

9TH ANNUAL

Global Transportation Management

BENCHMARK SURVEY

Discover the transportation management strategies, tactics and technology that top performers are leveraging to capitalize on market opportunities and adapt to challenges of a constantly evolving supply chain landscape.

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About the Survey

Since 2017, Descartes has conducted an annual benchmark survey of global transportation professionals to identify the strategies, tactics, and expectations for the industry. Survey participants represent a wide range of people responsible for transportation operations at both shippers and logistics service providers across North America and Europe to provide a balanced view of transportation management (TM).

Each year our benchmark survey:

- Explores how companies view the role of TM
- Identifies key industry trends driving the market
- Examines how transportation value is measured
- Uncovers which capabilities, technologies, and competitive strategies/tactics are making the greatest impact
- Provides the outlook for future IT investment

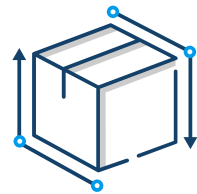
The 2025 Transportation Management Survey: A Journey in Value Creation

This year's survey shows the continuing expansion of the role of transportation management as an enabler for growth and differentiation, but it also highlights the areas (e.g. Automation, AI) where improvements are needed to help organizations enhance operations.

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Key Survey Findings

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Transportation's Evolving Role

- 81% of respondents view transportation as a differentiator or competitive weapon—**a record high**
- Sharing transportation data across teams and partners continues to grow, fueling connected ecosystems
- Business growth is the top driver for TMS expansion



Fraud & Theft Prevention Rising

- Carrier monitoring (insurance, safety, fraud)—**selected as a top 3 TMS capability**
- Carrier vetting & identity validation ranked important by 25% of respondents
- North America values these capabilities 7% higher than Europe, reflecting greater fraud concerns in NA



Automation & AI Adoption

- Only 17% of respondents are fully automated; 37% use heavily manual processes
- Automation is tied to financial strength: 51% of leading financial performers are automated vs. 5–8% of poorer performers
- **Generative AI used by 96% of respondents**
- Top AI use cases: data entry (41%) and route/load optimization (39%)
- Companies not using AI are more likely to view transportation as a “necessary evil” and expect low growth



Growth & Investment Outlook

- 72% of respondents expect at least 5% annual revenue growth in the next two years
- **80% plan to increase TMS IT investment**
- Companies in better financial position invest more in TMS than poorer performers

Key Survey Findings

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Industry in Transition – From Tactical to Strategic Transportation Management

The 2025 Transportation Management Benchmark Survey reveals a sector making meaningful progress in elevating transportation from a cost center to a strategic driver of customer value and business growth. This transition is backed by the more strategic view of and investment in TMS.

Encouragingly, business growth (48%) was cited as the leading factor driving transportation management expansion, surpassing more traditional cost-reduction pressures. Companies are also broadening the internal and external sharing of transportation data, advancing the shift toward connected, value-driven ecosystems.

Despite these gains, there is still considerable room for advancement in automation and digital maturity. Only 17% of respondents are fully automated, while 37% remain heavily or mostly manual in their processes. This digital gap is especially pronounced between companies with Industry Leading Financial Positioning and those at the bottom, who trail significantly in automation, AI adoption, and growth expectations.

Similarly, although 96% of companies report some form of generative AI use, broader AI application and deeper integration of transportation data across supply chains remain opportunities for unlocking greater strategic value.

In sum, the industry is steadily evolving toward a more connected and strategic transportation function. The challenge ahead lies in closing the automation gap, scaling AI adoption, and embedding transportation insights into broader supply chain decisions—all essential to realizing the full value potential of modern transportation management—and only possible with accurate, timely data from in-transit tracking solutions, TMS, WMS, and back-end systems working together.

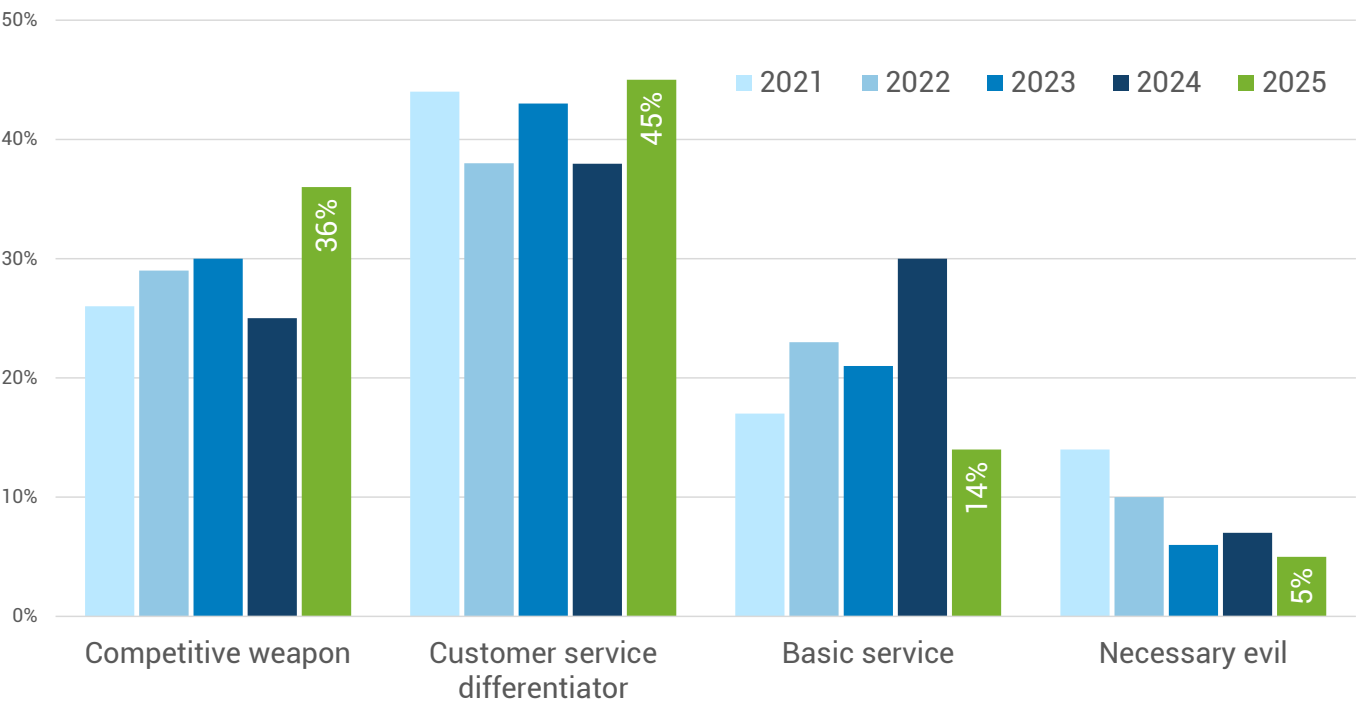


Respondent Perspectives

Respondent Perspectives

- Management that views transportation as a competitive weapon grew 11% to 36% compared to last year. Basic Service saw a drop of 16% to only 14% of respondents choosing it
- Transportation Management is growing in strategic importance

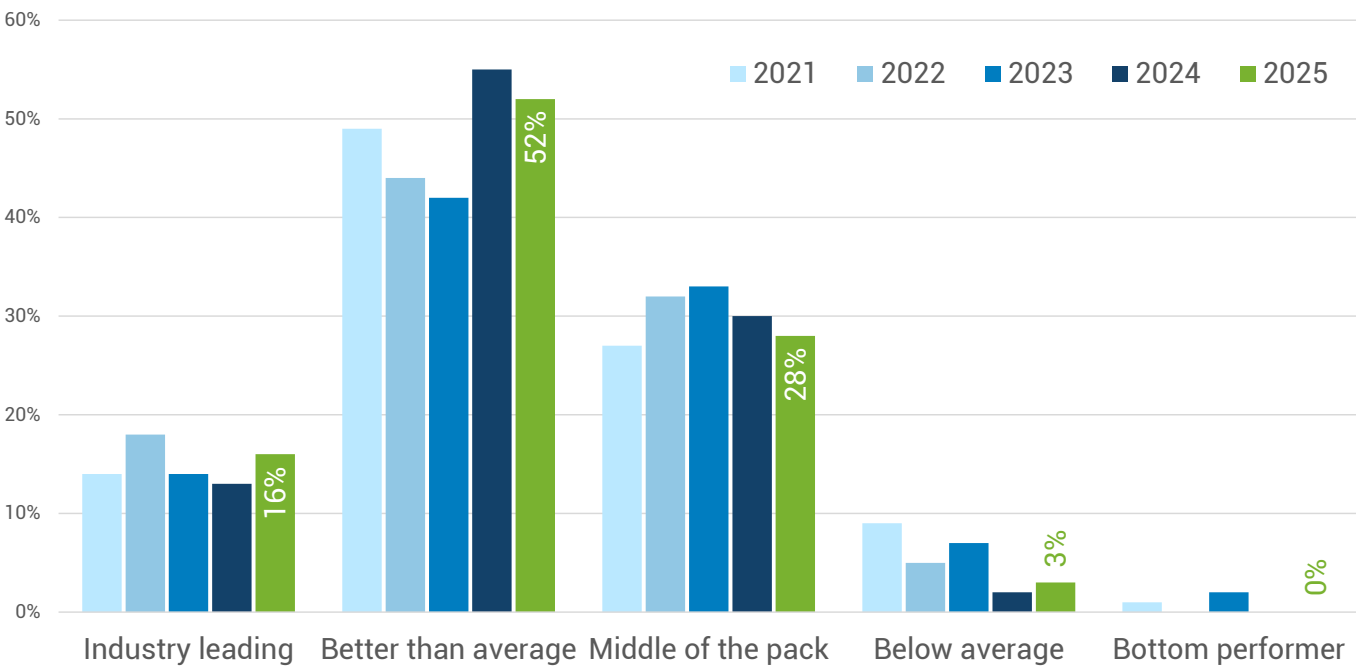
How strategically is transportation viewed by management? (select one)



