



ECONOMIC INSIGHTS

FEBRUARY 2025

LMI

PMI

Retail Sales

Cass Freight Index

LTL Producer Price Index

OTRI

ATA Truck Tonnage

DAT National Rates

Import TEUs

Diesel Price

Monthly GDP



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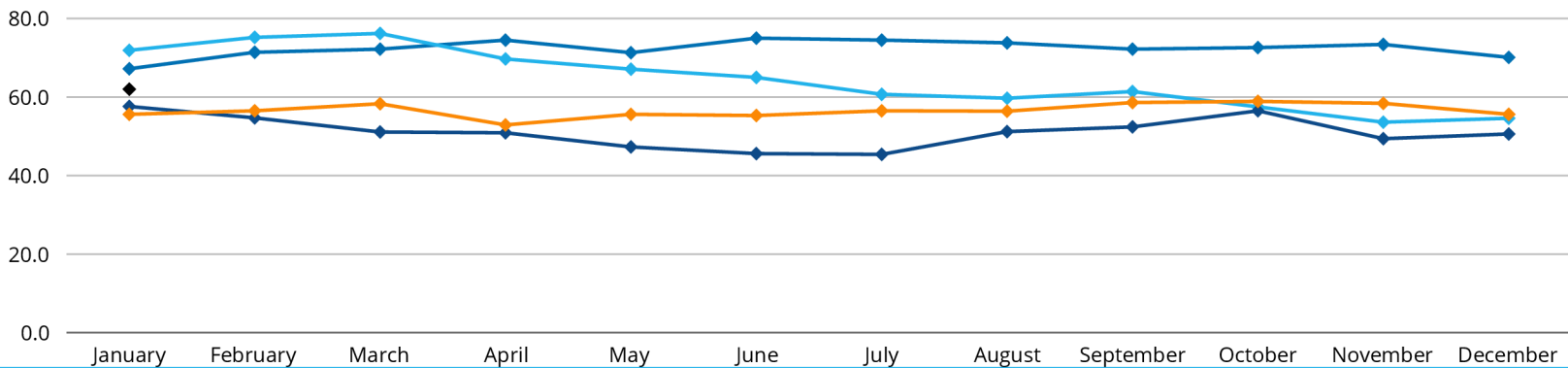
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Logistics Manager's Index (LMI)

Source: The-LMI.com

The Logistics Managers' Index (LMI) rose to 62.0 in January, indicating its fastest growth since June 2022 due to strong post-holiday inventory replenishment and increased demand in warehousing and transportation. Inventory levels increased to 58.5, with inventory costs up to 70.3. Warehousing utilization reached 61.7, while transportation prices surged to 66.8, the highest since April 2022. Transportation capacity tightened slightly to 52.0, suggesting a more constrained freight market.

■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025

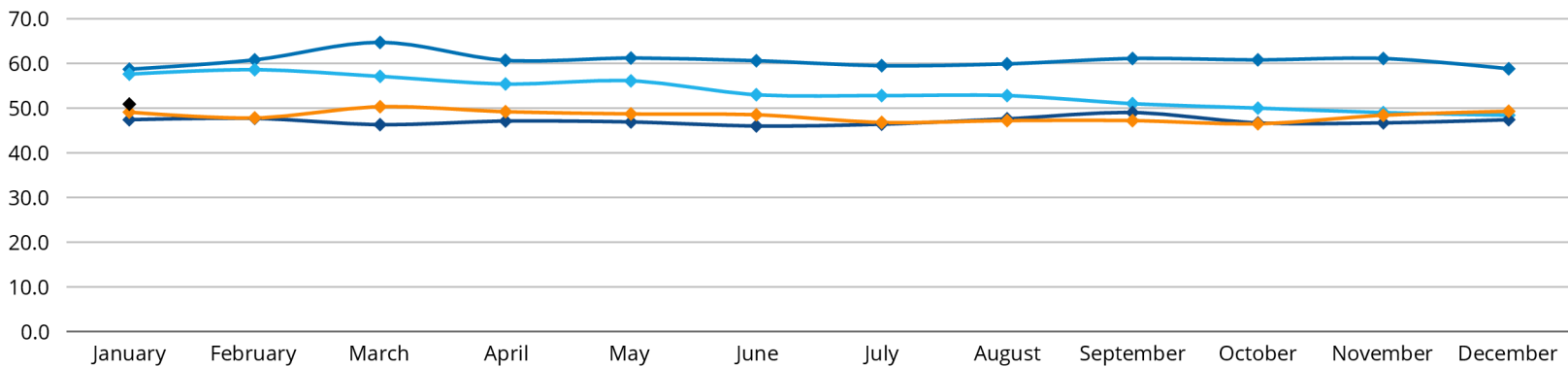


Purchasing Manager's Index: Manufacturing PMI

Source: The Institute for Supply Management (ISM)

