



ECONOMIC INSIGHTS

JULY 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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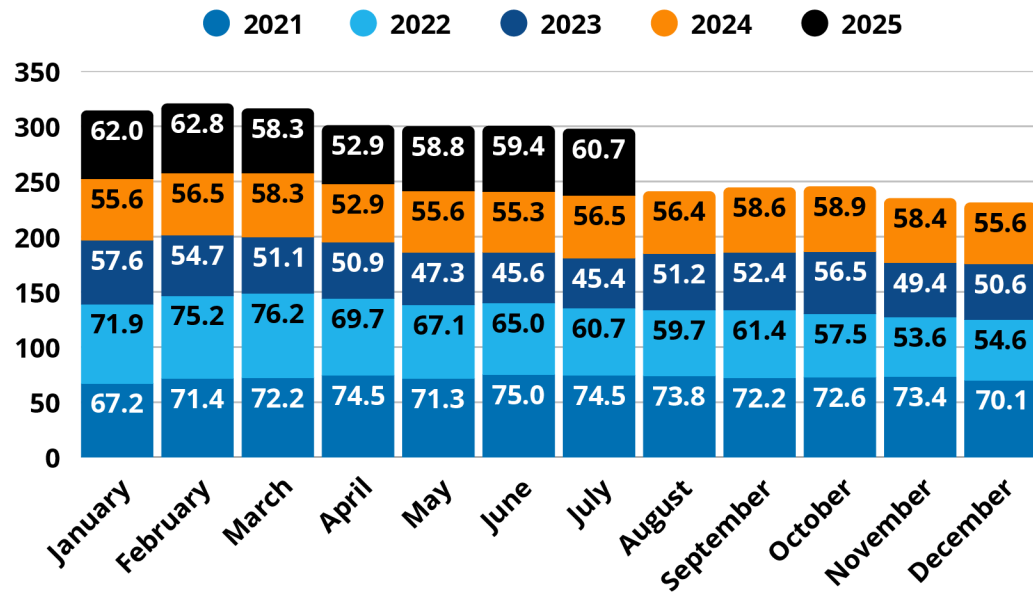


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Logistics Manager's Index (LMI)

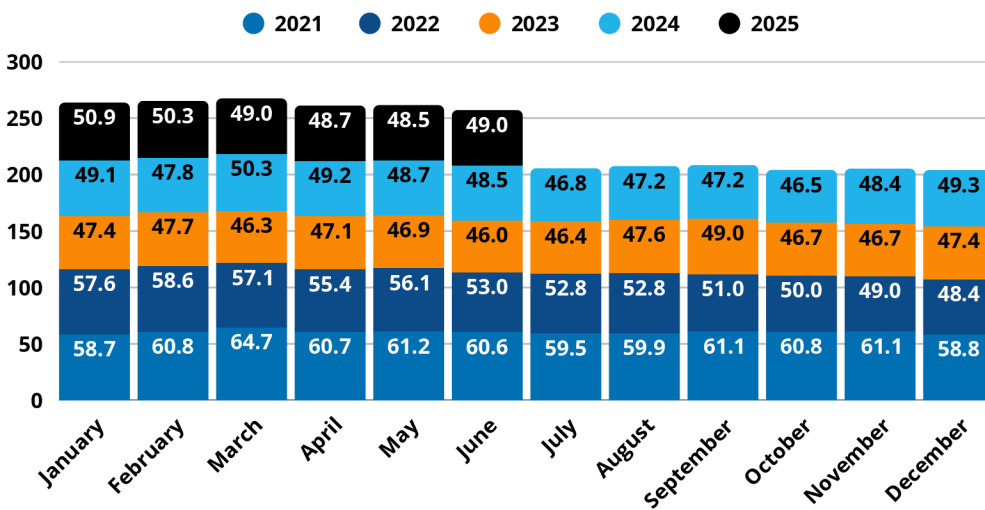
Source: The-LMI.com

The LMI rose to 60.7 in June, up 1.3 points, signaling strong supply chain growth. Inventory levels surged to 59.8, while costs spiked to 80.3, indicating expensive restocking. Warehousing capacity fell to 47.8, showing tighter storage conditions. Transportation stayed steady: prices climbed, capacity held, and utilization was flat. This stability in transportation contrasts sharply with the fluctuations in other areas. Analysts predict these trends may continue into the next quarter, reflecting ongoing challenges and opportunities in the logistics sector.



