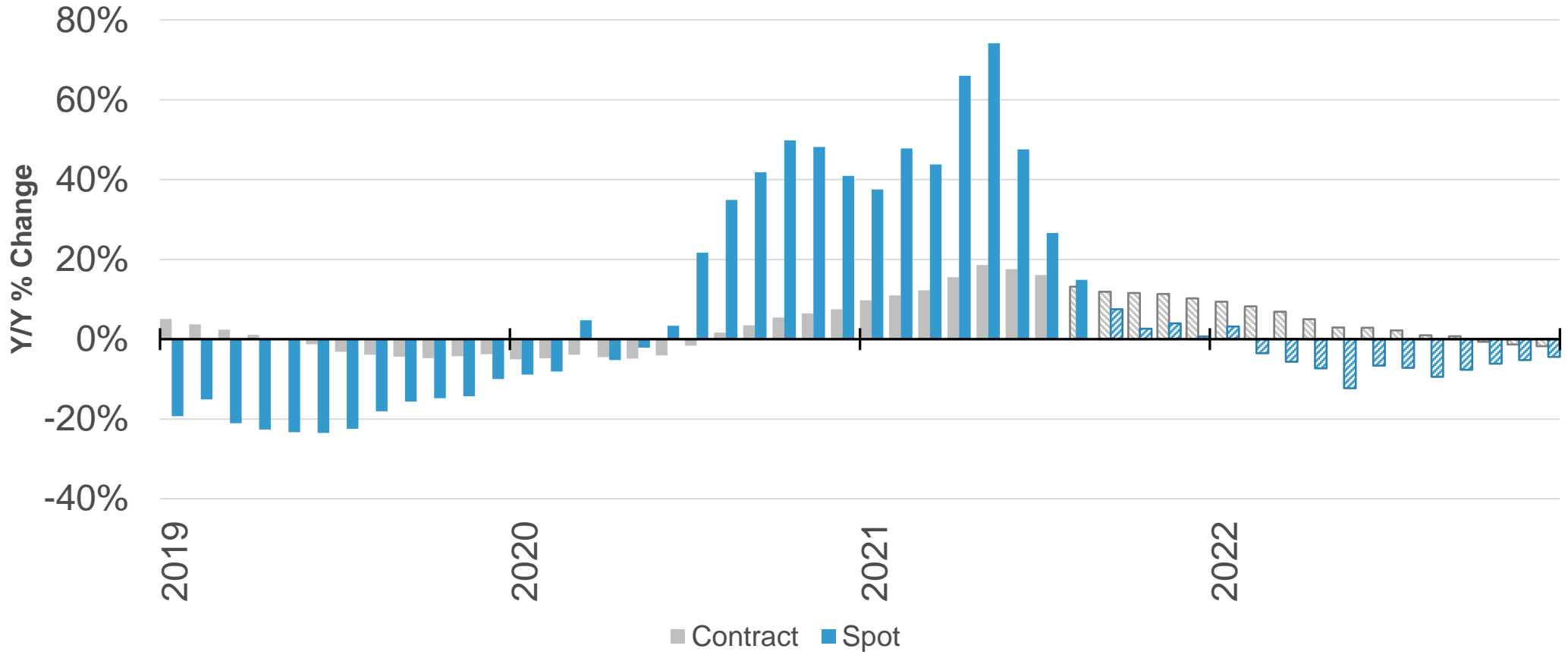
Rate excludes Fuel Surcharge, data is seasonally adjusted

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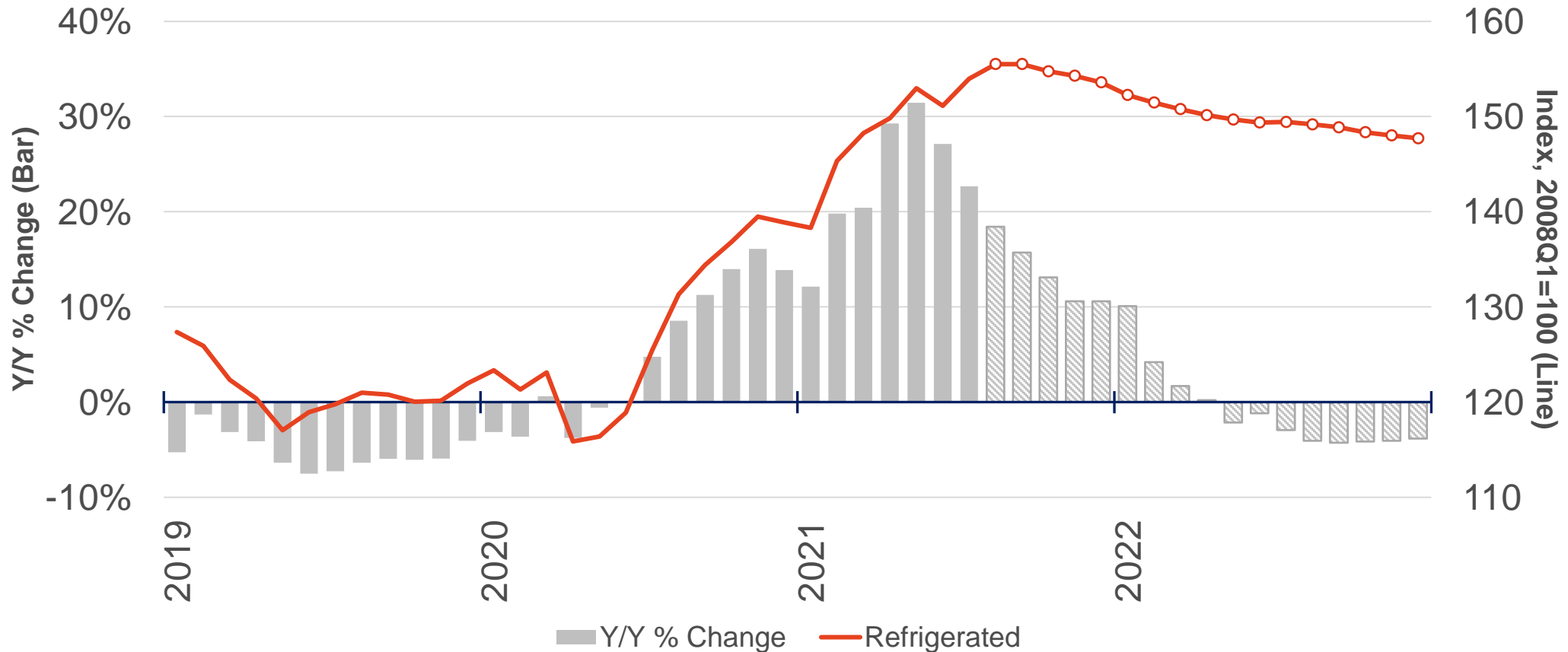
Dry Van Rates: Spot vs Contract



Rate excludes Fuel Surcharge, data is seasonally adjusted

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Rate Outlook: Refrigerated Van



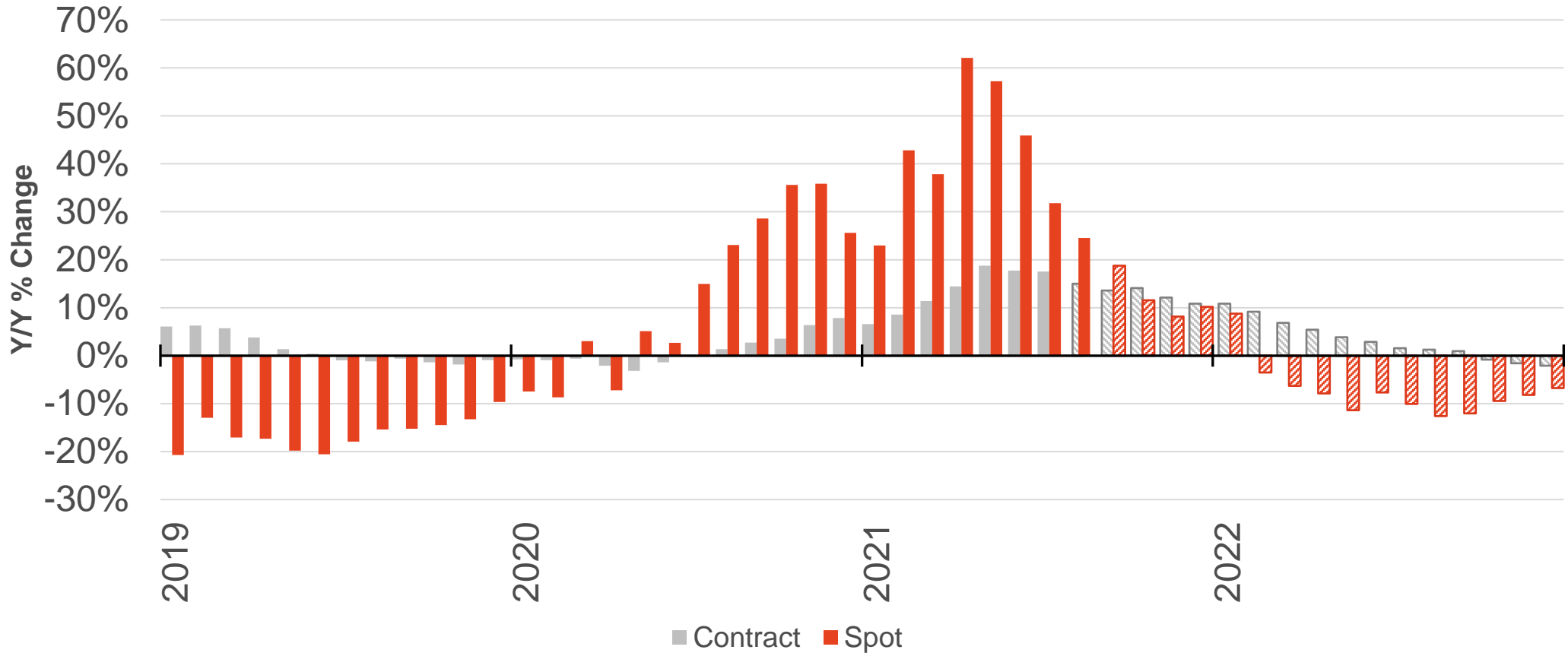
Rate excludes Fuel Surcharge, data is seasonally adjusted

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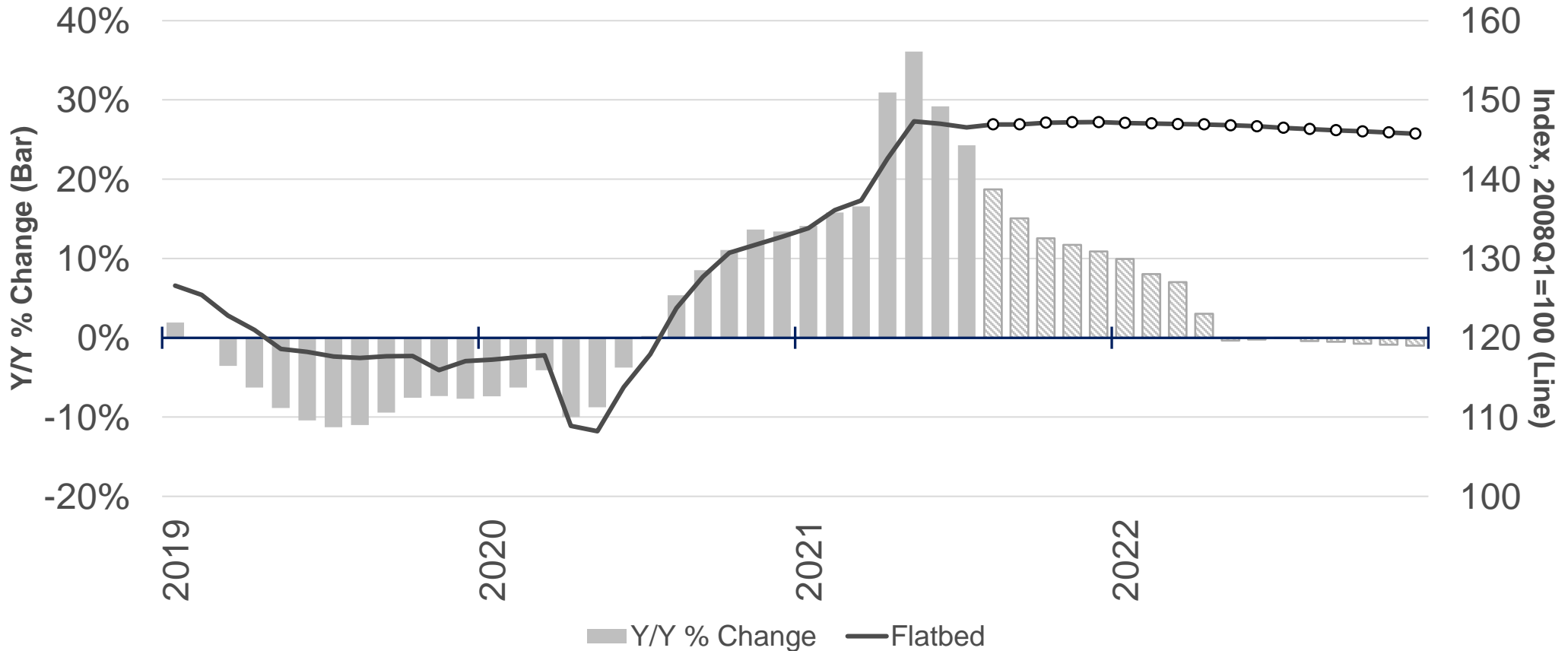
Refrigerated Rates: Spot vs Contract



Rate excludes Fuel Surcharge, data is seasonally adjusted

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Rate Outlook: Flatbed

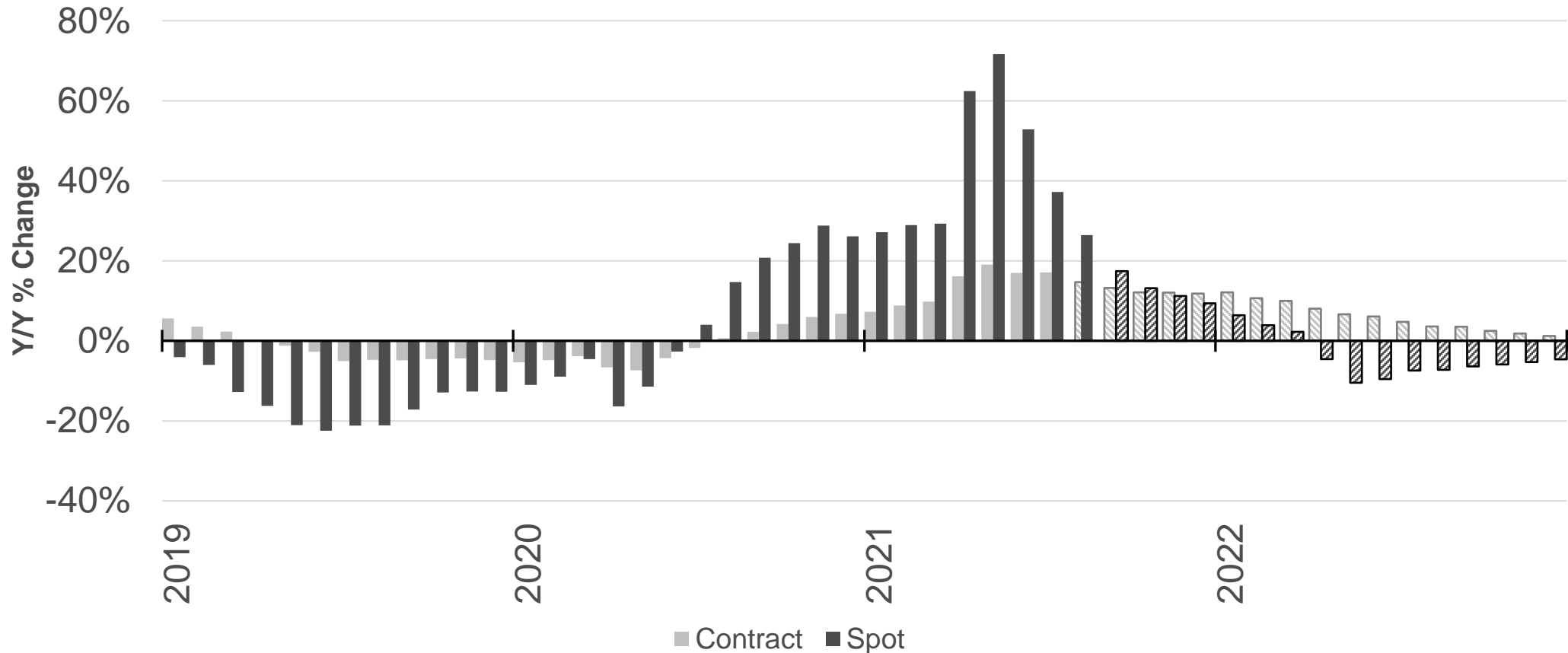


Rate excludes Fuel Surcharge, data is seasonally adjusted

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Flatbed Rates: Spot vs Contract

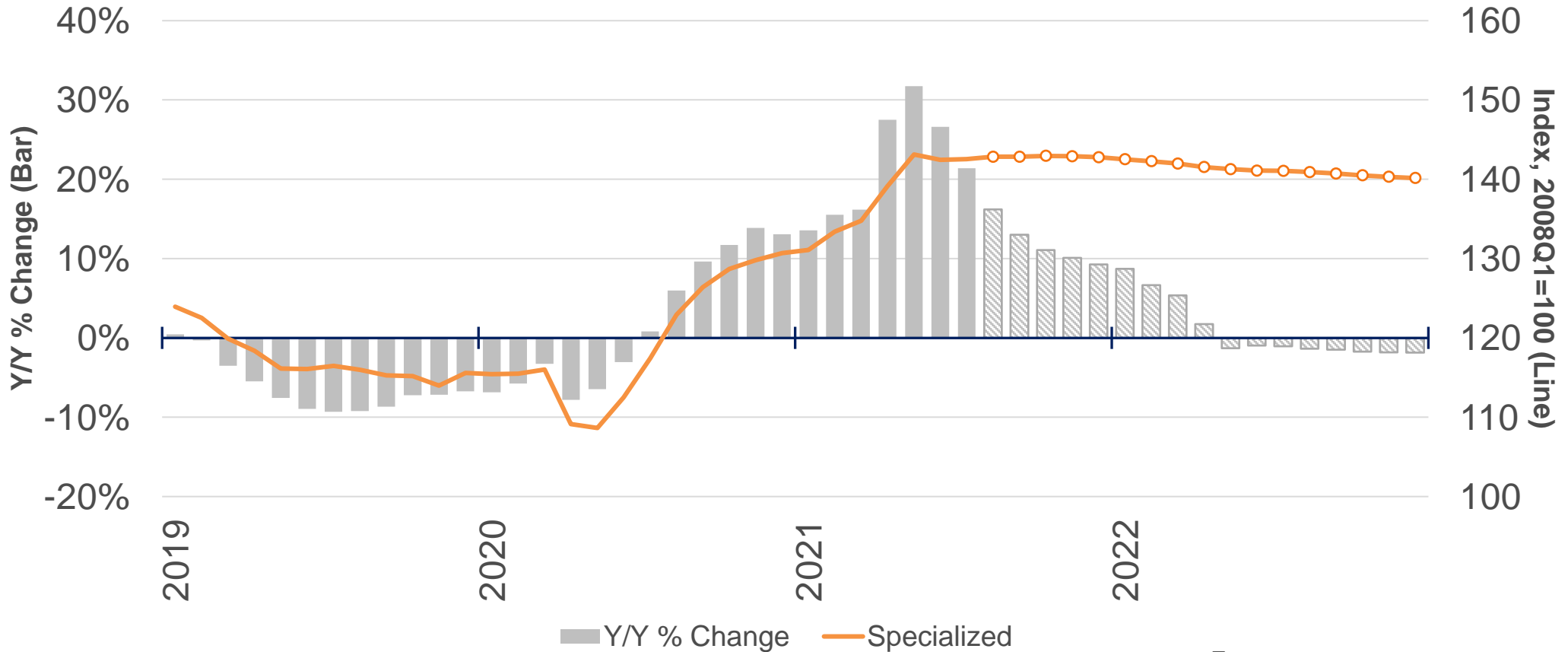


Rate excludes Fuel Surcharge, data is seasonally adjusted

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Rate Outlook: Specialized



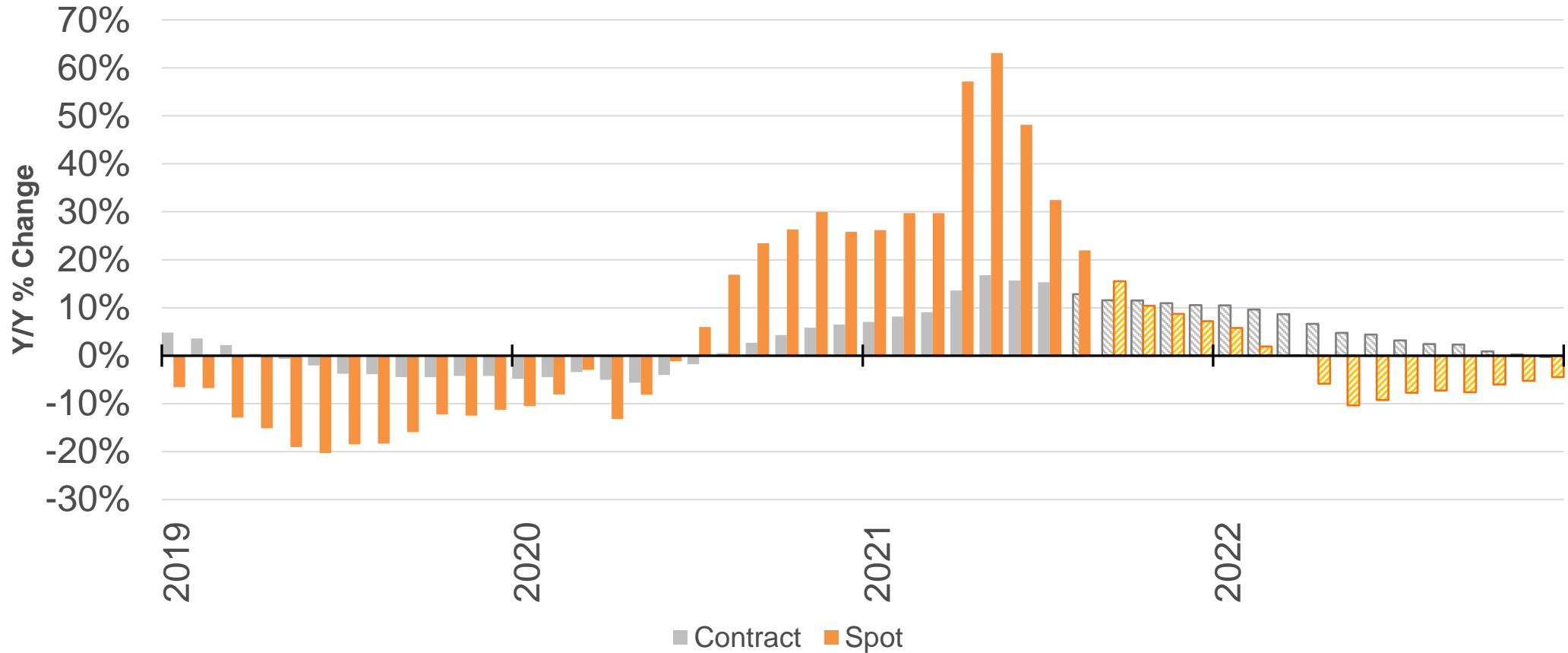
Rate excludes Fuel Surcharge, data is seasonally adjusted