The Manufacturing PMI® increased to 50.9%, indicating a return to expansion after 26 months of contraction. This growth was fueled by rises in New Orders (55.1%) and Production (52.5%), reflecting improved demand and output. The Employment Index also showed expansion at 50.3%. However, challenges remain with Inventories contracting to 45.9% and Backlog of Orders declining to 44.9%.

■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025

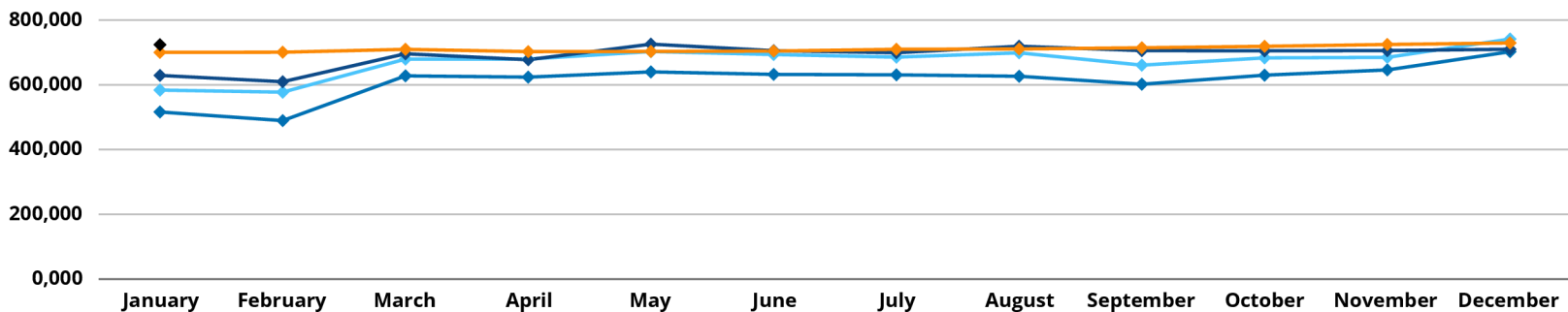


Monthly Retail Sales

Source: Census.gov

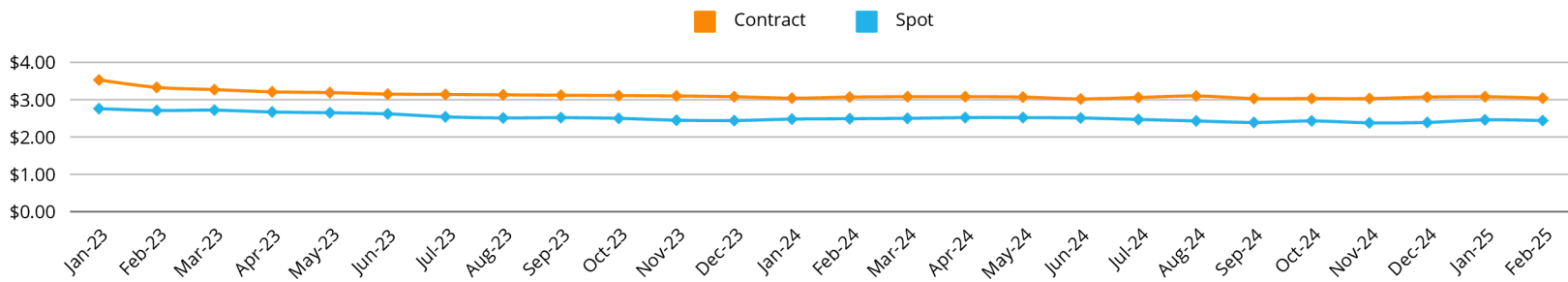
U.S. retail and food services sales were \$723.9 billion, a 0.9% decrease from December 2024 but a 4.2% increase from January 2024. This month-over-month drop, the largest in nearly two years, is linked to severe winter weather, reduced post-holiday spending, and economic uncertainties. However, year-over-year growth reflects consumer spending resilience, with sectors like motor vehicle dealers up 6.4% and food services rising 5.4% from January 2024, indicating ongoing demand.

