ECONOMIC INSIGHTS

MARCH 2026

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- 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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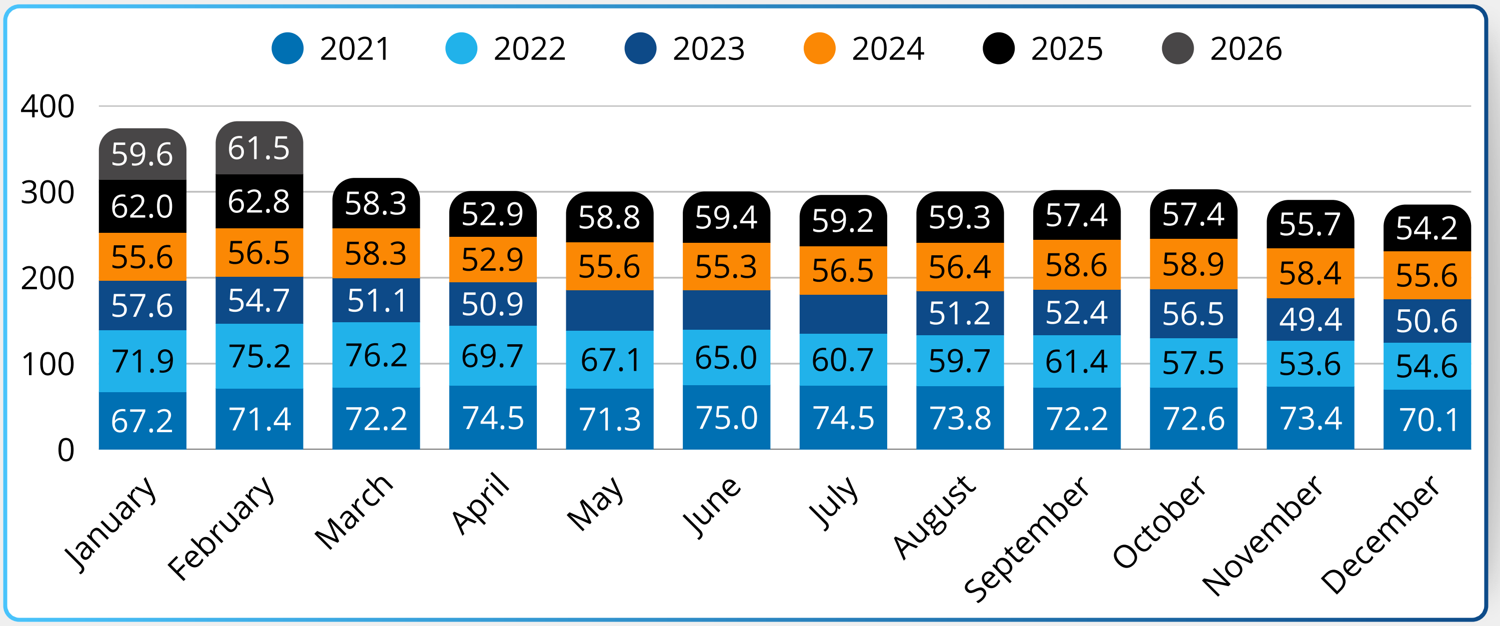
Logistics Manager's Index (LMI)