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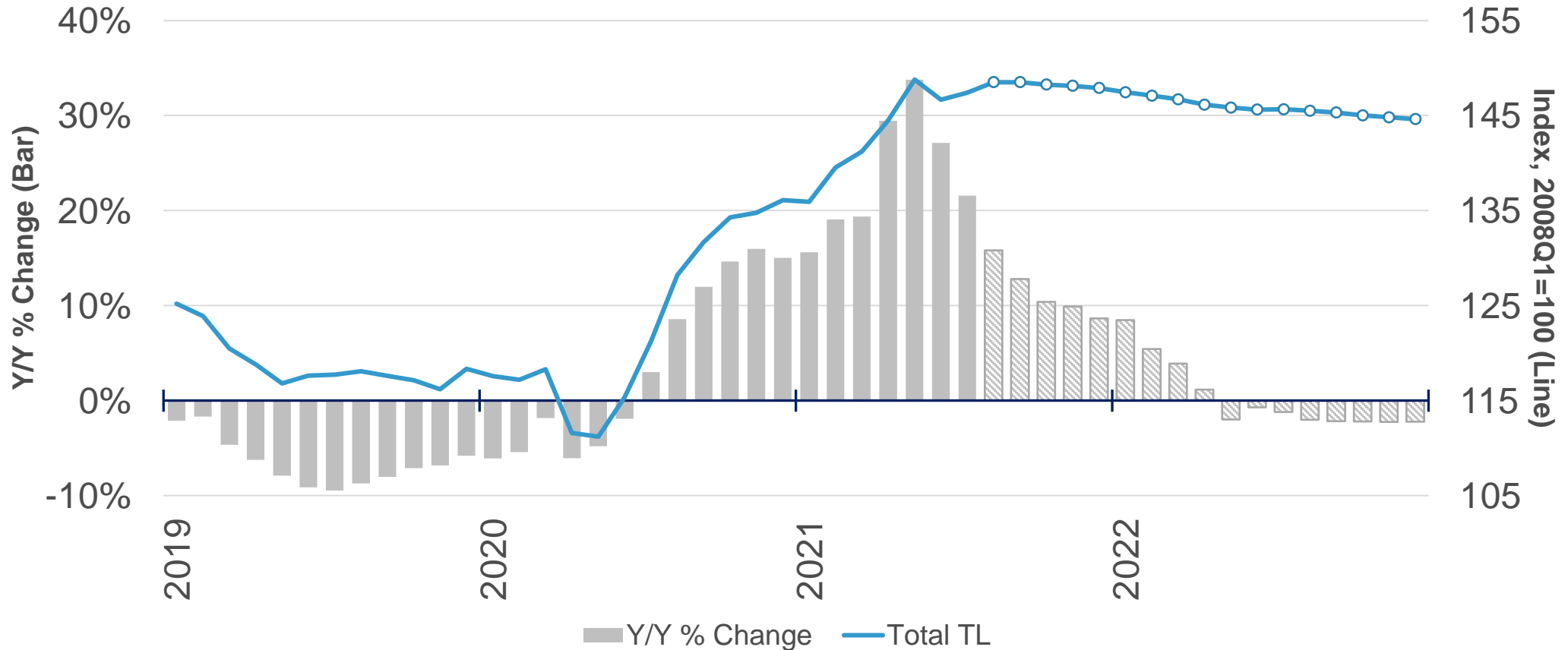
Specialized Rates: Spot vs Contract



Rate excludes Fuel Surcharge, data is seasonally adjusted

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Rate Outlook: Total TL

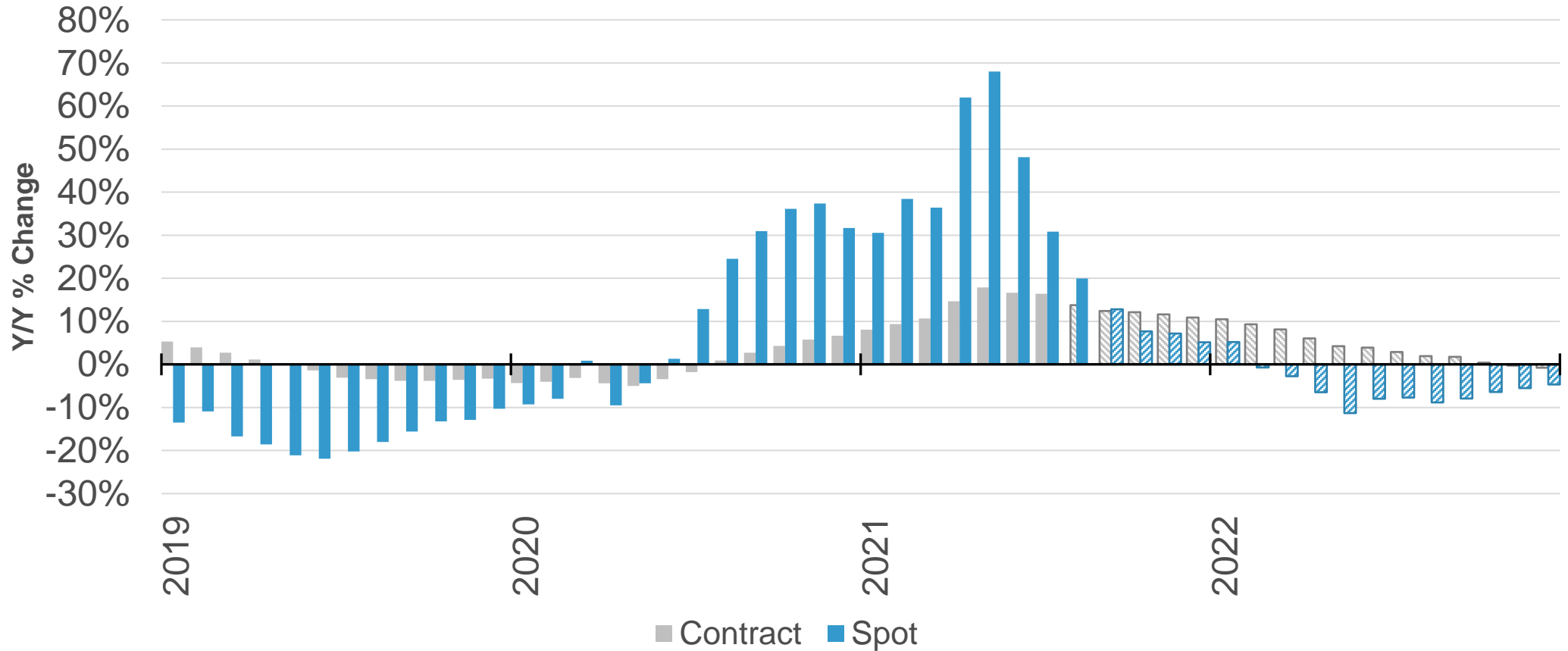


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Truckload Rates: Spot vs Contract

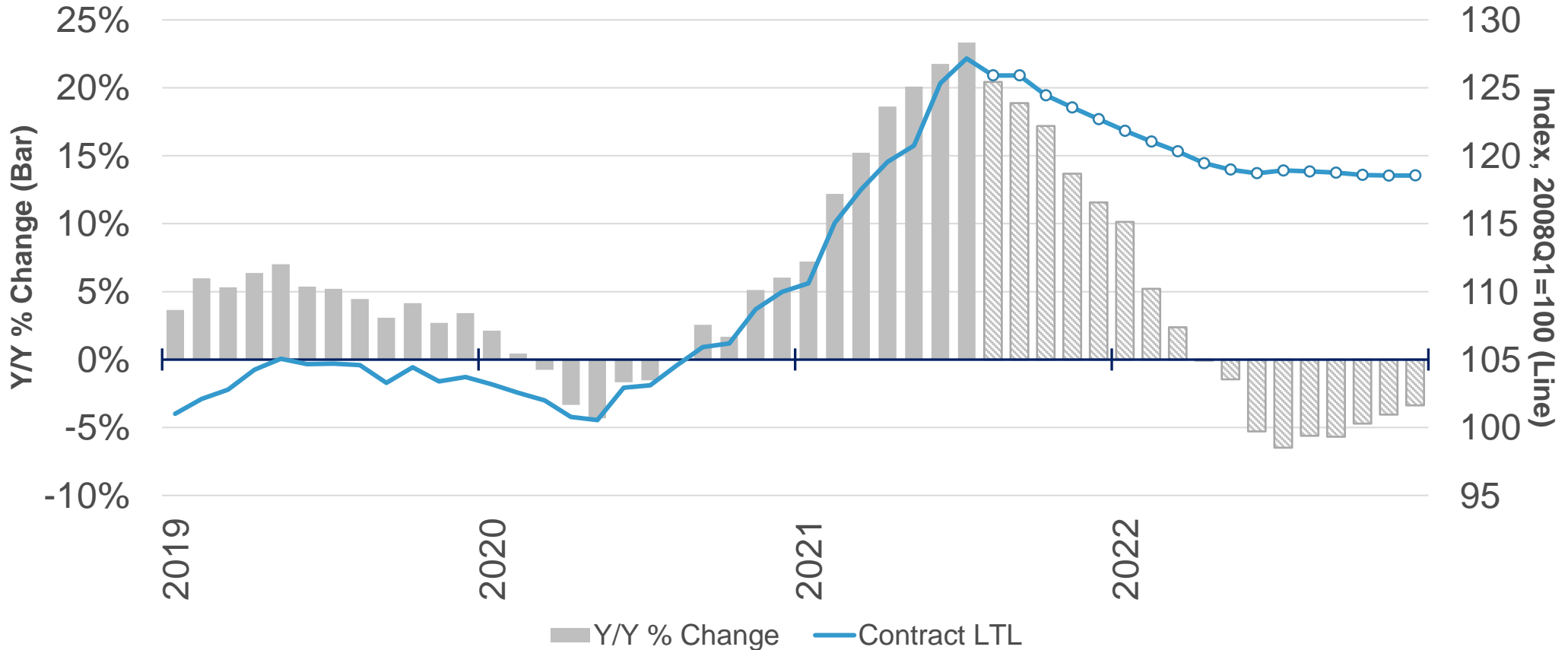


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Rate Outlook: Contract LTL

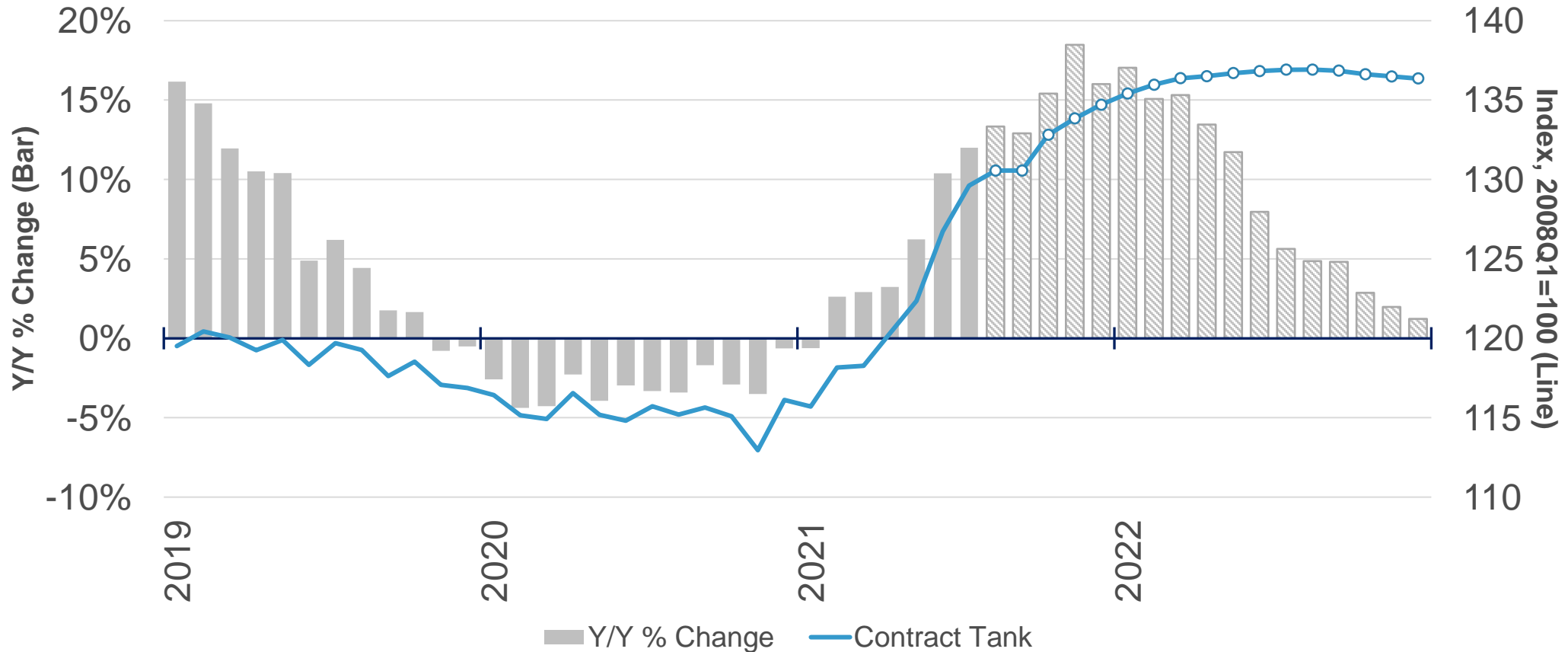


Rate excludes Fuel Surcharge, data is seasonally adjusted

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Rate Outlook: Contract Tank



Rate excludes Fuel Surcharge, data is seasonally adjusted

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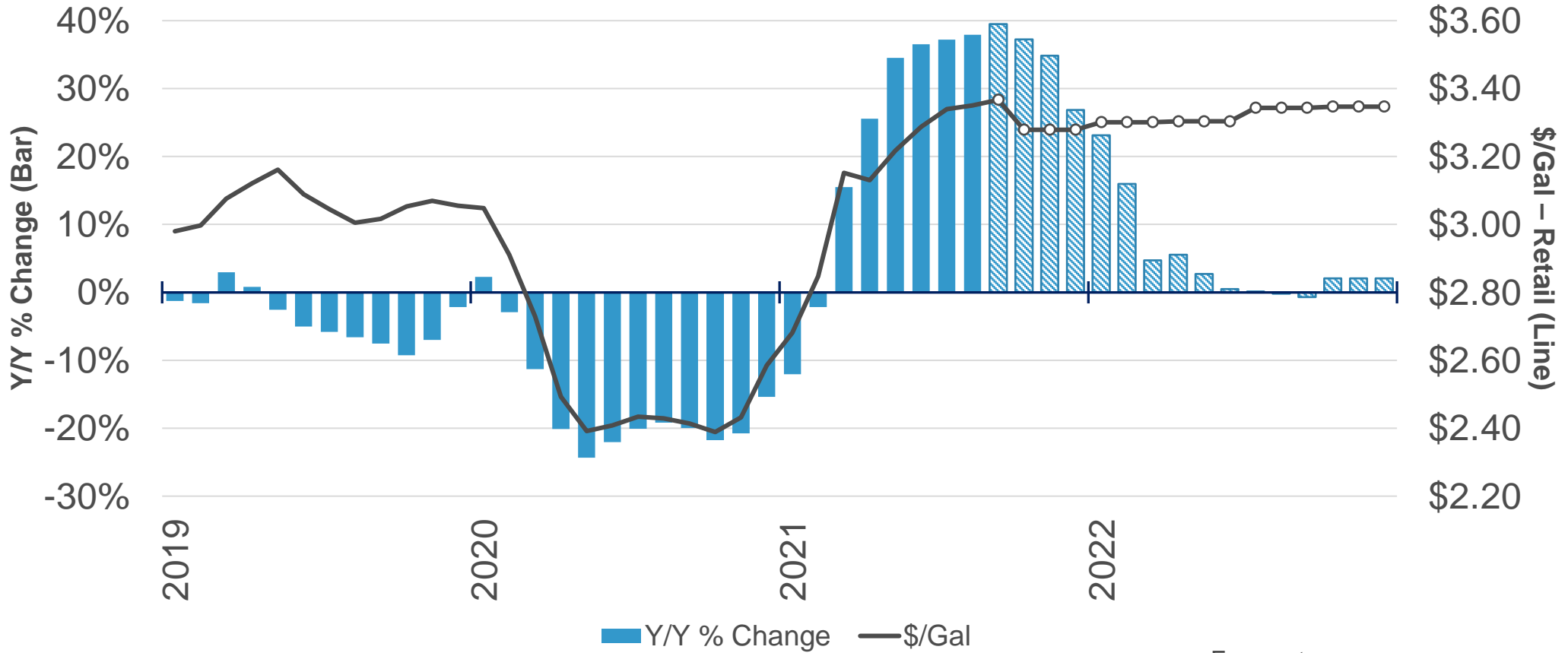
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Additional Market Outlooks

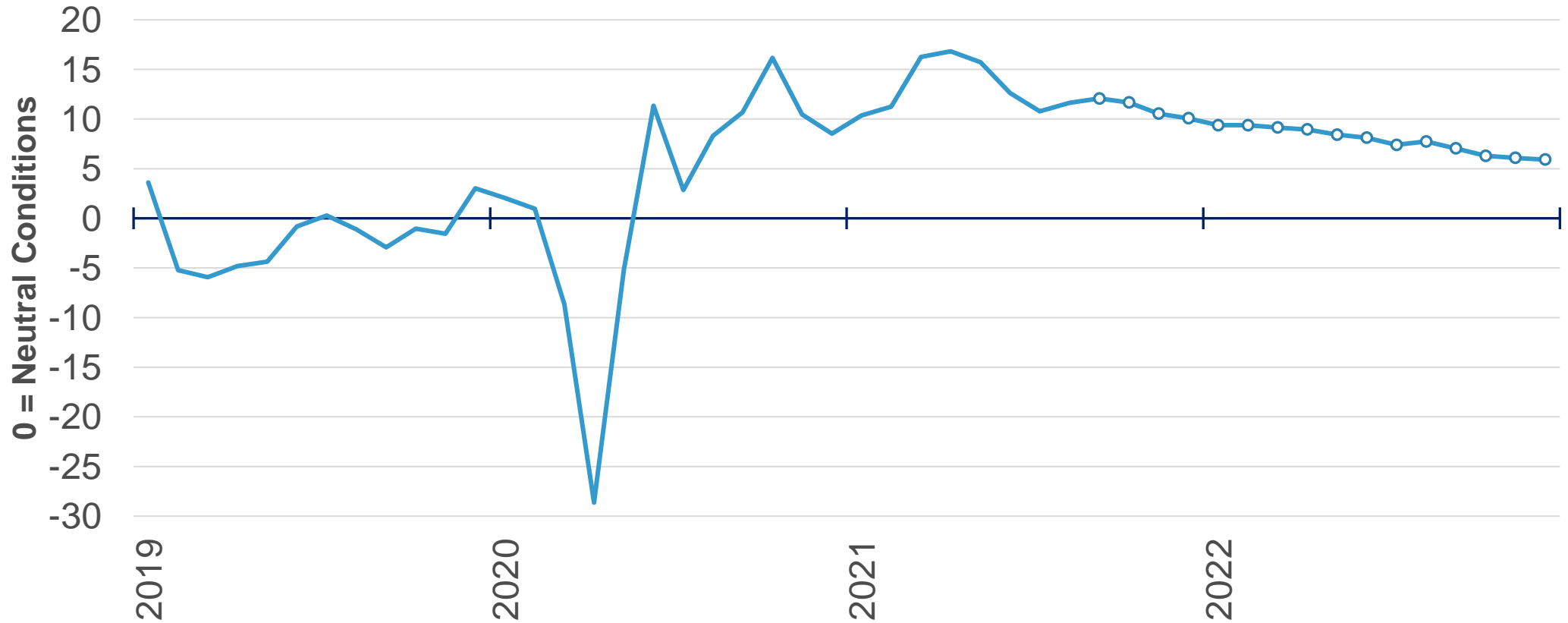
Monthly / Quarterly

Diesel Price Outlook



FTR Trucking Conditions Index

TCI is a broad measure of carrier conditions – volumes, rates, costs, etc.