Financial Standing

- Overall responses on current company financial performance stayed about the same as last year. As in past years, a vast majority of companies where management views transportation as a Competitive Weapon (79%) are also in an Industry Leading or Better than Average financial position

How well financially is your company doing today? (select one)

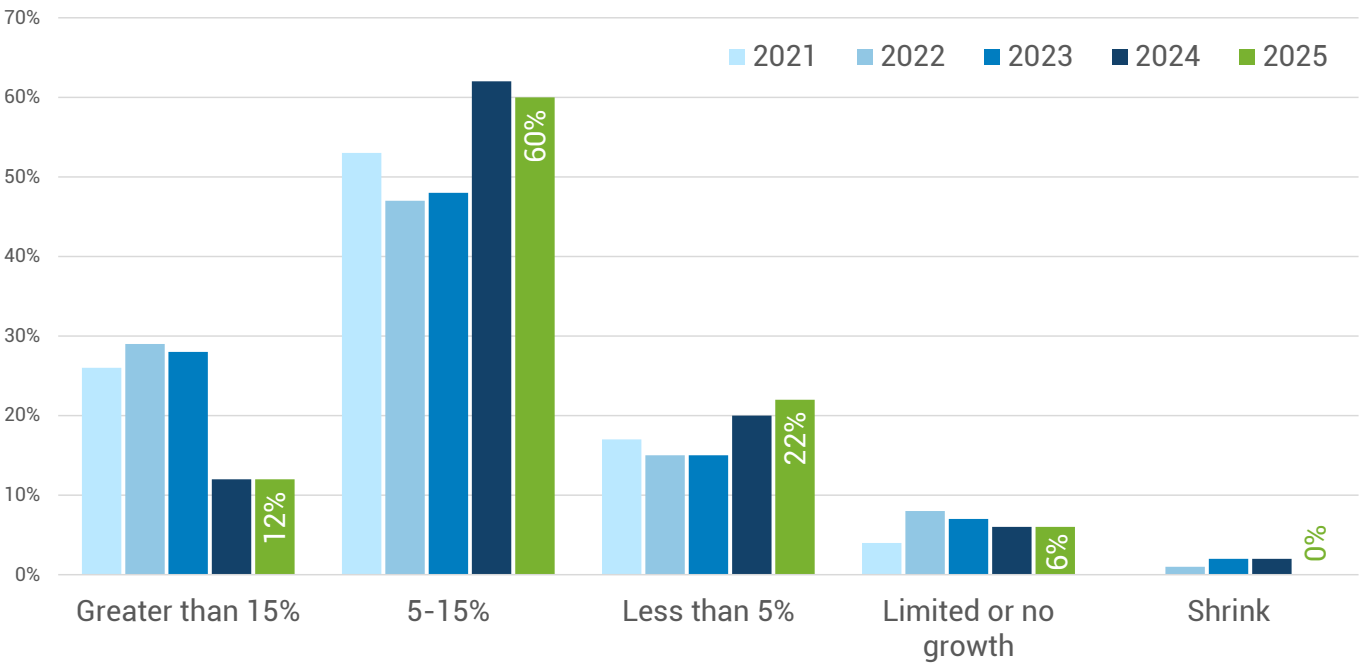


TM Strategy, Financial Performance & Growth

Company growth over the next 2 years

- Growth expectations remained about the same as last year's survey, with 94% of respondents expecting growth and 72% of them expecting growth by at least 5%
- Again, as in past years, we see that companies where management views transportation as a Competitive Weapon are around 10% more likely to expect to grow at least 5% than companies where management views transportation as a Basic Service or Necessary Evil

Based on current economic climate, what do you expect your annual growth to be over the next 2-3 years? (select one)



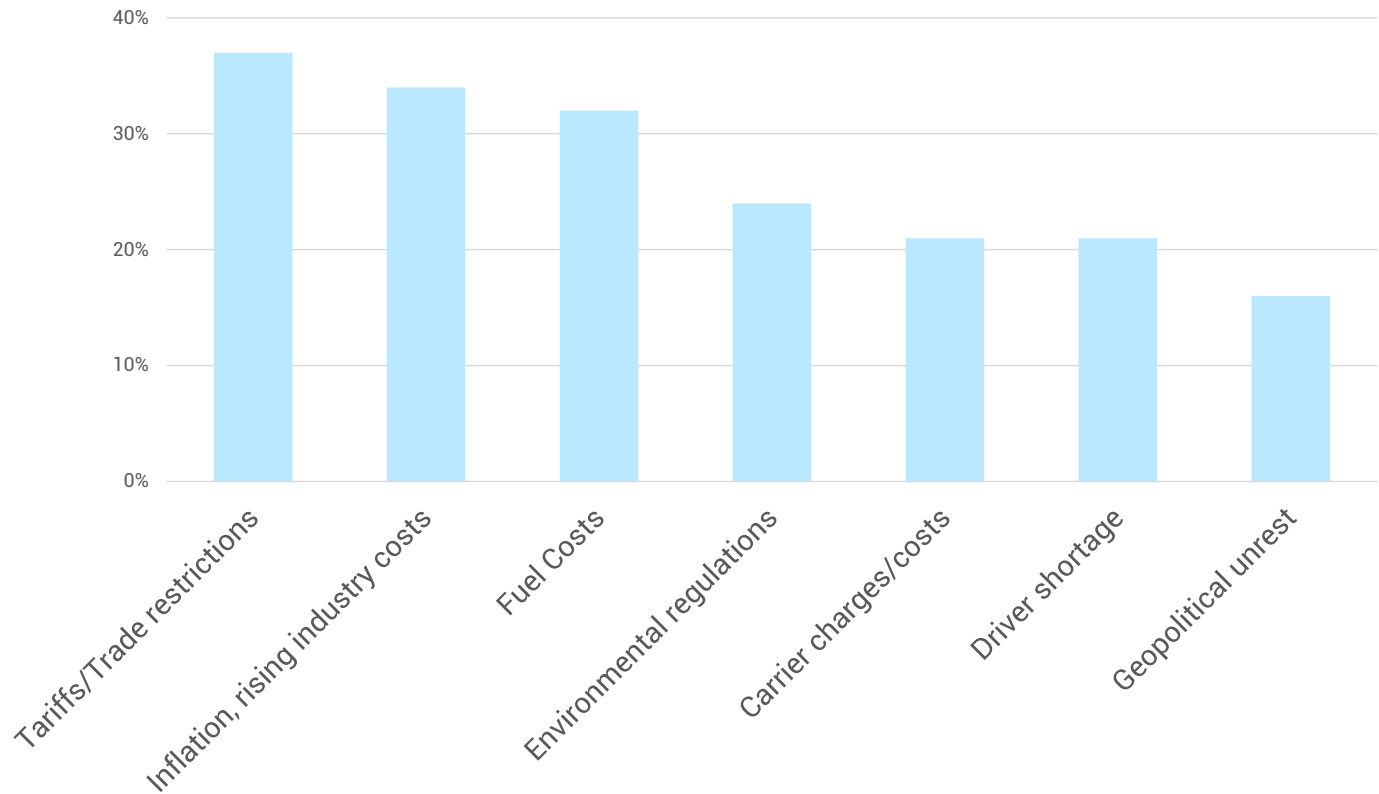
Key Trends & Practices

We asked respondents several questions related to transportation management regarding the future significance of current market and business drivers, value measurement, where information is used and concerns about competitive strategies.

Industry or regulatory changes with the greatest market impact over the next 5 years

- Tariffs took the top spot with 37% along with Inflation (34%) and Fuel Costs (32%) to round out the top three impacts. Tariffs and Inflation were chosen at a much higher rate by North Americans (44%, 39%) compared to Europeans (30%, 29%)
- Environmental Regulations dropped out of the top three with 24% choosing it. Europeans chose it at 27%, North Americans 22%

What industry or regulatory changes will have the greatest impact on transportation management over the next 5 years? (select three)