Source: The-LMI.com

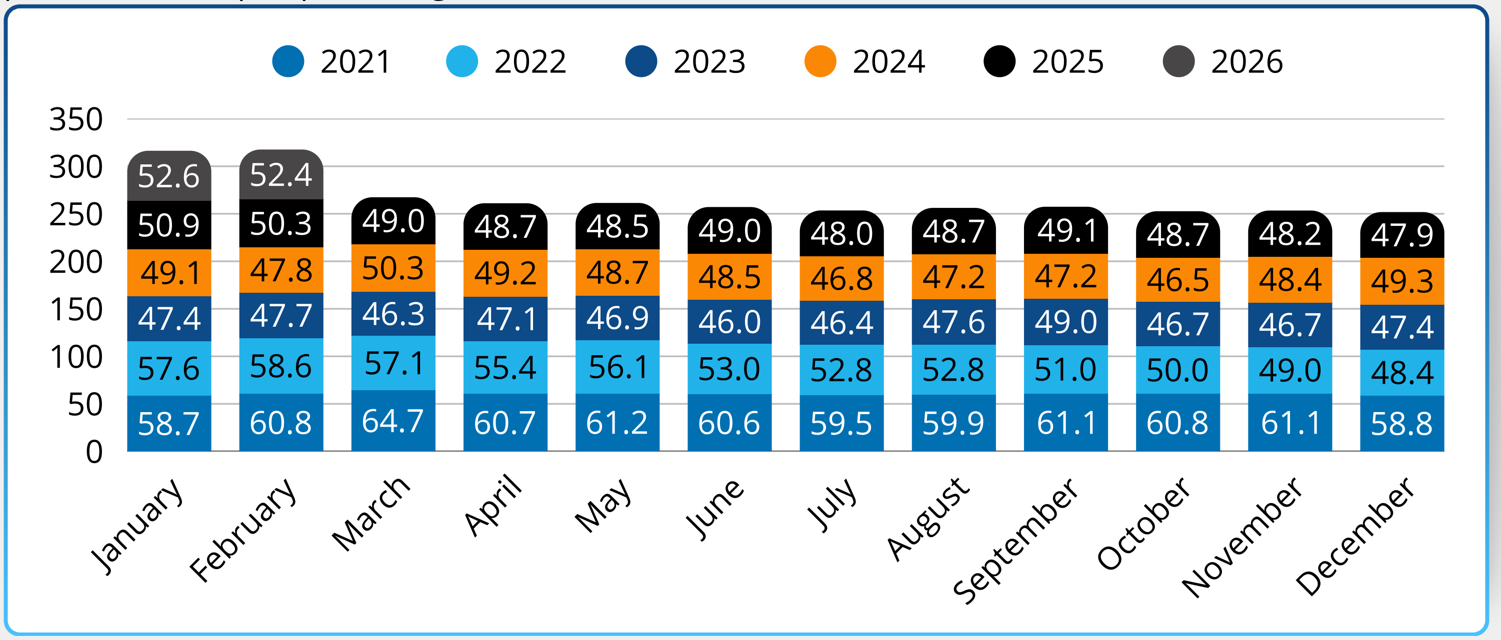
The Logistics Managers Index registered 61.5 in February, up slightly from January's 59.6 indicating solid expansion across the logistics sector. Growth remains driven by transportation pricing and utilization, while inventory levels and costs have moderated compared to last year. Firms appear to be maintaining leaner inventory strategies to manage elevated costs, resulting in more balanced warehousing conditions. Transportation capacity remains constrained, continuing to support upward pressure on pricing.



Purchasing Manager's Index: Manufacturing PMI