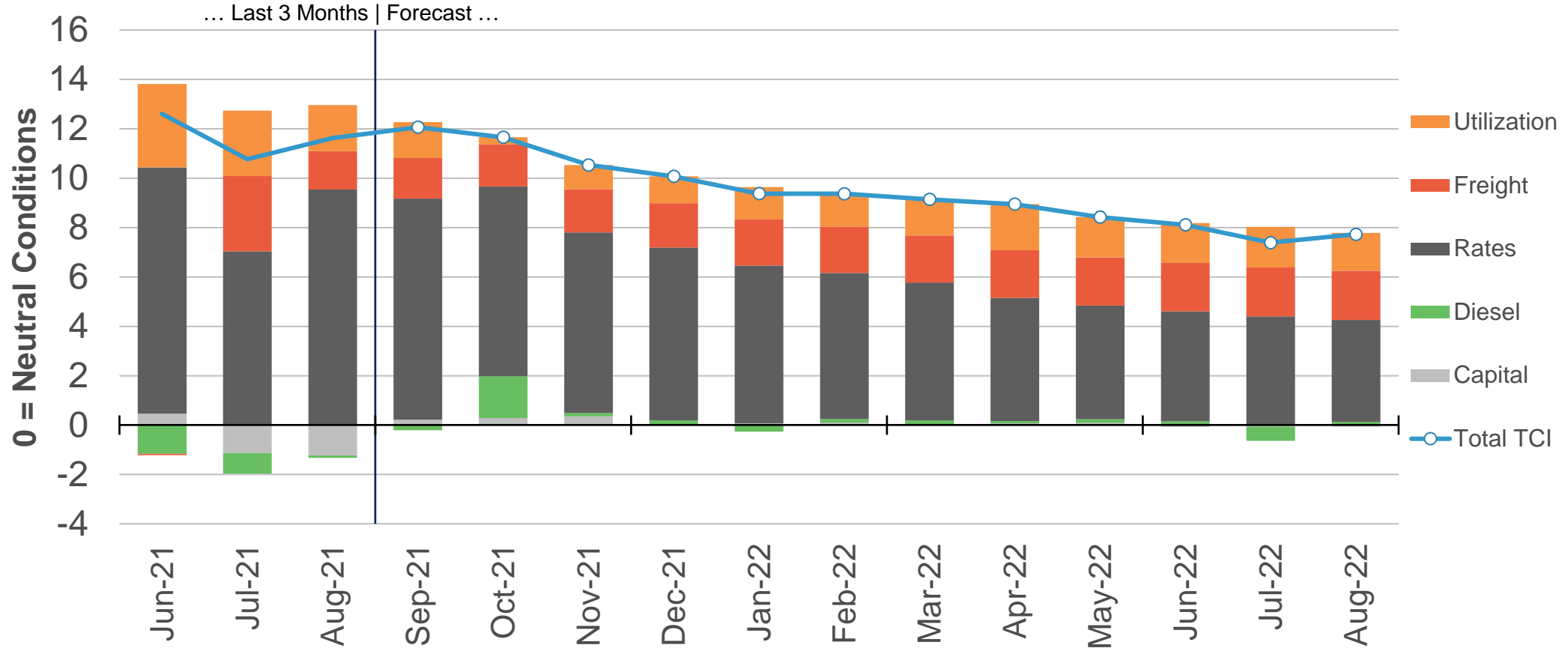
Positive = Favorable to Carriers / Negative = Favorable to Shippers

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Trucking Conditions Index

Key Elements of Carrier Conditions

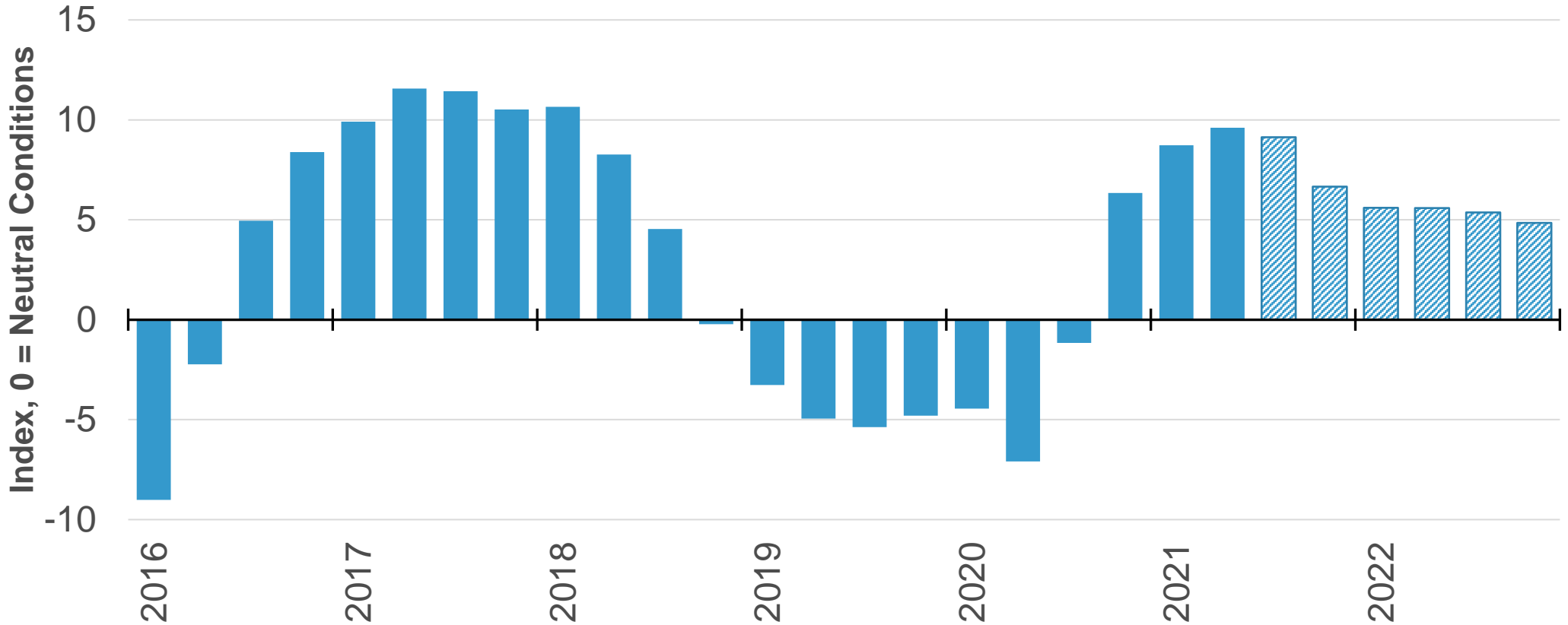


Changes in the underlying TCI metrics, grouped into 5 key characteristics

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Truck Driver Pressure Index



Positive = Greater pressure on driver availability / Negative = Less pressure on driver availability

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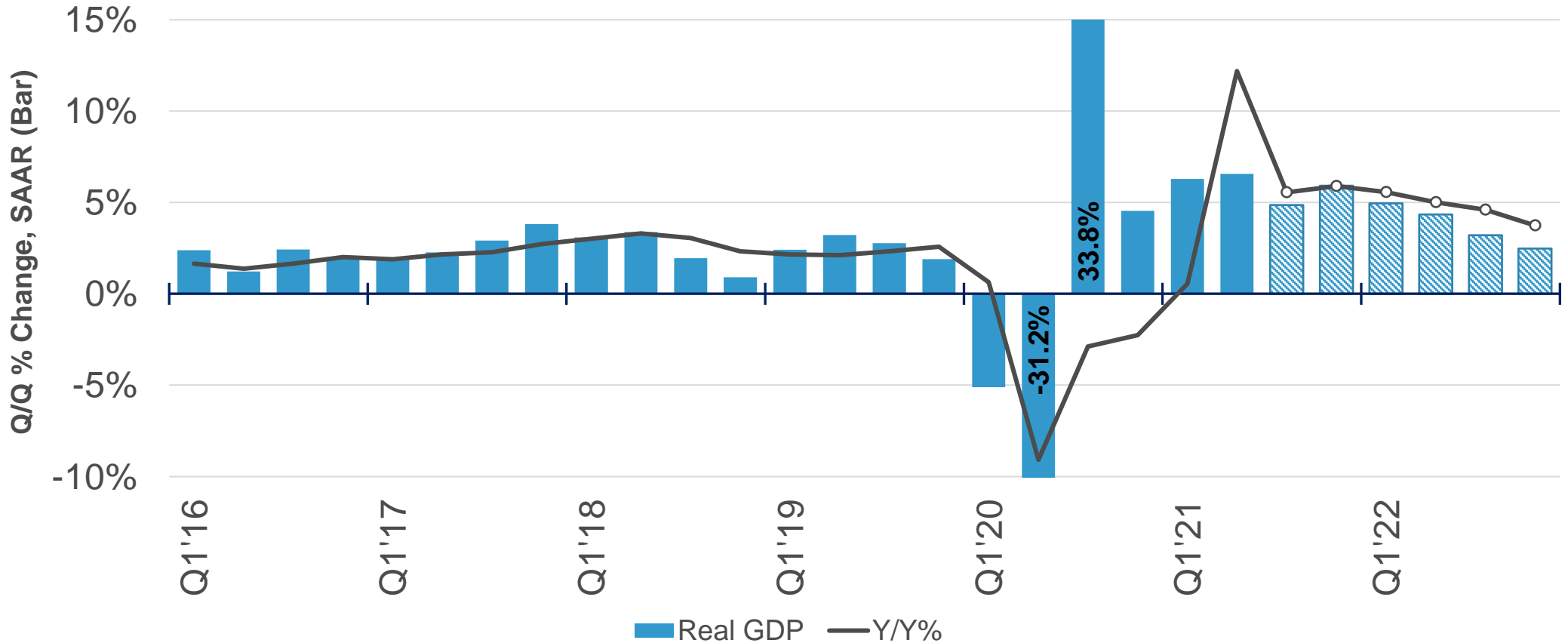
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Economic & Industrial Outlooks

Quarterly

Real GDP Outlook



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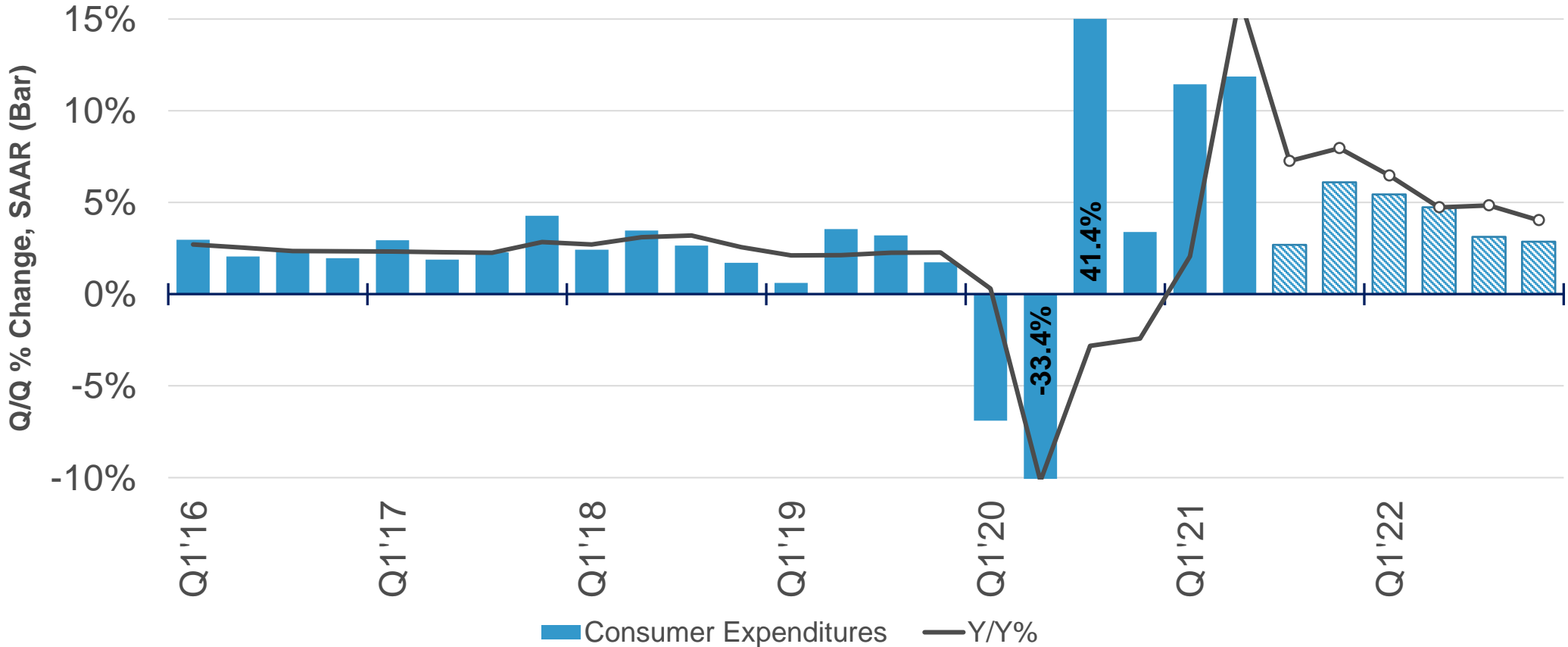
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GDP: Consumer Expenditures



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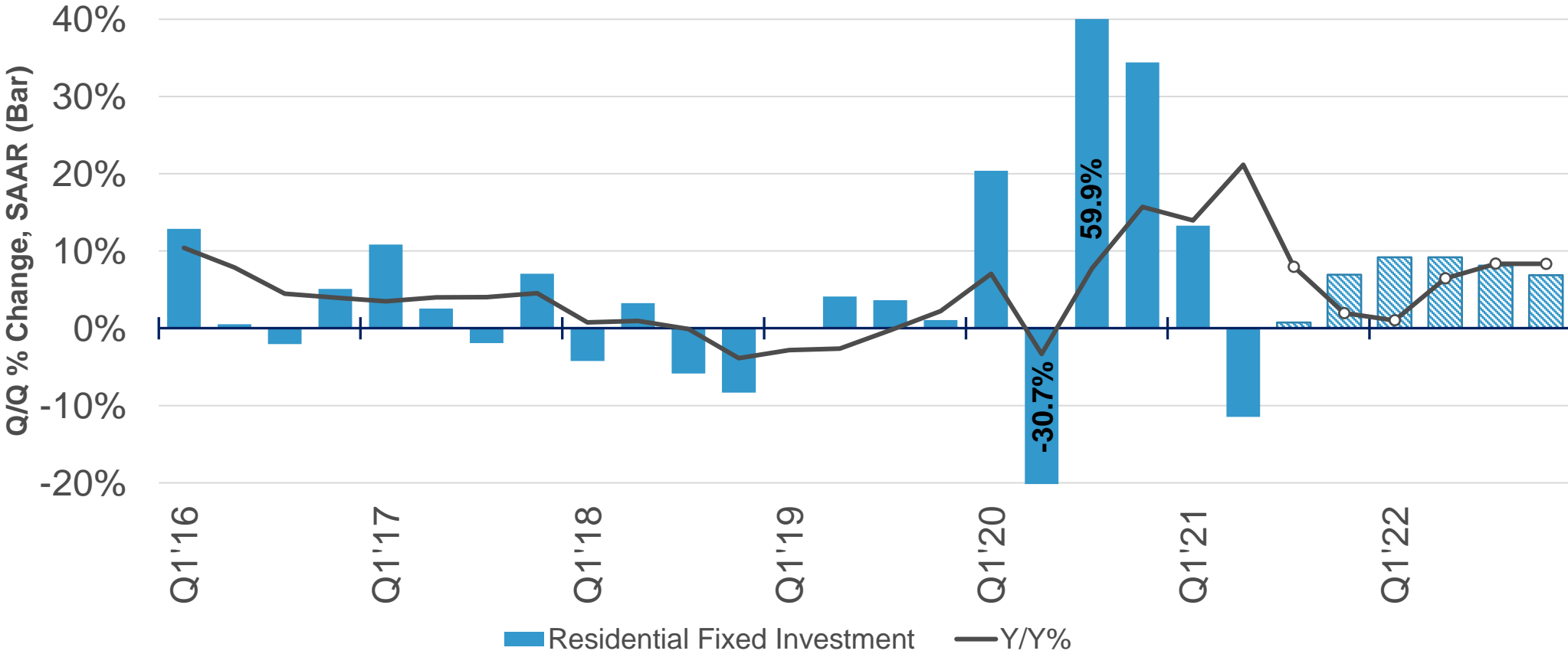
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GDP: Residential Investment



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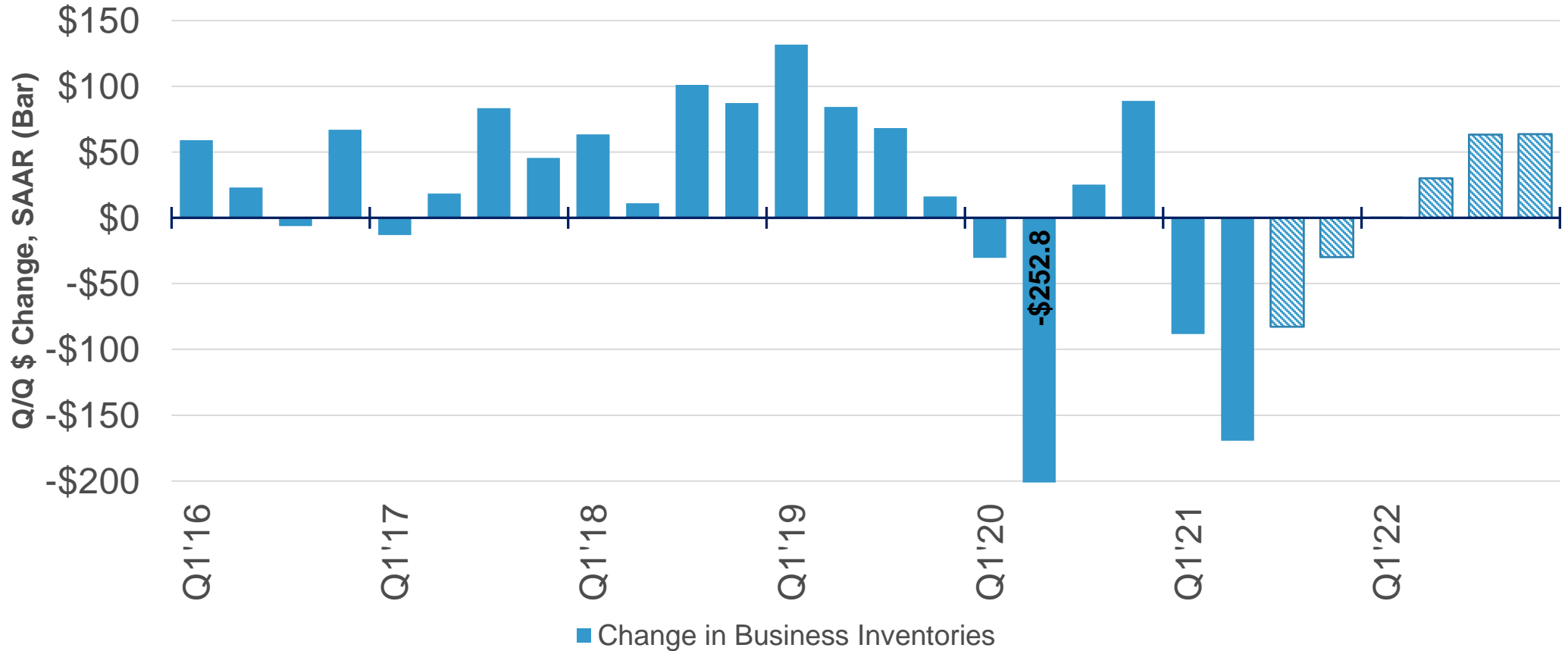
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GDP: Business Inventories

