Inbound Logistics' exclusive trucking market research report delivers shipper and motor carrier insights into trucking challenges and trends.

2015 TRUCKING PERSPECTIVES

BY JOSEPH O'REILLY

Capacity has become an inexorable focal point in the U.S. transportation and logistics sector over the past several years. Carriers and asset-based service providers alike have long proselytized the inevitable Armageddon likely to strike as freight volumes rebound and baby boomer drivers retire. Shippers have alternated between cynicism and belief. It's the yet-to-happen reality that consumes the here and now.

Trucking companies responding to *Inbound Logistics*' 2015 Trucking Perspectives survey by and large see an economy on the make — 54 percent expect static growth in the near term, while 40 percent see the economy trending upward. Only six percent forecast conditions getting worse.

Relative optimism aside, carriers are notably less positive about conditions than they were in 2014, when close to 75 percent indicated growth was trending upward. Many concerns on the global front — notably China's sputtering economy and currency devaluation — could impact U.S. exports and domestic job growth. Global stock market volatility has been sharp. U.S. consumer sentiment dropped to a one-year low in September 2015.

On the domestic front, capacity worries remain an important undercurrent in the transportation space. In some lanes, and for certain types of equipment, the market is already tightening. But a precipitous drop in oil prices, largely driven by a glut of North American production, provided shippers and carriers with a reprieve in 2015.

Shippers that migrated to more economical rail/intermodal services have been lured back by cheaper and faster over-the-road options. The market demands it. The continuing evolution of e-commerce and omni-channel management places a premium on speed. Carriers have been able to reallocate fuel cost savings to help recruit drivers with more lucrative enticements.

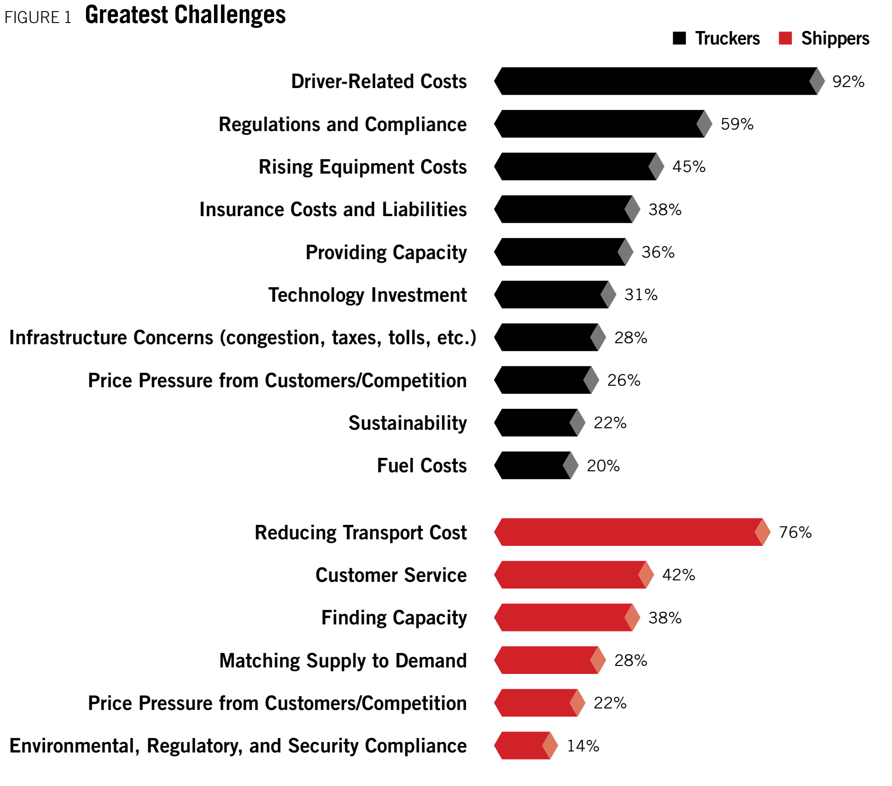
The U.S. trucking market is a dynamic force. Shipper proclivities year to year reflect the volatility of supply and demand, and offer a good indication of where the economy is trending. 2015 has been no less intriguing.

ASSETS OR NOT?

XPO Logistics' recent $3-billion acquisition of Con-way offers a pretty good idea of how industry appreciates capacity. The third-party logistics (3PL) provider has long maintained an asset-light profile. But its decision to buy the second-largest U.S. less-than-truckload (LTL) carrier was predicated on listening to customer demand. "If you don't have assets, you're not sitting at the adult table," said XPO Logistics Chairman and CEO Brad Jacobs on a recent investor's call announcing the acquisition.