Source: The Institue for Supply Management (ISM)

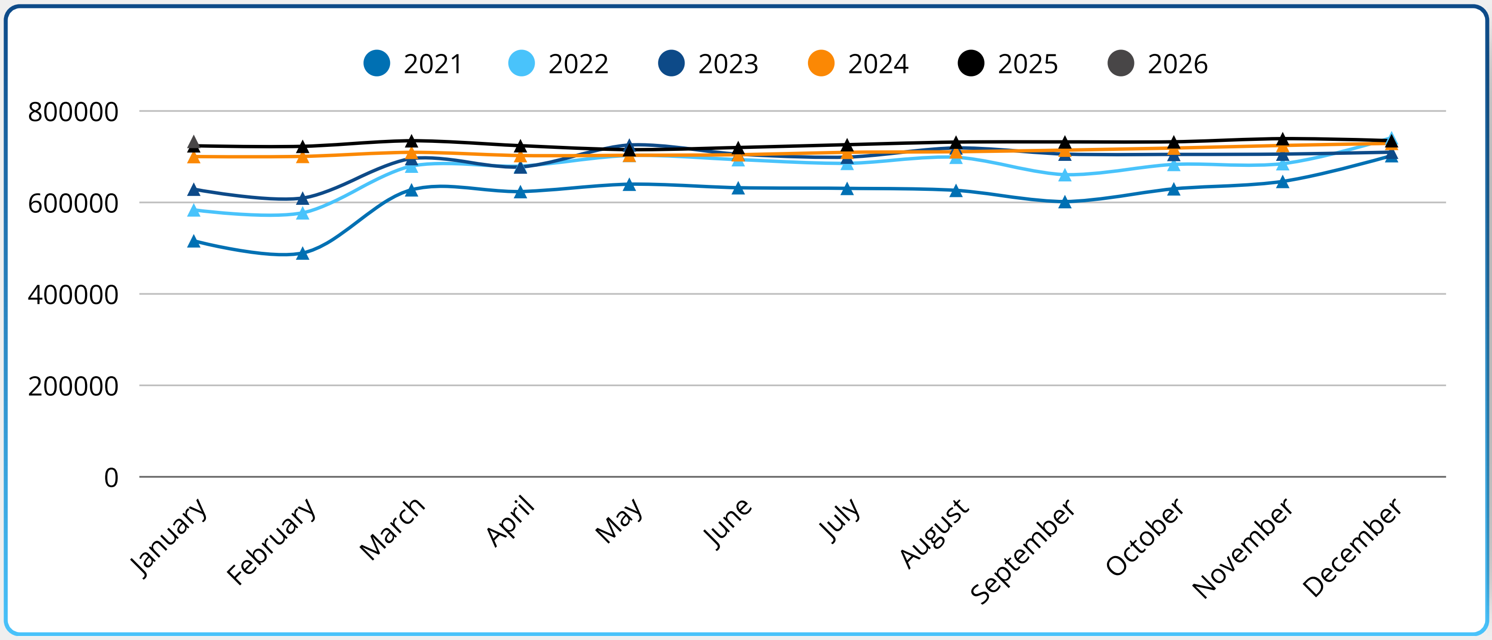
The Manufacturing PMI came in at 52.4, signaling continued expansion in the industrial sector and marking a clear improvement over prior months. Most notably, New Orders remained in expansion territory, indicating strengthening demand that typically precedes increased production and freight activity. While manufacturing output is stabilizing, hiring remains cautious and inventories are still being managed tightly. The rebound in demand suggests a potential lift in freight volumes as production ramps up heading into Q2.