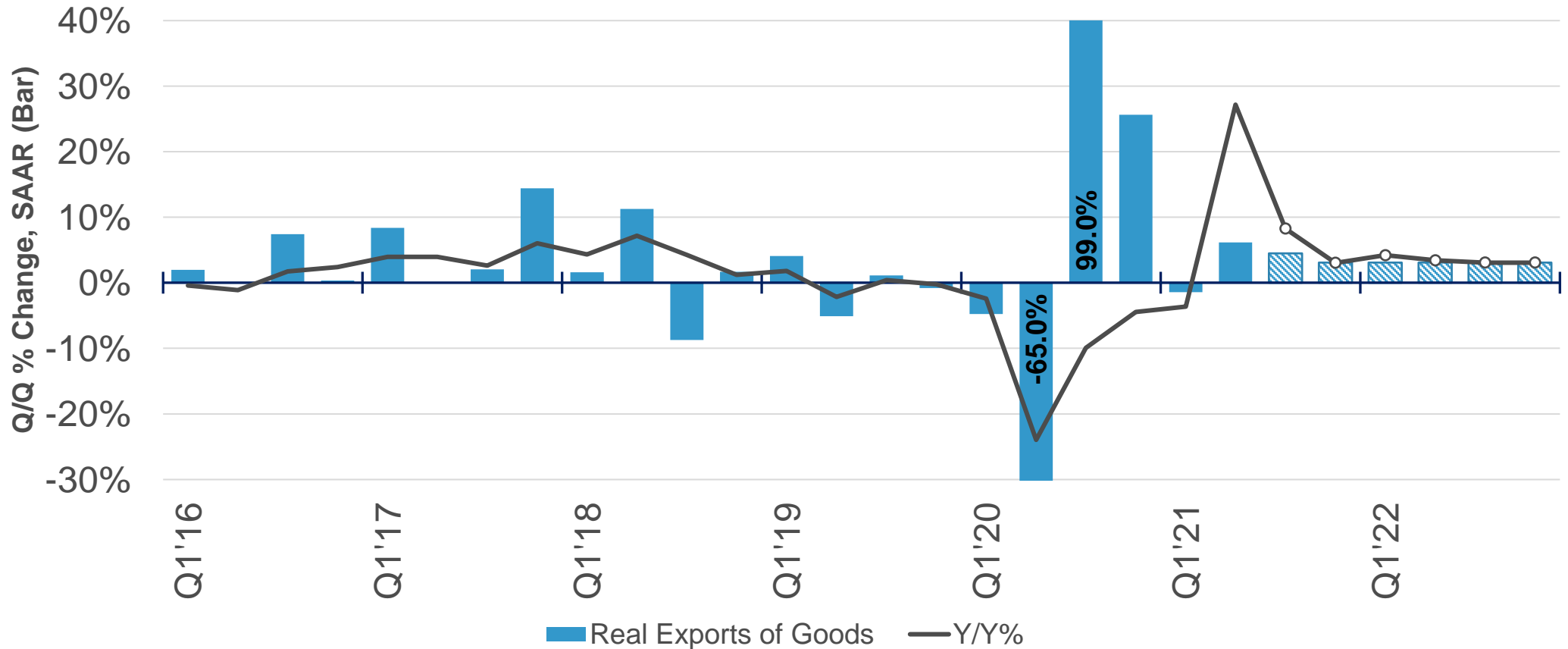


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GDP: Exports of Goods



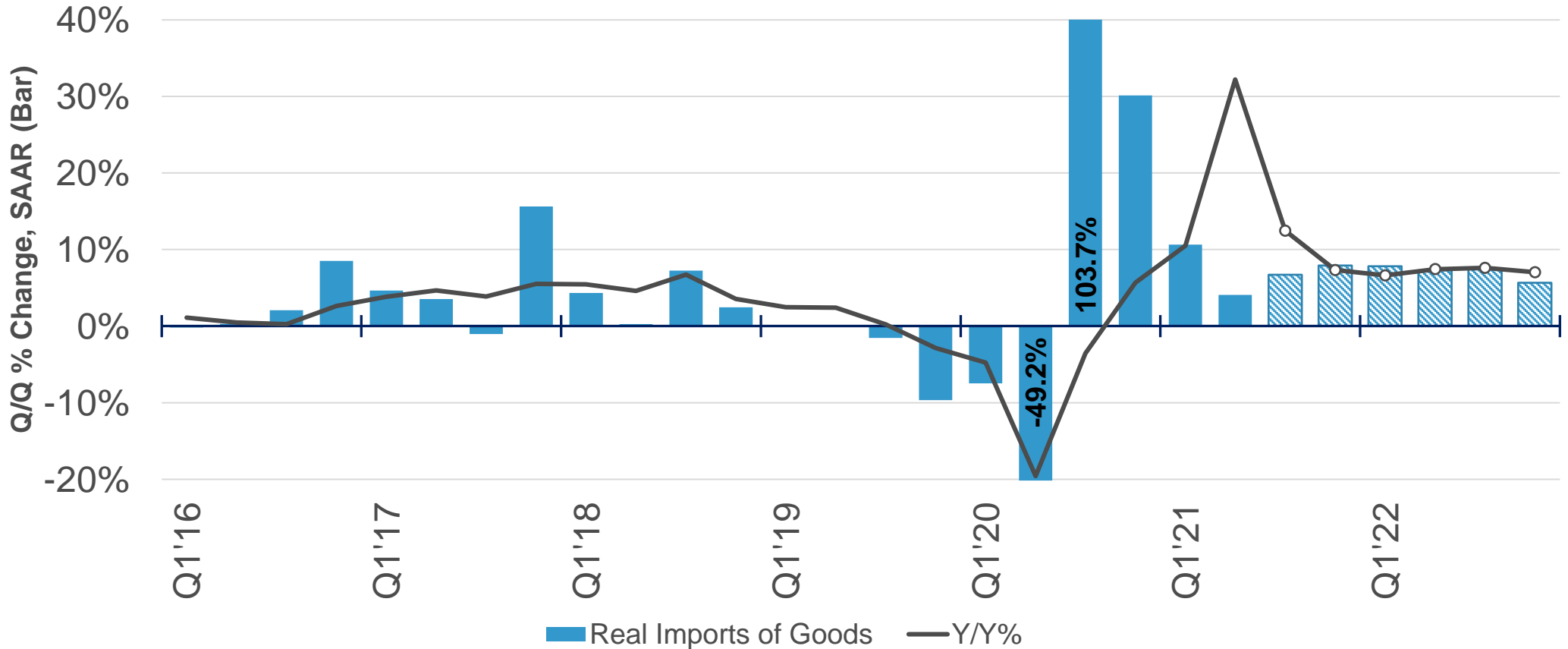
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GDP: Imports of Goods



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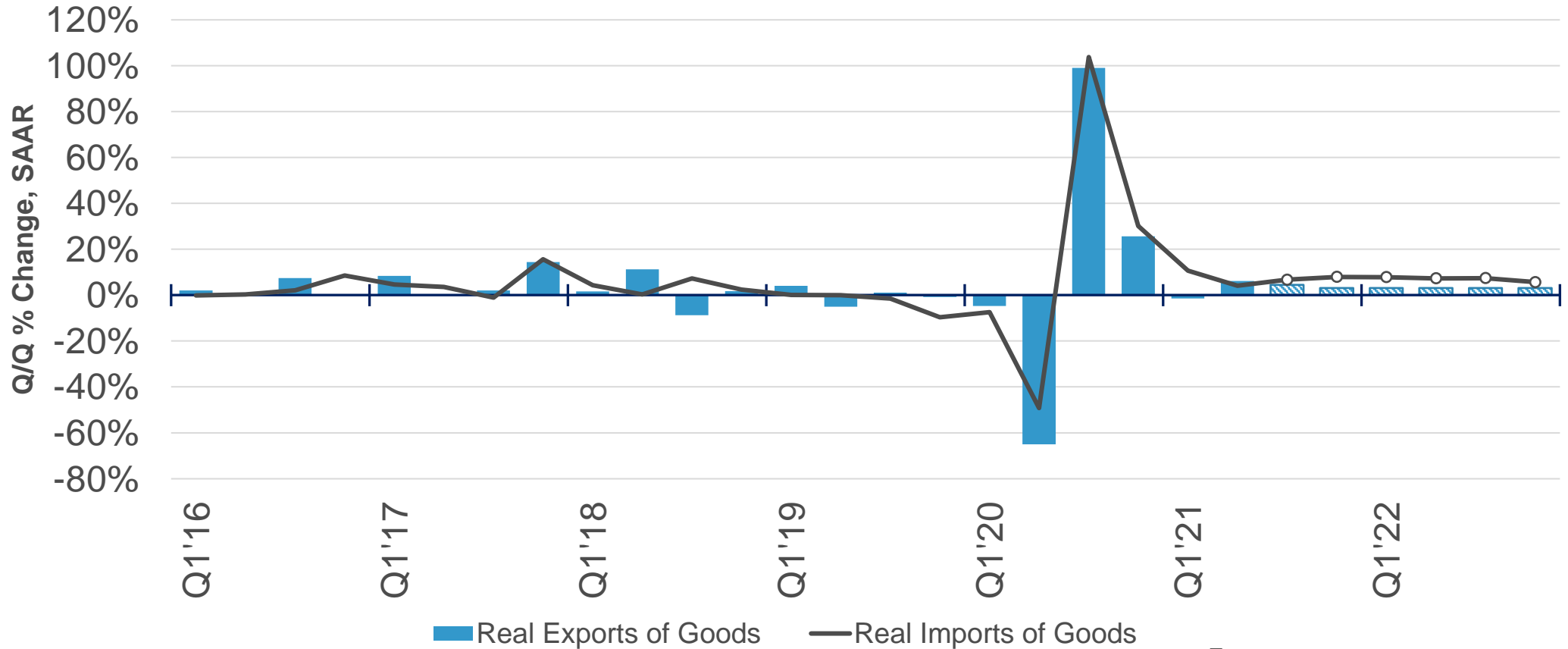
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GDP: Exports vs Imports



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GDP: Goods Transport Sector



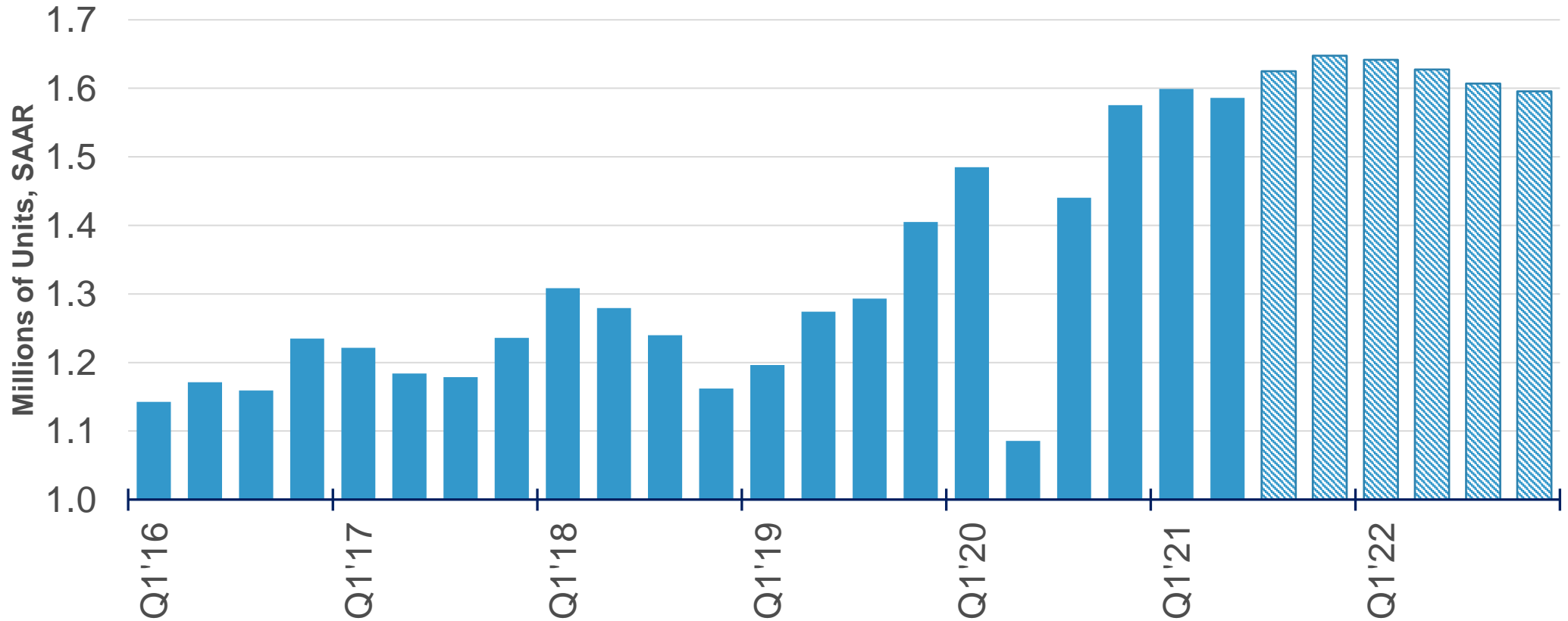
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Housing Starts Outlook



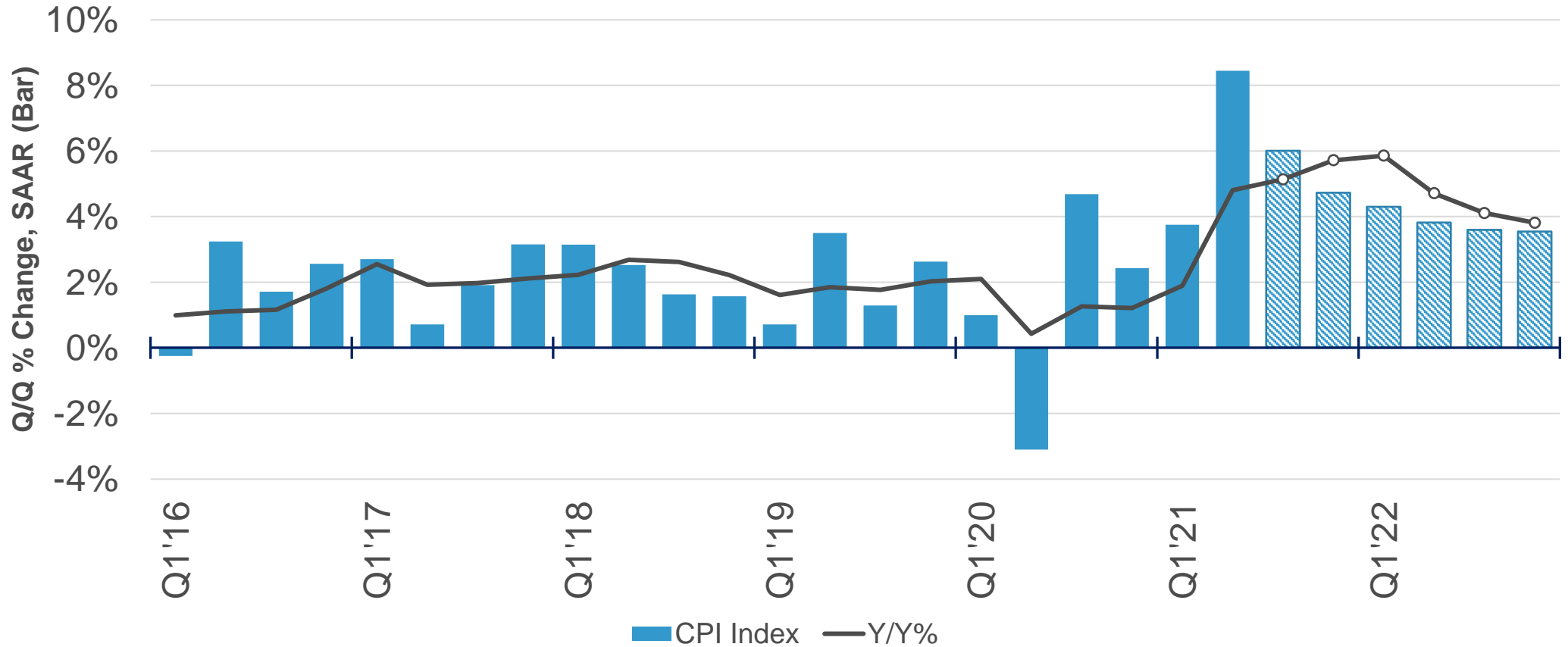
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Inflation Outlook: CPI



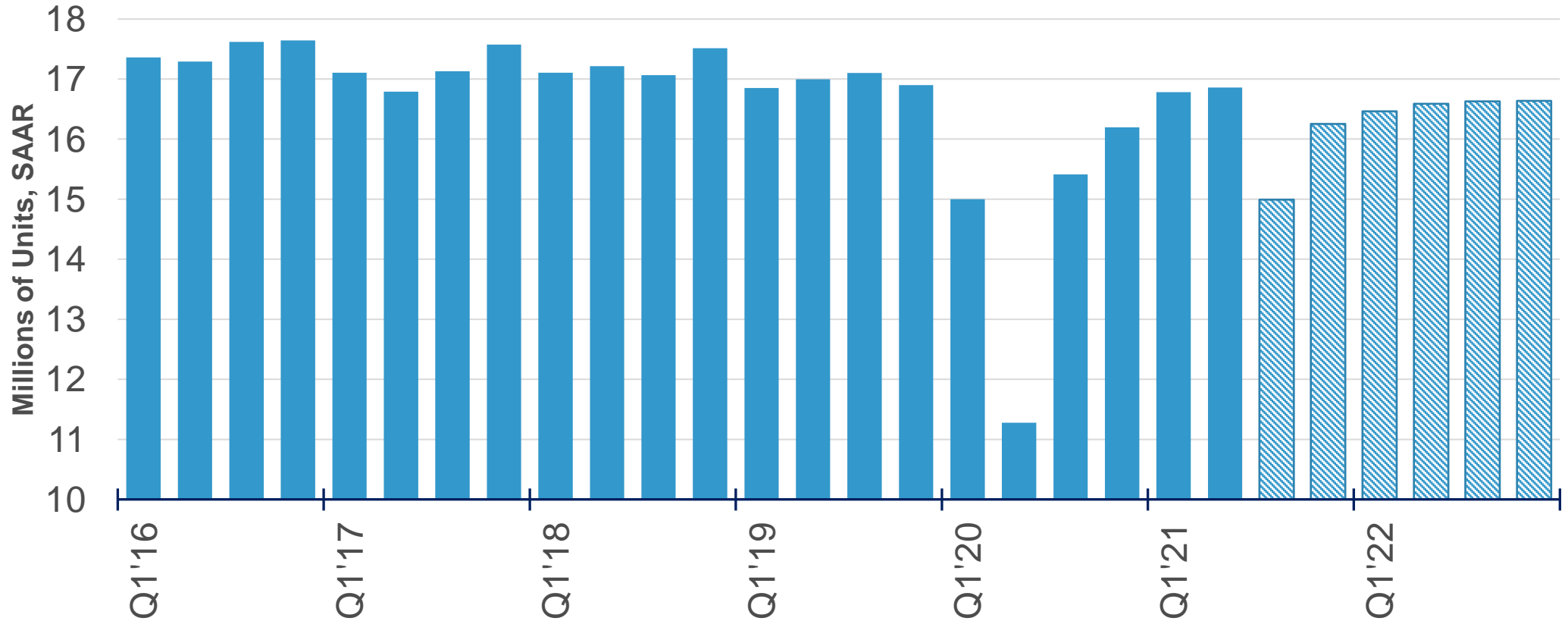
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Auto Sales Outlook



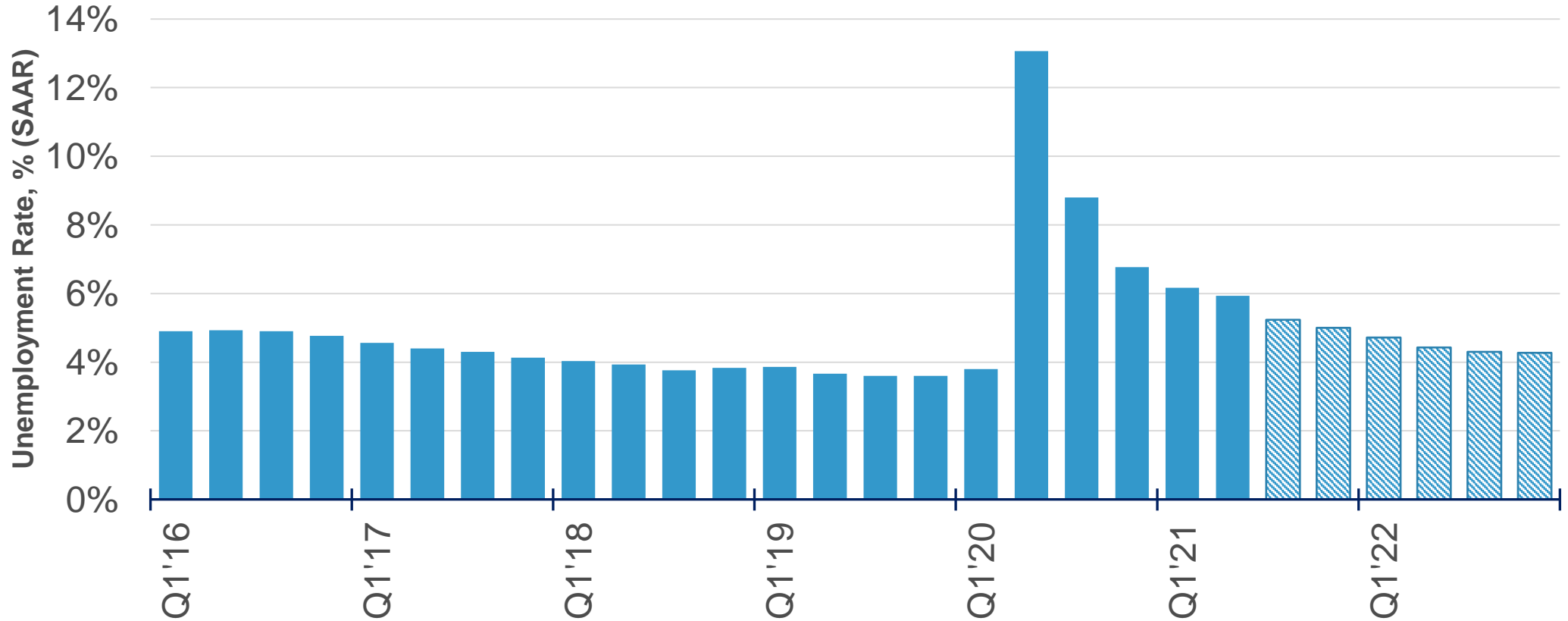
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Unemployment Rate Outlook



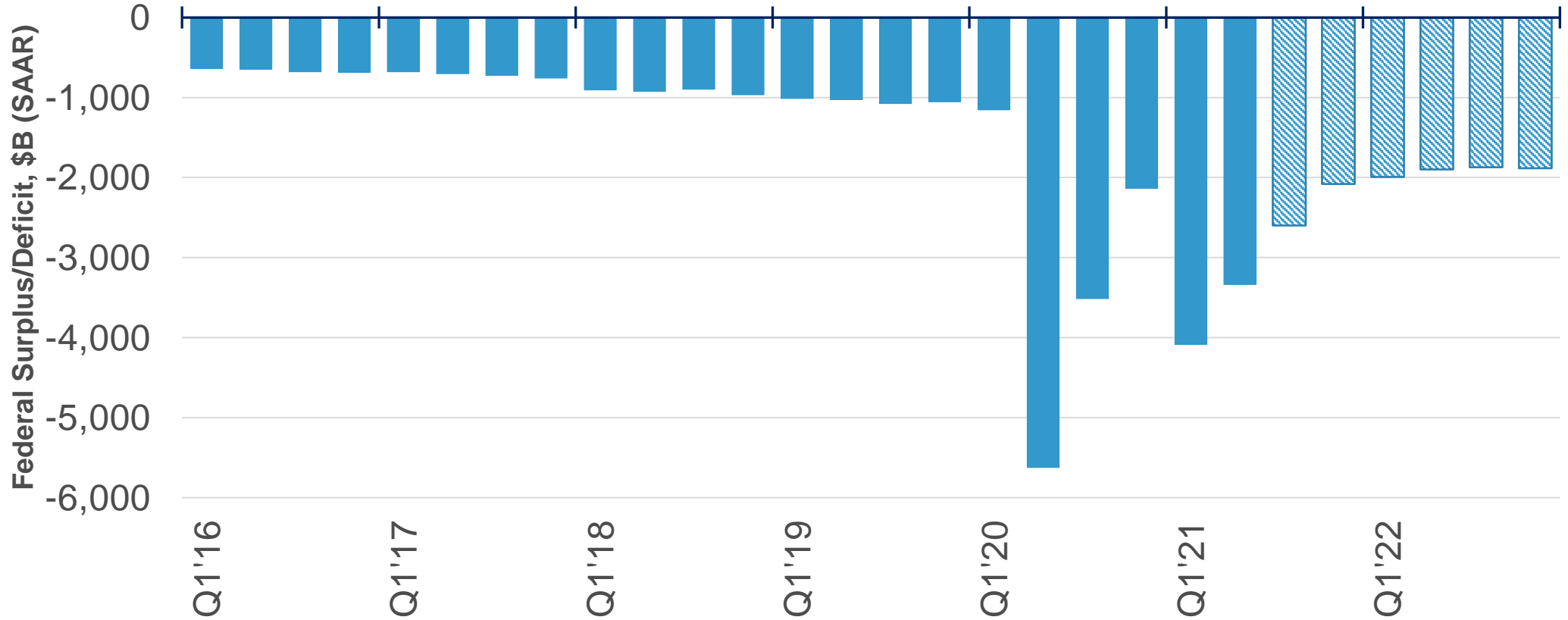
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Federal Deficit Outlook