Purchasing Manager's Index: Manufacturing PMI

Source: The Institute for Supply Management (ISM)

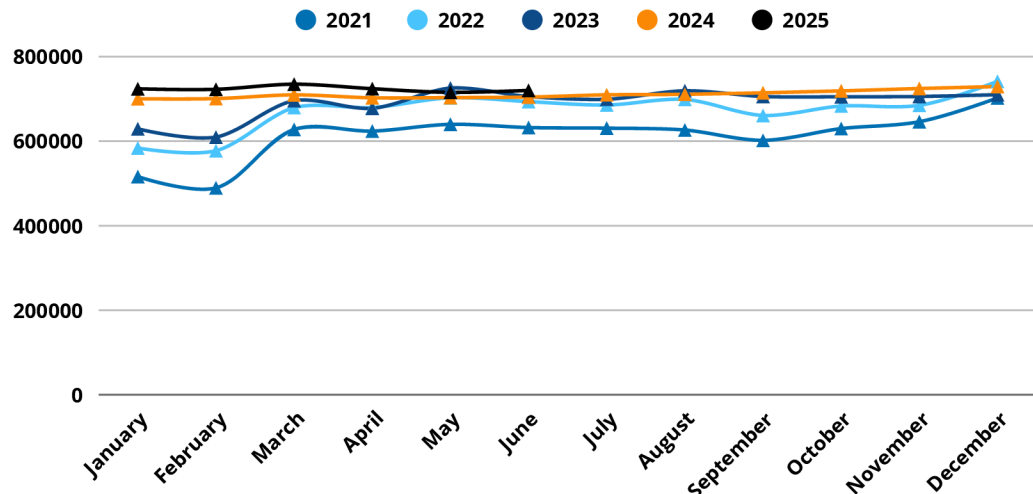


June's Manufacturing PMI edged up to 49.0%, signaling slower contraction, even as new orders dropped to a three-month low (46.4%). Production recovered into growth territory (50.3%), though employment fell further (45.0%), keeping hiring subdued. Supplier deliveries eased, but raw material costs climbed to 69.7%, marking ongoing inflation. The mixed signals argue for cautious capacity planning and continued monitoring of input cost pressures.