■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025



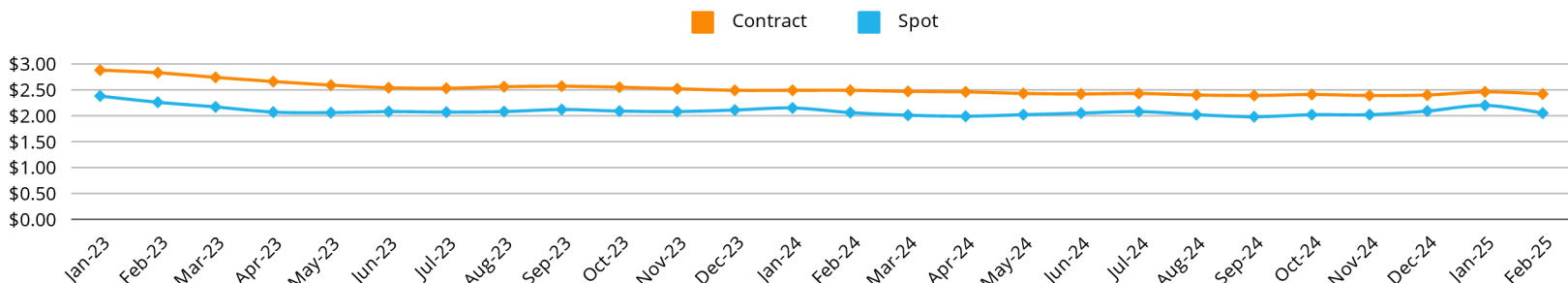
National Flatbed Rates

Source: DAT



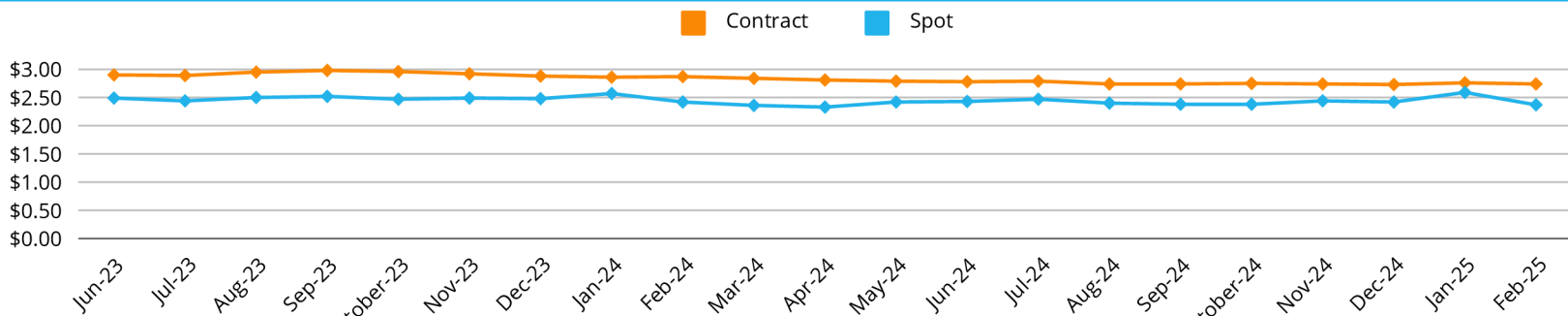
National Van Rates

Source: DAT