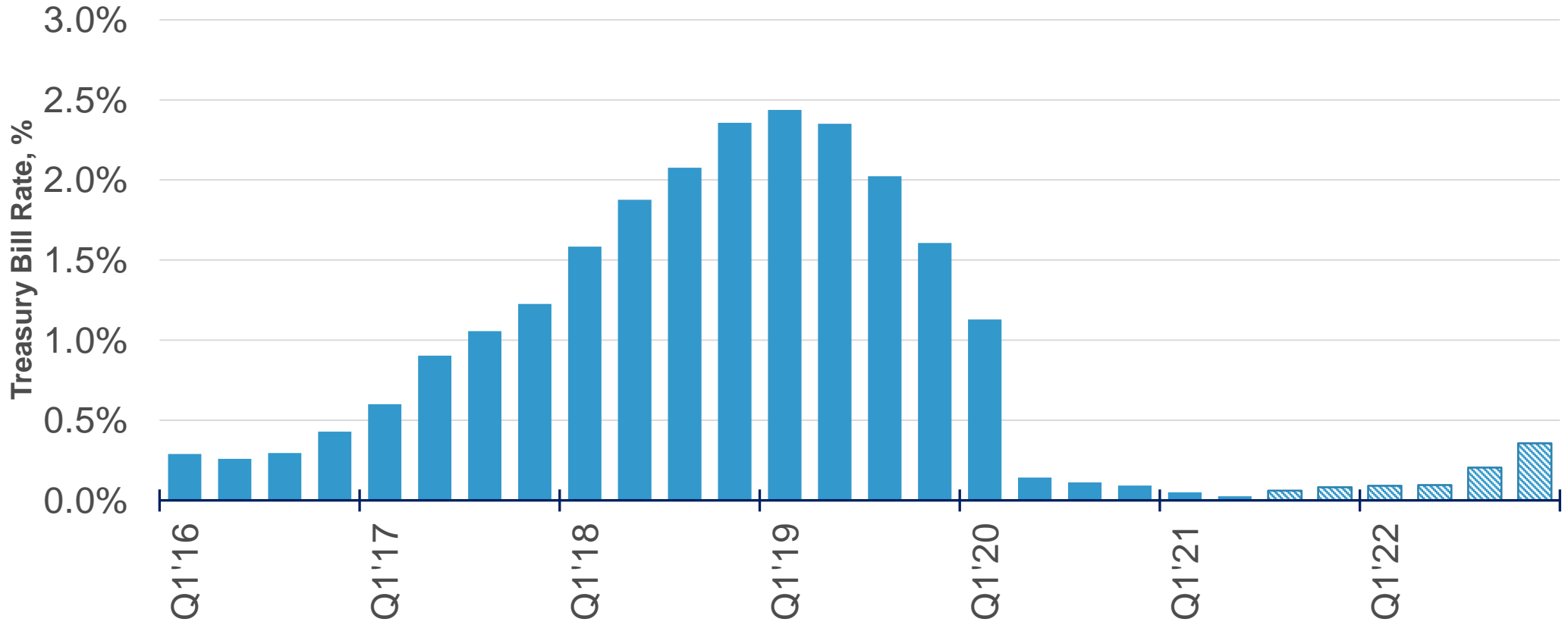
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Cost of Capital: 3-Month Treasury Bill

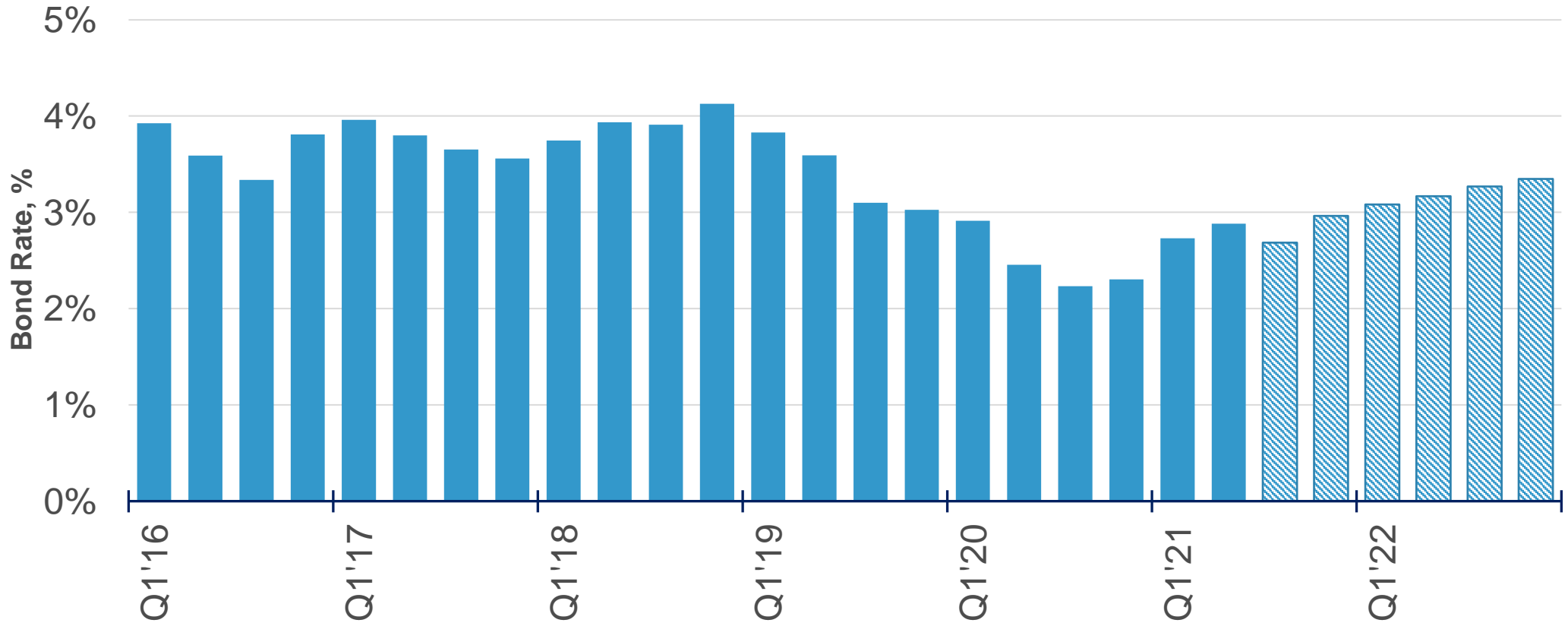


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Cost of Capital: AAA Bond Rate

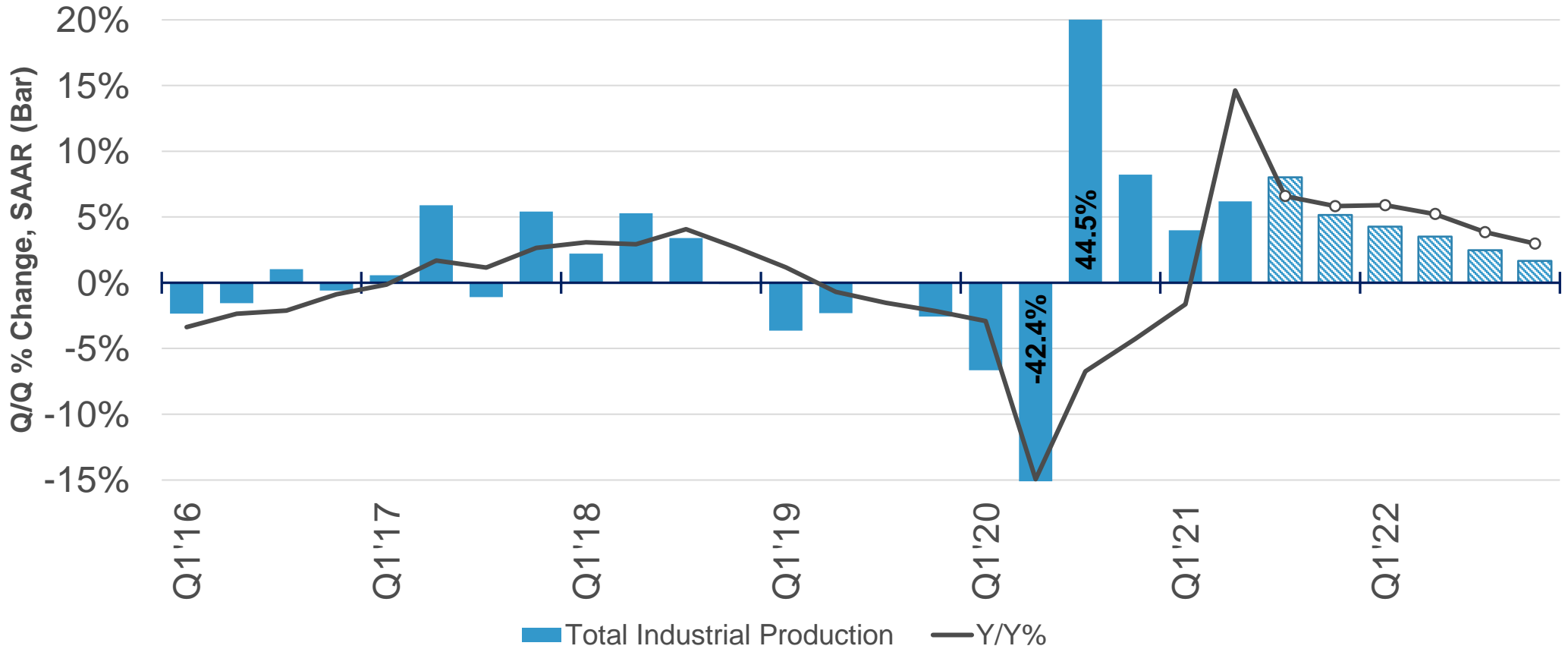


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Industrial Production Outlook



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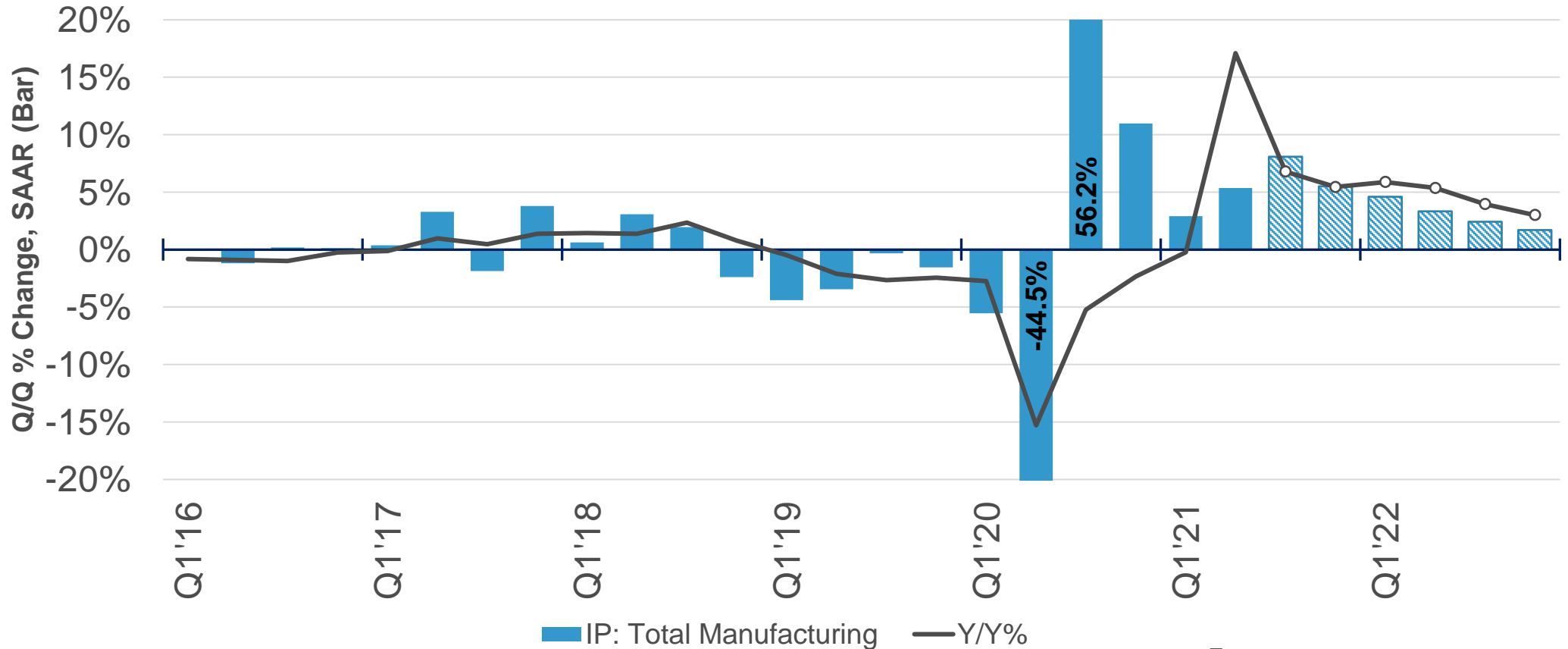
Source: Federal Reserve, Witte Econometrics, FTR | Transportation Intelligence™

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IP Outlook: Manufacturing



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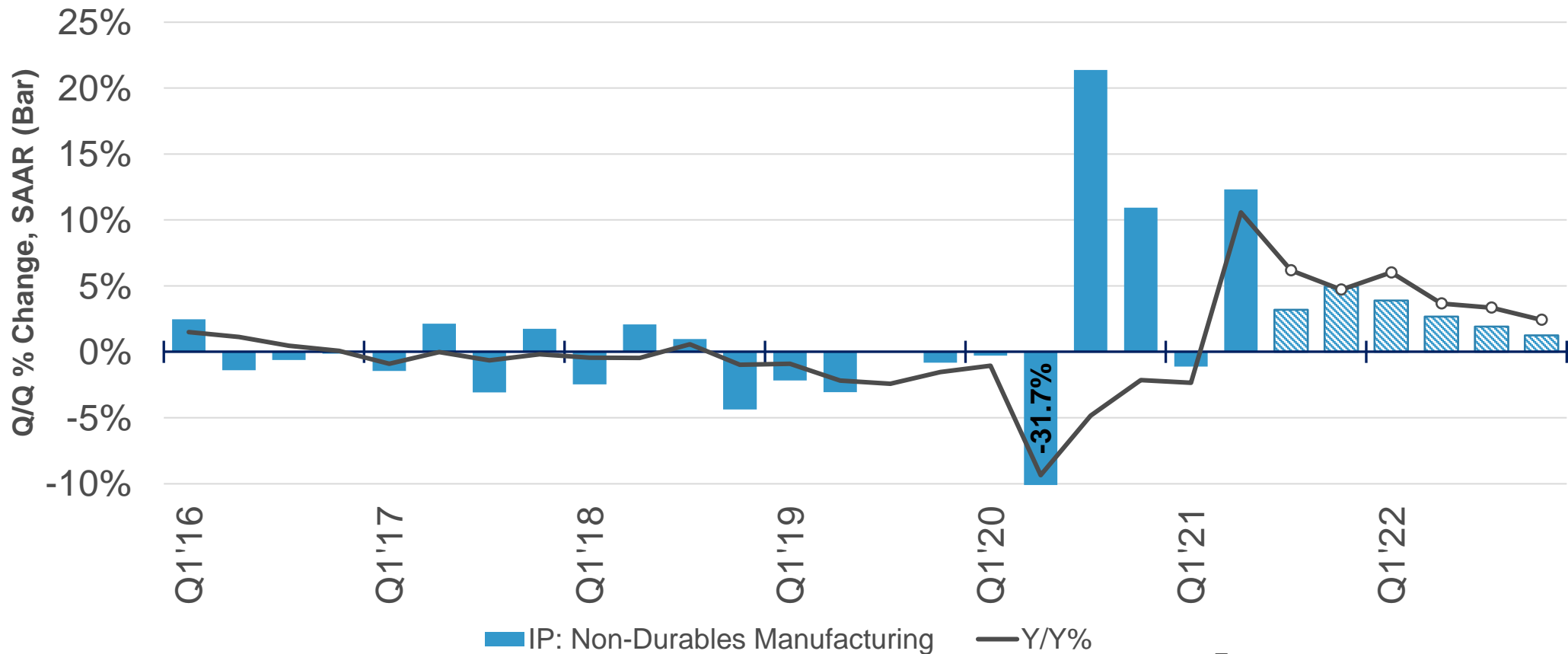
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IP: Non-Durables Manufacturing



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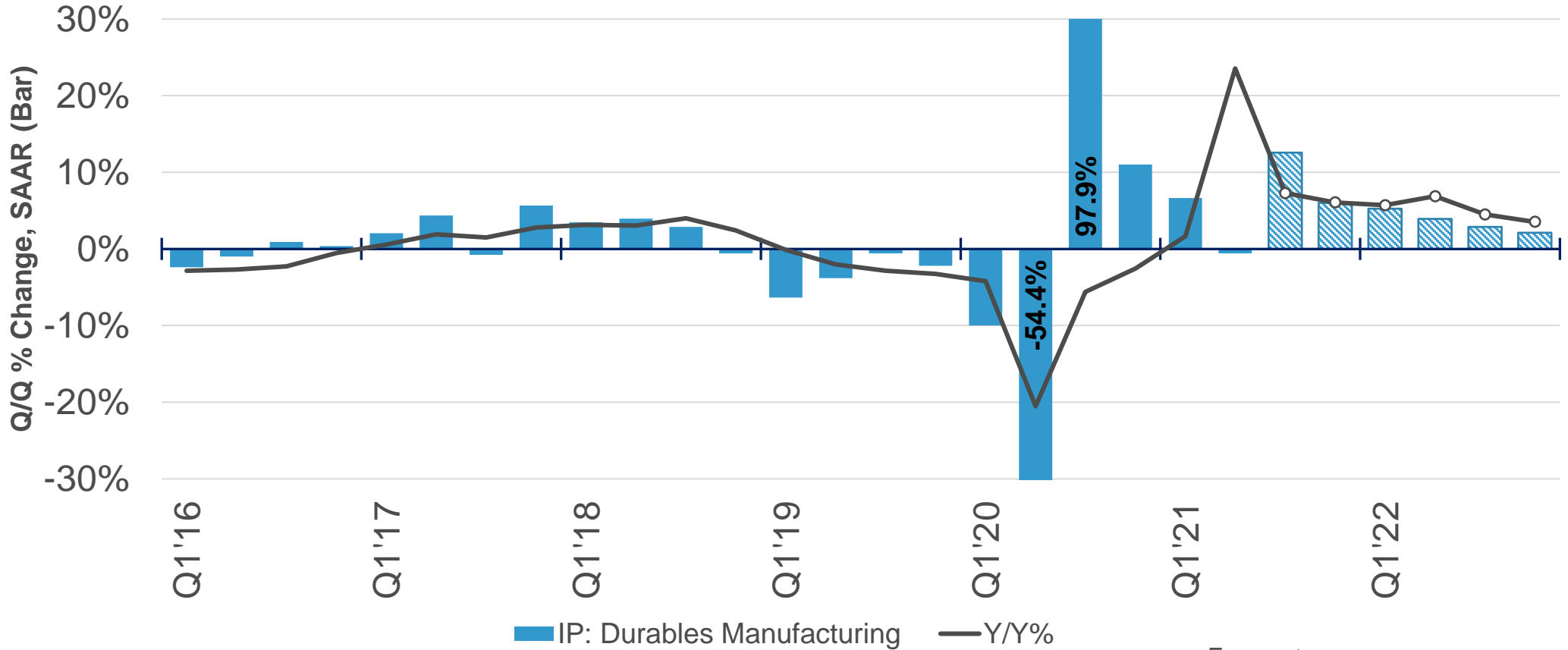
Source: Federal Reserve, Witte Econometrics, FTR | Transportation Intelligence™