Monthly Retail Sales

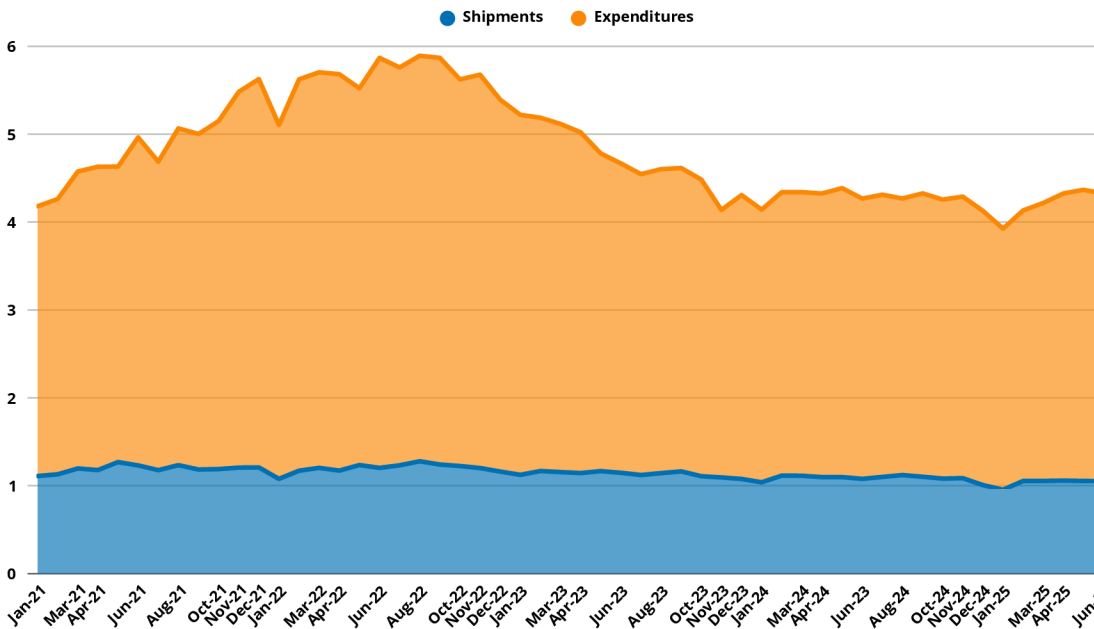
Source: Census.gov

U.S. retail and food service sales rose 0.6% in June to \$720.1 billion, recovering from two months of decline. Year-over-year growth was 3.9%, mainly due to nonstore retailers and food services. Core retail (excluding autos and gas) increased by 0.5%, indicating strong consumer demand. This suggests resilience for shippers ahead of back-to-school and holiday inventory builds, though tariff-related price volatility may still occur.



Cass Freight Index

Source: Cass Information Systems

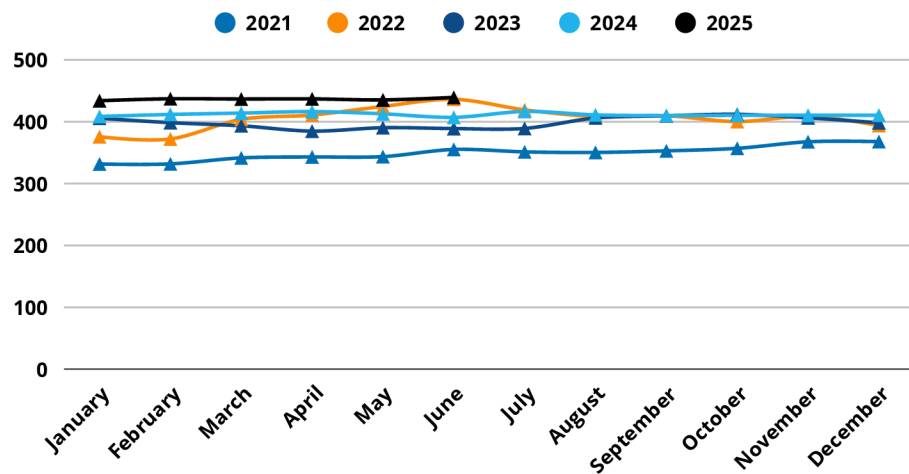


Cass data for June reveals that shipments decreased by 0.2% month-over-month and 2.4% year-over-year, marking 29 consecutive monthly declines. Expenditures fell by 1.2% month-over-month but rose by 2.6% year-over-year. Inferred freight rates increased by 5.2% year-over-year, indicating a shift to truckload and higher pricing. These trends highlight ongoing cost pressures amid subdued demand.