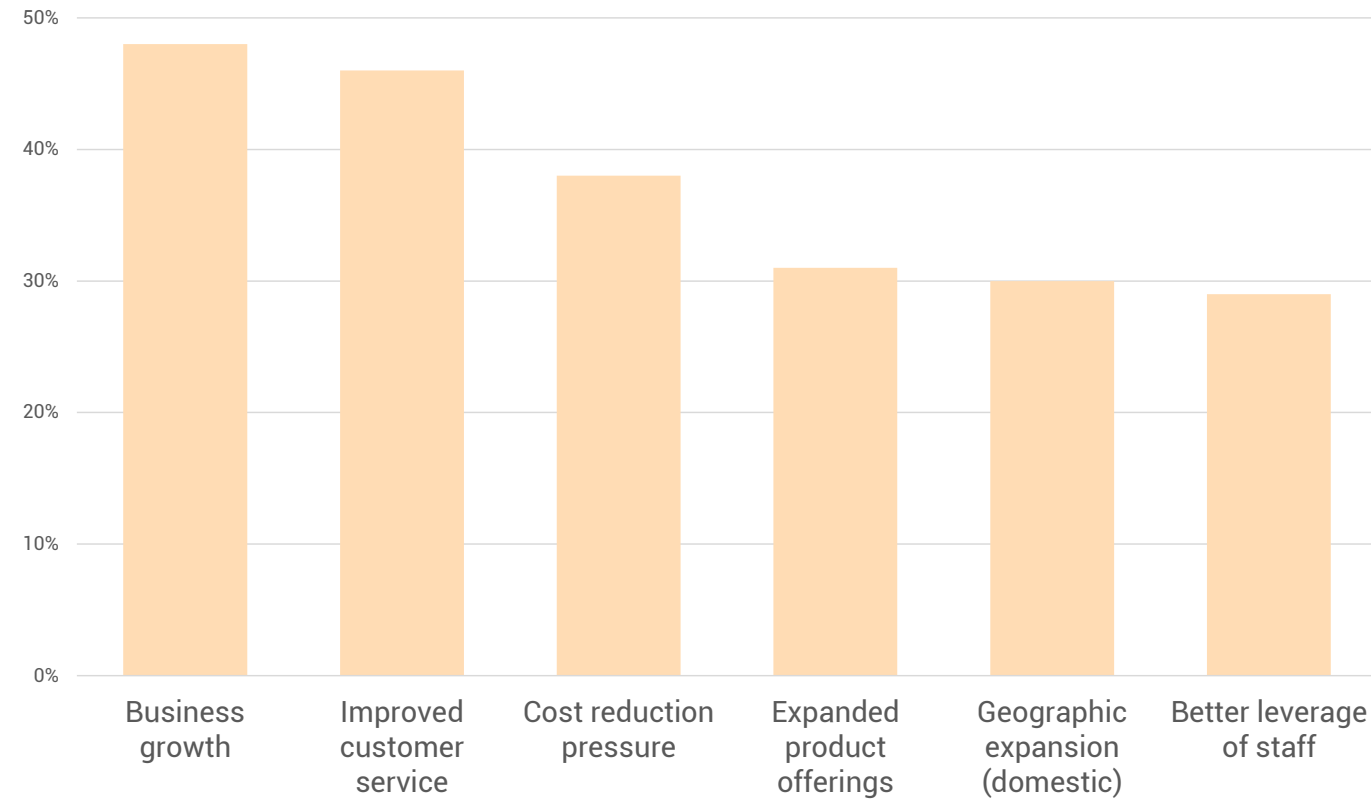
Key Trends & Practices (cont'd)

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What's driving TM expansion?

- Business Growth was the top choice (48%), up 10% from last year's 3rd place selection
- Improved Customer Service (46%) and Cost Reduction Pressure (38%) remain in the top 3 categories again this year
- Business Growth and Improved Customer Service were selected much more often by companies with Industry Leading financial positioning
- Cost Reduction was more important to Below Average financial positioned companies

What business drivers are resulting in your expanded (or initial) use of a transportation management system? (select all that apply)

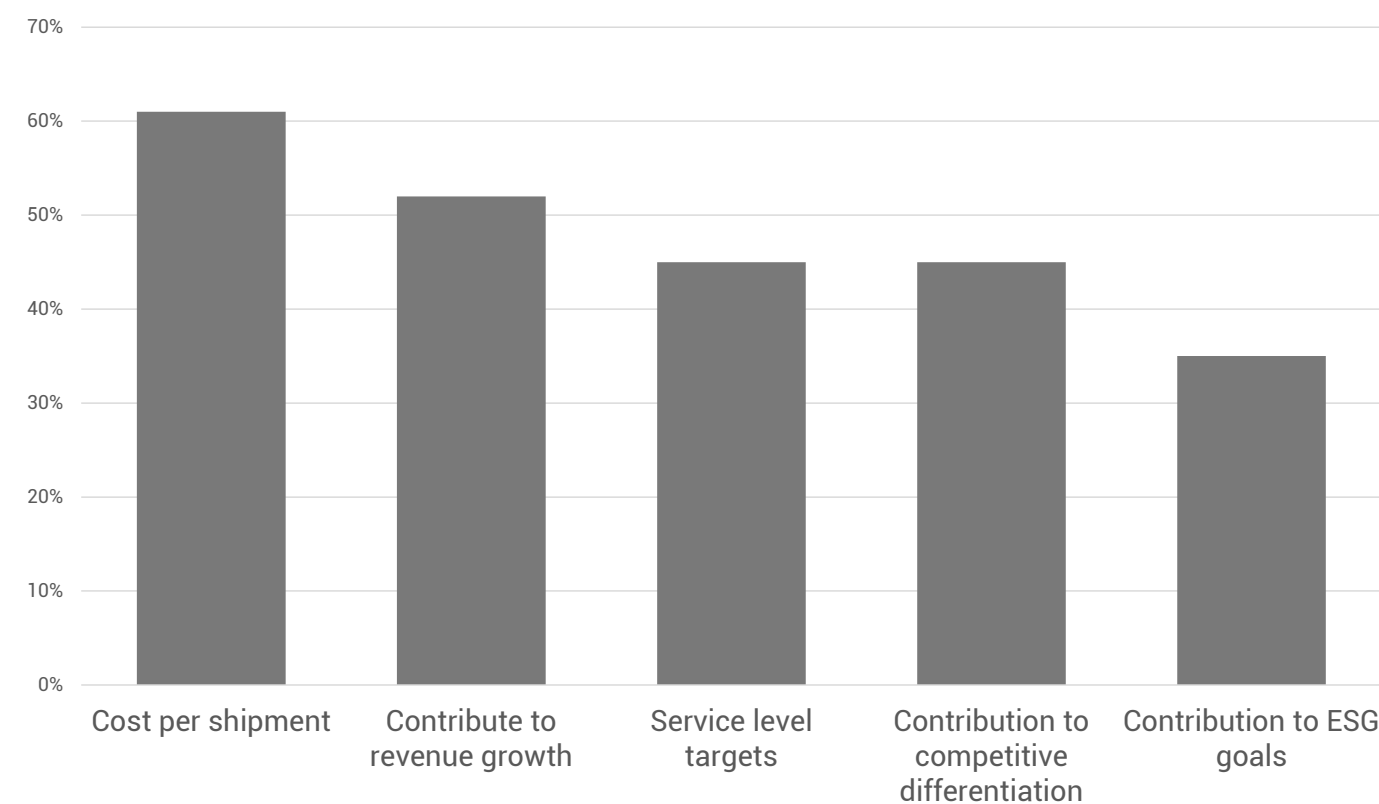


Key Trends & Practices (cont'd)

Measuring transportation value

- Cost per shipment remained the top choice in 2025 (61%) as it was in 2024 (61%). All other categories showed significant gains, demonstrating the increasing importance of transportation to overall performance, not just cost
- Contribution to Environmental, Social and Governance (ESG) was a new category this year and debuts at 35%
- Companies that view transportation management as a Competitive Weapon chose Contribution to Revenue Growth (60%) by 20% more than companies regarding transportation as a Basic Service (40%) or Necessary Evil (38%)

How is the value of the transportation measured?
(select all that apply)

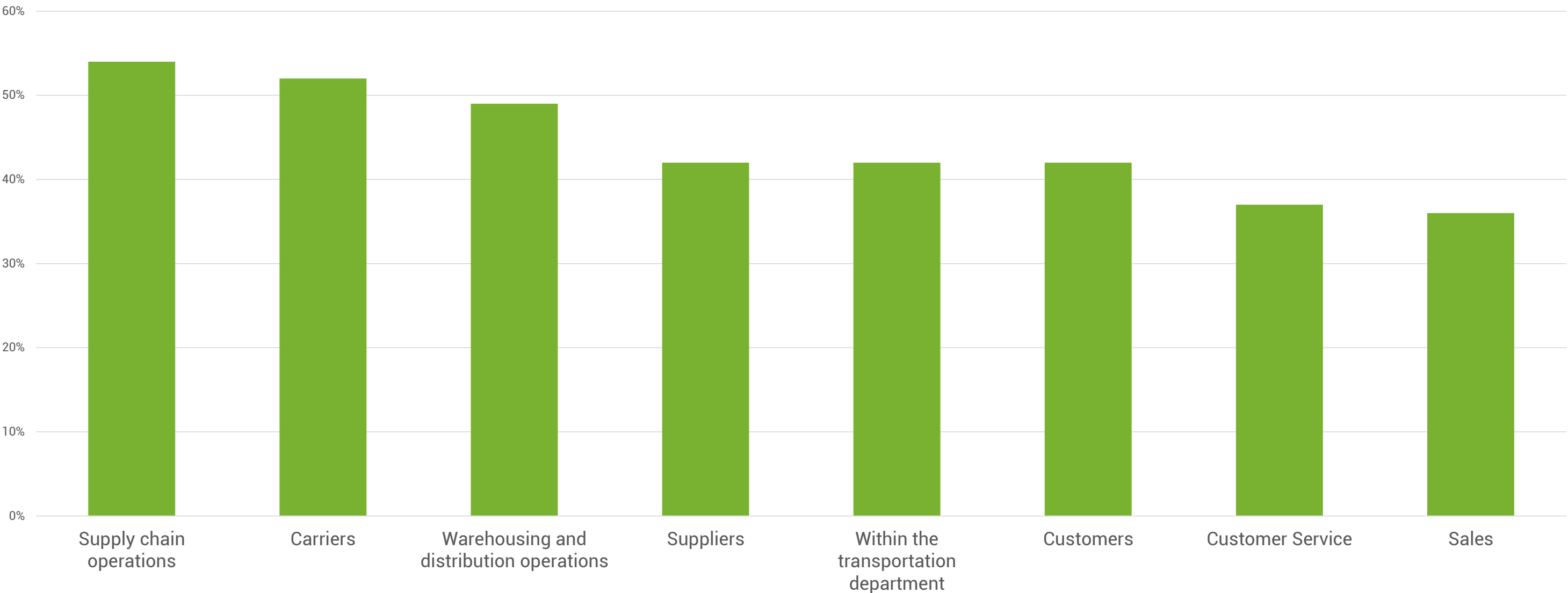


Key Trends & Practices (cont'd)