Shippers value carriers that have dedicated capacity. As the

FIGURE 1 **Greatest Challenges**



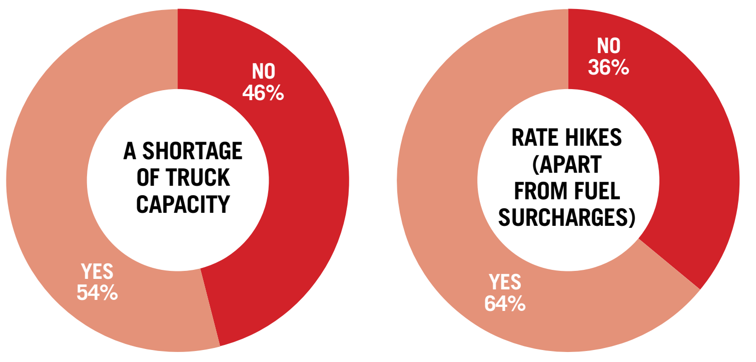
Trucking Perspectives Methodology

Inbound Logistics' annual Trucking Perspectives market insight report includes input from both over-the-road carriers and shippers to provide a comparative analysis supported by empirical data and anecdotal observations. Our outreach comprises two parts.

First, *IL* solicited more than 200 trucking companies to complete a questionnaire that documents their assets, service capabilities, operational scope, and areas of expertise. We also asked carriers to comment on challenges and opportunities in today's market.

Secondly, *Inbound Logistics* reached out to more than 100 unique freight shippers to comment on industry trends, regulatory challenges, and their partnerships with carriers.

FIGURE 2 **SHIPPERS: Have you experienced…**



market tightens, it will become an invaluable asset.

In 2015, carriers on average report fleets with 3,352 units, up from 3,268 last year. Just five years ago, the average was 2,542 units. In terms of equipment, trucking companies own 7,536 trailers—compared to 7,252 in 2014. Attrition and consolidation continue to shape the truck fleet.

Driver availability remains the topic du jour. Many carriers are stepping up recruitment efforts to attract new talent. Some are leveraging the drop in fuel prices to help subsidize higher pay.

Trucking companies report on average 3,011 drivers (owner operators included) compared to 2,867 drivers in 2014. Coming out of the recession in 2011, headcount was 2,507. Carriers are sensitive to demographic shifts and how labor recruitment, retention, and training impact their business. Turnover is a huge cost. Estimates peg the price of recruiting and training one new driver at $5,000. As expected, 92 percent of truckers polled in this year's Trucking Perspectives identify driver-related costs as their greatest challenge—compared to 89 percent in 2014 (*see Figure 1*).

Carrier outlay inevitably bleeds to the shipper, and ultimately to the end consumer. That's why reducing transport costs remains the top concern among freight buyers, according to 76 percent of survey respondents—followed by customer service (42 percent) and finding capacity (38 percent). It's worth noting that shipper sentiment toward cost reduction and customer service in 2014 was considerably more balanced—46 percent to 44 percent.

Why the change? For one, only 54 percent of shippers in 2015 report experiencing a shortage of capacity, compared to 78 percent in 2014 (*see Figure 2*). By the same token, 89 percent experienced rate hikes apart from fuel surcharges in 2014. This year, only 64 percent of freight buyers responded in kind.

Even more telling, 90 percent of shippers cite price as the most important factor to consider when vetting truck partners (*see Figure 3*), followed by reliability (82 percent), customer service (62 percent), and capacity (52 percent). This represents a significant shift from 2014, when reliability topped the list, followed by pricing.

Clearly, shippers still believe they have leverage in the market to negotiate with carriers. It remains to be seen how long that will last.

Technology is another important facilitator. To point, 31 percent of truckers identify IT investment as a challenge. Carriers need to acquire the appropriate transportation management, dispatch, and optimization systems to improve yields and increase efficiency. This includes equipment as well. Trailer skirts and tails that advance fuel economy are growing increasingly popular.

From a network perspective, a lot of latent capacity in the market goes unused—whether it's within urban courier networks or private fleets. A number of different IT vendors provide platforms that give users visibility into capacity. This way they can better utilize assets, build more continuous moves, and ultimately reduce deadheads. Elsewhere, the idea of crowdsourcing unused space using Uber-type technology continues to gain traction.

While labor remains a constraint, technology and innovation may soon provide yet another alternative. Truck manufacturers are toying with self-driving prototypes. Germany-based Daimler, for example, has been piloting autonomous rigs in Nevada during the past year. Mainstream deployment in Europe could happen by 2020.

REGULATION CONSTERNATION

Legislators have proposed another solution to ease the truck driver crisis, eliciting mixed reaction from public and private stakeholders. The latest highway bill circulating Congress

FIGURE 3 **SHIPPERS: What are the most important factors to consider when choosing a motor carrier?**

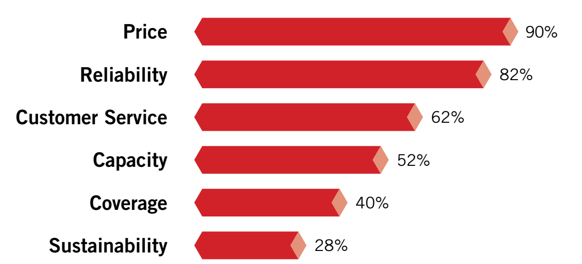
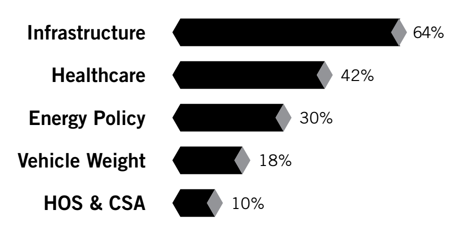