LTL Producer Price Index

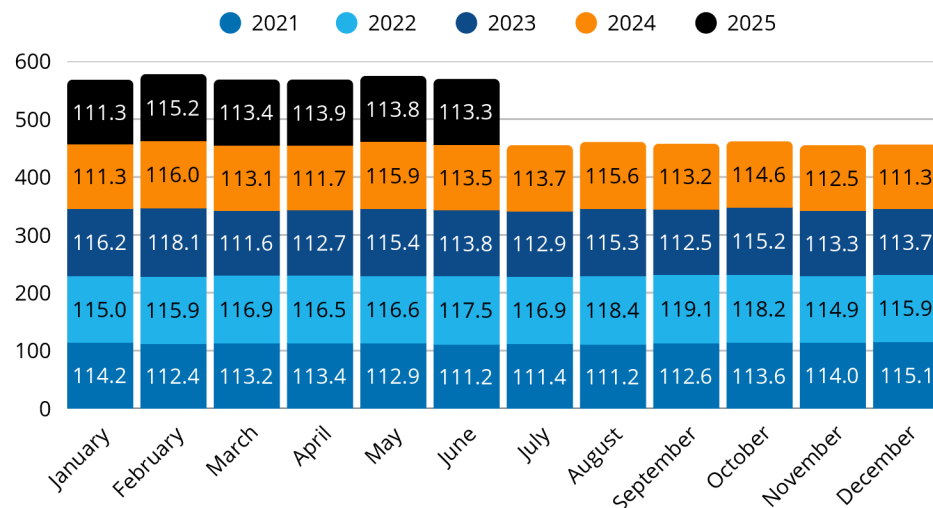
Source: Bureau of Labor Statistics

LTL pricing remained elevated in May, with the Producer Price Index for long-distance LTL trucking registering at 437.0. This marks a modest increase from April and a 4.9% rise year-over-year, indicating ongoing upward pressure on rates despite subdued overall freight demand. Factors such as labor costs, regional imbalances, and capacity constraints in key shipping lanes continue to support pricing strength in the LTL segment. Shippers should remain attentive to contract terms and explore multimodal solutions to help offset persistent cost inflation in this space.



Truck Tonnage

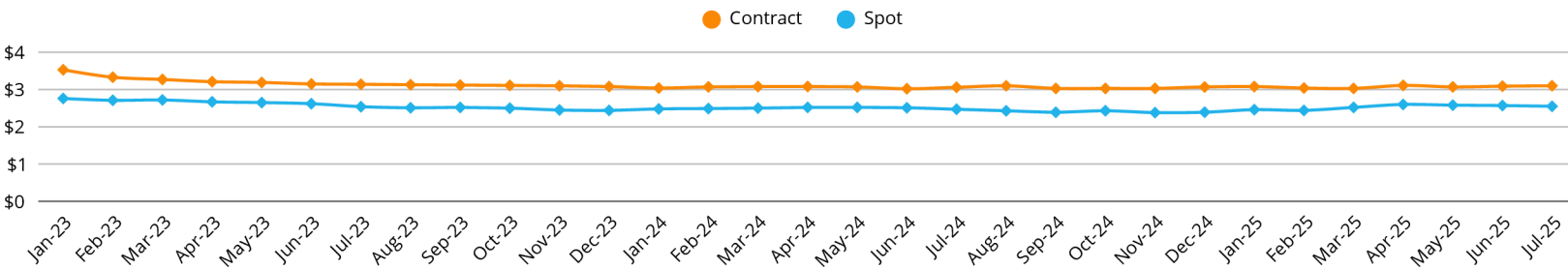
Source: American Trucking Association



Freight tonnage softened in June, with a 0.4% month-over-month decline and a slight year-over-year dip. After a strong Q2 start, flat quarterly performance (+0.2%) highlights a sideways market. Seasonally unadjusted tonnage also slowed, down to 114.9 from 116.2. With freight volumes drifting and capacity lingering, shippers should remain agile and align capacity strategies to evolving market conditions.