Sharing information beyond transportation operations

- Supply Chain Operations (54%) took the top overall response spot again. Carriers (52%) moved up from 3rd into 2nd place with a 15% increase in selection. Warehousing and Distribution Operations (49%) remains a top 3 choice this year. All categories showed an increase year over year showing that information is being shared more overall
- Companies that view transportation as a Competitive Weapon chose Supply Chain Operations (61%) at a much higher rate than Basic Service (40%) or Necessary Evil (45%)

Where is transportation information used to create value? (select all that apply)

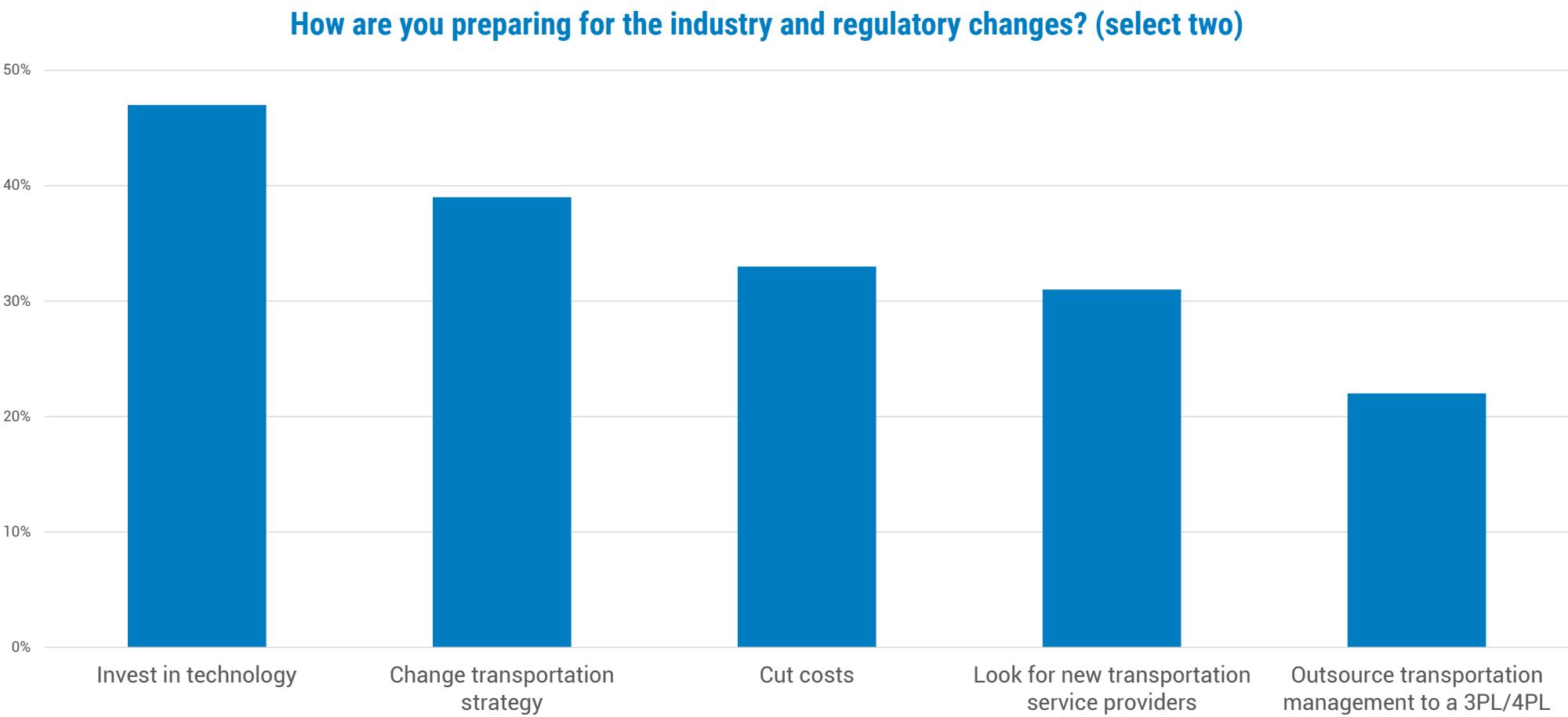


Strategies & Tactics

Survey respondents were asked how they are planning to address the key trends and improve transportation value—both strategically and tactically. In addition, they ranked the capabilities required to effectively manage transportation, and then took a deeper dive into the highest ranked capabilities.

Preparing for industry and regulatory change

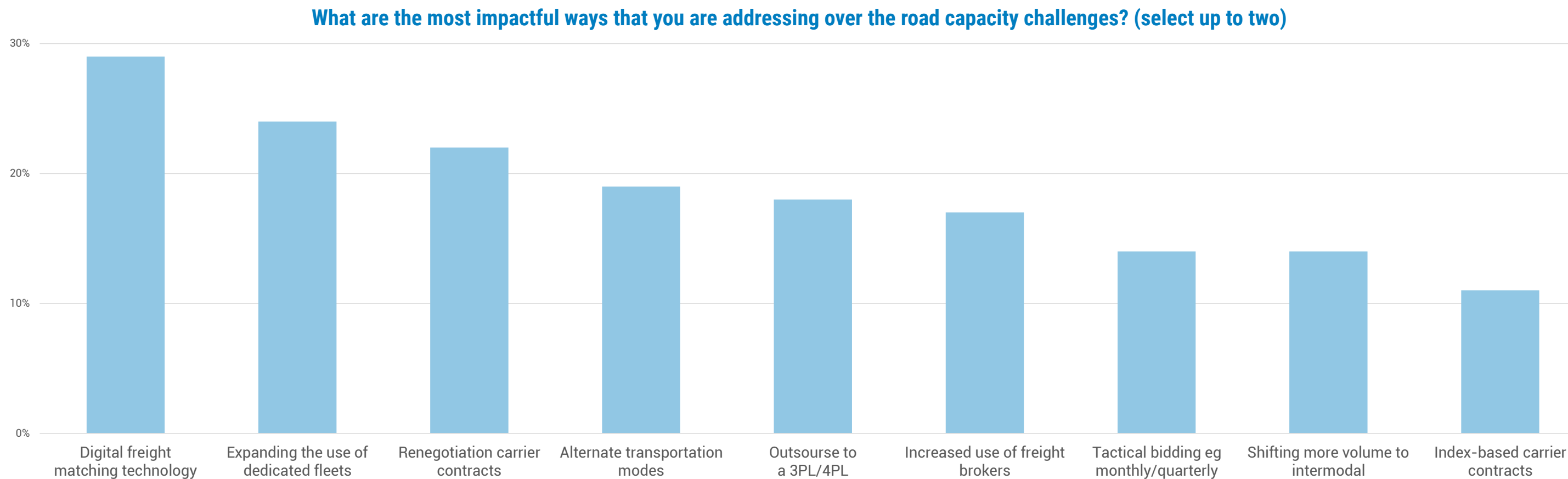
- Invest in Technology was the top overall response (47%) for the 8th year. Companies that view transportation as a Competitive Weapon were more focused on investing in technology (55%) compared to those who view transportation as a Basic Service or Necessary Evil (35%). Companies with worse financial performance chose Cut Costs at a higher rate than Industry Leaders, and were also more likely not to expect growth in the next two years



Strategies & Tactics (cont'd)

Addressing over the road capacity

- Investing in Digital Freight Matching (29%) jumped 13% from last year to take the top spot
- Expanding Fleets (24%) and Renegotiating Contracts (22%) are top three categories again this year
- Companies that view transportation as a Competitive Weapon chose Digital Freight Matching at a much higher rate compared to those who view transportation as a Basic Service or Necessary Evil

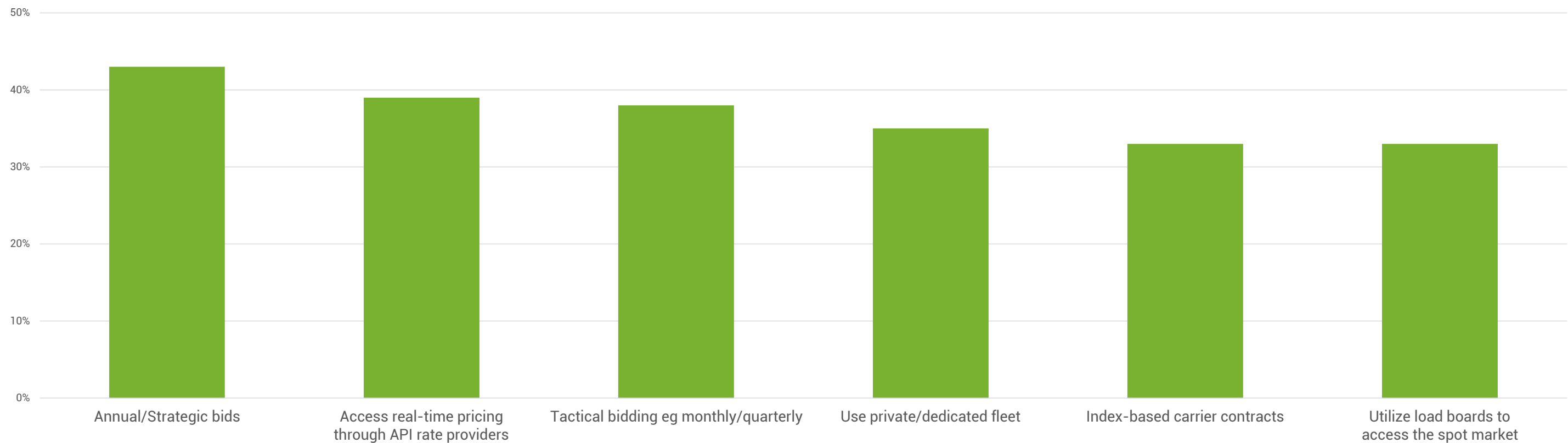


Strategies & Tactics (cont'd)

How are truckload contracts managed?

