

# SEASONS GREETINGS:

On behalf of Emergency Fleet Service,  
we wish everyone a fantastic holiday  
and a wonderful New Year!  
- Phil Benedetti, Director of Operations/Sales

## US Business Activity Boosted After Reopening Government

Business activity in the United States increased for the second consecutive month and reached a four-month high in November, S&P Global reported Friday (Nov. 21).

The company's Flash U.S. Composite PMI Output Index rose from 54.6 in October to 54.8 in November, according to the press release.

By sector, services companies reported their strongest increase in output since July and their largest increase in new business this year. Manufacturing companies reported an increase in production but a slowdown in new orders.

S&P Global Market Intelligence noted that output increased across both manufacturing and services sectors in November.

The survey also found that companies were more confident about their prospects in the year ahead than they have been since January.

By sector, manufacturing company optimism reached a five-month high, and services company optimism reached an 11-month high.

The end of the government shutdown on Nov. 12, following President Donald Trump's signing of a continuing resolution to temporarily restore funding, allowed agencies to reopen and federal workers to return to their offices.

During the shutdown, the U.S. Chamber of Commerce estimated that \$3 billion a week could have been earned by 65,500 small business contractors, and the U.S. Travel Association estimated that the shutdown could have cost America's travel economy \$1 billion a week.

The National Federation of Independent Business reported on Nov. 11 that during October, small business optimism declined slightly, with owners reporting decreases in sales and profits.



## Ford, Hyundai On Amazon Autos

Ford Motor Co. has reached an agreement with Amazon.com Inc. to sell certified used cars through the Amazon Autos e-commerce platform, joining Hyundai Motor Co. on the site. Ford is offering its "Blue Advantage" certified used cars through the platform.

Car buyers will take delivery through participating Ford dealers. Dealers in Los Angeles, Seattle, and Dallas have signed up, and about 200 of Ford's 2,800 dealers nationwide have expressed interest in selling on Amazon.

The used vehicles are sold at a set price, with multipoint inspections completed and limited warranties of up to one year or 12,000 miles. The Amazon platform provides buyers with service history and condition reports.

Ford and Amazon highlighted that the program combines vehicle certification with the convenience of online browsing and purchasing.



## Fleets Turn To Natural Gas, Renewal Diesel, Biodiesel For Alternative Fuels, Cleaner Runs

Trucking fleets are increasingly using renewable, biomass-based diesel fuels, such as renewable diesel and biodiesel, as drop-in alternatives to petroleum diesel to reduce emissions without modifying vehicle technologies or fueling infrastructure.

Renewable diesel and biodiesel can be used in diesel engines in any concentration because they are chemically equivalent to petroleum-based distillate fuel. Renewable diesel reduces greenhouse gas emissions, particulate matter by more than 40%, carbon monoxide by more than 25%, total hydrocarbons by more than 20%, and nitrogen oxides by 10%. It can be used without purchasing new equipment or changing infrastructure.

Penske Truck Leasing has been distributing renewable diesel, also known as hydrotreated vegetable oil (HVO), for three years at West Coast fueling locations, where it accounts for about 10% to 15% of total bulk fuel sales. The supply of renewable diesel has increased over the past three to five years due to investments in refinery conversions. The U.S. Energy Information Administration reported that renewable diesel production averaged about 220,000 barrels per day in 2024, up from 170,000 in 2023, with a projected 5% increase in 2025.

Renewable diesel is limited outside states with low-carbon fuel standards, such as California, Oregon, and Washington. Production is concentrated in coastal areas or regions with ample feedstock. Changes to the \$1-per-gallon biodiesel and renewable diesel blenders tax credit have affected availability and cost.

The adoption of natural gas as a fuel for heavy-duty trucks has increased with the introduction of engines like the Cummins X15N and growing renewable natural gas (RNG) availability. Natural-gas-powered fleets include UPS and Paper Transport, which operate trucks with 9-liter, 12-liter, and 15-liter natural gas engines. Higher initial equipment costs can be offset by fuel savings over time, particularly for high-mileage operations. Practices such as slip-seating trucks can further optimize utilization and reduce total cost of ownership.

RNG captures methane from waste streams, such as landfills and dairy farms, and converts it into a low-carbon fuel for heavy-duty trucking. Companies like Clean Energy Fuels and Nopetro Energy produce RNG at landfills and dairy farms, and operate fueling stations for commercial fleets. RNG infrastructure in North America includes more than 1,200 CNG and LNG fueling stations, with access to almost 3 million miles of natural gas distribution pipeline in the U.S.



## Trucking Grows More Confident About Freight Market Upturn

Data shows an acceleration in carrier capacity exits, indicating a tightening of the market, and macroeconomic indicators are changing.

Tonnage data and the Logistics Managers' Index for September suggested a regression after positive signs in the summer.