FIGURE 4 **TRUCKERS: What legislative issues have the greatest impact on your business?**

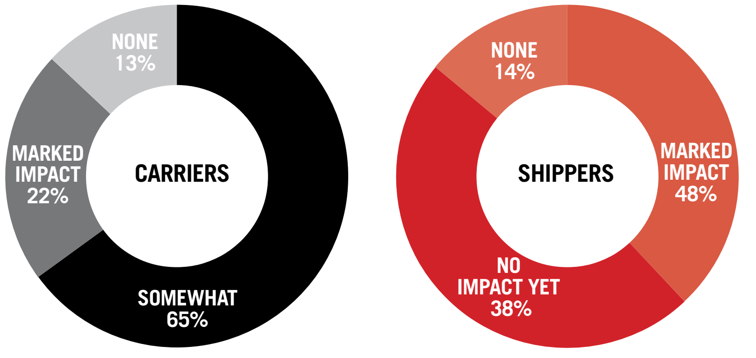


includes a provision that would lower the minimum truck-driving age to 18 for interstate commerce. Currently, teenagers can only operate rigs within a state's borders.

It's a divisive issue that will likely be jettisoned in favor of compromise, but it presents a realistic alternative.

For many in the trucking industry, however, government regulation is a bane. Freight carriers and buyers have long suffered from overbearing and onerous legislation that impedes productivity and increases costs. Apart from driver recruitment and related costs, 59 percent of trucking respondents cite an oppressive regulatory environment as their second-greatest challenge.

FIGURE 5 **What impact have Hours-of-Service regulations had on your operations?**



While the public sector widely supports efforts to improve safety and security on U.S. highways and byways, it has done little to improve the crumbling infrastructure necessary to support interstate and global commerce. It's worth reiterating that Congress has passed 33 extensions over the past six years to keep the Highway Trust Fund solvent. It's an inconvenient, and ironic, contrast.

Infrastructure remains the most impactful legislative issue on the docket, according to 64 percent of truckers. Healthcare (42 percent), energy policy (30 percent), vehicle weight (18 percent), and Hours-of-Service/Compliance, Safety, Accountability (10 percent) round out the list (*see Figure 4*).

The debate over increasing gross vehicle weights has become a flashpoint in the transportation industry. Railroads have sided with public safety advocates who oppose any change to the existing 80,000-pound limit for interstate commerce. Given the

Riding Shotgun

The U.S. trucking industry provides an array of services, from mud-flapping nationwide truckload shipments to white-glove, last-mile delivery–and everything in between. Here's an overview of carrier services, geographic scope, and assets based on Trucking Perspectives survey responses.

CAPACITY

Average Fleet Size (tractors and vans)	3,352 units
Average Trailer Fleet	7,536 units
Average Number of Drivers (owner operators included)	3,011

OPERATING AREA

North America	64%
U.S. Only	36%
Global	29%

TRUCKING SERVICES

Truckload	85%
Logistics Services	69%
Expedited	62%
Dedicated Contract Carriage	61%
Less-than-Truckload	55%
Intermodal	52%
Refrigerated	44%
Flatbed	44%
Bulk	35%
Final Mile	30%
White Glove	27%
Household Goods	26%
Motor Vehicle Carrier	16%
Tank Car	16%
Package	4%

CERTIFICATIONS

SmartWay	94%
HazMat	78%
C-TPAT	62%
Free And Secure Trade (FAST)	41%
Partners In Protection (PIP)	29%
ISO	27%
ACC Responsible Care	16%

VERTICAL SPECIALTY

Food & Beverage	82%
Retail	81%
Freight All Kinds	79%
Automotive	79%
Construction & Building Materials	78%
Valuables (electronics, pharma, jewelry)	64%
Chemicals	60%
Agriculture	57%
Furniture	54%
Oil & Gas	22%

downward fuel price trend, trucking has become a more competitive option. The railroads view any increase in tonnage as a competitive disadvantage.

Meanwhile, motor freight carriers and shippers are still coming to terms with the Federal Motor Carrier Safety Administration's (FMCSA) Hours-of-Service (HOS) and Compliance, Safety, Accountability (CSA) mandates—both of which have increased costs. Industry appears to be more receptive and/or less reactive to regulations that improve safety and quality. For example, 50 percent of shippers have not experienced a noticeable cost or service impact on operations because of CSA scorecarding—25 percent have. That said, freight buyers are largely insulated because the burden of responsibility ultimately falls on carriers and brokers.

