

2009 LTL Carrier Survey

survey period February 23-March 9

Topic	Statement	Avg.	Strongly Agree %	Not Sure %	Disagree %
Base rates	<i>Over the next twelve months, general rate increases (GRI's of 5-6%) already implemented will not be retained by LTL carriers.</i>	1.6	57%	29%	14%
Discounts	<i>LTL discounts have hit their market ceiling.</i>	2.2	14%	50%	36%
Minimum charge floors	<i>Minimum charge floors will continue to rise even if GRI's are not implemented.</i>	1.5	64%	21%	14%
Accessorials	<i>LTL carriers will continue to look to accessorials as a means to improve yield.</i>	1.3	79%	14%	7%
Fuel	<i>LTL fuel surcharges will vary greatly over the next twelve months.</i>	1.9	43%	29%	29%
Bids	<i>The poor economy will cause shippers to bid LTL contracts more frequently.</i>	1.2	86%	7%	7%
Growth	<i>Growth in the LTL sector will be flat for the remainder of 2009.</i>	1.7	50%	29%	21%
Trends	<i>In the traditional product lifecycle as illustrated by a bell curve, LTL as a product is a mature product meaning it has reached its maximum market potential for growth.</i>	2.1	21%	50%	29%
Competition	<i>In the down economy, LTL carriers are sacrificing profitability for market share and cash flow.</i>	1.2	79%	21%	0%
from other modes	<i>Carriers are losing more revenue to competitors from other modes (parcel, TL, et al) as opposed to other LTL carriers.</i>	2.1	21%	43%	36%
Industry consolidation	<i>The LTL industry will experience significant increase in the number of closures during the remainder of 2009.</i>	1.2	79%	21%	0%
Niche services	<i>LTL carriers must develop and offer niche services (e.g. warehousing, international transportation, et al) to differentiate from competitors.</i>	1.1	93%	7%	0%
Emerging Technologies	<i>Our company is developing an emerging technology that will be introduced in 2009.</i>	1.5	64%	21%	14%
Economy	<i>The economy will begin to grow again in 2009.</i>	1.9	29%	57%	14%

1 = Strongly Agree

2 = Not sure

3 = Disagree