- Annual bids are the top choice again this year (43%), Real-Time Pricing (39%), and Tactical Bids (38%) round out the top three
- All categories showed an increase this year over last, indicating that companies are continuing to use multiple strategies to manage Truckload freight. Index Rates saw the biggest jump in adoption from last year (33% in 2025 vs. 20% in 2024)

For truck load freight, how do you contract rates with carriers? (select all that apply)



Organizational approach to transportation strategies

- Create or adopt leading edge strategies (44%) took over the top spot in 2025, growing by 8% from 2024. North American respondents (51%) chose Create or adopt leading edge strategies 14% more than Europeans (37%)
- Not surprisingly companies that view transportation as a Competitive Weapon (65%) chose Create or adopt leading edge strategies at around 40% more than those who view transportation as a Basic Service (22%) or Necessary Evil (21%)



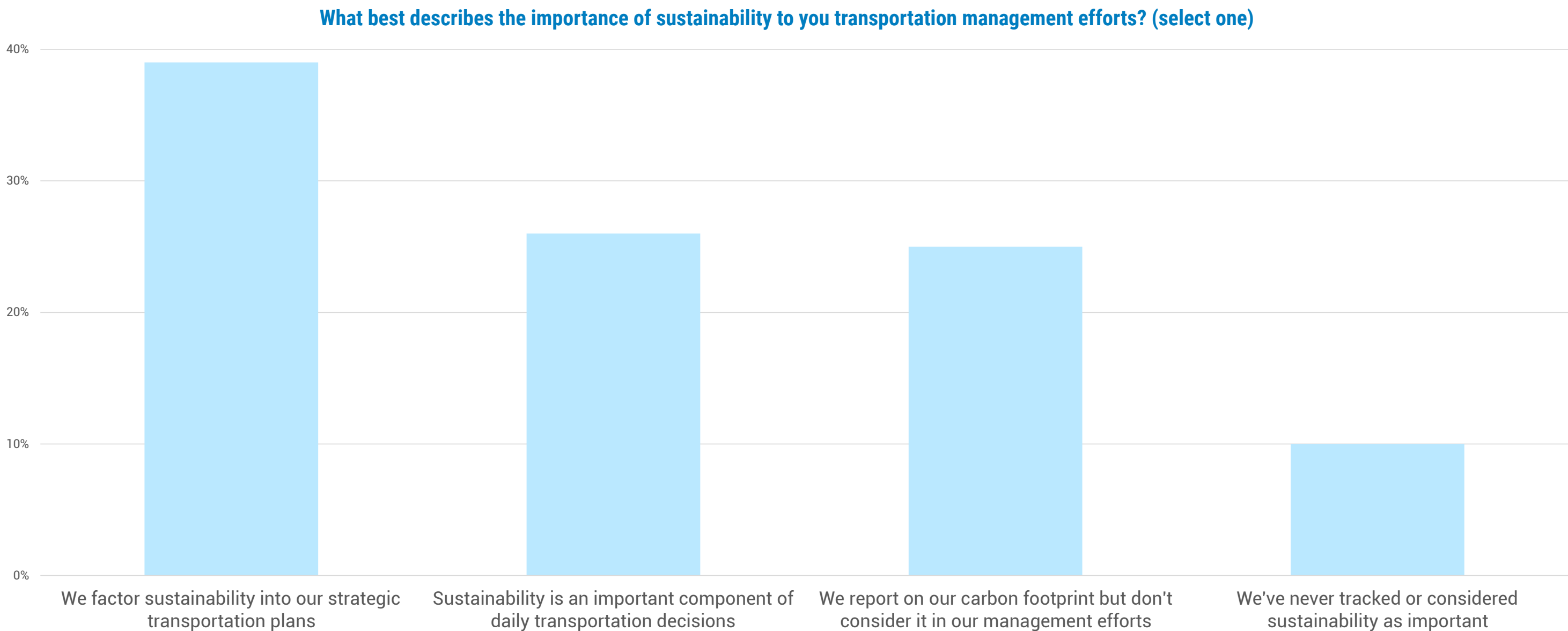
Strategies and tactics for improving transportation value

- Automating processes (31%) moved to the top spot with new categories, Adopting AI (26%) and Managing Disruptions (23%) making their debut in the top three. Companies that view transportation as a Competitive Weapon chose Adopting AI at 15% more than companies viewing transportation as a Necessary Evil (25% vs. 10%)
- Cut Costs (20%) dropped 13% this year from 2024. Cut Costs was selected by Necessary Evil at double the rate of Competitive Weapon companies (34% vs. 16%)



Importance of Sustainability

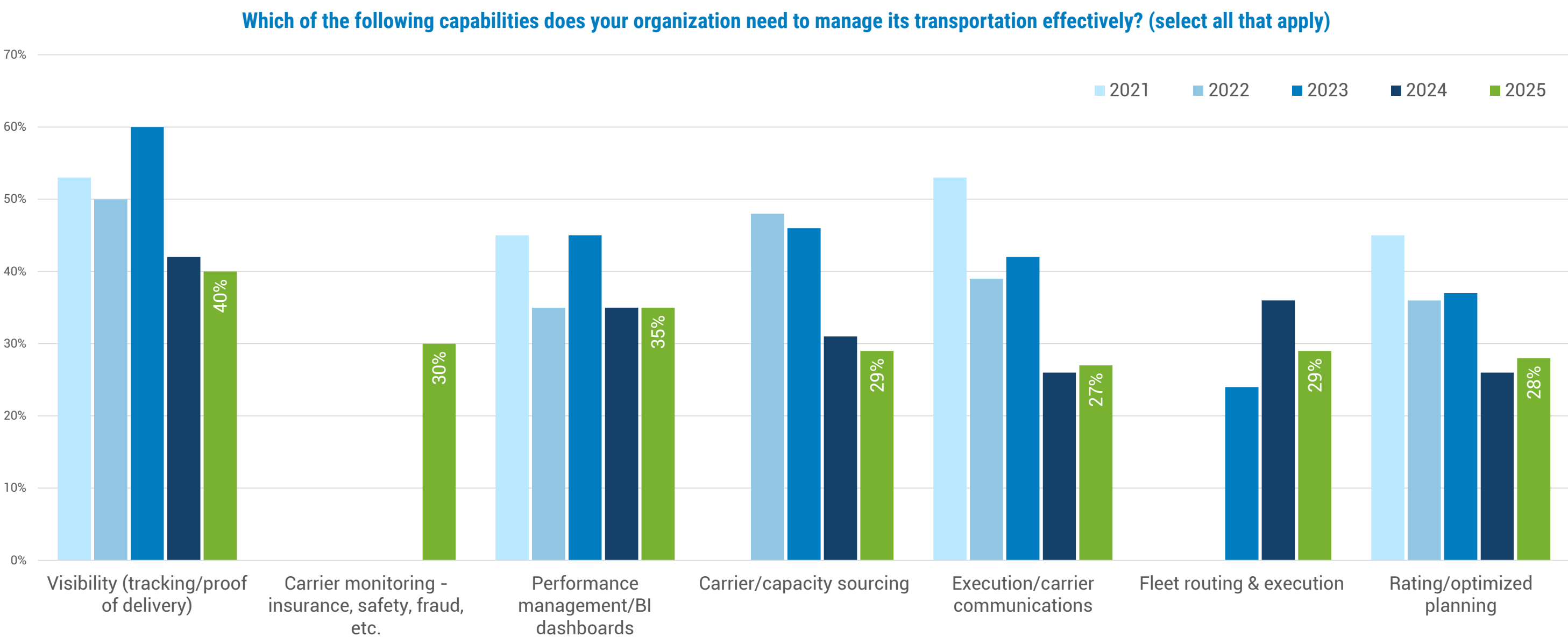
- Factoring sustainability into strategic transportation plans was the top choice again, but dropped a few percentage points to 39%. Companies that view transportation as a Competitive Weapon (41%) selected Important to daily decisions at a much higher rate than companies viewing transportation as a Necessary Evil (24%)
- Companies in better financial positions also factor sustainability into strategic plans and daily decisions at a much higher rate than poorer performers



Strategies & Tactics (cont'd)

