

JARRETT SUPPLY CHAIN REPORT



MARKET

- The Logistics Managers' Index returned a 57.3 reading for available transportation, showing capacity growing faster than pricing. That was 4.7 percentage points higher than in July and the highest capacity reading since May 2024. ([FreightWaves September 2025](#))
- U.S. truck pricing rose in August despite what carriers referred to as a continuing soft freight market, a sign that shippers are balancing current capacity needs and future demand. ([JOC September 2025](#))
- Despite an influx of new orders, U.S. manufacturing activity was relatively flat in August compared to the previous month as tariff uncertainty loomed. ([TruckingDive September 2025](#))
- The Motor Carrier Safety Selection Standard Act, reintroduced by U.S. Rep Pete Stauber, requires that brokers and shippers only contract with trucking companies that are registered with the FMCSA, hold a valid operating authority and meet the required insurance thresholds. ([FreightWaves September 2024](#))
- The average price of diesel fuel in the U.S. rose for the third week to \$3.78/gallon on Sept. 8. It is up 5.93% from one year ago. ([US EIA September 2025](#))

LESS-THAN-TRUCKLOAD (LTL)

- Regional less-than-truckload carrier Dayton Freight announced that it has expanded its reach further east with the opening of a new terminal in Bedford, Pennsylvania. ([FreightWaves September 2025](#))
- Daily shipment volumes fell at some of the largest U.S. less-than-truckload (LTL) carriers in August, as soft demand reportedly brought new pressure to bear on rates and challenged the LTL industry's pricing discipline. ([JOC September 2025](#))
- Tonnage in August declined year over year for Old Dominion Freight Line, XPO and Saia while ArcBest reported a 2% increase in its asset-based operating segment. ([TruckingDive September 2025](#))
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- The U.S. freight downturn is stretching into its fourth year, but inventory restocking may give trucking a boost in early 2026. ([JOC September 2025](#))

TRUCKLOAD (TL)

- Stubborn U.S. truck overcapacity is not likely to shift before 2027, prolonging shipper pricing power. ([JOC September 2025](#))
- International and PlusAI recently announced the launch of customer fleet trials using second-generation autonomous trucks. International will be piloting the driverless trucks powered by PlusAI's virtual driver along the I-35 corridor in Texas that runs between Laredo and Dallas. ([FreightWaves September 2025](#))
- More than 3,000 truckers have been taken off the job in the U.S. since strict English language proficiency (ELP) requirements implemented by the Trump administration came into force in late June. ([SupplyChainBrain August 2025](#))
- U.S. truckload rates are trending up in September compared to August. Dry van spot rates rose nearly 1% m/m, while Flatbed spot rates rose 1.2% m/m. Following the Labor Day long weekend, dry van load posts decreased significantly by 17% w/w. Flatbed load post volumes held steady for the fifth straight week, up more than 20% y/y. ([DAT Freight & Analytics September 2025](#))

PARCEL

- UPS Mail Innovations holiday surcharges coming in October. The peak season fees will build upon rate hikes the UPS business installed in May after its U.S. Postal Service contract expired. ([SupplyChainDive September 2025](#))
- Canada Post and the union representing some 50,000 mail carriers returned to the bargaining table and failed to make progress. The impasse is raising the risk for businesses that depend on reliable parcel delivery. ([FreightWaves September 2025](#))
- UPS and DHL Express are the latest parcel delivery providers to announce significant demand surcharges for the peak shipping season, putting added pressure on the freight transportation budgets of retailers and other businesses. ([FreightWaves September 2025](#))

INTERNATIONAL

- The British government and private industry will invest \$1.5 billion in the country's ports, with \$600 million allocated to reducing emissions from UK shipping. ([JOC September 2025](#))

- Landside cargo flow in and out of the ports of Mundra and Kandla has effectively been shut down after drayage operators serving the western Indian ports walked out Friday, bringing over-the-road cargo traffic in the region to a standstill. ([JOC September 2025](#))
- Ocean shipping rates from China to the U.S. West Coast continue to fall from their June high, a sign this year's peak shipping season was earlier and shorter than usual. ([WSJ September 2025](#))
- The Drewry WCI Composite index, which measures the bi-weekly ocean freight rate movements of 40-ft. containers in seven major maritime lanes, was \$2,044 per 40-ft. container on Sept. 11. It is down 13% since Aug. 14. ([Drewry September 2025](#))