





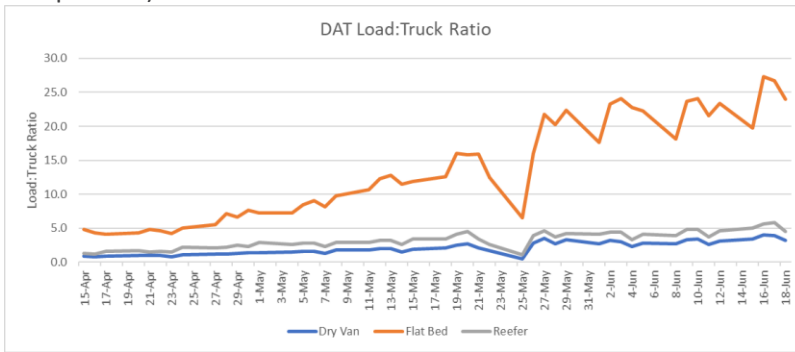
## Market Updates

### Bulk, LTL & Truckload (Van/Reefer/Flatbed):

- Capacity is tightening as the economy begins to open back up, and with produce season in the South and Southeast. Areas of high demand are the East & South Texas areas, and a swath across Tennessee stretching to the western Carolinas. As capacity begins to tighten up, providing adequate lead times will help shippers succeed in securing coverage at contracted rates. Short lead times limit options, often resulting in higher costs, missed pickups or potentially both. Predictability and stability in order patterns helps carriers plan their operations more efficiently.

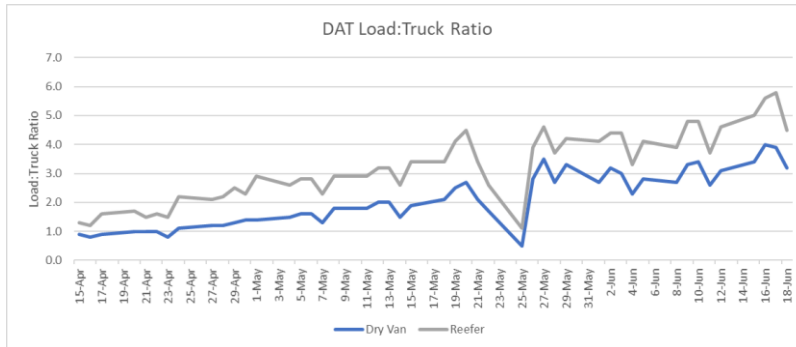
### Trend info for Dry Van/Reefer/Flatbed:

- Spot market activity increased 6.5% overall last week in comparison to the prior week, per DAT.
- Van shipment load to truck ratio increased by 9.1% last week.
- Reefer shipment load to truck ratio increased by 9.5% last week.
- Flatbed shipment load to truck ratio increased by 0.6% last week.
- The table below is the latest load to truck ratio from DAT (US shipments).



Source: DAT Solutions, LLC.

- Same table as above but removed the flatbed info to show van/reefer in finer detail.



Source: DAT Solutions, LLC.