Data also shows a 5% drop in carriers operating in the week that ended Nov. 5 and a decrease of 7.3% between Oct. 1 and Oct. 31.

GenLogs tracks unique Department of Transportation numbers observed on the roads each day through a nationwide network of cameras deployed along major interstates and highways. The cameras track truck traffic as they pass, and artificial intelligence is used to extract identifiers such as DOT/MC numbers, equipment type, or logos.

This indicated a dip in the number of smaller unit carriers with 1-10 power units, as unique truck numbers show an October dip of 0.83%.

National shipment volume contracted 2.9% in the third quarter of 2025, according to the U.S. Bank Freight Payment Index, while shipper spending increased. The data showed that shippers paid more to move less freight, partially influenced by higher fuel prices.

A survey of owner-operators and small fleets by Truckstop.com and Bloomberg Intelligence showed changes in optimism among carriers. Truckstop.com and Bloomberg Intelligence surveyed 211 carriers, of which 80% were owner-operators or small fleets with five or fewer trucks.

Macroeconomic factors include the expected resolution of the federal government shutdown, greater clarity over tariffs, and the effects of recent Federal Reserve interest rate reductions. ArcBest, based in Fort Smith, Ark., ranks No. 13 on the Transport Topics Top 100 list of the largest for-hire carriers in North America and No. 8 in the less-than-truckload segment.

Freight cycles typically last 14 to 15 months, and the current downswing has lasted approximately double that.

Rates are steady. The average rate for DAT Freight & Analytics' top 50 dry van linehaul lanes by load volume remained unchanged for a third week, averaging \$2 per mile and 28 cents higher than the national seven-day rolling average spot rate. The national seven-day rolling average for refrigerated carriers decreased by 2 cents, settling at \$2.08 per mile.

The suspension of Supplemental Nutrition Assistance Program (SNAP) benefits may create short-term headwinds for reefer carriers. The SNAP program serves 42 million Americans, with recipients spending 20% more on groceries than average, representing between 10% and 11% of total retail grocery spending.

## Port Activity October, 2025

PORT VOLUMES	TEUs Processed OCTOBER 2025	TEUs Processed OCTOBER 2024	% ↑ ↓ Year- Over-Year
<a href="#">Port of Los Angeles</a>	848,424	905,025	-6.25%
<a href="#">Port of Long Beach</a>	839,671	987,191	-14.94%
<a href="#">NW Seaport Alliance (Seattle/Tacoma)</a>	233,927	273,355	-14.42%
<a href="#">Port Houston</a>	365,773	309,623	18.13%
<a href="#">SC Port Authority (Charleston)</a>	206,859	214,558	-3.59%
<a href="#">Port of Oakland</a>	182,879	192,963	-5.23%
<a href="#">Port of Virginia</a>	214,291	237,816	-9.89%
<a href="#">Georgia Ports Authority</a>	452,934	494,261	-8.36%
<a href="#">Port Authority of NY &amp; NJ reports its volume one month behind other ports</a>	TEUs Processed In SEPTEMBER, 2025		
	740,254	779,388	-5.02%
<b>TOTAL PORT VOLUMES</b>	<b>4,085,012</b>	<b>4,394,180</b>	<b>-7.04%</b>

## October, 2025: Tonnage, Trailer Orders, Class 4-7 Sales,

### Class 8 Orders/Sales, Used Trucks, Retail, Economy

**TONNAGE:** Freight tonnage continued to slow sequentially in October, reaching its lowest level since the start of the year, American Trucking Associations reported Nov. 18. The ATA For-Hire Truck Tonnage Index decreased 2.1% to 111.9 from 114.3 in September. The results also showed a contraction of 1.8% from the prior-year period. For unadjusted seasonality, tonnage increased 3.8% from September to 119.2. The index also showed that YTD tonnage is about where it was at this point in 2024.

**TRAILER ORDERS:** U.S. trailer orders in October trended slightly above the previous year's results after a brief detour from recent gains, ACT Research reported. Preliminary net orders increased 3% year over year to 17,100 units. September had marked the first time orders trended below the prior-year results since April. October's volume also showed a seasonally expected spike of 51% sequentially. The seasonally adjusted figure in the annual order cycle lowers the monthly tally to about 12,600 units.

**MEDIUM DUTY SALES:** U.S. medium-duty truck sales dropped sequentially and compared with the prior year in October amid ongoing tariff headwinds and market uncertainty, according to data from Omdia Automotive. Classes 4-7 retail truck sales for the month decreased 25.1% to 15,345 units from 20,484 in October 2024. The last year-over-year increase in medium-duty sales occurred in January. Total sales decreased 9.3% sequentially from the 16,916 units reported in September.

**CLASS 8 ORDERS:** North American Class 8 truck orders experienced an unusually weak October as economic uncertainty continued to weigh on carriers, according to ACT Research. Preliminary data showed orders decreased 21% year over year to 24,500 units but posted a 17.8% sequential gain from the 20,800 units reported for September.