HOS, on the other hand, remains a third-rail topic for the trucking industry. In 2015, 87 percent of trucking respondents report that the HOS rules have had an impact on their operations—while 22 percent cite a "marked impact" (*see Figure* 5). This follows 2014 data. Shipper reactions remain mixed—48 percent acknowledge that HOS has had a "marked impact," while 14 percent have seen no impact whatsoever. The remaining 38 percent expect to eventually see one.

Government's decision to roll back two important provisions in the new rules—that a driver's 34-hour restart include two 1 a.m. to 5 a.m. periods, and the limitation of the restart's use to once per week—was widely applauded. FMCSA will need to conduct further study before a final decision is ultimately made regarding enforcement.

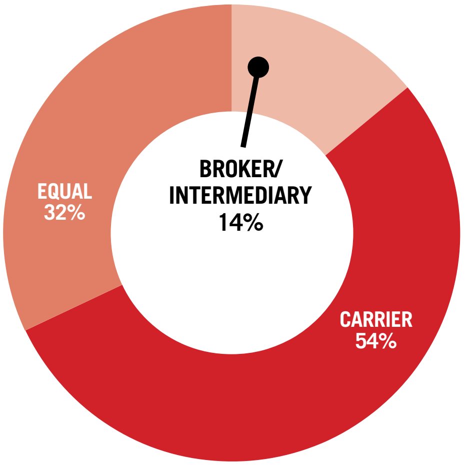
The electronic on-board recorder (EOBR) mandate, which is part of the HOS guidelines, has been well received by the trucking industry. Many carriers see the requirements as inevitable—while also recognizing the value of automating driver data collection. Eighty-seven percent of surveyed truckers have already equipped their fleets with EOBRs.

BROKERING CHANGE

On the brokerage side, change is rampant. UPS' acquisition of Coyote Logistics and the XPO-Con-way merger reflect ongoing contraction within the industry. Freight brokerage is a lucrative business in good times and bad. When capacity is tight, service providers help shippers find space and empower carriers to seek more backhaul opportunities. In a soft market, brokers help carriers find loads and provide freight buyers with leverage to cost compare different lanes. Venture capital is taking notice. Investors see opportunities to further consolidate a very fragmented space.

The growth of megabrokers will invariably have an impact on shippers as they control more of the market, including pricing. As intermediaries become more technologically savvy, and develop value-added capabilities beyond transactional, the value proposition only grows. More shippers, especially small and mid-sized companies, will likely seek their services.

FIGURE 6 **SHIPPERS: What is more important, your relationship with your carrier or with your broker/intermediary?**



An interesting dichotomy still exists between brokers and carriers, and how shippers align with both. XPO's Con-way acquisition, which was driven by customer demand, reveals how important dedicated capacity is in the minds of shippers—especially as the market tightens.

Fifty-four percent of surveyed shippers say they value carrier partners more than brokers—compared to 56 percent last year (*see Figure* 6). In 2012, only 38 percent acknowledged as much, which may offer a clue as to where shippers see the capacity pendulum swinging. By comparison, only 14 percent prefer brokers exclusively; and 32 percent hold both brokers and carriers in similar esteem.

Invariably, shippers will likely have to lean on both carrier partners and brokers, and benchmark off both, as they evaluate their transportation needs moving forward.

2015 TOP 100 TRUCKERS

As always, *Inbound Logistics*' annual Top 100 Truckers directory brings Trucking Perspectives full circle with an in-depth index of carriers that match the diverse needs of the shipping community.

IL editors selected this year's list from a pool of 200-plus trucking companies, evaluating surveys, conducting online research, and talking with truckers and shippers alike. This guide serves as a benchmark for the types of services transportation buyers value when looking for new partners or evaluating current ones.

The Top 100 list offers a snapshot of the trucking segment, including large truckload and LTL carriers with global inroads and niche-specific regional haulers that get their white gloves dirty delivering to the final mile.

Together, Trucking Perspectives and the Top 100 Truckers directory provide a comprehensive guide to help you find partners that will put your company in the driver's seat. ■