Shelter In Place Directives		
State	Effective Date	"Reopen"
Alabama	4/4/2020	4/30/2020
Alaska	3/27/2020	4/24/2020
Arizona	3/31/2020	5/15/20
California	3/19/2020	Partial 5/12/20
Colorado	3/26/2020	4/26/2020
Connecticut	3/23/2020	5/20/2020
Delaware	3/24/2020	5/31/2020
Florida	4/3/2020	5/4/2020
Georgia	4/3/2020	4/24/2020
Hawaii	3/25/2020	5/31/20
Idaho	3/25/2020	4/30/2020
Illinois	3/21/2020	5/29/2020
Indiana	3/25/2020	5/4/2020
Kansas	3/30/2020	5/3/2020
Kentucky	3/23/2020	Retail open 5/20/2020
Louisiana	3/23/2020	5/15/20
Maine	4/2/2020	5/31/2020
Maryland	3/23/2020	5/15/2020
Massachusetts	3/24/2020	5/18/20
Michigan	3/24/2020	6/1/2020
Minnesota	3/28/2020	4/27/2020
Mississippi	4/3/2020	4/27/2020
Missouri	4/6/2020	5/3/2020
Montana	3/28/2020	4/27/2020
Nevada	3/25/2020	5/9/2020
New Hampshire	3/27/2020	6/15/20
New Jersey	3/21/2020	6/9/2020
New Mexico	3/24/2020	5/31/2020
New York	3/22/2020	5/28/2020
North Carolina	3/30/2020	5/22/2020
Ohio	3/23/2020	5/29/20
Oregon	3/20/2020	Partial 5/15/20
Pennsylvania	3/19/2020	6/4/20
Rhode Island	3/28/2020	5/8/20
South Carolina	4/7/2020	4/20/2020
Tennessee	4/1/2020	4/27/2020
Texas	4/2/2020	4/30/2020
Vermont	3/25/2020	5/15/20
Virginia	3/25/2020	6/10/2020
Washington	3/23/2020	5/31/20
Washington DC	4/1/2020	5/29/20
West Virginia	3/24/2020	5/4/2020
Wisconsin	3/25/2020	5/13/2020



## Export/Import/Ocean:

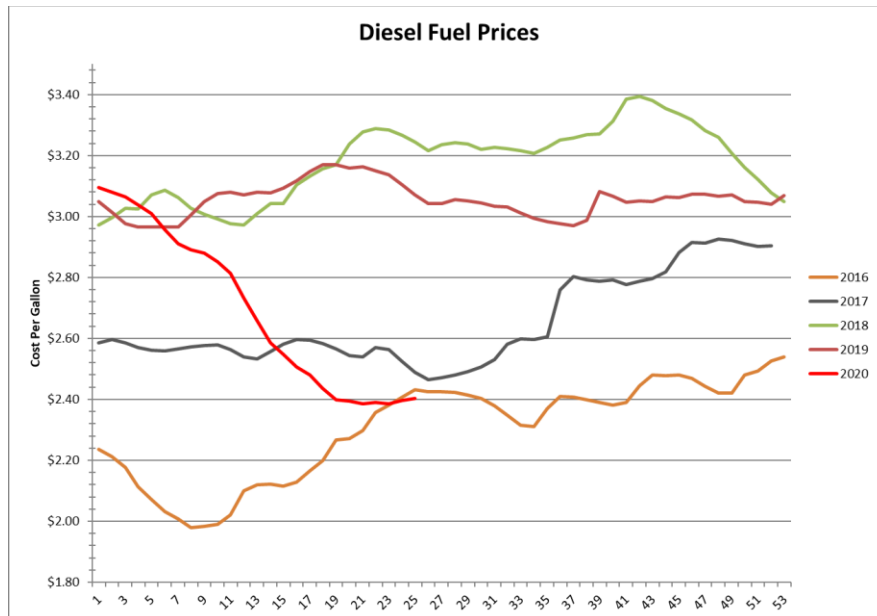
- Thousands of seafarers have been effectively 'trapped' by not being able to return home due to pandemic travel restrictions. In some cases, crewmembers have been on board their ships for more than a year.
- According to data from eeSea, only 26 third quarter blank sailings have been announced for US arrivals, as compared to 105 blank sailings for April to June.
- Air Cargo rates declined last week as the demand for PPE shipments has slowed. At the same time, carriers have decreased the number of all-cargo flights being operated passenger jets.
- Maersk reported market demand was more favorable than originally expected in the second quarter. They still are anticipating a 15-18% decline in volume for the quarter, an improvement from the prior decline of 20-25% forecast.

## Rail:

- The Association of American Railroads has reported that US weekly traffic is down 14.9% as compared to the same week last year.

