Inbound Freight Costs are Rising.
What are logistics managers doing to better manage costs?

INBOUND LOGISTICS IS A COMPLEX PROCESS that can consume more than 40% of the average organization's annual freight budget, according to Aberdeen Group, which estimates that total inbound freight spend alone consumes between 3.6% to 5.2% of a firm's total annual sales. Due to inbound freight savings' direct impact on the organizational bottom line, shippers that make it a supply chain priority reap significant inventory efficiencies, better cost containment, and a higher chance of achieving productivity and service goals.

As customers’ service level expectations and demands continue to expand and change, inbound product flow is becoming increasingly complex. In search of new ways to manage shipping costs, more companies are turning to inbound logistics management providers for support. By ensuring an efficient and cost-effective flow of goods and information across multiple entities, these providers manage the transport, storage, and delivery of goods coming into a shipper’s location and contribute to the development of comprehensive supply chain management strategies.

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Challenges in managing inbound freight operations
Our research shows that organizations expect to spend, on average, $65.4 million on transportation, freight services, and equipment during the upcoming year. Companies expect to handle an average of 34,000 inbound shipments each month, and then distribute those goods across multiple transportation modes. (See Fig. 1)

Nature of inbound shipments

<table>
<thead>
<tr>
<th>Nature of shipment</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less-than-truckload (LTL)</td>
<td>74%</td>
</tr>
<tr>
<td>Truckload (TL)</td>
<td>70%</td>
</tr>
<tr>
<td>Small package</td>
<td>64%</td>
</tr>
<tr>
<td>Ocean</td>
<td>46%</td>
</tr>
<tr>
<td>Air cargo</td>
<td>39%</td>
</tr>
<tr>
<td>Intermodal</td>
<td>34%</td>
</tr>
<tr>
<td>Flatbed</td>
<td>26%</td>
</tr>
<tr>
<td>Rail</td>
<td>21%</td>
</tr>
</tbody>
</table>

As a leading cost element within the supply chain, transportation is coming to the forefront of shippers’ cost reduction, efficiency, and operational excellence strategies. Focused on the procurement and movement of raw materials, inbound freight management is facilitated by real-time freight tracking, transportation optimization, good routing practices, and transparent pricing structures. Effectively reducing costs requires a combination of logistics expertise, proficiency, technology, and automation.

To help companies better understand the challenges and opportunities associated with inbound freight management, Peerless Research Group (PRG), on behalf of Logistics Management and PLS Logistics Services, a leading third-party logistics solutions provider, surveyed 267 top logistics and transportation managers who are responsible for their organization’s transportation and/or inbound freight management. The research in this paper examines organizations’ inbound freight practices, the challenges supervisors face in managing their inbound operations, and how inbound processes are best managed.

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INBOUND FREIGHT COSTS ARE RISING. WHAT ARE LOGISTICS MANAGERS DOING TO BETTER MANAGE COSTS?

Consequently, even highly successful inbound freight operations are likely to encounter their fair share of challenges. In particular, cost containment and management, attaining greater visibility and shipment tracking, and improving process efficiencies are the major issues on which logistics managers are focused. Other key challenges include the need for better shipment status notification and data analysis/decision support, a lack of automation, and the fact that related processes are not streamlined. (See Fig. 2)

Transportation costs are a major supply chain expense
Right now, freight cost hikes are plaguing a wide swath of companies that rely on carriers to get their goods to market. While about 20% of companies are seeing freight costs recede (perhaps due to the current low fuel costs), the larger percentage is dealing with inflating transportation expenses. In 2015, approximately one-half (51%) of shippers saw inbound freight operation price increases, and nearly one out of three saw no change. Looking ahead to 2016, the forecast is comparable to last year. (See Fig. 3)

Vendors take multiple shipments to fill a given order. Vendors ship from multiple origins to fill a given order. Vendors ship from secondary or even a third DC when orders are collect thus it costs us more in freight.
VP, General Manager; Warehousing services; $250M - $500M

Shippers are changing freight classes after shipment or there’s constant re-weighs resulting in additional unrecoverable costs.
Purchasing Management; Automotive and parts; <$50M
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Among the shippers that are seeing their inbound freight costs climb, freight base rates and other vendor charges are affected the most by the increases. Inbound freight charges from vendors, assessorial charges and those made for performing additional freight services (beyond normal pickup and delivery), and premiums for expedited shipments are also rising. (See Fig. 4)