Capabilities needed for effective transportation management

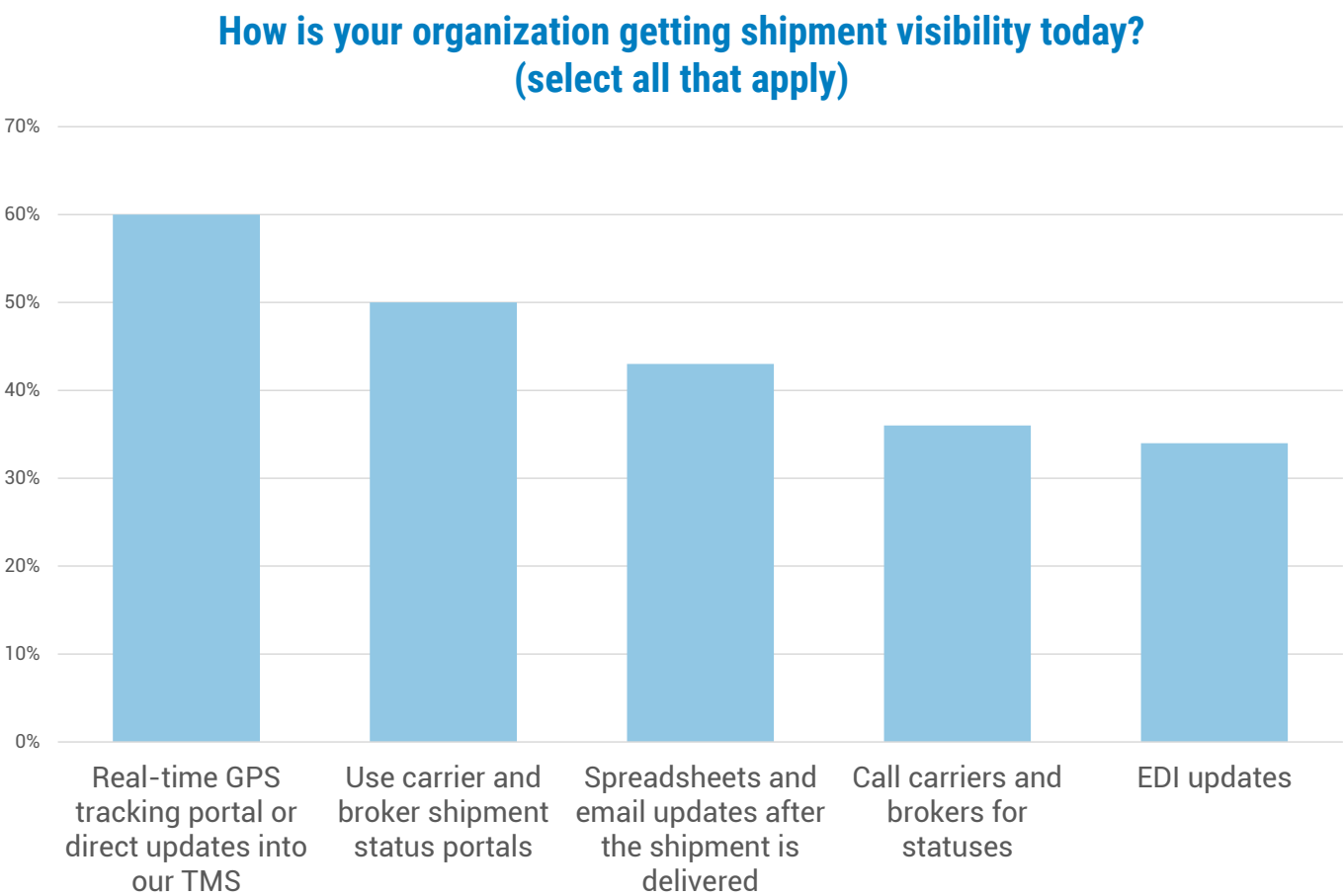
- Visibility (40%) was top overall capability for the eighth year in a row. New capability added this year for Carrier Monitoring debuts at 30% in the third spot. 'Carrier Vetting and Identity Validation' were also new this year and selected by 25% of respondents, but not high enough to make it on the graphic below
- Carrier Monitoring was selected 10% more by North America Shippers compared to European Shippers (33% vs. 23%), noting the difference in the prevalence of fraud/theft in the regions



Strategies & Tactics (cont'd)

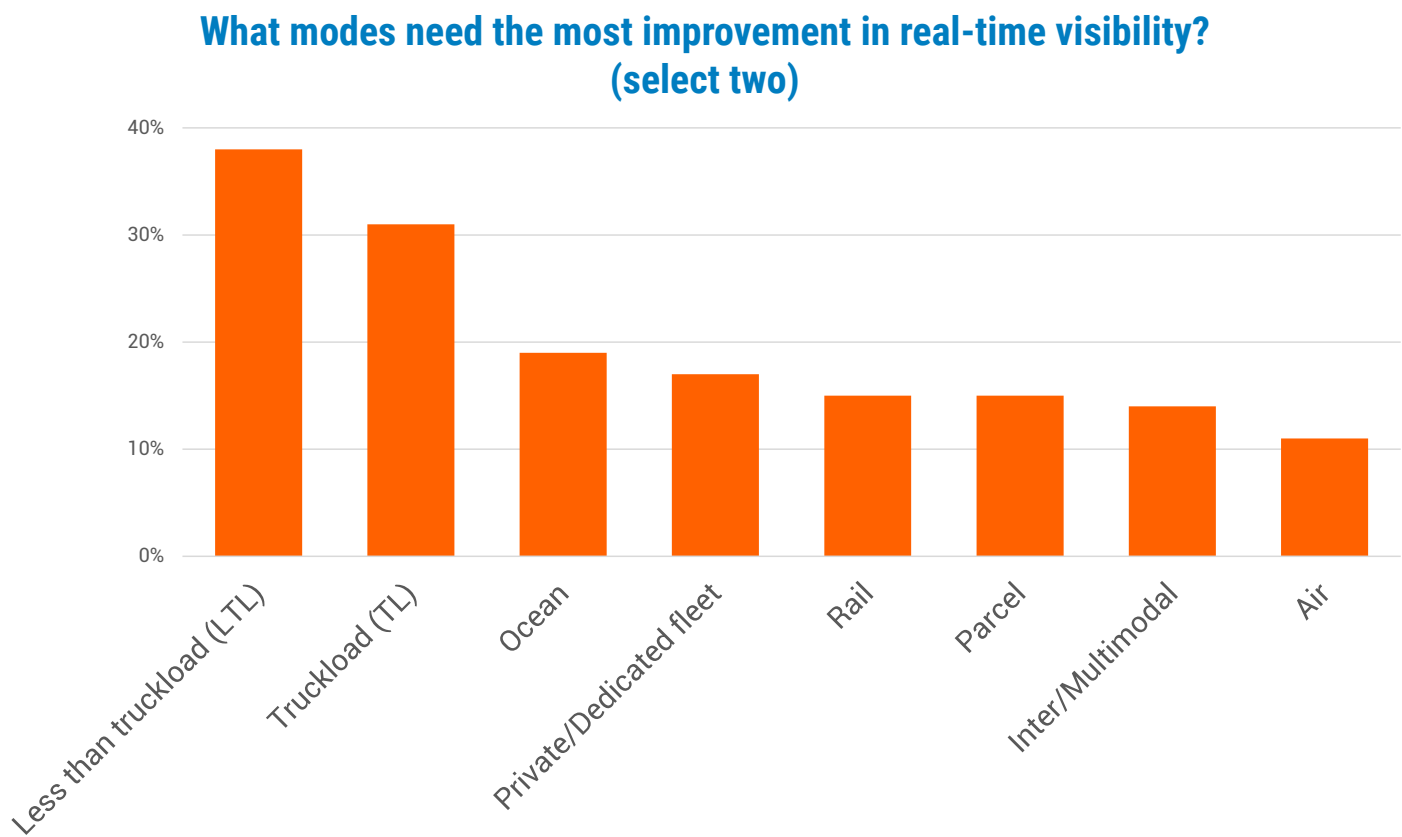
Shipment visibility today

- Real-time GPS/ELD (60%) was the top pick and increased by 8% from 2024. Carrier/Broker Shipment Statuses/Portal (50%) was selected second. Spreadsheets and emails (43%) are still used by a large portion of respondents for visibility
- Companies that view transportation as a Competitive Weapon were the greatest users of real-time GPS/ELD (68%) compared to 52% for companies that view transportation as a Basic Service or Necessary Evil



Real-time visibility performance

- Less than Truckload (38%) took the top spot for mode needing the most improvement in visibility as Truckload (31%) dropped 16% from 2024
- Ocean is a distant third place at 19%
- North American Shippers chose Truckload (43%) at a much higher rate than European Shippers (32%)