TOP 100 TRUCK

COMPANY	URL	PHONE	GENERAL INFORMATION: TRACTOR AND VAN FLEET SIZE	TRAILER FLEET SIZE	NUMBER OF DRIVERS (INCLUDING OWNER OPERATORS)	USE ELECTRONIC ON-BOARD RECORDERS	UNION STATUS	PUBLIC OR PRIVATE	AREAS SERVED/ OPERATING AREAS: GLOBAL SERVICES	NORTH AMERICA	U.S. ONLY	NATIONWIDE (48 STATES)	REGIONAL/MULTI-REGIONAL
A. Duie Pyle	aduiepyle.com	800-523-5020	918	2,162	1,150	●	N	PRIV			●		●
A&R Logistics	ARDoingItRight.com	800-542-8058	750	1,100	750	●	N	PRIV	●	●			
AAA Cooper Transportation	AAACooper.com	334-793-2284	2,500	5,300	3,700	●	N	PRIV	●	●			
ABF Freight	abf.com	479-785-8700	5,100	20,400	7,500	●	B	PUB	●	●			
All State Express	allstateexpress.com	877-742-5875	200	90	225	●	N	PRIV		●			
ATS	atsinc.com	800-MEET-ATS	1,310	3,925	1,100		N	PRIV	●	●			
Averitt Express	averittexpress.com	800-283-7488	4,603	13,400	DNR	●	N	PRIV	●	●			
Bennett International Group	bennettig.com	770-957-1866	1,586	1,422	2,723	●	N	PRIV	●	●			
Bison Transport	bisontransport.com	204-833-0000	1,400	4,000	1,676	●	N	PRIV		●			
Brown Trucking	browntrucking.com	770-482-6521	1,094	5,100	1,079	●	N	PRIV			●		●
Bulkmatic	bulkmatic.com	800-535-8505	DNR	1,200	500	●	N	PRIV		●			
C.R. England	crengland.com	801-972-2712	4,260	5,923	5,655	●	N	PRIV		●			
Cardinal Logistics Management	cardlog.com	704-789-2070	3,500	8,700	4,500	●	N	PRIV			●	●	
Cargo Transporters	cgor.com	828-459-3401	2,080	1,600	500	●	N	PRIV			●	●	
Carlile	carlile.biz	907-276-7797	1,900	1,500	375	●	N	PRIV	●	●			
Celadon Trucking	celadontrucking.com	800-235-2366	3,450	9,800	2,990	●	N	PUB		●			
Central Freight Lines	centralfreight.com	800-782-5036	1,884	6,853	DNR	●	N	PRIV			●		●
Central States Trucking	cstruck.com	630-787-8773	3,500	3,500	1,500	●	N	PUB			●	●	
CEVA Logistics	cevalogistics.com	877-714-8001	4,025	1,400	767	●	B	PRIV	●	●		●	
Challenger Group	challenger.com	800-265-6358	1,500	3,000	2,000	●	N	PRIV	●	●			

ERS 2015

KEY TO ABBREVIATIONS

U	Union
N	Non-union
B	Both union and non-union
DNR	Did not report

AREAS OF SPECIALIZATION										TRUCKING SERVICES															CERTIFICATIONS						
AGRICULTURE	AUTOMOTIVE	CHEMICALS	CONSTRUCTION/BLDG. MAT'LS.	FOOD & BEVERAGE	FREIGHT (ALL KINDS)	FURNITURE	RETAIL	HIGH VALUE	OIL & GAS	LTL	TL	PACKAGE	EXPEDITED	LOGISTICS SERVICES	DEDICATED CONTRACT CARRIAGE	FLATBED	INTERMODAL	HOUSEHOLD GOODS	BULK	MOTOR VEHICLE CARRIER	REFRIGERATED	TANKER	WHITE GLOVE	FINAL MILE	C-TPAT	ACC RESPONSIBLE CARE	FREE AND SECURE TRADE (FAST)	HAZMAT	ISO	PARTNERS IN PROTECTION (PIP)	SMARTWAY
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Information supplied by trucking companies; where they did not provide data, historical and website information was used.

TOP 100 TRUCK

Company	URL	Phone	General Information: Tractor and Van Fleet Size	Trailer Fleet Size	Number of Drivers (including owner operators)	Use Electronic On-Board Recorders	Union Status	Public or Private	Areas Served/Operating Areas: Global Services	North America	U.S. Only	Nationwide (48 states)	Regional/Multi-Regional
Colonial Cartage	atlantabonded.com	770-424-1000	85	225	90	●	N	PRIV			●		●
Colonial Freight Systems	cfsi.com	865-966-9711	300	500	330	●	N	PRIV			●	●	
Con-way Freight	con-way.com/en/freight	734-994-6600	8,750	24,500	13,980	●	N	PUB	●	●			
Con-way Truckload	true2blue.com	417-623-5229	2,506	7,800	2,976	●	N	PUB		●			●
Continental Expedited Services	shipces.com	931-472-0392	75	150	125		N	PRIV		●			
Covenant Transportation Group	covenanttransport.com	423-463-3266	2,850	6,600	3,900	●	N	PUB		●			
Crete Carrier Corporation	cretecarrier.com	800-998-8000	5,357	12,892	5,159	●	N	PRIV			●	●	●
CRST International	crst.com	800-736-2778	4,400	7,290	7,200	●	N	PRIV			●	●	
Daily Express	dailyexp.com	800-735-3136	300	500	300		N	PRIV		●			
Dart Transit Company	dart.net	800-366-9000	1,875	5,789	1,875	●	N	PRIV		●			
Daseke	daseke.com	972-248-0412	2,000	3,600	DNR	●	N	PRIV	●	●			
Daylight Transport	dylt.com	800-468-9999	500	100	180		N	PRIV		●		●	
Dayton Freight Lines	daytonfreight.com	937-415-1715	1,228	3,109	1,845	●	N	PRIV			●		●
Epes Transport System	epestransport.com	336-931-9792	1,121	5,500	1,350	●	N	PRIV		●			
Erb Group of Companies	erbgroup.com	519-662-2710	900	1,250	950	●	N	PRIV		●			
Estes Express Lines	estes-express.com	866-378-3748	7,221	25,347	7,745	●	N	PRIV	●	●			
Evans Network of Companies	evansdelivery.com	800-666-7885	2,850	DNR	2,850		N	PRIV			●	●	
FedEx Custom Critical	customcritical.fedex.com	800-762-3787	1,200	500	2,000	●	N	PUB	●	●			
FedEx Freight	fedex.com	800-463-3339	14,400	43,526	18,000	●	N	PUB		●			
FedEx Ground	fedex.com	800-463-3339	30,000	13,000	34,000	●	N	PUB		●	●		