Monthly Retail Sales

Source: Census.gov

Retail sales reached $733.5B in January 2026, reflecting continued strength in consumer spending. While growth has moderated compared to prior years, demand remains stable enough to support consistent freight movement across retail and distribution networks. E-commerce and food service spending continue to play a significant role in sustaining transportation demand, particularly across regional and last-mile networks.



Cass Freight Index

Source: Cass Information Systems

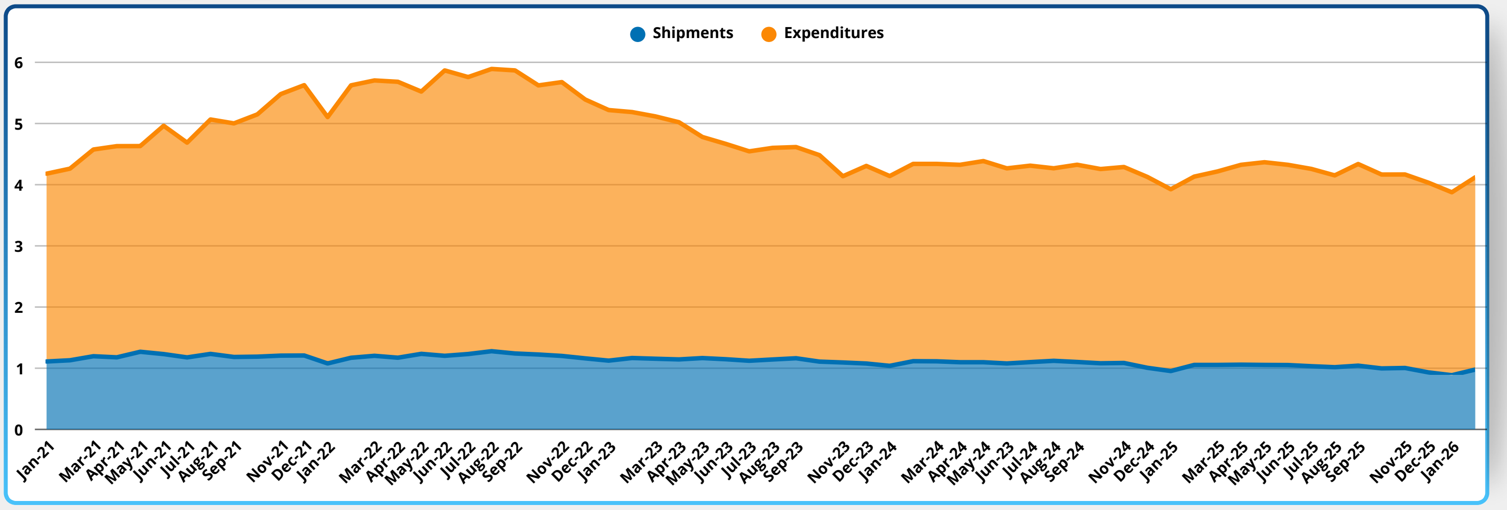
Shipments

0.978 +10.4%

Expenditures

3.143 +5.1%

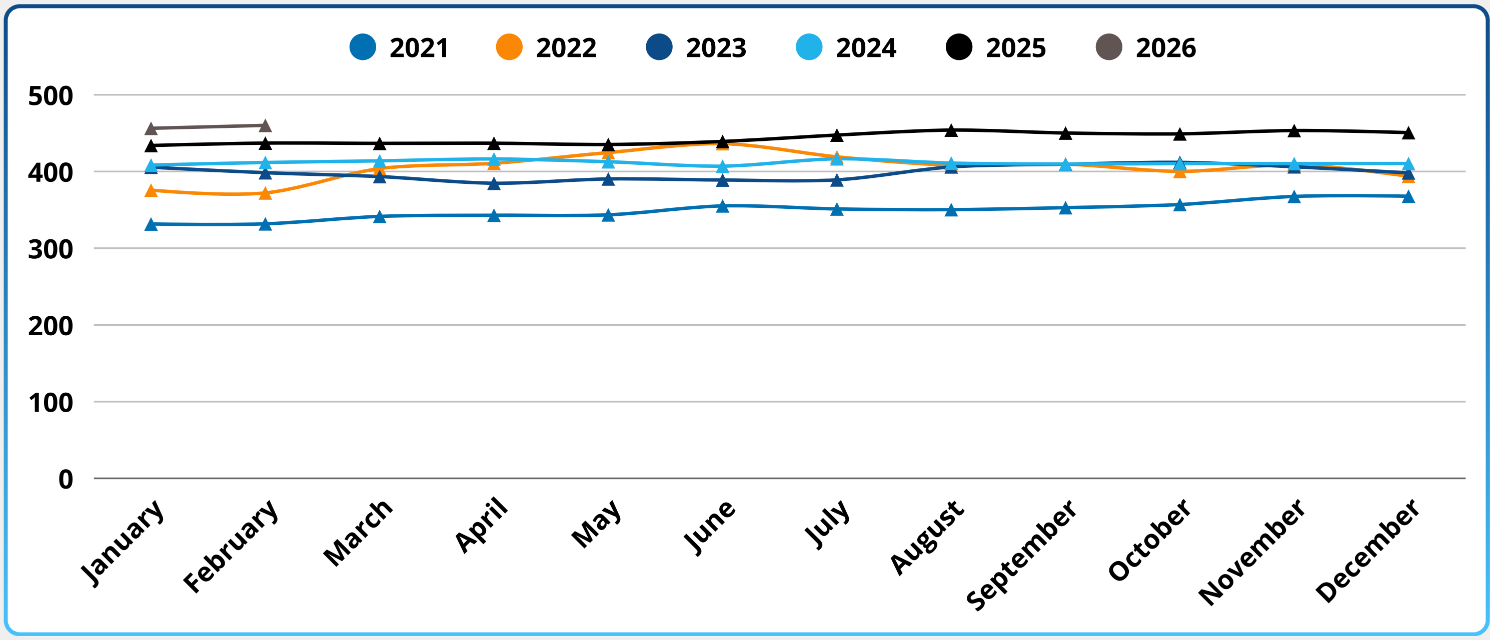
The Cass Freight Index rebounded in February, with shipments rising 10.4% month-over-month to 0.978, recovering from January's softer volumes. Despite the increase, shipment activity remains below prior-year levels, indicating continued softness across key freight sectors. Expenditures rose 5.1% month-over-month to 3.143, signaling that pricing remains firm even as volumes fluctuate. This combination suggests early signs of stabilization, with gradual capacity tightening beginning to emerge beneath the surface.