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IP: Durables Manufacturing



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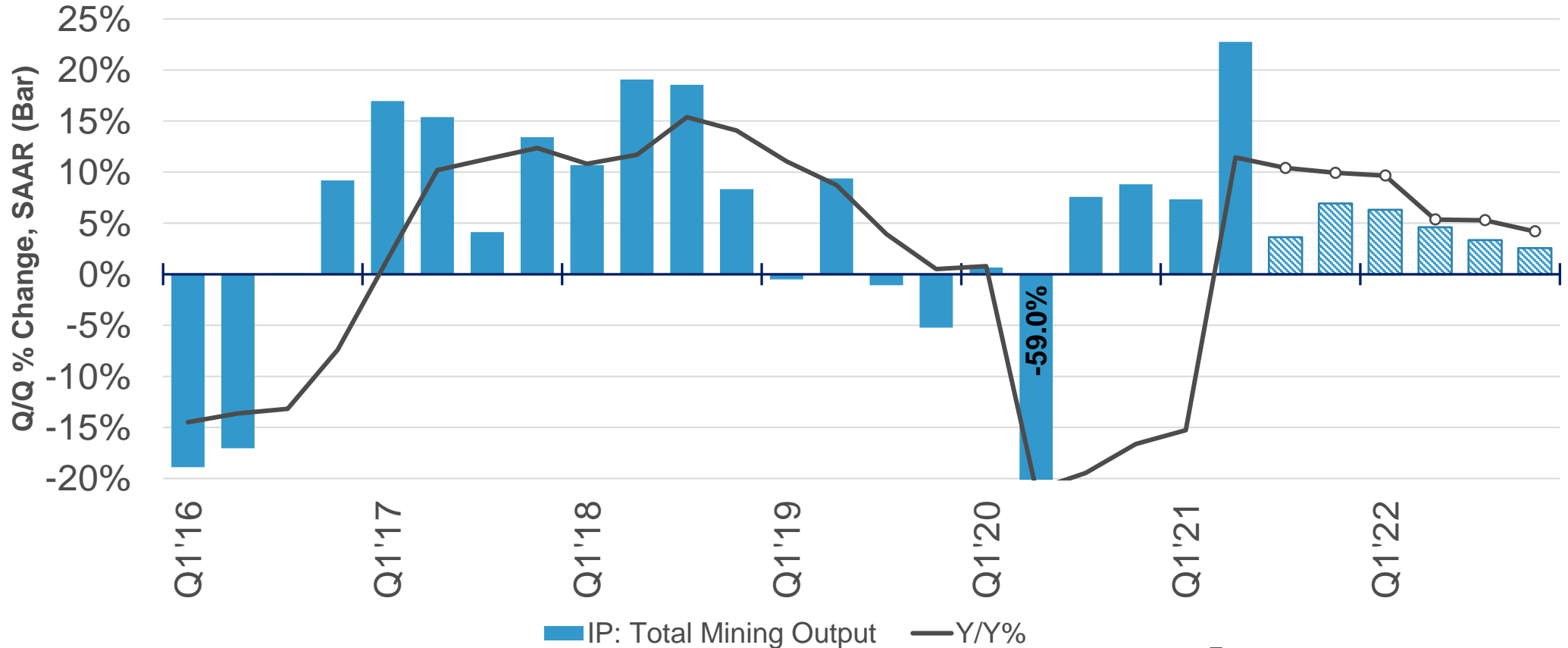
Source: Federal Reserve, Witte Econometrics, FTR | Transportation Intelligence™

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IP: Mining Output



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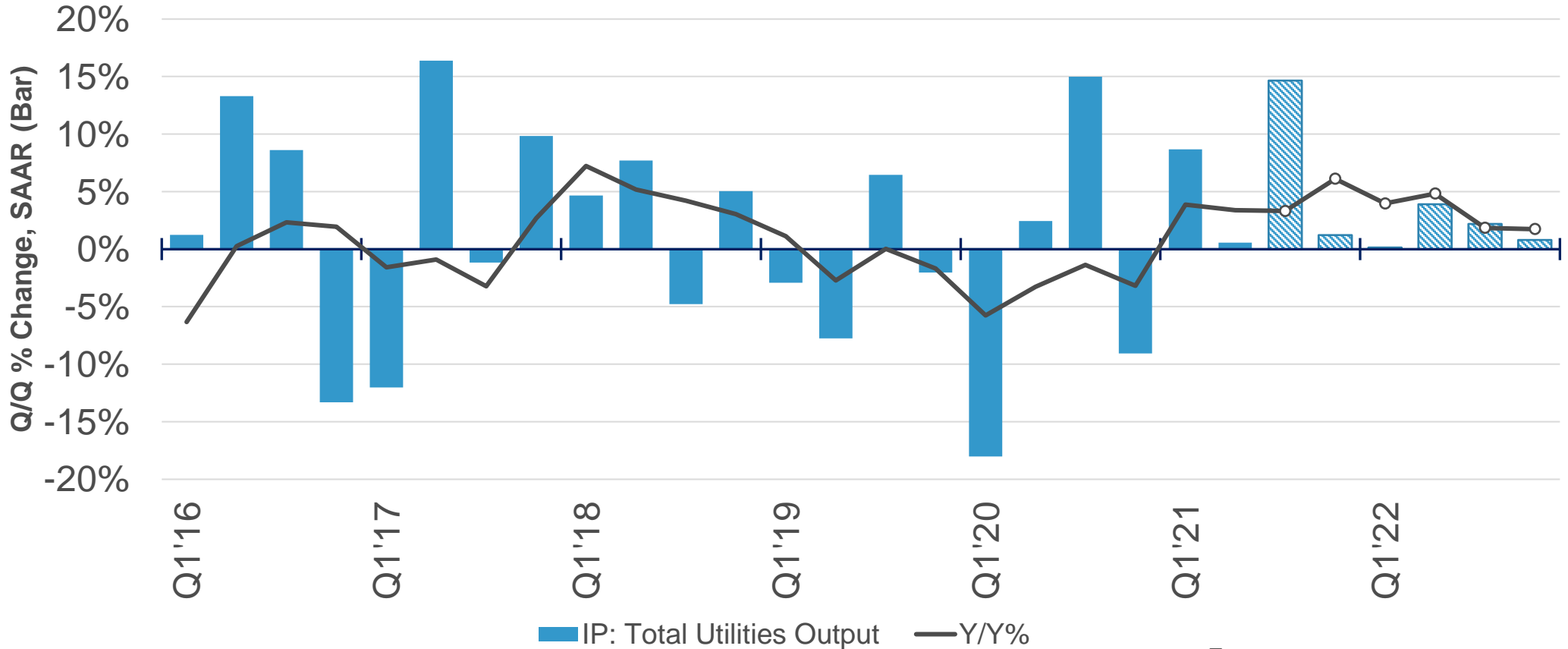
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IP: Utilities Output



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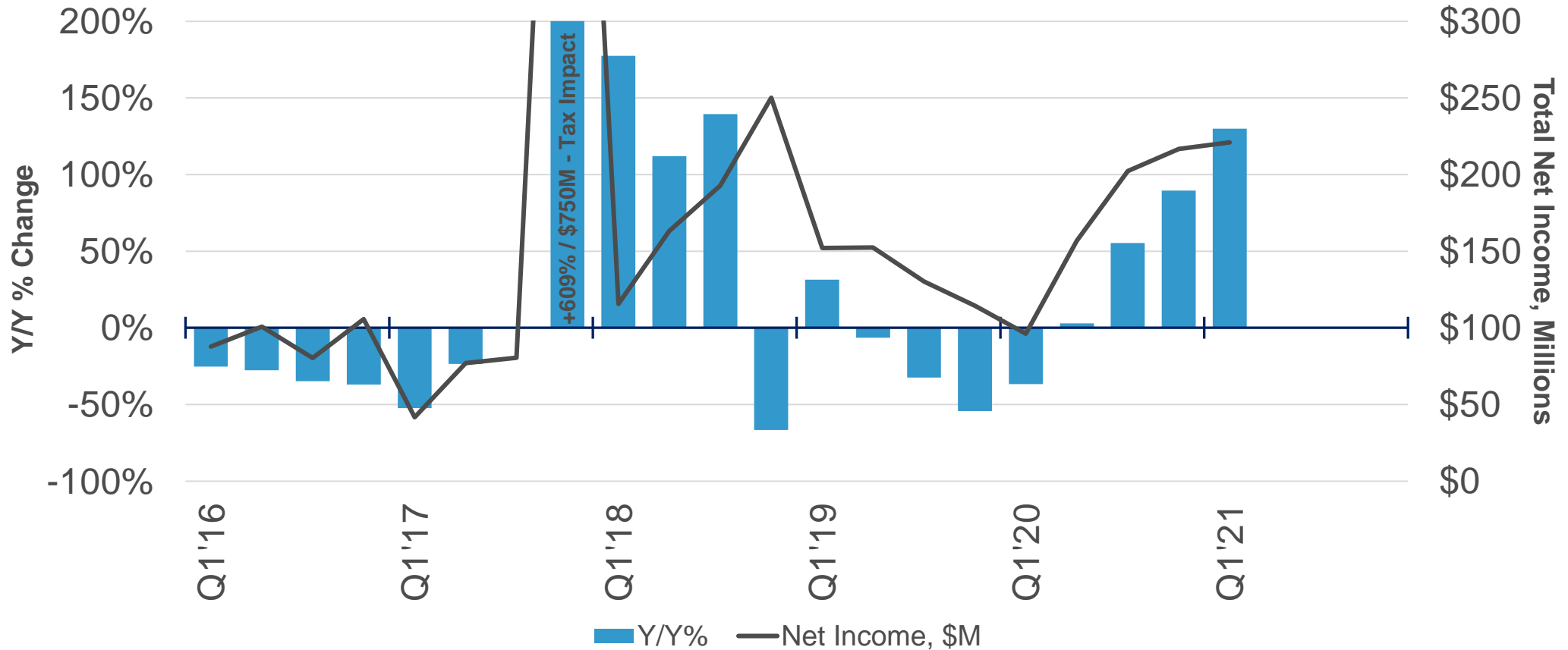
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Intelligence

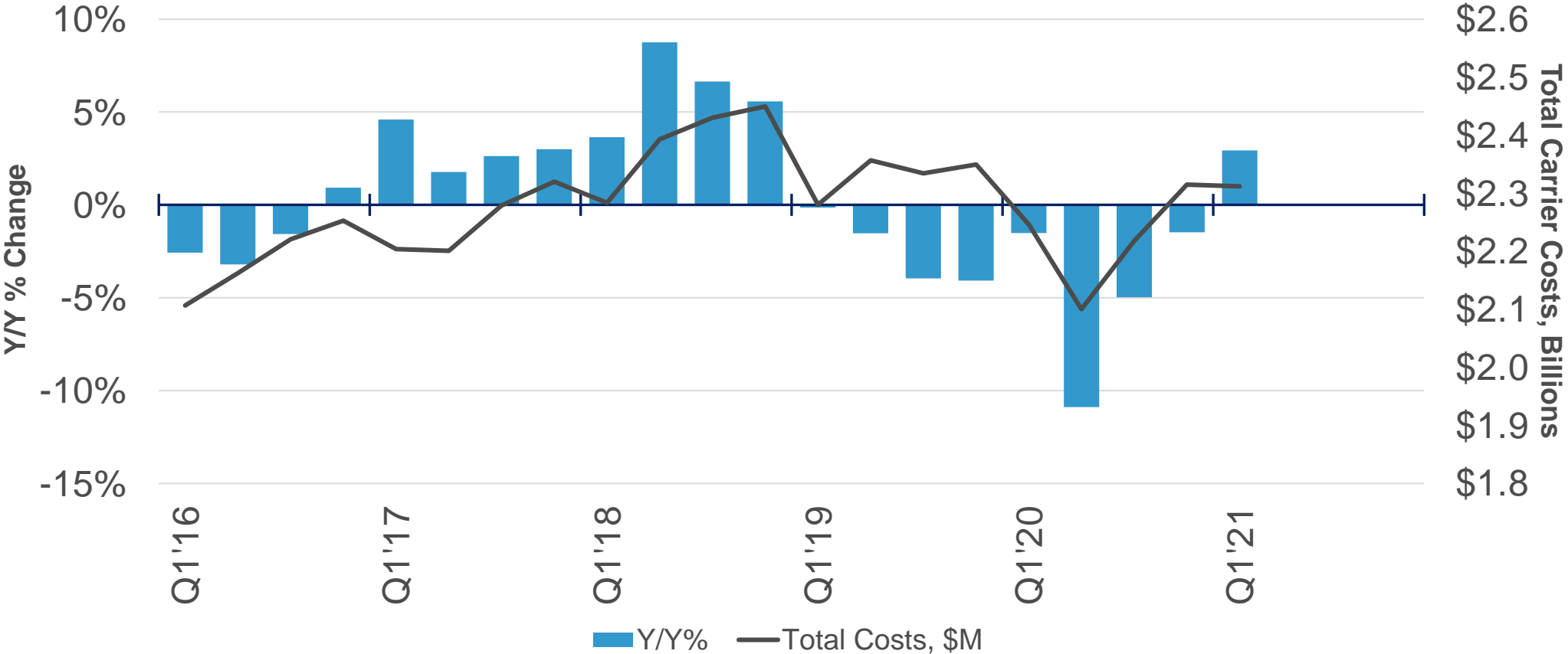


Public TL Carrier Results Quarterly

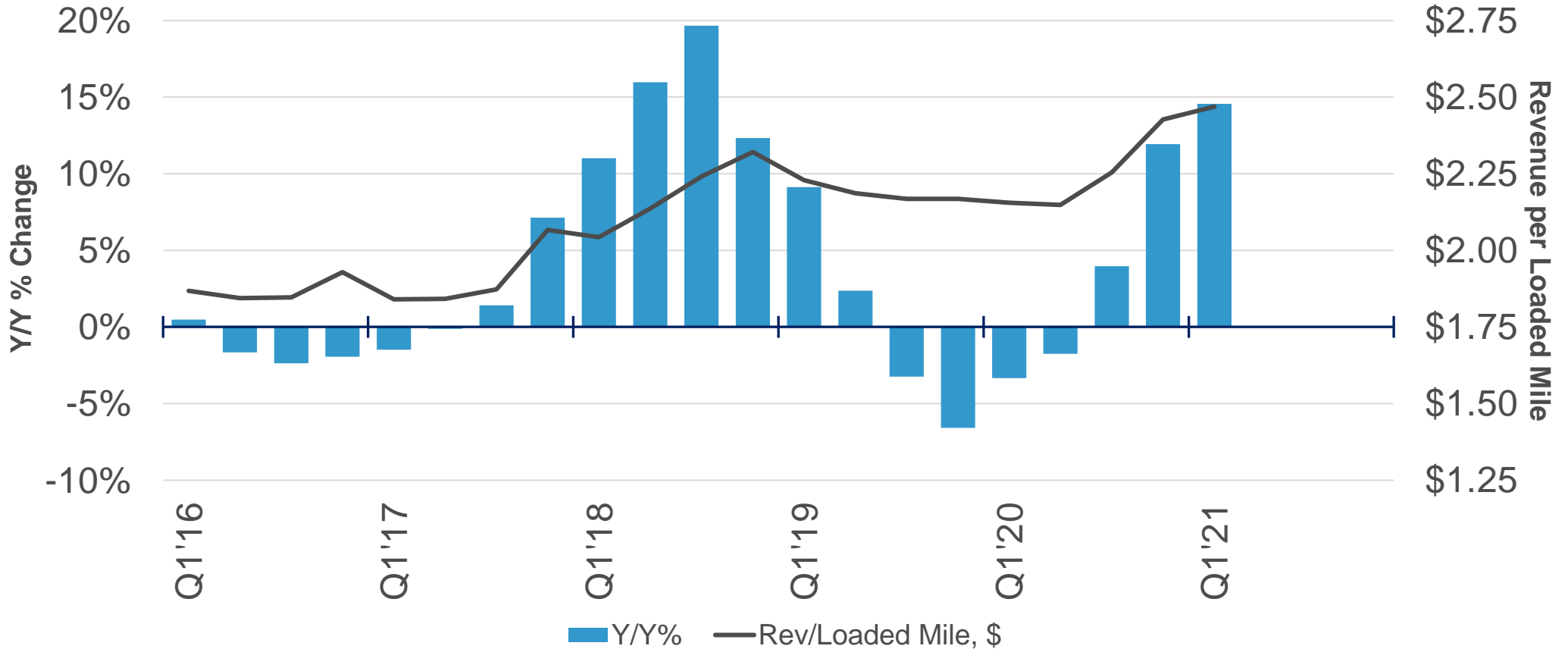
TL Carriers: Net Income



TL Carriers: Total Costs



TL Carriers: Rates



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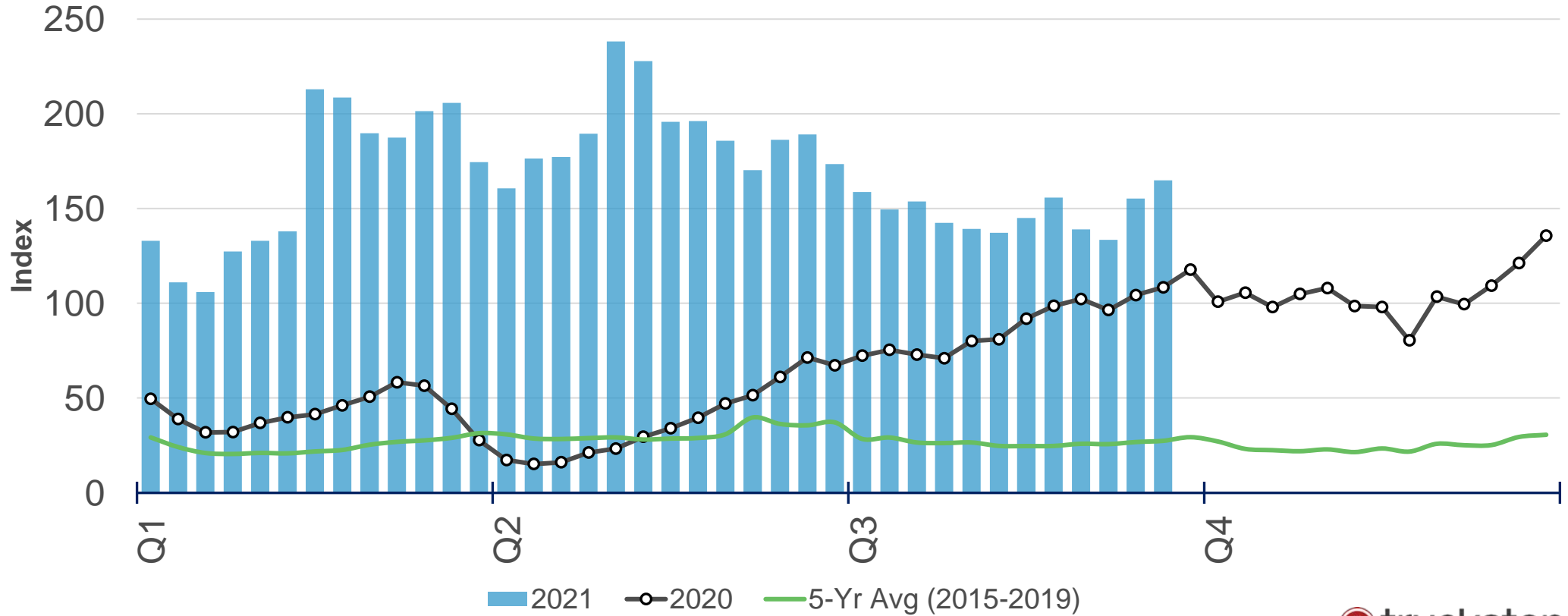
Spot Market Metrics Weekly

Source: Truckstop.com



Spot Market: Total MDI

Market Demand Index (MDI)



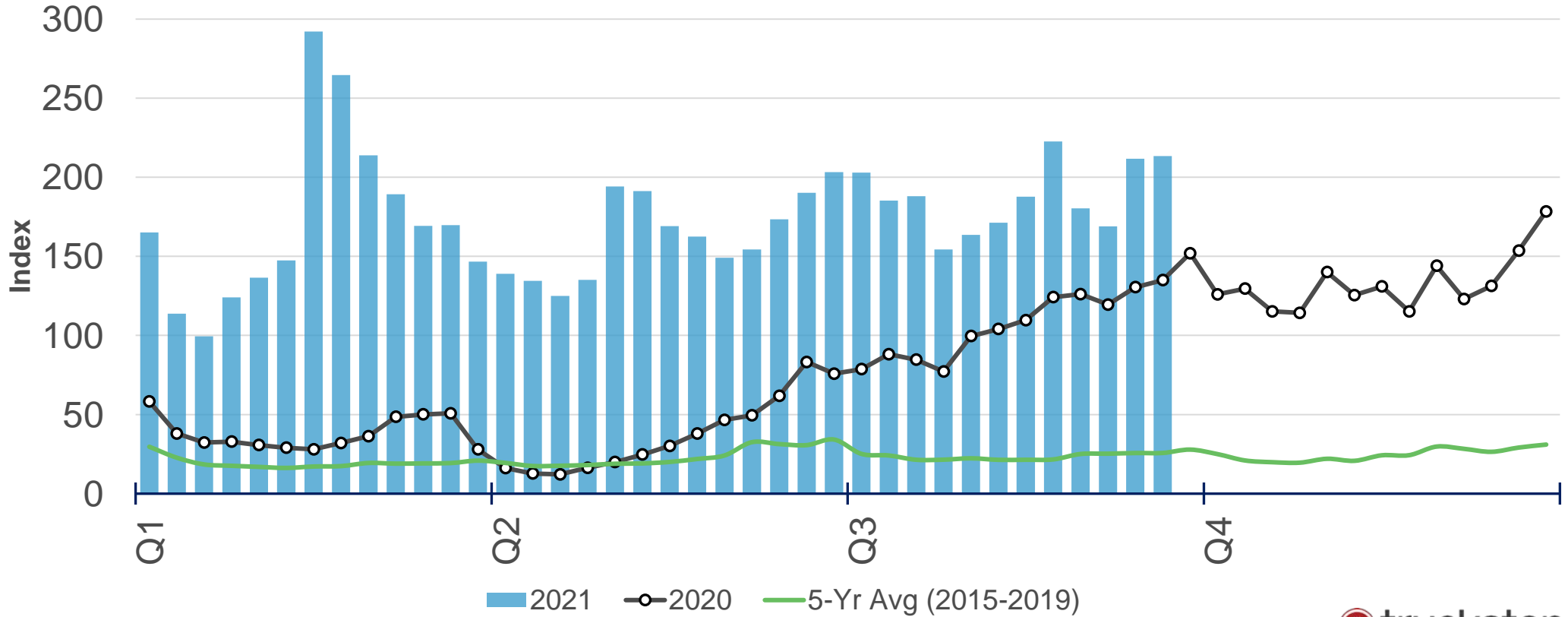
Ratio of available loads to available trucks. A higher index indicates more demand for available capacity.