ERS 2015

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U	Union
N	Non-union
B	Both union and non-union
DNR	Did not report

AREAS OF SPECIALIZATION

AGRICULTURE	AUTOMOTIVE	CHEMICALS	CONSTRUCTION/BLDG. MAT'LS.	FOOD & BEVERAGE	FREIGHT (ALL KINDS)	FURNITURE	RETAIL	HIGH VALUE	OIL & GAS
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TRUCKING SERVICES

LTL	TL	PACKAGE	EXPEDITED	LOGISTICS SERVICES	DEDICATED CONTRACT CARRIAGE	FLATBED	INTERMODAL	HOUSEHOLD GOODS	BULK	MOTOR VEHICLE CARRIER	REFRIGERATED	TANKER	WHITE GLOVE	FINAL MILE
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CERTIFICATIONS

C-TPAT	ACC RESPONSIBLE CARE	FREE AND SECURE TRADE (FAST)	HAZMAT	ISO	PARTNERS IN PROTECTION (PIP)	SMARTWAY
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Information supplied by trucking companies; where they did not provide data, historical and website information was used.

TOP 100 TRUCK

COMPANY	URL	PHONE	TRACTOR AND VAN FLEET SIZE	TRAILER FLEET SIZE	NUMBER OF DRIVERS (INCLUDING OWNER OPERATORS)	USE ELECTRONIC ON-BOARD RECORDERS	UNION STATUS	PUBLIC OR PRIVATE	GLOBAL SERVICES	NORTH AMERICA	U.S. ONLY	NATIONWIDE (48 STATES)	REGIONAL/MULTI-REGIONAL
			GENERAL INFORMATION						AREAS SERVED/ OPERATING AREAS				
FLS Transport	flstransport.com	514-739-0939	120	225	130	●	N	PRIV		●			
Frozen Food Express (FFE)	ffeinc.com	214-630-8090	747	1,231	1,025	●	N	PRIV			●	●	
Gale Triangle/ Performance Team	performanceteam.net	562-345-2271	724	1,450	818	●	U	PRIV	●		●	●	●
Groendyke Transport	groendyke.com	800-843-2103	1,023	1,496	939	●	N	PRIV		●			
Heartland Express	heartlandexpress.com	800-451-4621	4,878	14,372	DNR	●	N	PUB			●	●	●
Highland Transport	highlandtransport.com	905-513-2014	1224	588	224	●	B	PUB		●			
Holland	hollandregional.com	866-465-5263	4,208	7,119	6,395		U	PUB		●			
Hub Group Trucking	hubgroup.com	800-964-2515	2,915	29,110	2,752	●	N	PUB		●			
J.B. Hunt Transport	jbhunt.com	800-452-4868	13,932	104,747	15,150	●	N	PUB	●	●			
Kenan Advantage Group (KAG)	thekag.com	800-969-5419	6,822	9,448	8,896	●	N	PRIV		●			
KLLM Transport Services	kllm.com	601-936-5633	2,300	3,300	2,400	●	N	PRIV			●	●	
Knight Transportation	knighttrans.com	602-606-6315	4,282	11,487	4,738	●	N	PUB	●	●			
Lakeville Motor Express	lakevillemotor.com	701-318-4448	300	1,250	350	●	B	PRIV		●			
Landstar	landstar.com	877-696-4507	8,932	13,372	8,932	●	N	PUB	●	●			
Lily Transportation Corp.	lily.com	781-247-1325	398	553	500	●	U	PRIV		●			
Lynden Transport	lynden.com	206-575-9575	240	1,400	285	●	B	PRIV	●	●			
Marten Transport	marten.com	888-470-9958	2,536	4,240	2,536	●	N	PUB		●			
Melton Truck Lines	meltontruck.com	918-234-8000	1,150	2,000	1,100	●	N	PRIV		●			
Mercer Transportation	mercer-trans.com	502-625-3487	2,500	2,700	2,500	●	N	PRIV		●			
Miller Transporters	millert.com	601-709-5901	431	1,080	415	●	B	PRIV		●			