## Fuel:

- The national average price per gallon this week is \$2.403. A slight increase from the prior week and the third increase in the past five.



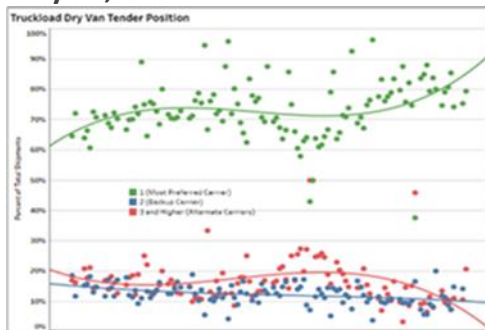
Source: U.S. Energy Information Administration



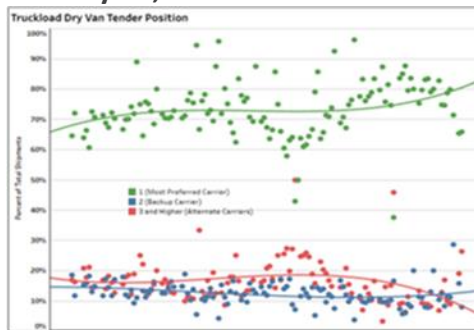
## Market Tender Position -> Six-Week recap:

- The six-week trend capture of tender acceptance as noted by the CLX carrier network for sequential tenders is below.
- Green dots/line represents the primary carrier, blue represents the backup carrier, red represents other alternate carrier options.
- Capacity beginning to tighten up as noted earlier in this week's chart as primary carrier acceptance has started to decline.

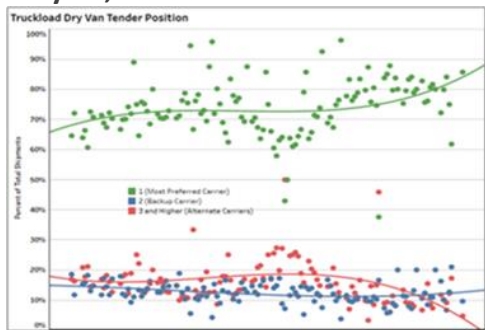
May 15, 2020



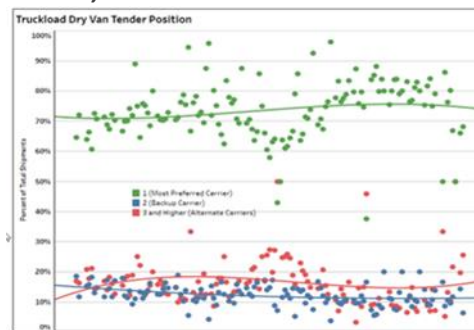
May 22, 2020



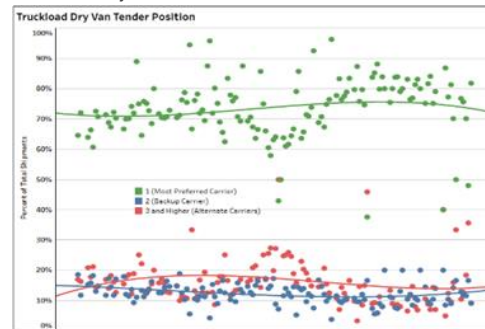
May 29, 2020



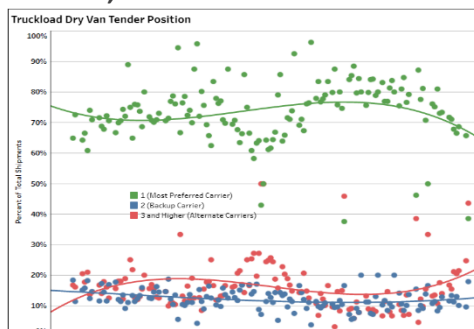
June 5, 2020



June 12, 2020



June 19, 2020



Source: CLX Logistics US carrier network. YTD June 2020. Customer pickup and return shipments excluded.

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