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Spot Market: Dry Van MDI

Market Demand Index (MDI)



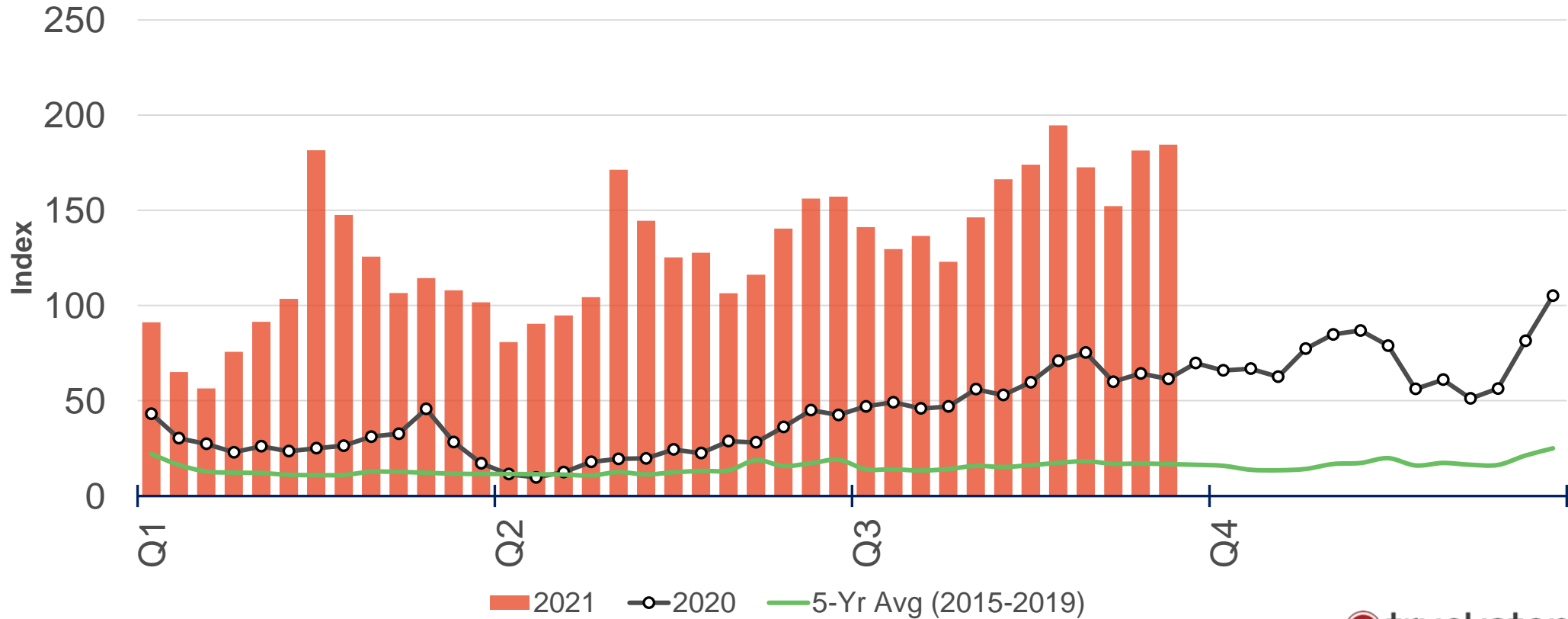
Ratio of available loads to available trucks. A higher index indicates more demand for available capacity.

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Spot Market: Refrigerated MDI

Market Demand Index (MDI)



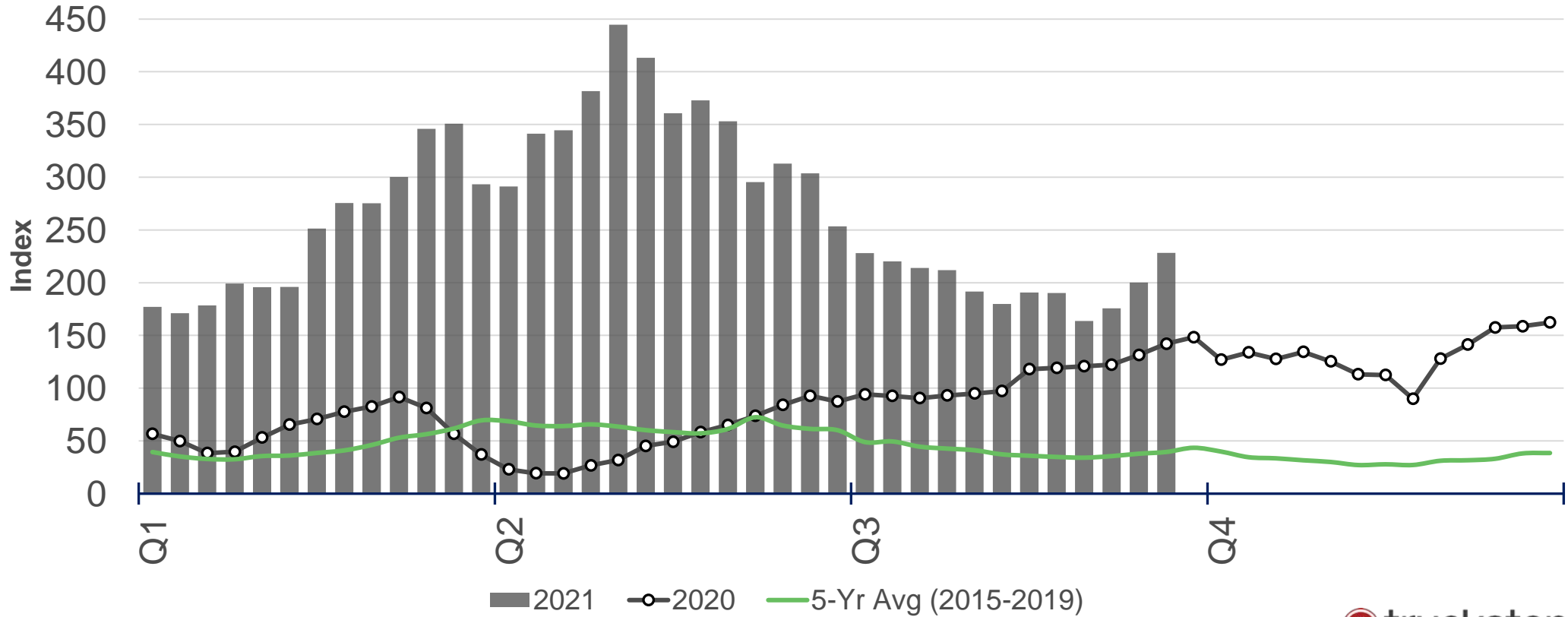
Ratio of available loads to available trucks. A higher index indicates more demand for available capacity.

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Spot Market: Flatbed MDI

Market Demand Index (MDI)



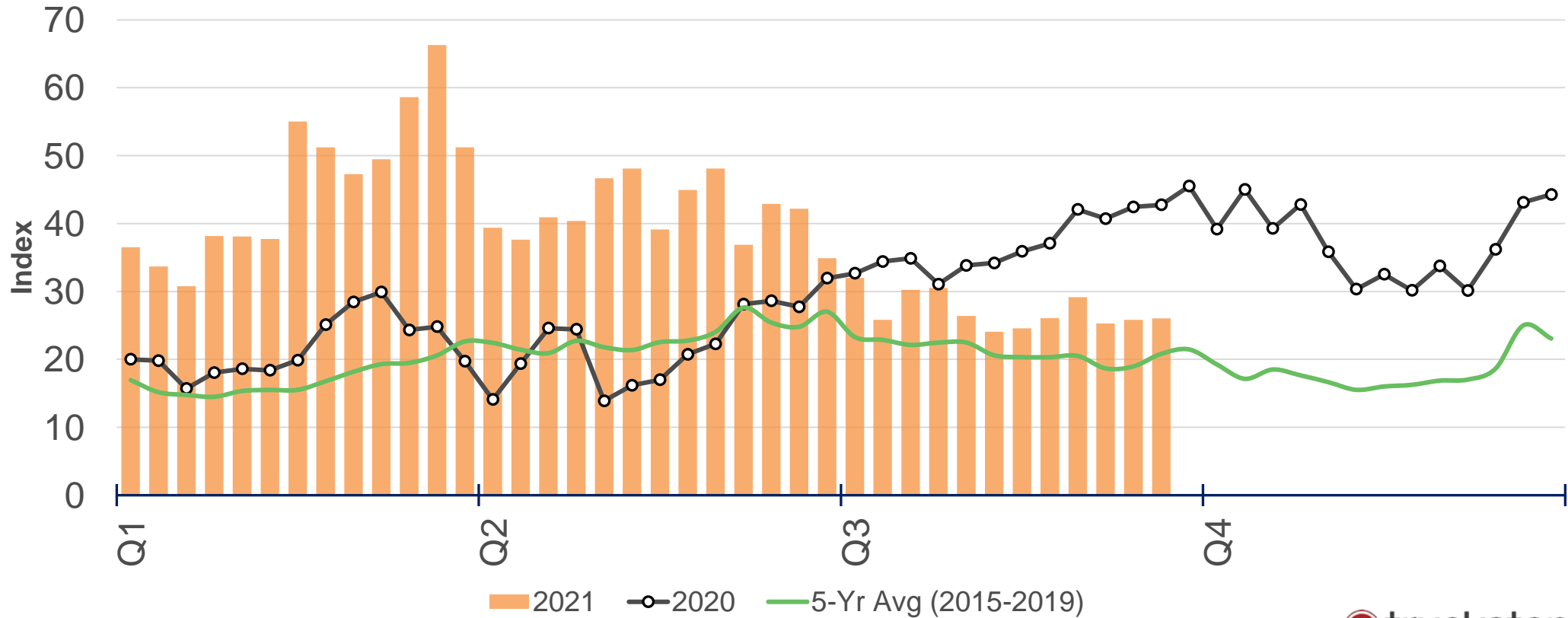
Ratio of available loads to available trucks. A higher index indicates more demand for available capacity.

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Spot Market: Specialized MDI

Market Demand Index (MDI)



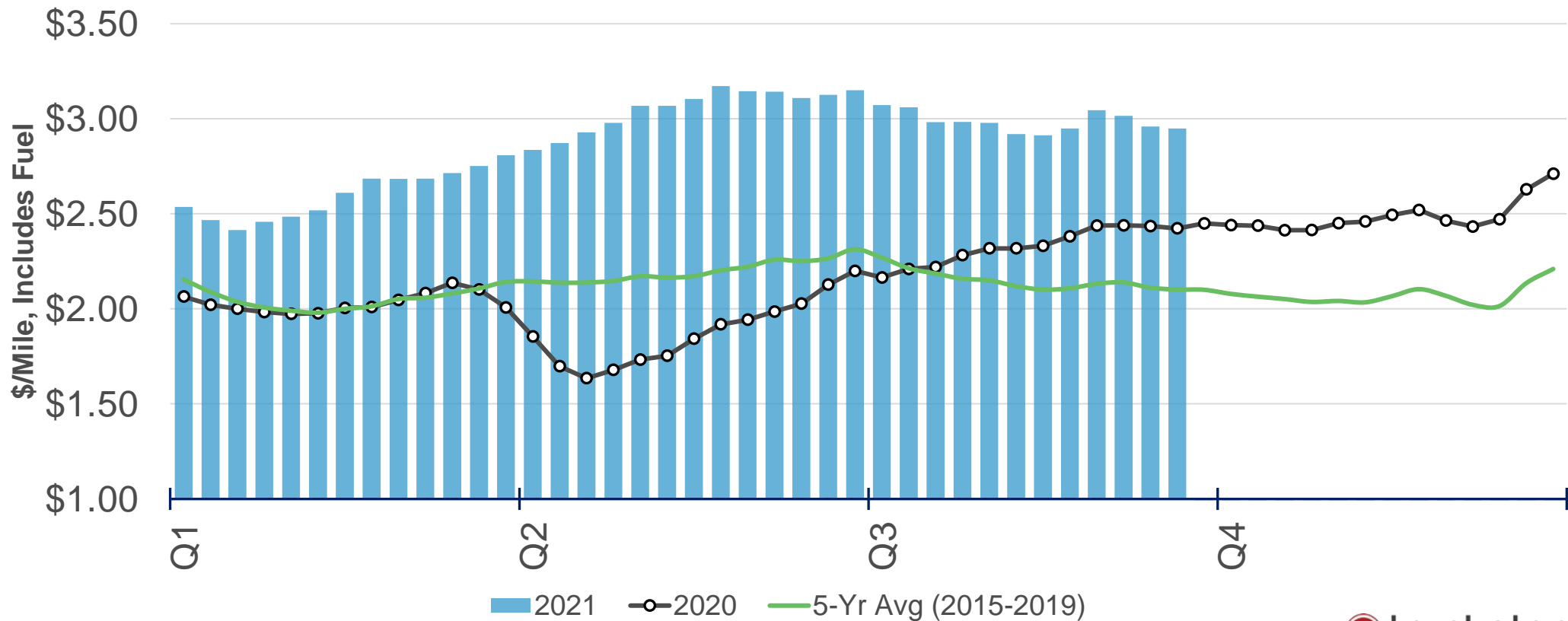
Ratio of available loads to available trucks. A higher index indicates more demand for available capacity.

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Spot Market: Total Rates

Broker-posted spot rate, including fuel



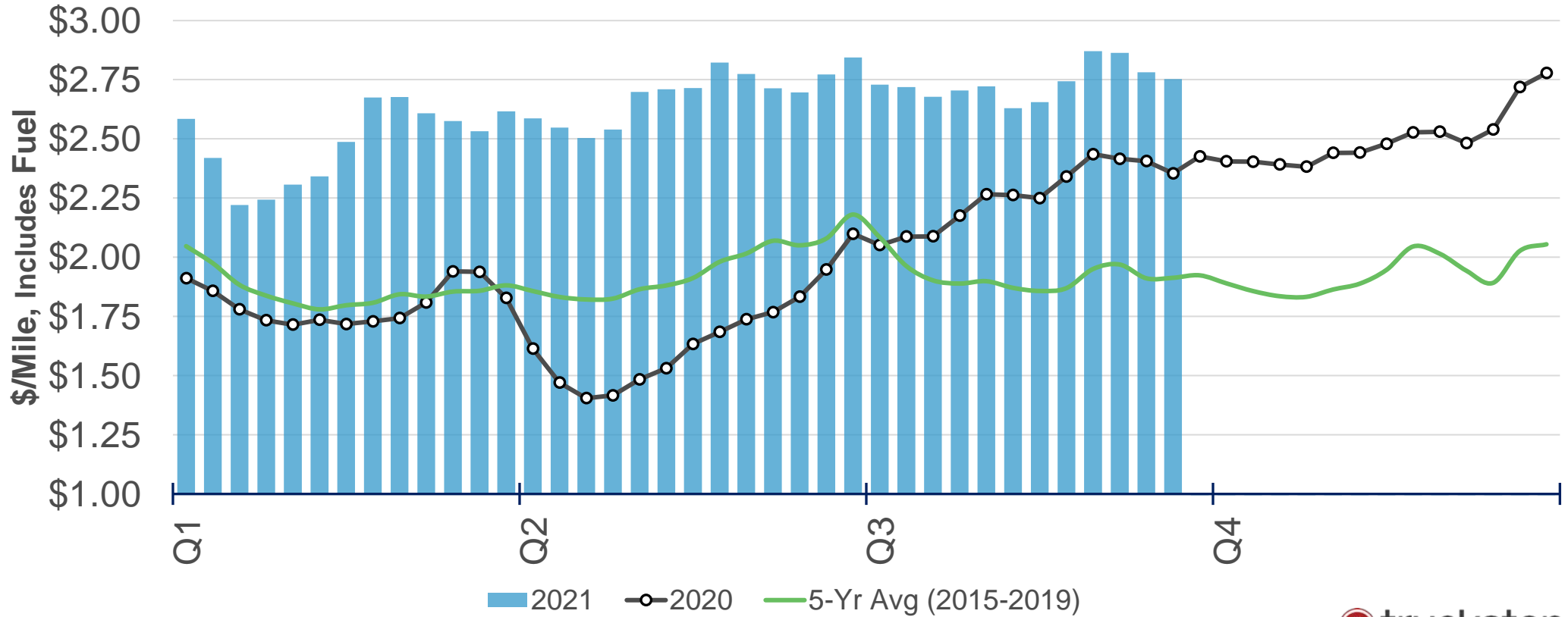
Broker-posted spot rates, including fuel (\$/loaded mile).

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Spot Market: Dry Van Rates

Broker-posted spot rate, including fuel



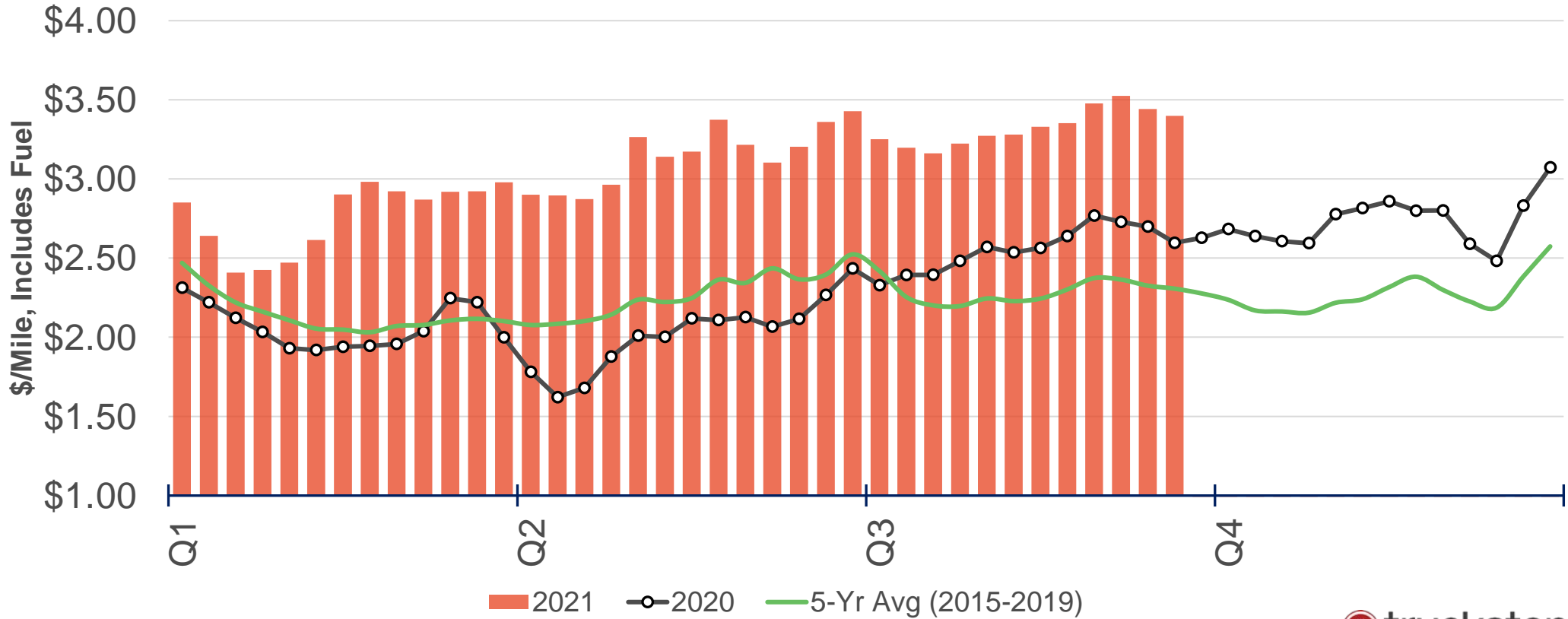
Broker-posted spot rates, including fuel (\$/loaded mile).

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Spot Market: Refrigerated Rates

Broker-posted spot rate, including fuel



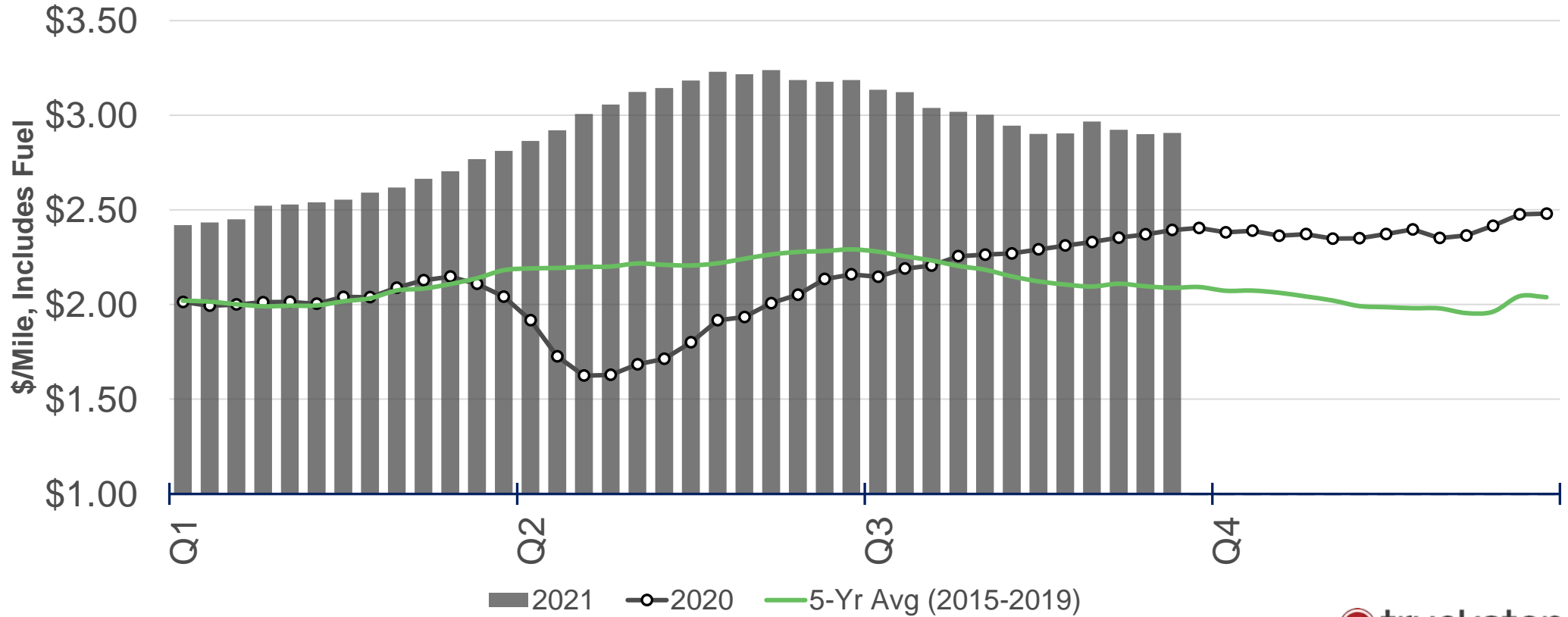
Broker-posted spot rates, including fuel (\$/loaded mile).

