

United States Less than-Truck-Load (LTL) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The United States Less than-Truck-Load (LTL) Market size is estimated at 114 billion USD in 2025, and is expected to reach 139.6 billion USD by 2030, growing at a CAGR of 4.13% during the forecast period (2025-2030).

E-commerce boom and rising online buyers supporting the growth of the LTL market

- In June 2024, the United States manufacturing sector saw significant developments, highlighted by Norwegian solar company NorSun's announcement of a USD 620 million investment in Tulsa, Oklahoma. This marks NorSun's first U.S. manufacturing plant, focused on producing 5 GW of silicon ingots and solar wafers. This investment underscores the increasing demand for American-made renewable energy components and significantly boosts the sector. These developments in the manufacturing sector are driving the demand for LTL services.
- In the coming years, the construction segment of the less-than-truckload market is projected to experience significant growth, driven by the United States construction sector's expected CAGR of 4.7% from 2024 to 2028. Increased investments in transport, electricity, and broadband infrastructure projects bolster this growth. Also, the US government's new infrastructure policies and efforts to boost domestic manufacturing are expected to boost the manufacturing end-user segment.

United States Less than-Truck-Load (LTL) Market Trends

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United States leads regional GDP with 86% contribution, driven by infrastructure and supply chain investments

- In September 2024, the FAA, under the US Department of Transportation, allocated USD 1.9 billion in grants for 519 projects. These projects span 48 states, Guam, Puerto Rico, and other territories, all part of the Airport Improvement Program (AIP). Additionally, USD 269 million in Supplemental Discretionary Grants for 2023 will back 62 projects at 56 U.S. airports. This competitive initiative aids airport owners and operators in enhancing the U.S. airport system. Marking its largest round yet, this fifth AIP grant cycle funds diverse projects, from airport safety and sustainability upgrades to noise reduction. The grants cater to airports nationwide, regardless of size.
- With infrastructure development and the e-commerce boom, the transportation and storage sector is set for a job surge. The Bureau of Labor Statistics (BLS) projects a 0.8% annual growth rate from 2022 to 2032, translating to nearly 570,000 new jobs. Notably, the couriers and messengers industry, alongside warehousing and storage, is expected to drive about 80% of this job growth.

The United States remained a net crude oil importer in 2022, importing about 6.28 million bpd of crude oil from 80 countries

- Gasoline prices in the US are expected to drop below USD 3 a gallon for the first time in over three years by October 2024, just before the presidential election. Lower fuel prices are mainly due to weaker demand and falling oil prices, providing relief to consumers who have faced high costs that fueled inflation. This could also help Vice President Kamala Harris and other Democrats counter Republican criticism over high gas prices. In September 2024, the average price for regular gas was USD 3.25 a gallon, down 19 cents from last month and 58 cents from last year.
- According to US Energy Information Administration (EIA), crude oil prices will stay steady in 2024 compared to 2023, then decrease in 2025. The US' introduction of new refining capacities in 2023 will boost its operable capacity, alleviating price strain on oil products in 2024 and 2025. Furthermore, the Middle East, particularly Kuwait, will add new international refining capacities, which will help ease global price pressure on gasoline and diesel. Also, it is expected, narrowing crack spreads in 2024 are likely to lead to lower average US retail fuel prices in both 2024 and 2025. Gasoline prices are projected to USD 3.36/gal in 2024 and USD 3.24/gal in 2025.

United States Less than-Truck-Load (LTL) Industry Overview

The United States Less than-Truck-Load (LTL) Market is fragmented, with the major five players in this market being C.H. Robinson, Estes Express Lines, FedEx, Old Dominion Freight Line and XPO, Inc. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

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2 REPORT OFFERS

3 INTRODUCTION

- 3.1 Study Assumptions & Market Definition
- 3.2 Scope of the Study?
- 3.3 Research Methodology

4 KEY INDUSTRY TRENDS

- 4.1 GDP Distribution By Economic Activity
- 4.2 GDP Growth By Economic Activity
- 4.3 Economic Performance And Profile
 - 4.3.1 Trends in E-Commerce Industry
 - 4.3.2 Trends in Manufacturing Industry
- 4.4 Transport And Storage Sector GDP
- 4.5 Logistics Performance
- 4.6 Length Of Roads
- 4.7 Export Trends
- 4.8 Import Trends
- 4.9 Fuel Pricing Trends
- 4.10 Trucking Operational Costs
- 4.11 Trucking Fleet Size By Type
- 4.12 Major Truck Suppliers
- 4.13 Road Freight Tonnage Trends
- 4.14 Road Freight Pricing Trends
- 4.15 Modal Share
- 4.16 Inflation
- 4.17 Regulatory Framework
- 4.18 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

- 5.1 End User Industry
 - 5.1.1 Agriculture, Fishing, and Forestry
 - 5.1.2 Construction
 - 5.1.3 Manufacturing
 - 5.1.4 Oil and Gas, Mining and Quarrying
 - 5.1.5 Wholesale and Retail Trade
 - 5.1.6 Others
- 5.2 Destination
 - 5.2.1 Domestic
 - 5.2.2 International

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 A. Duie Pyle, Inc.

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- 6.4.2 ArcBest
- 6.4.3 Averitt Express, Inc.
- 6.4.4 C.H. Robinson
- 6.4.5 Day & Ross
- 6.4.6 Daylight Transport, LLC
- 6.4.7 Dayton Freight Lines, Inc.
- 6.4.8 DHL Group
- 6.4.9 Estes Express Lines
- 6.4.10 Fastfrate Inc.
- 6.4.11 FedEx
- 6.4.12 Knight-Swift Transportation Holdings Inc.
- 6.4.13 Landstar System Inc.
- 6.4.14 Oak Harbor Freight Lines, Inc.
- 6.4.15 Old Dominion Freight Line
- 6.4.16 Pitt Ohio Transportation Group
- 6.4.17 R+L Carriers, Inc.
- 6.4.18 Roadrunner Freight
- 6.4.19 Saia Inc.
- 6.4.20 Schneider National, Inc.
- 6.4.21 Southeastern Freight Lines
- 6.4.22 TFI International Inc.
- 6.4.23 United Parcel Service of America, Inc. (UPS)
- 6.4.24 Ward Transport and Logistics Corporation
- 6.4.25 Werner Enterprises Inc.
- 6.4.26 XPO, Inc.

7 KEY STRATEGIC QUESTIONS FOR ROAD FREIGHT CEOS

8 APPENDIX

- 8.1 Global Logistics Market Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (Market Drivers, Restraints & Opportunities)
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms
- 8.7 Currency Exchange Rate

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