Managers evaluate their organization’s inbound freight operations
To manage their inbound freight, 53% of shippers use in-house staff and 21% rely on third-party logistics providers (3PLs). And, 11% of companies work with their suppliers/vendors for this aspect of freight management and 7% of firms rely on their purchasing departments to handle these activities. (See Fig. 5)

**Areas in which costs are increasing**

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base rates</td>
<td>57%</td>
</tr>
<tr>
<td>Increase in inbound freight charges from vendors</td>
<td>48%</td>
</tr>
<tr>
<td>Assessorial charges/Charges made for performing freight services beyond normal pickup and delivery</td>
<td>39%</td>
</tr>
<tr>
<td>Premiums for expedited shipments</td>
<td>33%</td>
</tr>
<tr>
<td>Initiatives to gain greater cost control</td>
<td>15%</td>
</tr>
<tr>
<td>Investment in systems</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>

**How companies are handling inbound freight shipments**

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>We manage it/In-house staff</td>
<td>53%</td>
</tr>
<tr>
<td>Use a 3PL</td>
<td>21%</td>
</tr>
<tr>
<td>Vendors/Suppliers managed</td>
<td>11%</td>
</tr>
<tr>
<td>Purchasing managed</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>
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Perhaps as a consequence, many of the shippers we surveyed admitted that their inbound operations are in need of improvement on some level. In fact, only 4% claim their inbound processes are “operationally excellent.” And, while the majority of companies rate their inbound freight practices as adequate, a full one out of five companies (21%) feels these processes are fair or even poor. (See Fig. 6)

When evaluating their inbound freight processes on key indicators, managers generally rate their operations as being “average” at visibility and tracking, meeting delivery schedules, technology utilization, and their ability to manage costs and processes. While managers do claim to be reasonably successful in meeting delivery schedules, many further admit that their operation is “less than proficient” at attaining supply chain visibility and shipment tracking capabilities, and at leveraging technology for process improvement. (See Fig. 7)

**Rating their organization’s inbound transportation management process**

- Excellent: 4%
- Very good: 32%
- Good: 44%
- Fair: 19%
- Poor: 2%

**Rating areas of their current inbound freight operations**

- Tracking information: 10% Excellent, 29% Very good, 32% Good, 23% Fair, 6% Poor
- On-time delivery: 7% Excellent, 36% Very good, 39% Good, 15% Fair, 3% Poor
- Ability to manage costs: 6% Excellent, 26% Very good, 42% Good, 21% Fair, 5% Poor
- Visibility: 6% Excellent, 25% Very good, 35% Good, 26% Fair, 8% Poor
- Tools and technology: 5% Excellent, 25% Very good, 31% Good, 28% Fair, 11% Poor
- Control over processes: 4% Excellent, 31% Very good, 39% Good, 21% Fair, 5% Poor

Availability of complete and accurate inbound information provides significant opportunity to match labor to work and assist load planning.

Industrial Engineer, Principal; Transportation/Warehousing; $2.5b in annual revenues

We use a controlled release process and work with your 3PL to move by best means based on end user needs.

Materials Manager; Refinery; $100M - $250M

We watch the product shipments to us and compare current costs to last shipment costs for the same shipments from the same vendors. If the freight rates go up past a certain amount, we look for a new freight forwarder. We also look at all incoming raw materials and inspect for damage. So far, so good!

President; Medical Devices; <$50M

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So, it’s interesting to see that while managers consider their inbound freight processes to be acceptable, many continue to manage these operations on their own. (See Fig. 8)

According to survey respondents, the inbound freight operational areas that need the most improvement include acquiring the best rate for shipment, track and trace capabilities, and ensuring the best possible rate for each shipment. Other key areas of concern include load optimization, consolidation and pooling; automated logistics execution; and inbound carrier key performance indicators (KPIs) and scorecards. (See Fig. 9)

Our priorities are centered on consolidation and optimization of network, implementation of TMS systems, and securing trucking capacity.