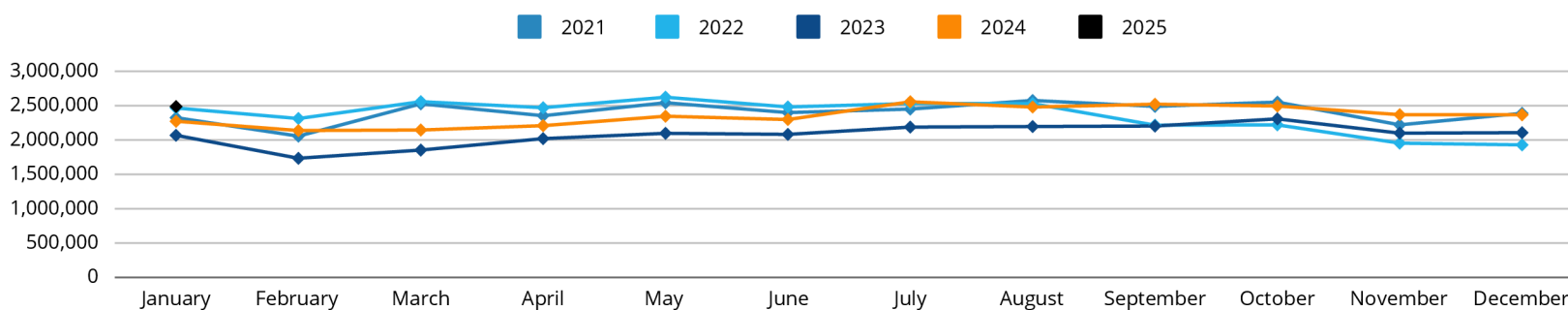
National Reefer Rates

Source: DAT



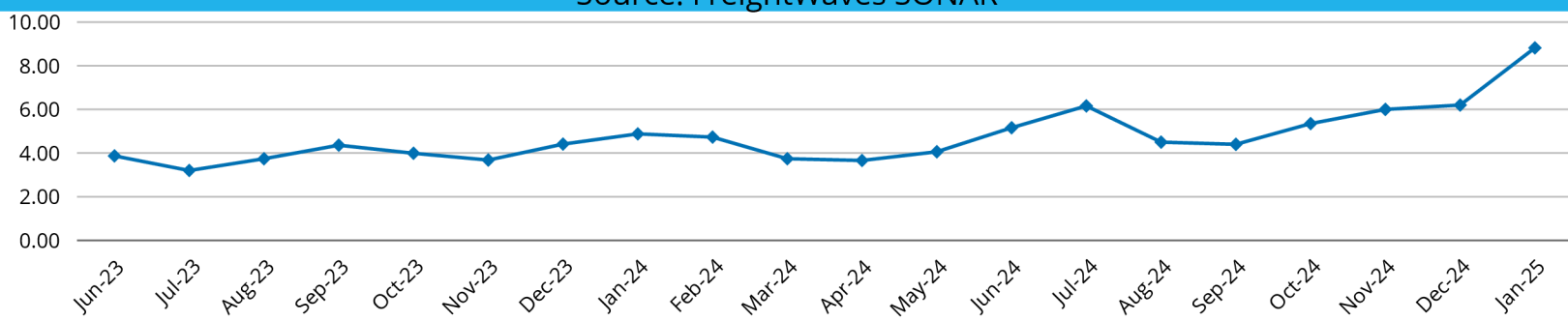
Import TEUs

Source: Descartes



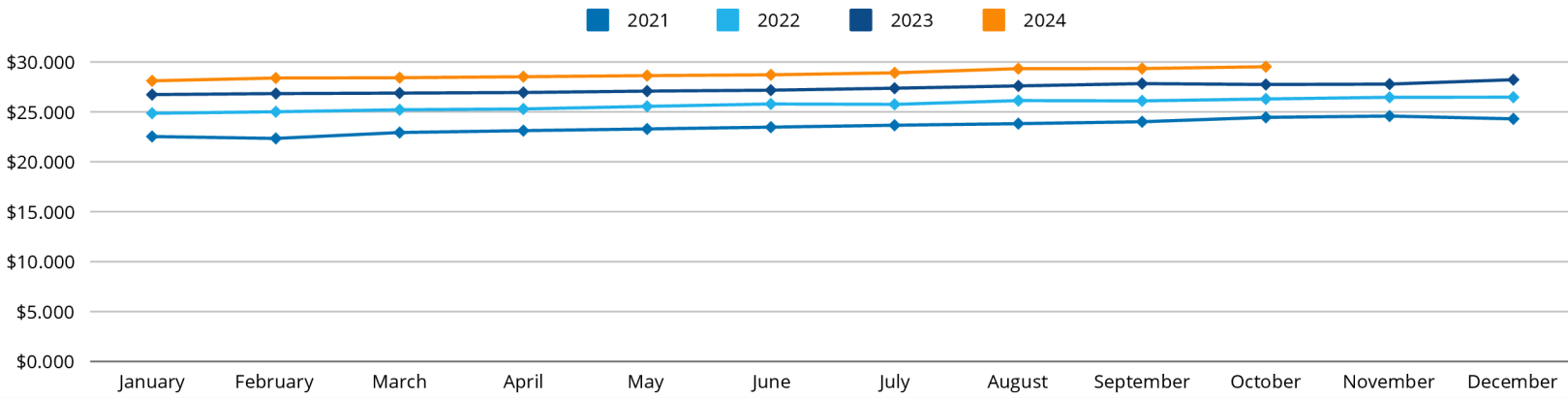
Outbound Tender Rejection Index (OTRI)