LTL Producer Price Index

Source: Bureau of Labor Statistics

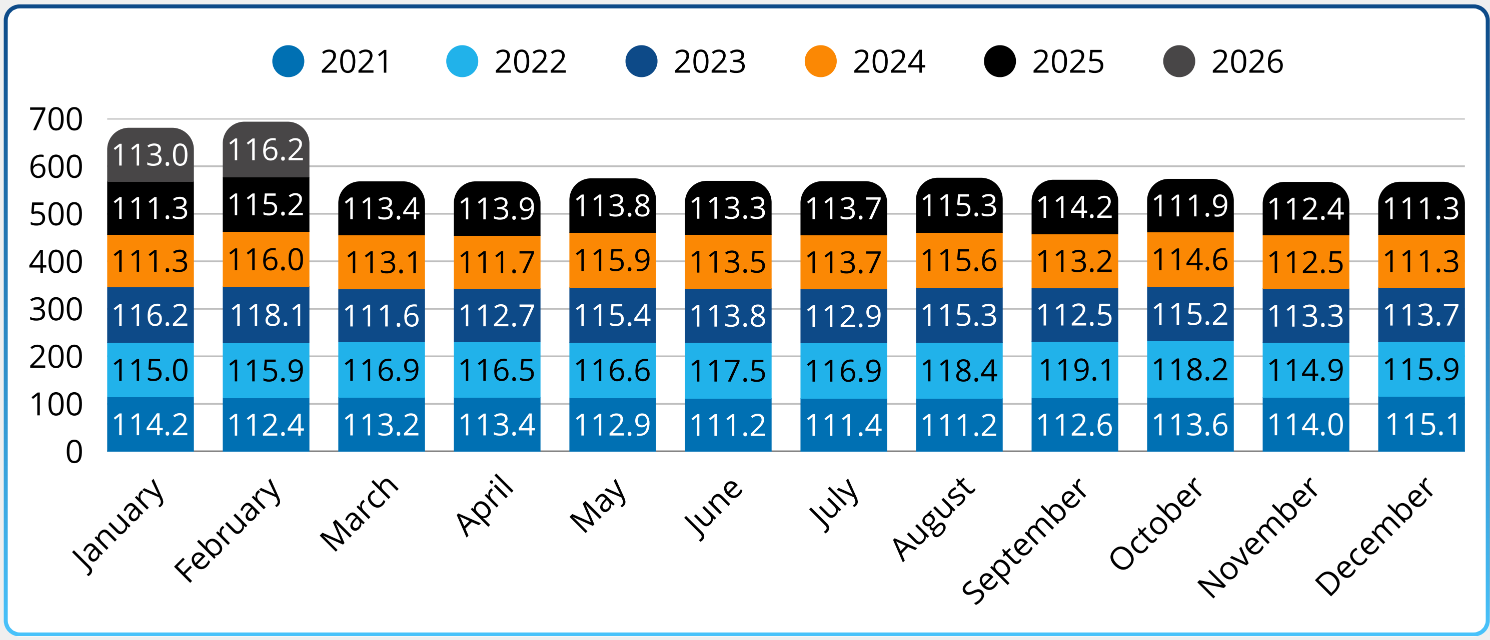
The LTL Producer Price Index climbed to 460.1 in February, continuing its upward trajectory and marking another record high. This represents sustained pricing pressure in the LTL sector, driven by elevated operating costs and disciplined carrier capacity. Even in a softer freight environment, LTL pricing remains firm, highlighting structural tightness and limited capacity expansion within the segment.



Truck Tonnage

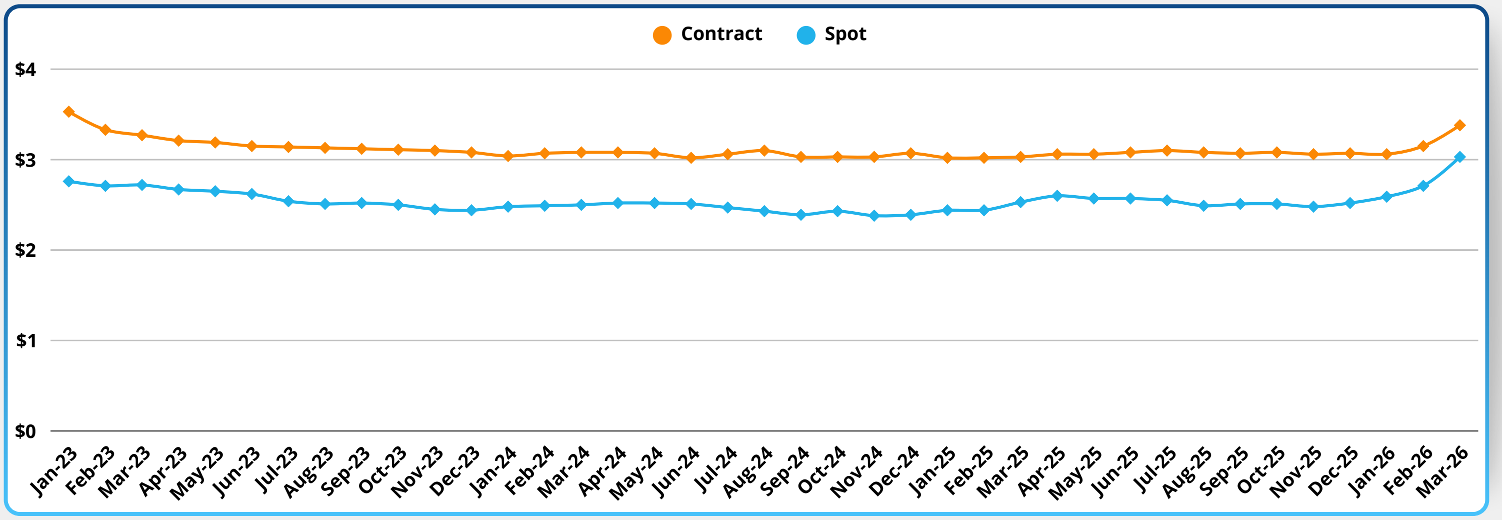
Source: American Trucking Association

Truck tonnage rose to 116.2 in February, showing modest improvement from January and signaling stable freight demand within core trucking markets. Year-over-year gains remain limited, reinforcing the narrative of a flat but stable freight environment. Retail and construction activity continue to support tonnage levels, while manufacturing softness remains a limiting factor for stronger growth.