Director of Logistics; Warehousing services; $2.5B+

Aspects of inbound freight operations that need improvement

- Acquiring the best rate per shipment: 55%
- Track and trace capabilities: 38%
- Ensuring the best rate for each shipment: 37%
- Load optimization, consolidation, pooling, etc.: 33%
- Automated logistics execution: 30%
- Inbound carrier KPIs/Scorecards: 30%
- Freight rate procurement/contract negotiations: 29%
- Electronic communication (e.g., EDI, XML) with customers and carriers: 28%
- Carrier rate negotiation and monitoring of safety, insurance and performance: 28%
- Vendor compliance management: 26%
- Claims management: 24%
- Inbound shipment planning (flatbed, LTL and van): 24%
- Dock scheduling: 22%
- Expediting and event management: 21%
- Freight invoice audit and payment: 20%
- Supplier collaboration and origin management: 19%
- Standard and customized reporting: 18%
- Integration of inbound transportation applications with other systems: 16%
INBOUND FREIGHT COSTS ARE RISING. WHAT ARE LOGISTICS MANAGERS DOING TO BETTER MANAGE COSTS?

Recognizing the problem . . .
Nearly all organizations (98%) are undertaking initiatives to improve their inbound freight management processes. (See Fig. 10)

In particular, shippers are:
• collaborating with their carriers to renegotiate rates;
• establishing performance metrics for carriers;
• reducing the number of providers they partner with;
• consolidating shipments; and,
• upgrading invoicing and payment procedures.

Actions taking to better manage/control your inbound freight processes

- Renegotiating freight rates: 57%
- Consolidating shipments: 52%
- Keeping close track of invoicing/payments: 44%
- Working with fewer partners such as carriers and forwarders or 3PLs: 42%
- Adopting KPIs/Performance metrics for carriers: 27%
- Improving knowledge of customs and clearance issues/Regulations compliance: 26%
- Improved reporting capabilities such as business intelligence solutions: 25%
- Using more local or regional sources/reducing imports: 17%
- Collaborating with other companies that are closer to our customers (even if limited to certain SKUs): 12%
- Using more rail, including piggyback/TOFC/COFC: 10%
- Other: 5%
- Nothing: 2%
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Technology adoption continues to lag
As previously highlighted in this research, the adoption of technology for inbound freight management is gradual, if not lagging. Curiously, many companies have chosen not to automate inbound freight management. While freight auditing, rate information, and shipment visibility are the most commonly automated processes, alarmingly small percentages—fewer than one out of three in each case—have automated these particular tasks.

And while between 19% and 31% of those firms surveyed plan to automate specific inbound activities that aren’t currently automated, the largest percentage of companies presently do not have plans to employ technology. Tasks least likely to be automated include monitoring of fuel rate changes, routing and carrier usage and options, transportation procurement, load optimization, and contract management. (See Fig. 11)

Tasks are currently automated/planned for future automation/no plans to automate

<table>
<thead>
<tr>
<th>Task</th>
<th>Now automated</th>
<th>Not currently automated but will</th>
<th>No plans to automate</th>
<th>Not using but have a need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freight audit and pay</td>
<td>33%</td>
<td>22%</td>
<td>35%</td>
<td>10%</td>
</tr>
<tr>
<td>Rate databases</td>
<td>31%</td>
<td>24%</td>
<td>32%</td>
<td>13%</td>
</tr>
<tr>
<td>Shipment visibility</td>
<td>31%</td>
<td>31%</td>
<td>28%</td>
<td>10%</td>
</tr>
<tr>
<td>Fuel charge adjustments/changes to carrier accessorialis</td>
<td>27%</td>
<td>20%</td>
<td>42%</td>
<td>11%</td>
</tr>
<tr>
<td>Logistics execution (booking/tendering)</td>
<td>25%</td>
<td>24%</td>
<td>38%</td>
<td>13%</td>
</tr>
<tr>
<td>Routing and carrier selection</td>
<td>24%</td>
<td>23%</td>
<td>44%</td>
<td>9%</td>
</tr>
<tr>
<td>Transportation procurement/tendering</td>
<td>23%</td>
<td>23%</td>
<td>43%</td>
<td>11%</td>
</tr>
<tr>
<td>Routing guides</td>
<td>22%</td>
<td>23%</td>
<td>39%</td>
<td>16%</td>
</tr>
<tr>
<td>Contract management</td>
<td>18%</td>
<td>19%</td>
<td>53%</td>
<td>10%</td>
</tr>
<tr>
<td>Reporting and KPIs</td>
<td>15%</td>
<td>29%</td>
<td>37%</td>
<td>19%</td>
</tr>
<tr>
<td>Load optimization</td>
<td>12%</td>
<td>25%</td>
<td>45%</td>
<td>18%</td>
</tr>
</tbody>
</table>

We are looking to mainly use one freight line for product. This will make it easier to control where they are and hopefully get lower prices.
Purchasing Manager; Food & Beverage; $100M - $250M