ERS 2015

KEY TO ABBREVIATIONS

U	Union
N	Non-union
B	Both union and non-union
DNR	Did not report

AREAS OF SPECIALIZATION										TRUCKING SERVICES															CERTIFICATIONS						
AGRICULTURE	AUTOMOTIVE	CHEMICALS	CONSTRUCTION/BLDG. MAT'LS.	FOOD & BEVERAGE	FREIGHT (ALL KINDS)	FURNITURE	RETAIL	HIGH VALUE	OIL & GAS	LTL	TL	PACKAGE	EXPEDITED	LOGISTICS SERVICES	DEDICATED CONTRACT CARRIAGE	FLATBED	INTERMODAL	HOUSEHOLD GOODS	BULK	MOTOR VEHICLE CARRIER	REFRIGERATED	TANKER	WHITE GLOVE	FINAL MILE	C-TPAT	ACC RESPONSIBLE CARE	FREE AND SECURE TRADE (FAST)	HAZMAT	ISO	PARTNERS IN PROTECTION (PIP)	SMARTWAY
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Information supplied by trucking companies; where they did not provide data, historical and website information was used.

TOP 100 TRUCK

COMPANY	URL	PHONE	GENERAL INFORMATION: TRACTOR AND VAN FLEET SIZE	TRAILER FLEET SIZE	NUMBER OF DRIVERS (INCLUDING OWNER OPERATORS)	USE ELECTRONIC ON-BOARD RECORDERS	UNION STATUS	PUBLIC OR PRIVATE	AREAS SERVED/ OPERATING AREAS: GLOBAL SERVICES	NORTH AMERICA	U.S. ONLY	NATIONWIDE (48 STATES)	REGIONAL/MULTI-REGIONAL
National Retail Systems	nationalretailsystems.com	201-330-1900	1,200	6,500	900	●	U	PRIV		●		●	
New England Motor Freight	nemf.com	908-965-0100	2,000	6,000	1,732	●	B	PRIV			●		●
New Penn	newpenn.com	800-285-5000	850	1,700	1,255	●	U	PUB		●			
NFI	nfiindustries.com	877-312-7207	2,384	8,200	2,900	●	N	PRIV	●	●			
Nussbaum Transportation	nussbaum.com	800-622-9741	305	650	295	●	N	PRIV			●	●	
Oak Harbor Freight Lines	oakh.com	253-288-8300	525	2,000	800	●	B	PRIV		●			
Old Dominion Freight Line	odfl.com	800-235-5569	7,100	27,300	9,254	●	N	PUB	●	●			
PAM Transport	pamtransport.com	800-879-7261	1,480	5,170	DNR		N	PUB					
Panther Premium Logistics	pantherpremium.com	800-685-0657	1,100	400	1,100	●	N	PUB	●	●			
Paschall Truck Lines	ptl-inc.com	800-626-3374	1,350	3,000	1,500	●	N	PRIV		●		●	●
Penske Logistics	penskelogistics.com	800-529-6531	2,522	7,275	4,300	●	B	PRIV	●	●			
PITT OHIO	pittohio.com	412-232-3015	1,320	2,049	2,698	●	N	PRIV	●		●	●	
Prime Inc.	primeinc.com	800-848-4560	6,419	11,297	7,380	●	N	PRIV		●			
Quality Distribution	qualitydistribution.com	800-282-2031	3,000	5,500	DNR		N	PUB		●			
R+L Carriers	rlcarriers.com	800-543-5589	13,000	DNR	DNR		N	PRIV	●				
Reddaway	reddawayregional.com	888-420-8960	1,400	3,500	1,600		B	PUB		●			
Roadrunner Transportation Systems	rrts.com	844-290-3569	4,170	5,135	4,281	●	N	PUB	●	●			
Roehl Transport	roehltransport.com	715-591-3795	1,969	4,953	2,015	●	N	PRIV		●			
Ruan	ruan.com	866-782-6669	3,754	8,395	4,203	●	B	PRIV		●			
Ryder System	ryder.com	305-500-4547	139,600	41,900	6,000	●	B	PUB	●	●			