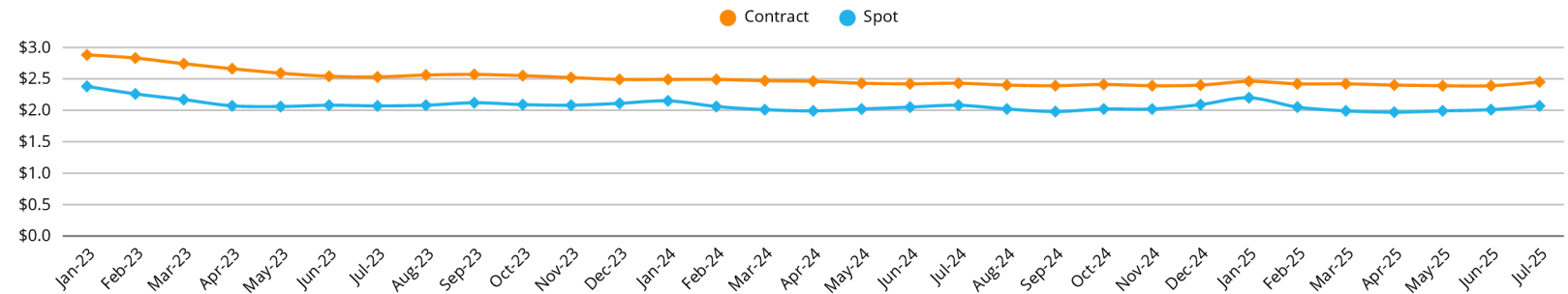
National Flatbed Rates

Source: DAT



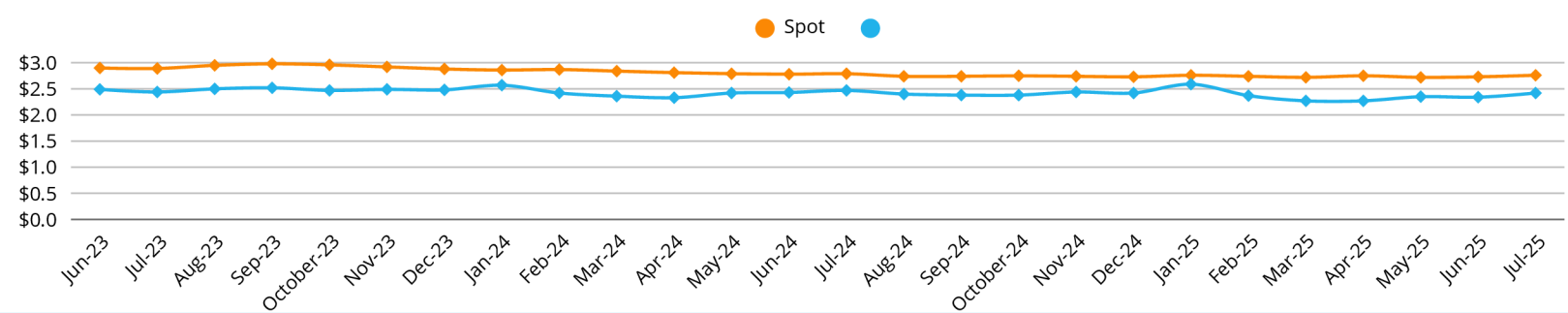
National Van Rates

Source: DAT



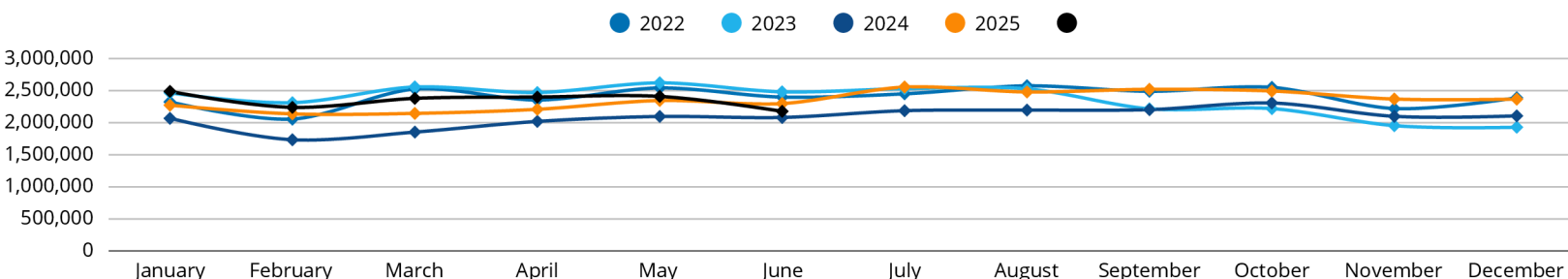