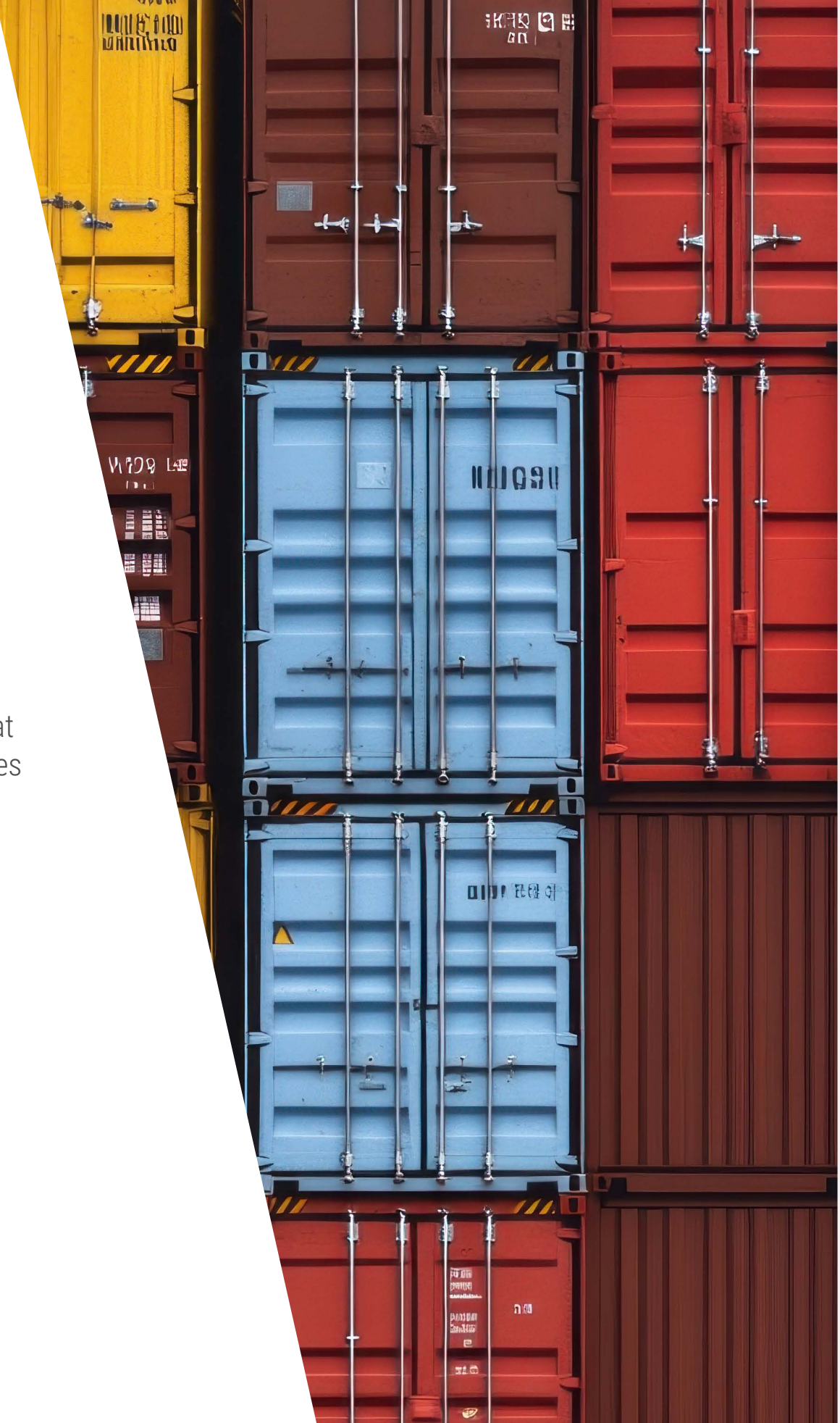
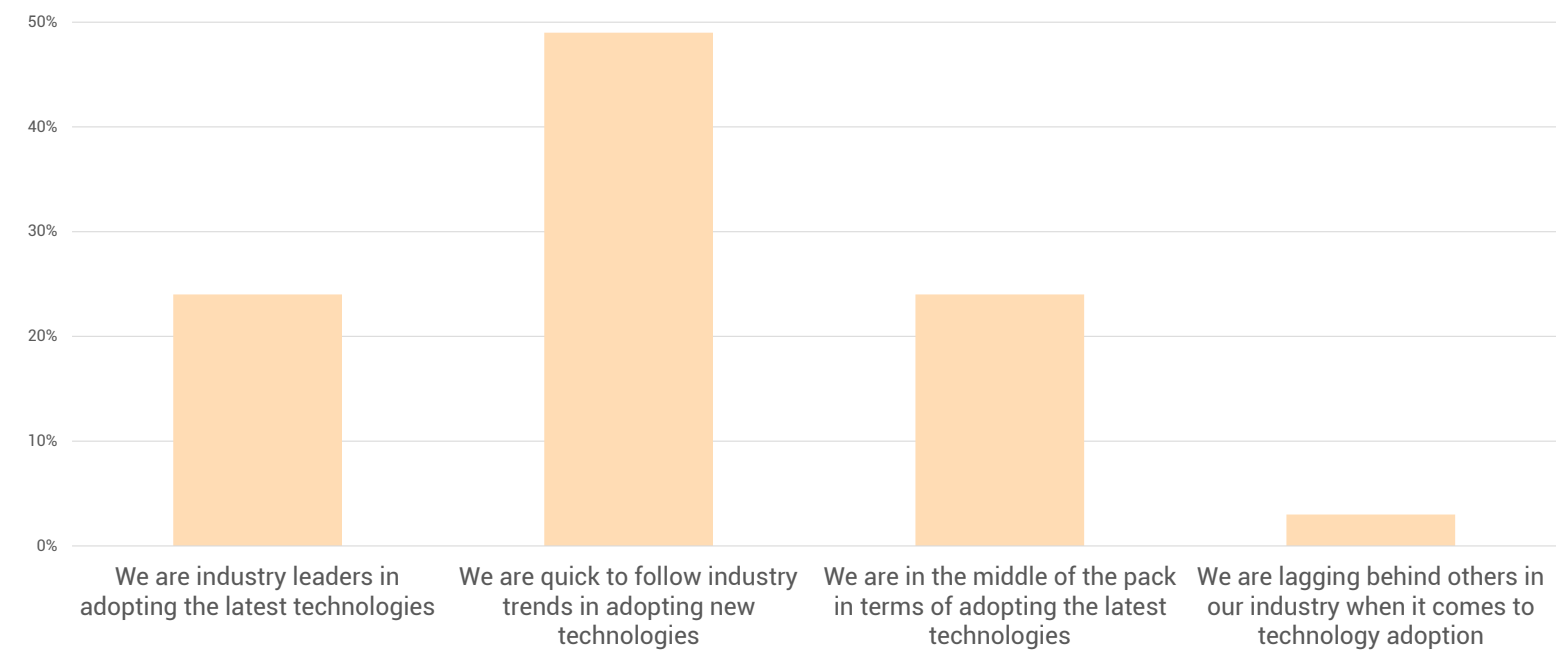
Technology Implications

This year’s survey asked participants questions designed to learn how they view the role of technology as well as their strategies and plans for adopting, investing in and leveraging it to create value for their companies.

Technology adoption strategy

- Quick to Follow Industry Trends (49%) took the top spot over Industry Leaders in Adopting Technologies (24%) and Middle of the Pack (24%)
- North American Shippers chose Industry Leading in Adopting Technologies (34%) compared to European Shippers (20%) while European Shippers chose Quick to Follow (58%) at a much higher rate than North American Shippers (41%)
- Companies that have Industry Leading Financial Positioning chose Industry Leading in Adopting Technologies at 69% while companies with Below Average Financial Positioning chose Industry Leading in Adopting Technologies at 15%

How would you describe your company’s technology strategy? (select one)

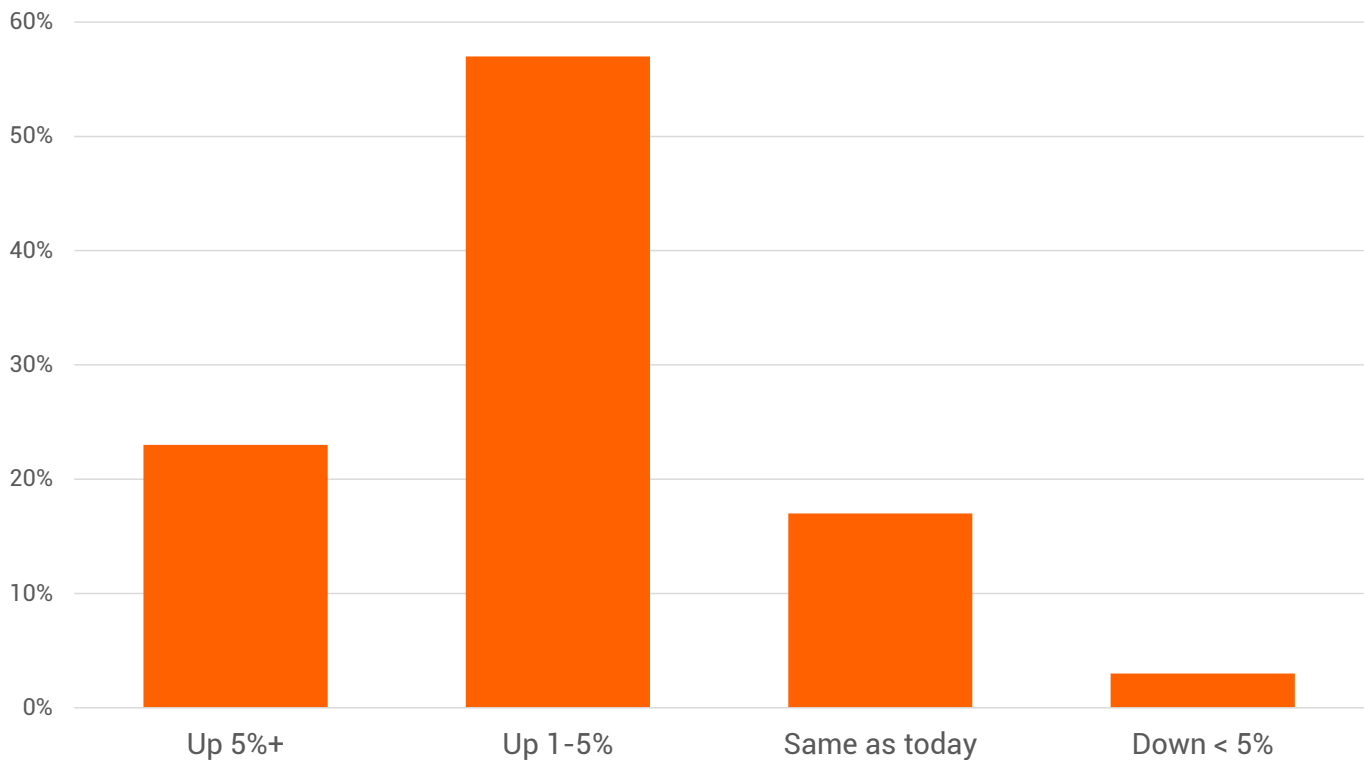


Technology Implications (cont'd)