**CLASS 8 SALES:** U.S. Class 8 retail sales fell below the prior-year level as all seven major truck makers showed declines in October, according to data from Omdia Automotive. Sales decreased 29.6% to 14,690 from the 20,859 units reported in October 2024. This marked the fourth consecutive month sales were down from the previous year, and they also declined 9.5% from 16,228 units in September. Year-to-date sales are down 11.4% to 175,664 from 198,220. Wards Intelligence became fully assimilated under the Omdia branding earlier this year.

**USED TRUCKS:** According to the latest State of the Industry: U.S. Classes 3-8 Used Trucks by ACT Research, same dealer used Class 8 retail truck sales decreased in October. The 4.9% m/m decline was counter to expected seasonal performance. The Class 8 average retail sale price contracted 3.9% m/m in October, falling to \$55,300. On a y/y basis, prices decreased 0.8%.

**RETAIL:** U.S. retail sales rose modestly in September, suggesting some consumers hit pause after several months of robust spending. The value of retail purchases, not adjusted for inflation, increased 0.2% after a 0.6% gain in August, Commerce Department data showed Nov. 25, after being delayed due to the government shutdown. Excluding cars and gas, sales rose just 0.1%.

**ECONOMY:** Consumer confidence weakened slightly in October as Americans remain anxious about their future financial prospects. The Conference Board said Tuesday that its consumer confidence index fell by 1 point to 94.6 in October from an September reading of 95.6. Economists were expecting the reading to come in unchanged from the previous month. One year ago, the reading was 109.5.

## Smart Trailer Tech Reshapes Trucking Operations, Fleet Mgmt

Smart trailer technology is evolving to support fleet operations and can improve efficiency across maintenance, safety, and data management.

An expert panel hosted by Hendrickson on Nov. 13 included representatives from Hendrickson, Phillips Connect, Advanced Transportation Technology, and Anderson Trucking Service. The panel discussed advancements, implementation challenges, and the role of smart trailer technology in fleet operations.

Hendrickson's vehicle technology division focuses on tire inflation systems, battery controls, and expanding into port sensor-related technology to provide actionable data to users.

Smart trailer technology involves adding sensors to trailers to generate data for technicians, drivers, and back-office personnel. The combination of sensors and analytics provides actionable insights for fleet management, including maintenance and safety monitoring.

Data from brakes and tires, such as Commercial Vehicle Safety Alliance (CVSA) inspection violations, are key for fleet maintenance. Tire pressure monitoring systems (TPMS) and automatic tire inflation systems (ATIS) provide critical information for technicians and fleet managers.

Anderson Trucking Service reported that implementing a tire-inflation system reduced CVSA violation scores and enabled systematic tire maintenance. The company noted a decline in under-inflation violations but highlighted the need for education on TPMS and ATIS in some maintenance shops. Integrating these technologies with telematics allows for real-time monitoring of tire pressure.

A challenge for fleets is managing the large volume of data to create actionable insights. Fleets must prioritize IT investments to effectively use data, either by building technology internally or leveraging platforms that simplify integration. Some fleets may require outsourcing to manage the technology efficiently.

Critical data selection is important to avoid information overload. Hendrickson has implemented edge computing, processing data directly on the vehicle via IoT devices and sensors to reduce unnecessary alerts and focus on actionable issues communicated to the back office.

Advanced Transportation Technology noted the use of physics-based AI to analyze trailer and vehicle data, enabling condition-based maintenance and predictive insights for components, rather than relying solely on time- or mileage-based schedules.

## Rockford, IL Brake Manufacturing Emerges From Bankruptcy

The Gunite foundry in Rockford, Ill., poured its first brake as a stand-alone commercial vehicle brake drum plant on Nov. 20.

The facility is 619,000 square feet on 41 acres and includes a gray iron foundry and machine shop.

Rockford Brake Manufacturing acquired the facility for \$100,000 in cash plus closing costs.

By Nov. 24, the company employed approximately 100 people; initial production is 30,000 units per month. Production is planned to increase to 65,000 units per month by mid-2026, with employment projected to reach 150. Critical mass is considered 100 employees.

The holding furnace is a cold-fired cupola lined with brick and refractory materials.

Materials input consists of approximately 85% recycled scrap steel or foundry-grade scrap iron and 5%-10% pig iron. Coking coal is domestically sourced.

Over 90% of the supply chain is Northern Illinois-sourced, with over 85% sourced in Rockford.

The plant supports more than 80 brake drum patterns and has secured over \$10 million in commitments from manufacturers and distributors.

# REMINDERS:

CHECK THE  
BRAKE SYSTEMS  
ON YOUR  
TRACTORS  
AND TRAILERS

Your trucks/trailers  
may be due for inspection

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