National Reefer Rates

Source: DAT



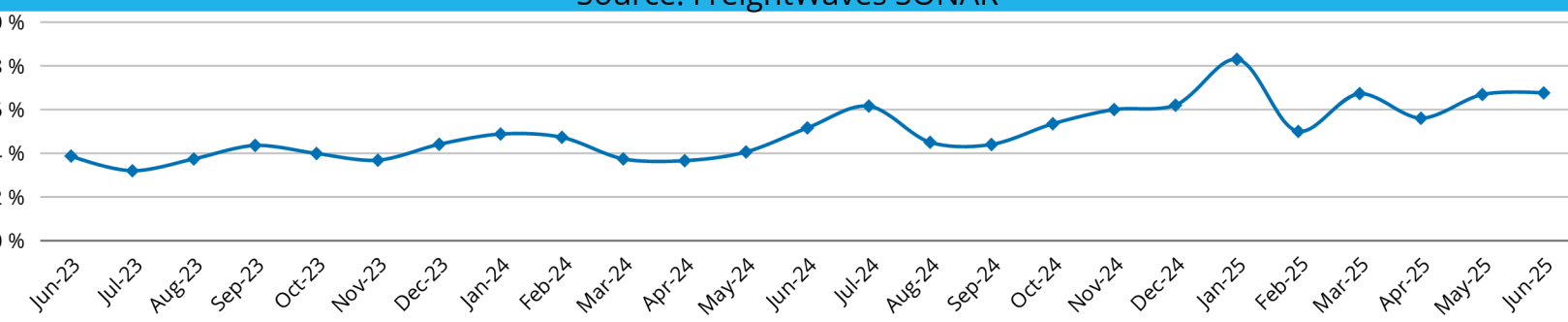
Import TEUs

Source: Descartes



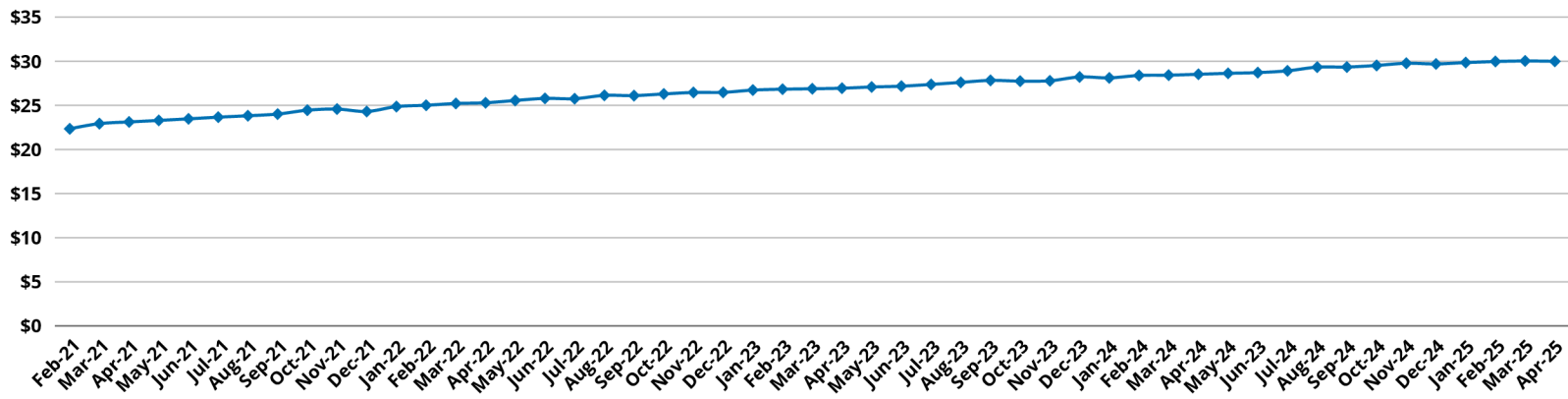
Outbound Tender Rejection Index (OTRI)