Source: FreightWaves SONAR



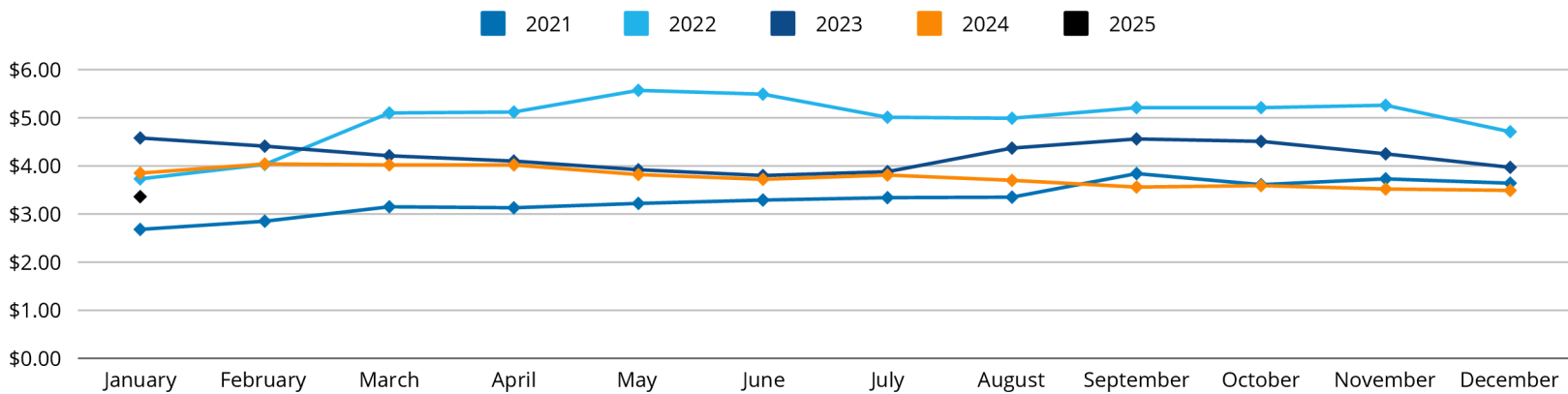
Monthly GDP (In Trillions)

Source: Bureau of Economic Analysis



US Diesel Price

Source: US EIA



Future Outlook

Shippers face a shifting freight landscape where declining shipment volumes contrast with rising transportation costs, making strategic planning more critical than ever. The Cass Freight Index reported an 8.2% year-over-year drop in shipments, while freight rates climbed, signaling tightening capacity. The LTL Producer Price Index jumped 5.7% month-over-month, driven by rising fuel costs, labor challenges, and winter disruptions. As demand softens, shippers must stay proactive—closely monitoring transportation expenses, optimizing routing strategies, and leveraging seasonal slowdowns to renegotiate contracts before costs rise further.

The Logistics Managers' Index (LMI) surged to 62.0, pointing to rising inventory levels and growing warehousing costs as businesses strategically position goods closer to consumers. Warehouse utilization expanded, while storage prices hit their highest levels since 2023, indicating tightening capacity that could further constrain Q2 operations. To stay ahead of rising costs, shippers should explore long-term storage solutions, diversify distribution networks, and secure flexible warehousing options to maintain supply chain stability.

While retail sales dipped 0.9% month-over-month, the 4.2% annual increase underscores resilient consumer demand, supporting a gradual freight recovery. The Manufacturing PMI returned to expansion at 50.9%, as new orders and production ramped up, hinting at a potential rebound in freight volumes. With private fleet expansion ongoing and truck tonnage holding steady, shippers must prioritize capacity flexibility and balance contract and spot market strategies to stay competitive.



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