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DNR	Did not report

Agriculture	Automotive	Chemicals	Construction/Bldg. Mat'ls.	Food & Beverage	Freight (All Kinds)	Furniture	Retail	High Value	Oil & Gas	LTL	TL	Package	Expedited	Logistics Services	Dedicated Contract Carriage	Flatbed	Intermodal	Household Goods	Bulk	Motor Vehicle Carrier	Refrigerated	Tanker	White Glove	Final Mile	C-TPAT	ACC Responsible Care	Free and Secure Trade (FAST)	Hazmat	ISO	Partners in Protection (PIP)	SmartWay
	AREAS OF SPECIALIZATION									TRUCKING SERVICES															CERTIFICATIONS						
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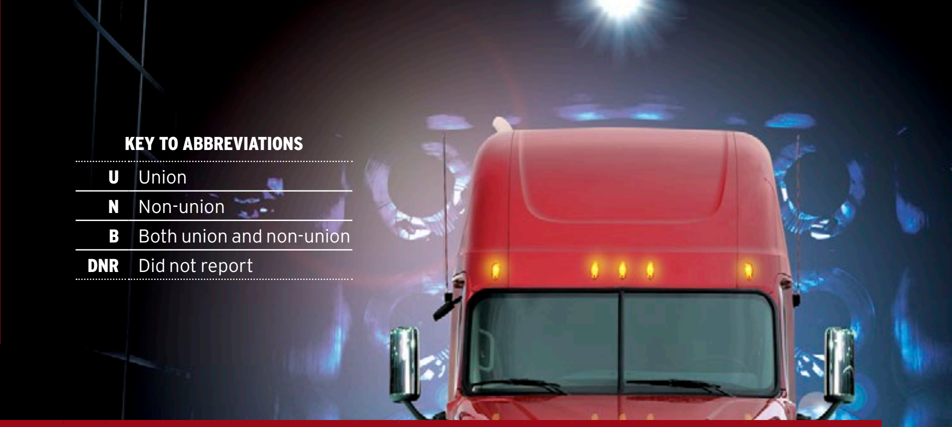
COMPANY	URL	PHONE	GENERAL INFORMATION: TRACTOR AND VAN FLEET SIZE	TRAILER FLEET SIZE	NUMBER OF DRIVERS (INCLUDING OWNER OPERATORS)	USE ELECTRONIC ON-BOARD RECORDERS	UNION STATUS	PUBLIC OR PRIVATE	AREAS SERVED/ OPERATING AREAS: GLOBAL SERVICES	NORTH AMERICA	U.S. ONLY	NATIONWIDE (48 STATES)	REGIONAL/MULTI-REGIONAL
Saia LTL Freight	saia.com	800-765-7242	3,700	11,000	4,700	●	N	PUB	●		●		●
Schilli Corporation	schillicorp.com	636-717-2653	350	650	330	●	B	PRIV		●		●	
Schneider	schneider.com	920-592-4200	9,800	32,350	13,800	●	B	PRIV	●	●			
Southeastern Freight Lines	sefl.com	803-794-7300	8,328	8,800	3,890	●	N	PRIV	●		●		●
Standard Forwarding	standardforwarding.com	309-751-0251	1,360	900	450	●	U	PUB			●		●
Superior Bulk Logistics	superiorbulklogistics.com	800-654-7707	940	2,037	DNR		DNR	PRIV		●			
Swift Transportation	swifttrans.com	602-477-7146	18,000	60,000	18,000	●	N	PUB		●			
System Freight	systemfreight.net	609-395-8600	325	2,000	348	●	B	PRIV		●			
Transport America	transportamerica.com	800-329-3927	1,500	4,200	1,700	●	N	PUB		●			
Trimac Transportation	trimac.com	281-985-0000	2,175	4,828	2,596	●	B	PRIV		●			
U.S. Xpress Enterprises	usxpress.com	423-510-3273	6,250	15,850	6,825	●	N	PRIV		●			
UniGroup Logistics	unigrouplogistics.com	636-349-7467	4,000	6,000	3,500	●	N	PRIV	●	●			
Universal	goutsi.com	586-467-1457	4,325	6,290	3,832	●	B	PUB	●	●			
UPS Freight	ltl.upsfreight.com	800-333-7400	5,759	19,391	8,761	●	B	PUB		●			
USA Truck	usa-truck.com	479-471-2500	2,000	6,200	1,900	●	N	PUB		●			
Ward Transport & Logistics Corp.	wardtlc.com	800-458-3625	650	1,150	724	●	N	PRIV			●	●	
Werner Enterprises	werner.com	402-895-6640	7,332	23,765	10,113	●	N	PUB	●	●			
Western Express	westernexp.com	615-259-9920	2,500	6,000	2,750	●	N	PRIV			●	●	
Wilson Trucking Corporation	wilsontrucking.com	540-949-3200	952	2,805	1,079		N	PRIV		●			●
YRC Freight	yrcfreight.com	800-610-6500	8,300	32,800	10,400		U	PUB		●			

ERS 2015



KEY TO ABBREVIATIONS

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DNR	Did not report

AREAS OF SPECIALIZATION										TRUCKING SERVICES															CERTIFICATIONS						
AGRICULTURE	AUTOMOTIVE	CHEMICALS	CONSTRUCTION/BLDG. MAT'LS.	FOOD & BEVERAGE	FREIGHT (ALL KINDS)	FURNITURE	RETAIL	HIGH VALUE	OIL & GAS	LTL	TL	PACKAGE	EXPEDITED	LOGISTICS SERVICES	DEDICATED CONTRACT CARRIAGE	FLATBED	INTERMODAL	HOUSEHOLD GOODS	BULK	MOTOR VEHICLE CARRIER	REFRIGERATED	TANKER	WHITE GLOVE	FINAL MILE	C-TPAT	ACC RESPONSIBLE CARE	FREE AND SECURE TRADE (FAST)	HAZMAT	ISO	PARTNERS IN PROTECTION (PIP)	SMARTWAY
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