Source: FreightWaves SONAR



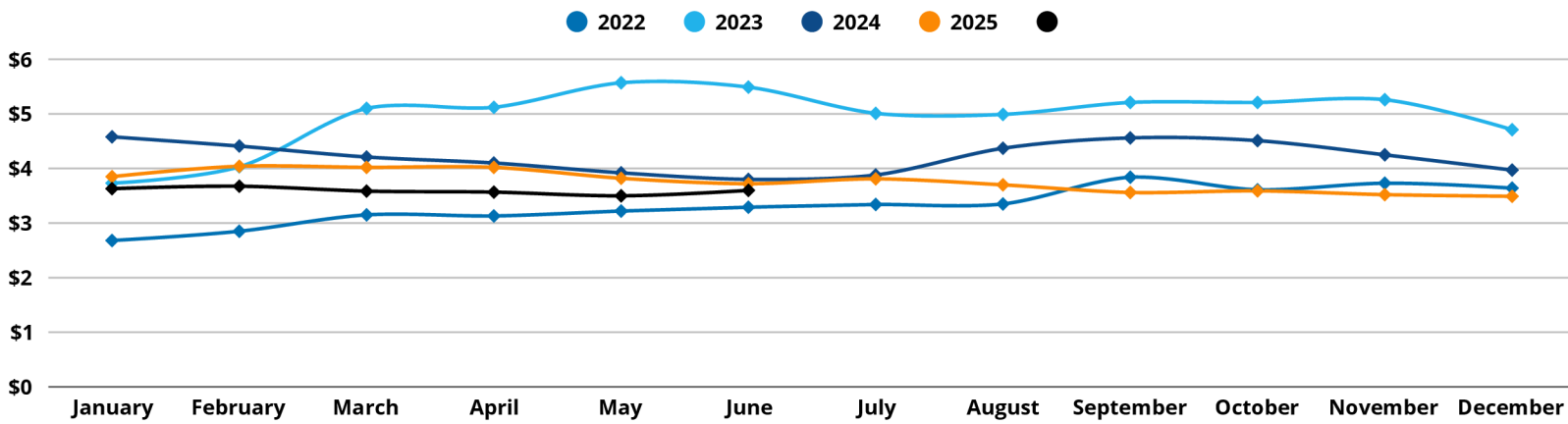
Monthly GDP (In Trillions)

Source: Bureau of Economic Analysis



US Diesel Price

Source: US EIA



Future Outlook

As Q3 begins, logistics professionals are navigating mixed signals across the freight landscape. Retail demand remains steady, but rising transportation costs and uneven freight volumes point to a market still seeking equilibrium. The Logistics Managers' Index suggests continued supply chain expansion, driven by resilient inventory activity and tighter warehousing conditions. Meanwhile, manufacturing shows modest improvement but hasn't regained full momentum, adding complexity to demand forecasting.

Spot rates across equipment types have leveled off, and LTL pricing continues to hold firm, suggesting a rate floor is forming. At the same time, port congestion risks are resurfacing out West, while Southeast and Midwest lanes remain fluid with capacity. With diesel costs relatively stable and the Fed's rate decisions on the horizon, cost structures and margin dynamics could shift quickly depending on macroeconomic movement.

To stay competitive, teams should focus on building flexible transportation strategies, strengthening carrier relationships, and aligning contract negotiations with current cost trends. Staying ahead means watching regional trends, evaluating mode mix options, and fine-tuning routing guides in response to market shifts—all essential to maintaining service and cost efficiency in the months ahead.



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