We will be migrating all carriers’ tracking and shipment data into our global visibility platform.
Distribution Manager; Paper; $1B - $2.5B

We are continuing to automate internally:
We created software in our intranet that tracks our inbound ocean freight, but we need to improve the rail data collection and then the local cartage companies don’t have any sort of automation—it is all done manually over the phone. That has to improve as it is taking too much of our time.
VP, General Manager; Automotive and Transportation Equipment Manufacturing; <$50M

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Adoption of transportation management systems (TMS)

Only one out of three operations currently uses a transportation management system; and, of these, 8% expect to upgrade their TMS in the upcoming year. Additionally, while some are in the process of installing a TMS (11%) or are evaluating a TMS (12%), nearly one-half (44%) do not have plans to adopt at the present time. (See Fig. 13)

Those companies that are presently operating a TMS or planning to use one in the future are split on the preferred method of deployment. While four out of 10 managers (40%) opt to host their TMS, one out of four (26%) favor running their TMS as a cloud-based application. And, 34% of companies are open to either deployment method.

Just over one-half of the operations surveyed (54%) run metrics to help manage inbound freight costs (See Fig. 12). The top indicators being measured includes spend by carrier and volume (71%), costs by routes/lanes (68%), and on-time performance for shipping routes/lanes (61%).
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Employing a third party to manage inbound operations

Roughly one-half of the businesses surveyed (49%) outsource their logistics and/or transportation management functions. Of the remaining shippers, 13% are considering a 3PL to manage these tasks while slightly more than one-third (38%) have no immediate plans to use a 3PL. (See Fig. 14)

Tasks that are either now commonly outsourced or that are likely to be farmed out include inbound and outbound transportation and freight forwarding operations. Other transportation-related tasks that shippers outsource (or, want to outsource) to a 3PL include freight audit and payment, warehousing, cross-docking, and inventory management. (See Fig. 15)

Tasks (currently or considering) outsourcing to a 3PL

- Inbound transportation: 46%
- Freight-forwarding: 38%
- Outbound transportation: 34%
- Freight audit and payment: 30%
- Warehousing: 29%
- Cross-docking: 25%
- Inventory management: 15%
- Technology: 15%
- Packaging: 11%
- Entire supply chain operations: 9%
- Other: 11%
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Conclusion
As evidenced by the Logistics Management research and the emerging trends in transportation, inbound freight management should be a core focus for shippers of all sizes and across all industries in 2016. The challenges of managing these efforts internally is clear, but the benefits associated with good inbound freight management techniques range from reduced expenses to improved on-time deliveries to better inventory management, to name just a few.

As more shippers strive to gain better control and oversight with this aspect of their transportation operations, third-party logistics providers will continue to help “fill the gap” through streamlining and automation of inbound freight processes.

Efficient inbound freight management practices yield favorable results
With inbound freight consuming such a high percentage of the typical shipper’s transportation budget, and with the complexity of these processes increasing, both shippers and customers alike stand to benefit from effective inbound freight management. Cost control over inbound processes and better inventory management are just two of the primary benefits that can drive customer-facing improvements such as on-time delivery and advanced service levels. Other benefits include better administrative efficiency, less product handling and damage, and access to proactive notices about disruptions and related issues. (See Fig. 16)
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Methodology
The research in this brief was conducted by Peerless Research Group on behalf of Logistics Management for PLS Logistics Services. This study was executed in December of 2015, and was administered over the Internet among subscribers to Logistics Management magazine. Respondents were qualified for being involved in decisions related to their organization’s transportation and/or inbound freight management operations. Results of this research are based on information provided by 267 executives who are logistics or distribution managers (27%), top corporate executives (26%), transportation managers (13%), supply chain managers (7%), and operations managers (6%). Roughly two-thirds of those in this study are employed in manufacturing businesses that includes food and beverage, computers and electronics, pharmaceuticals, and automotive and parts, etc. Wholesalers and retailers are also included in the study. This research encompasses businesses of all sizes.

About PLS Logistics Services
PLS Logistics Services is a leading provider of full service transportation management and technology services for shippers across all industries. PLS handles millions of loads annually across all major freight modes: flatbed, van, LTL, rail and barge, air and ocean. The PLS carrier network consists of more than 20,000+ trucking companies along with Class-1 railroads and major barge companies. PLS improves transportation processes through the development of inbound freight management. The company has discovered that clients who engage in an inbound transportation strategy are rewarded with significant cost savings, more visibility and improved processes.

Contact Information:
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