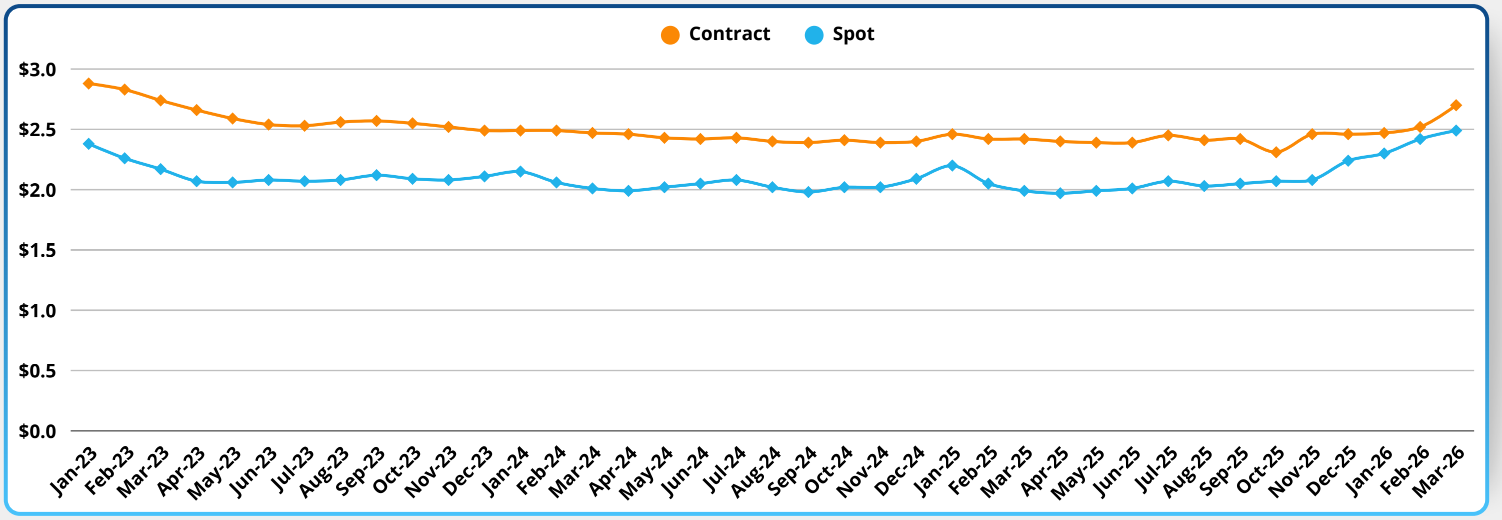
National Flatbed Rates

Source: DAT



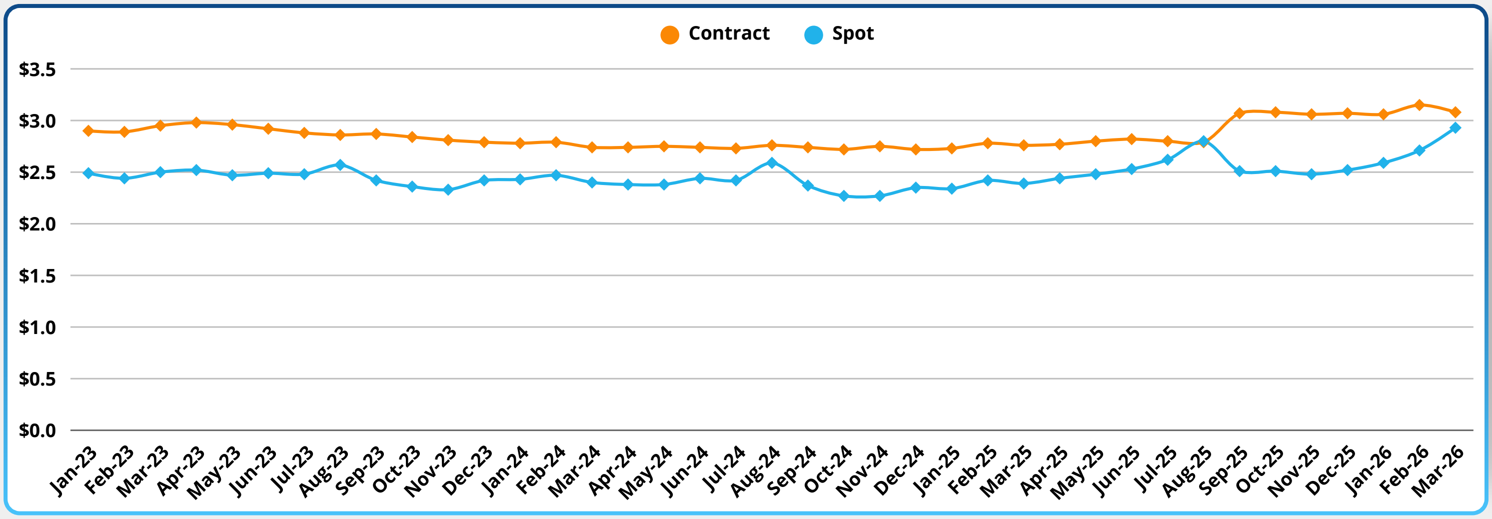
National Van Rates

Source: DAT



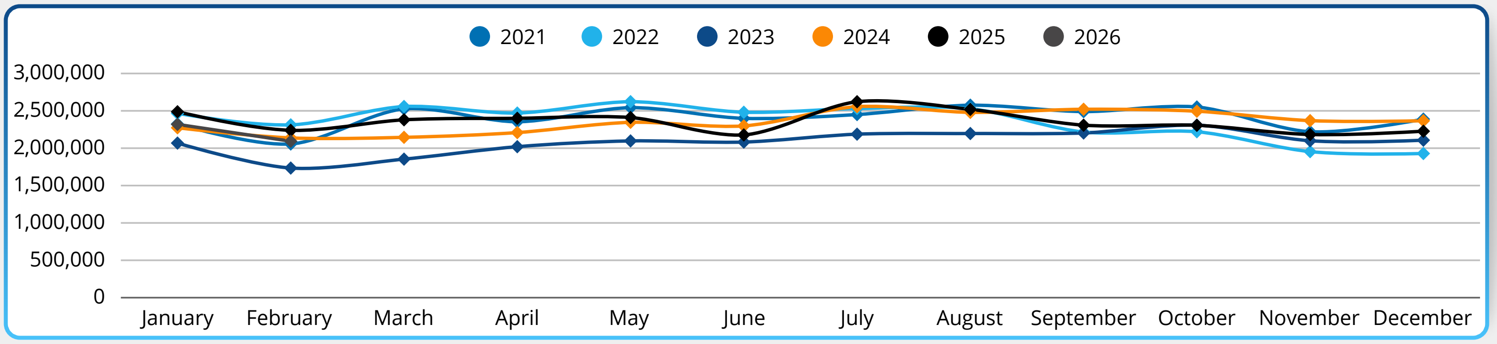
National Reefer Rates

Source: DAT



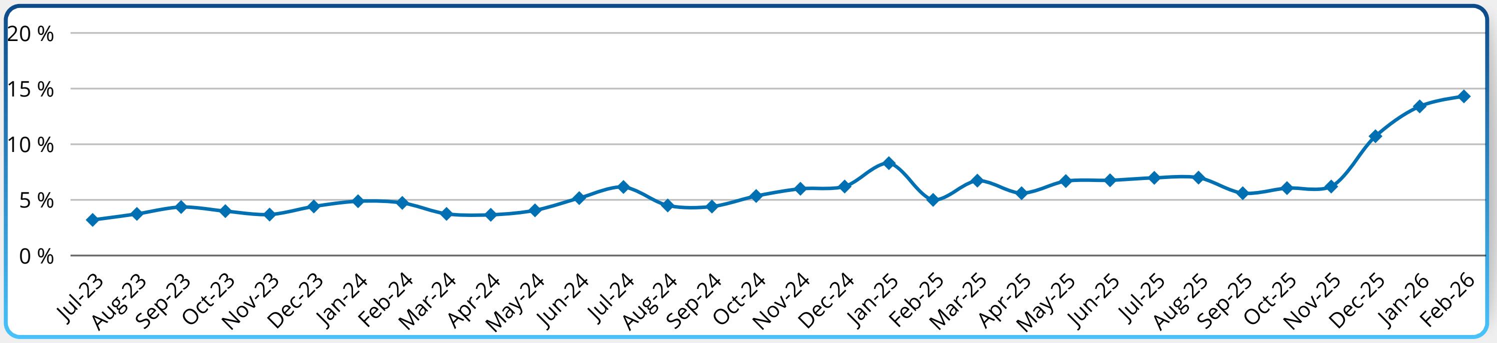
Import TEUs

Source: Descartes



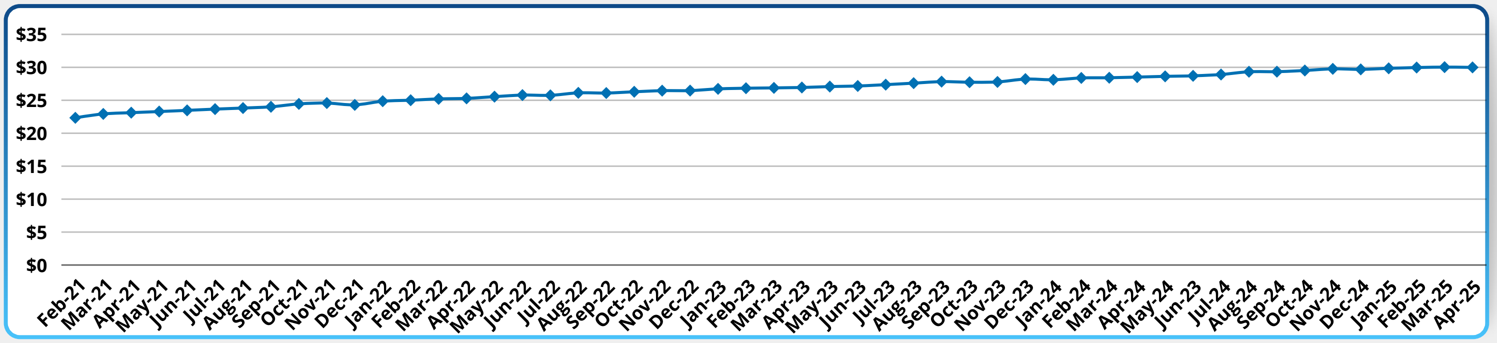
Outbound Tender Rejection Index (OTRI)

Source: FreightWaves SONAR



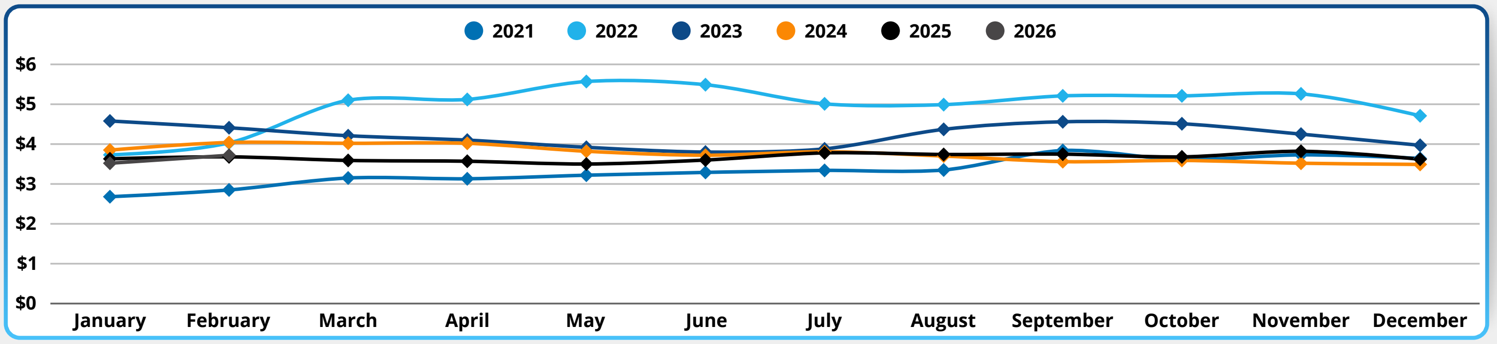
Monthly GDP (In Trillions)

Source: Bureau of Economic Analysis



US Diesel Price

Source: US EIA



Future Outlook

As we move further into 2026, the freight market continues working through the final stages of its recent downturn. Import volumes have normalized following the early-year push, while truckload markets remain balanced as carriers and shippers adjust to current demand levels.

One encouraging signal is manufacturing, where both **output and new orders have now expanded for a second consecutive month** after nearly three years of contraction. If sustained, this trend could begin to tighten capacity and shift pricing dynamics as we move deeper into Q2.

Shipper Playbook for the Next 30–90 Days

Strategy Focus	Action
Lock in Capacity	Secure core lanes while the market remains balanced
Prepare for Demand Shift	Align teams for emerging volume increases
Eliminate Cost Leakage	Tighten accessorials, dwell, and execution discipline
Run Modes Independently	Treat TL, LTL, and specialized as distinct markets

What We're Watching

Indicator	Why It Matters
Manufacturing Momentum	New Orders expansion signals future freight demand growth
Inventory Positioning	Restocking behavior will drive warehousing and trucking demand
Carrier Capacity Discipline	Firm rates despite soft volumes signal tightening conditions
Consumer Spending Trends	Retail and e-commerce continue to anchor freight demand

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