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Spot Market: Flatbed Rates

Broker-posted spot rate, including fuel



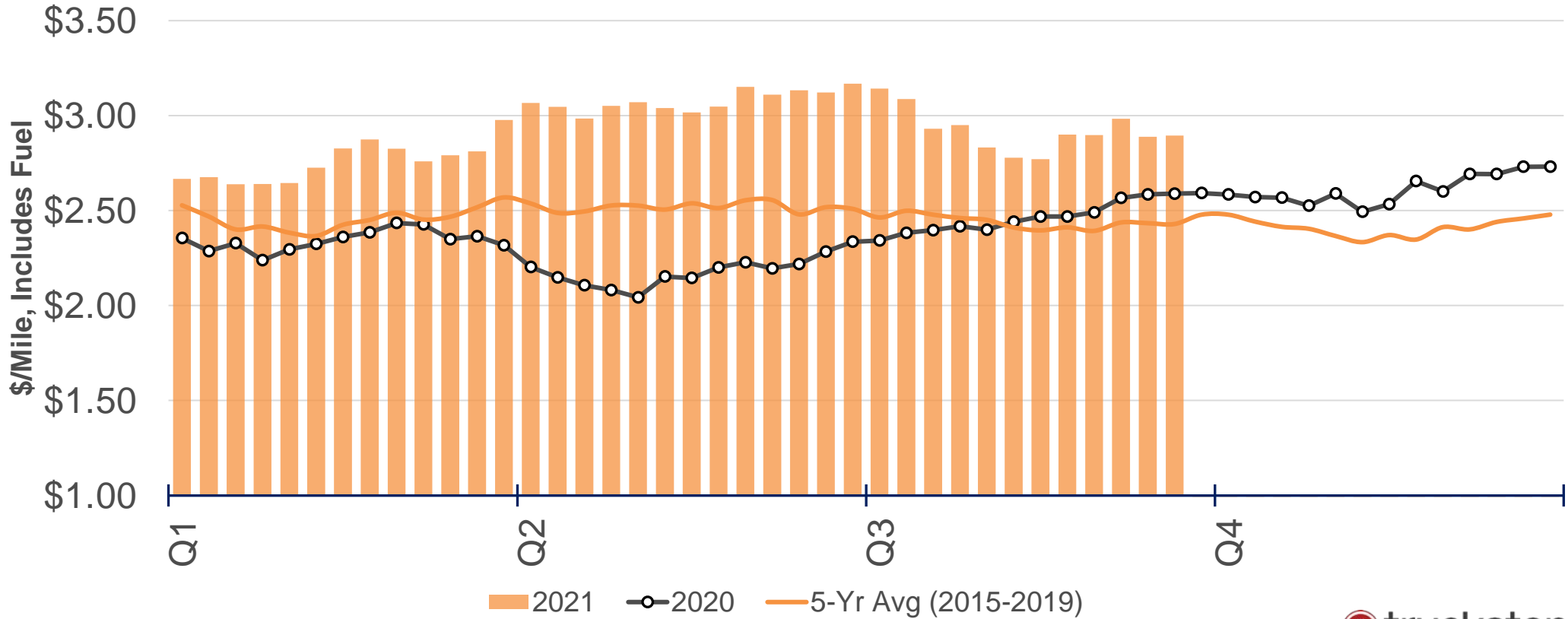
Broker-posted spot rates, including fuel (\$/loaded mile).

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Spot Market: Specialized Rates

Broker-posted spot rate, including fuel

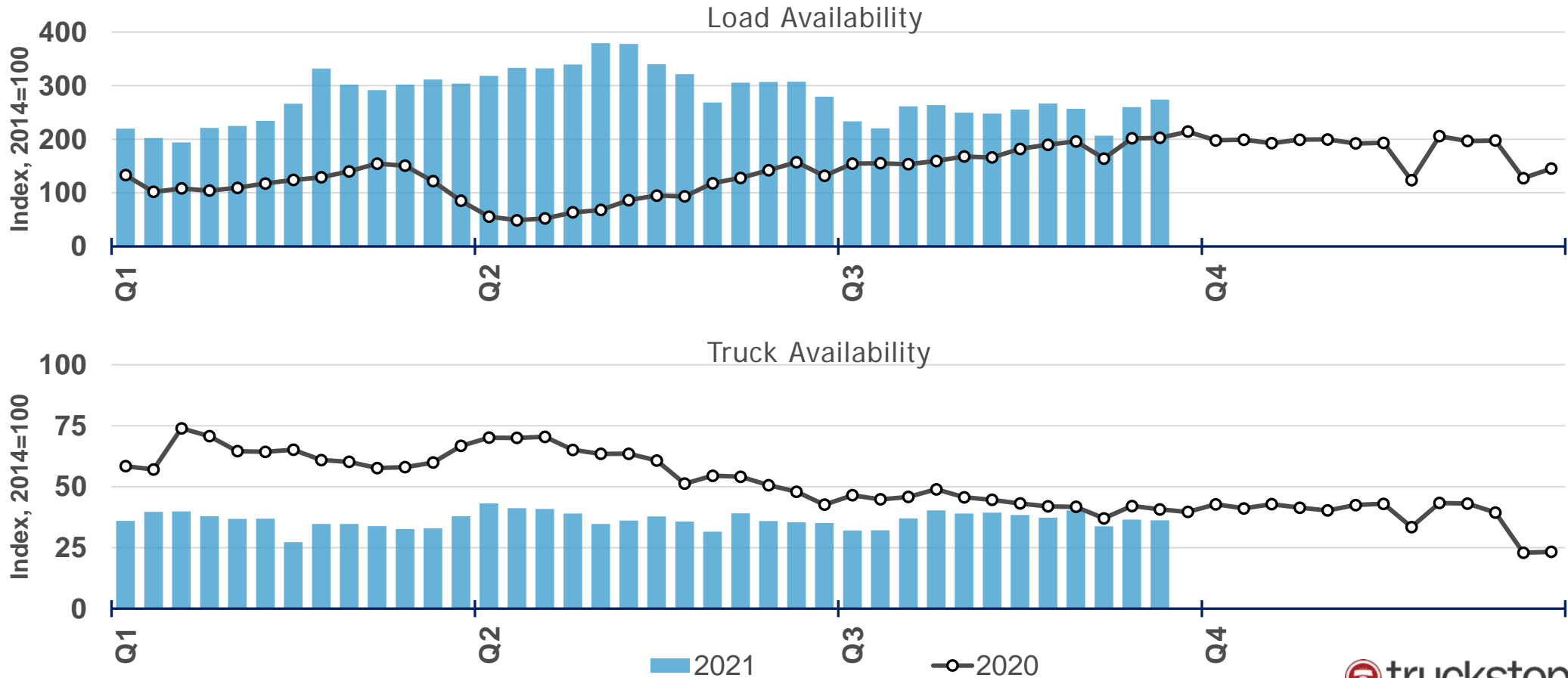


Broker-posted spot rates, including fuel (\$/loaded mile).

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Spot Market: Supply vs Demand – Total

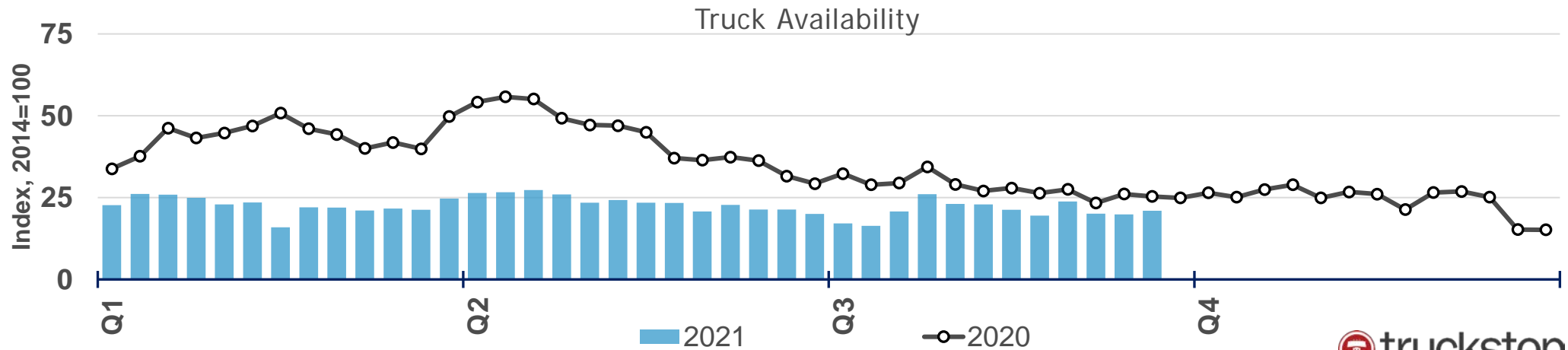
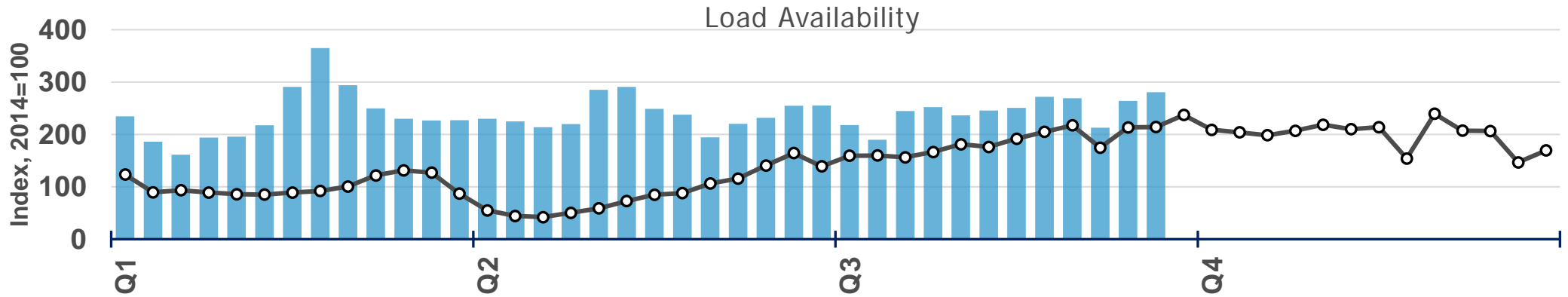


Number of loads and trucks posted on the Truckstop.com load board. Data is indexed to 2014.

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Spot Market: Supply vs Demand – Dry Van

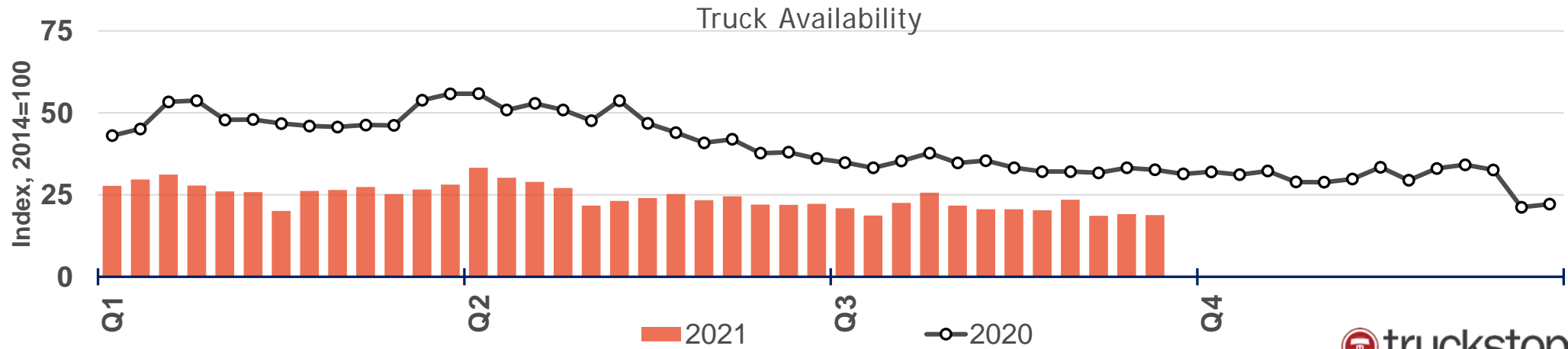
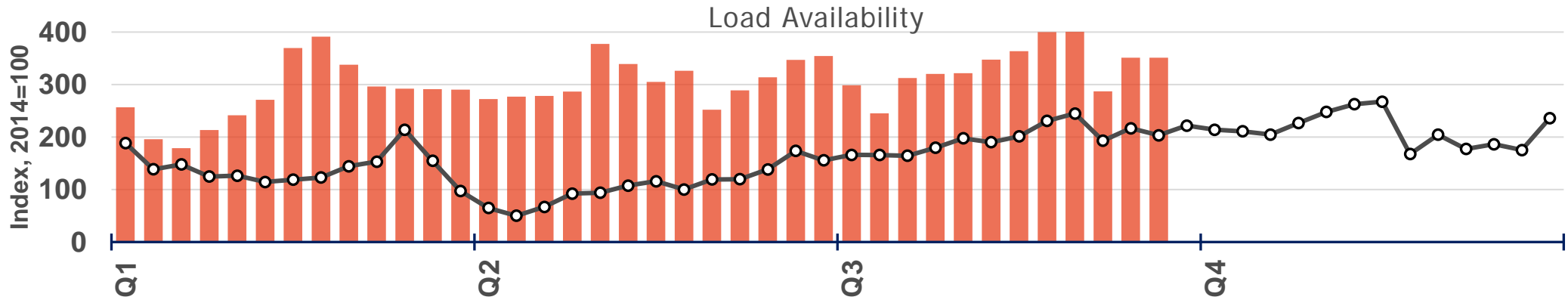


Number of loads and trucks posted on the Truckstop.com load board. Data is indexed to 2014.

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Spot Market: Supply vs Demand – Ref. Van

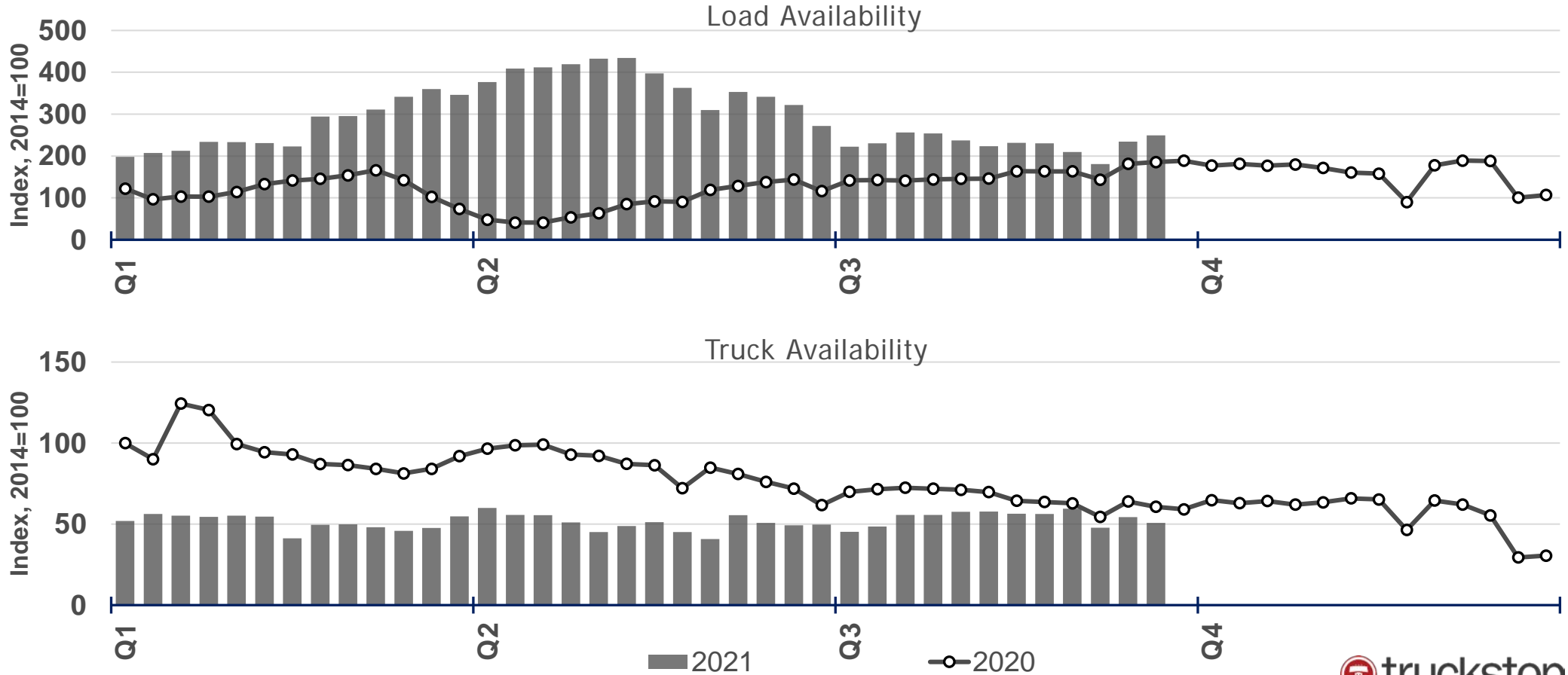


Number of loads and trucks posted on the Truckstop.com load board. Data is indexed to 2014.

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Spot Market: Supply vs Demand – Flatbed

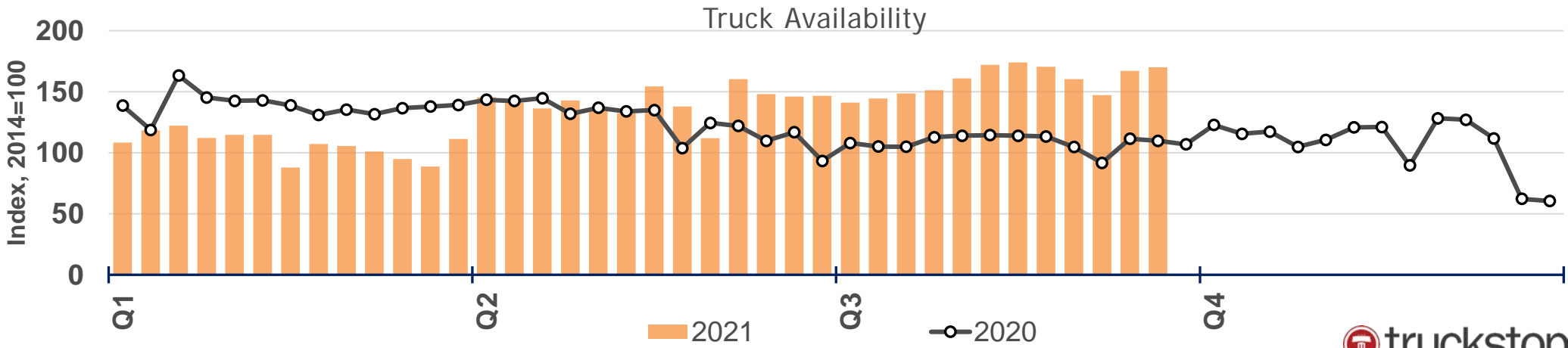
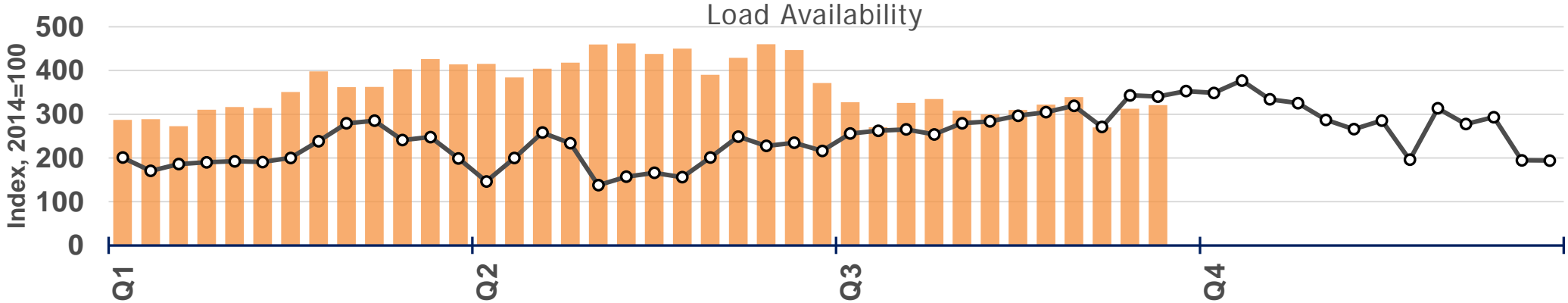


Number of loads and trucks posted on the Truckstop.com load board. Data is indexed to 2014.

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Spot Market: Supply vs Demand – Specialized



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