Transportation management IT spend outlook

- Increasing transportation IT spend by 5%+ remained about the same this year as last at 23%
- Overall, 80% of respondents indicating they are increasing their TM IT investments for the next two years
- 84% of companies that have Industry Leading Financial Positioning will increase TM IT spend while only 45% of companies with Below Average Financial Positioning will increase TM IT spend

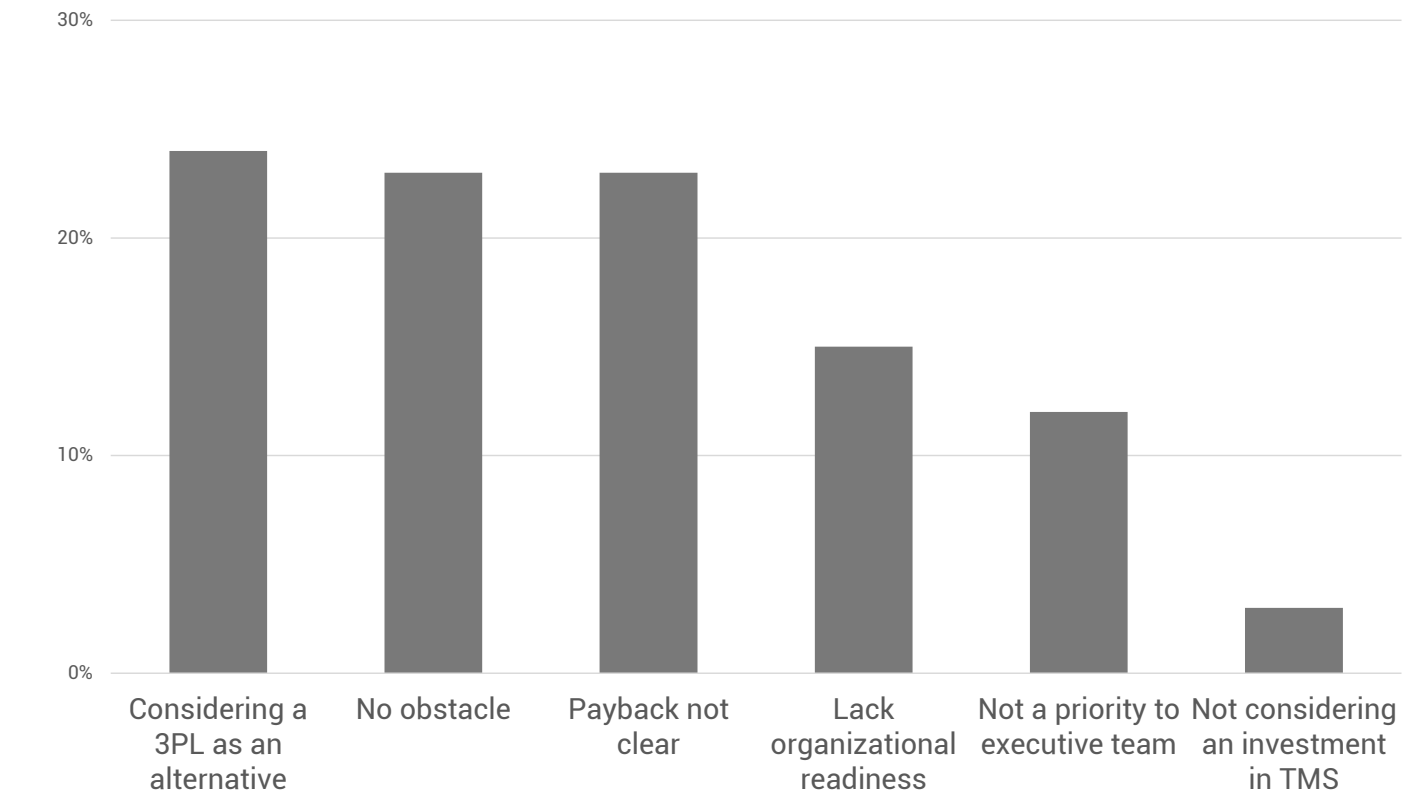
How will your Transportation Management IT spend change over the next 2 years?
(select one)



Primary obstacle to TMS investment

- No obstacle to investment in a TMS (23%) stayed the same as in 2024
- Other categories saw very little change from last year as well
- Considering a 3PL / 4PL was the top choice at 24%, and Unclear Payback was the next top obstacle at 23%

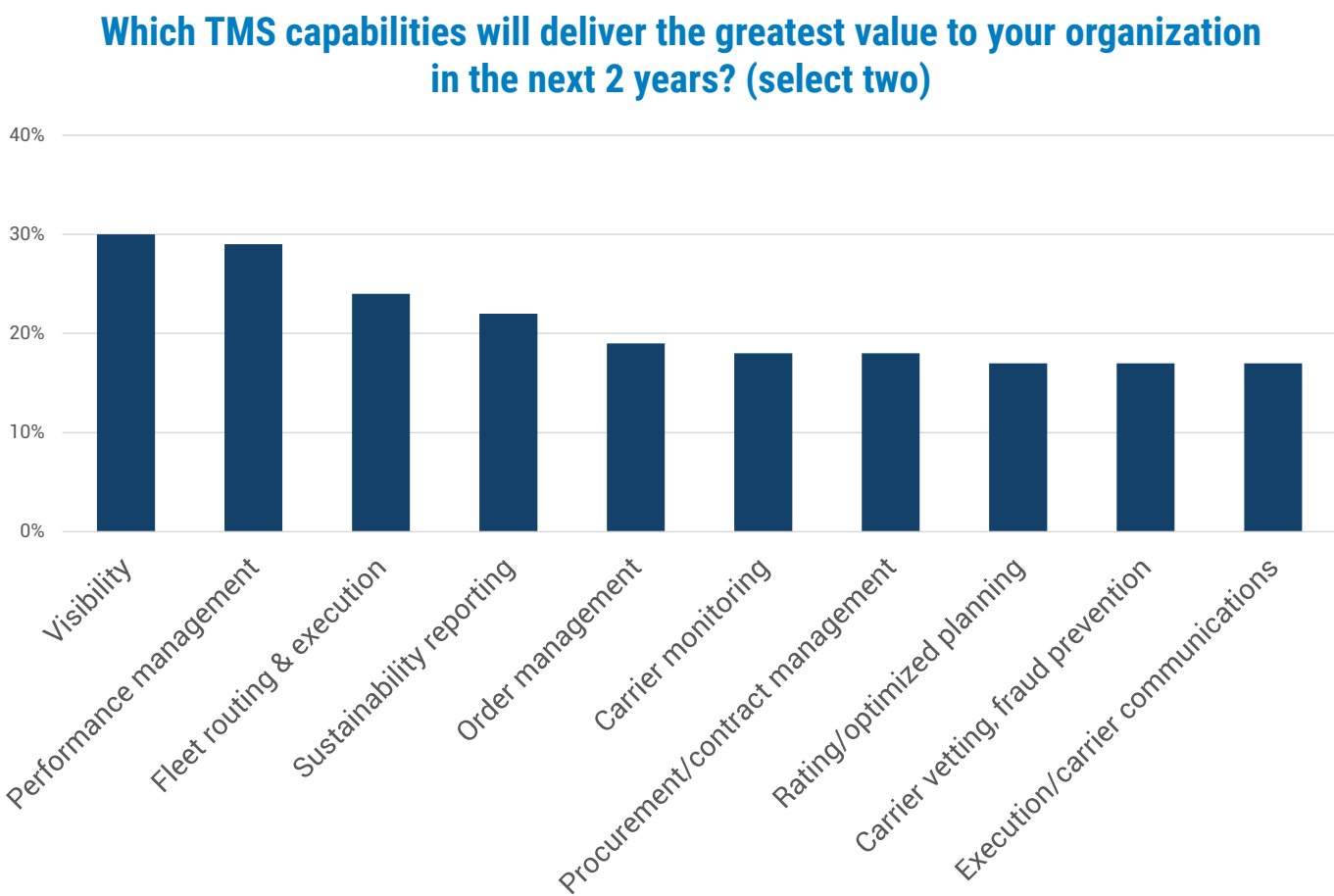
If your organization is considering an investment in TMS but has not yet done so, what would be the primary obstacle? (select one)



Technology Implications (cont'd)

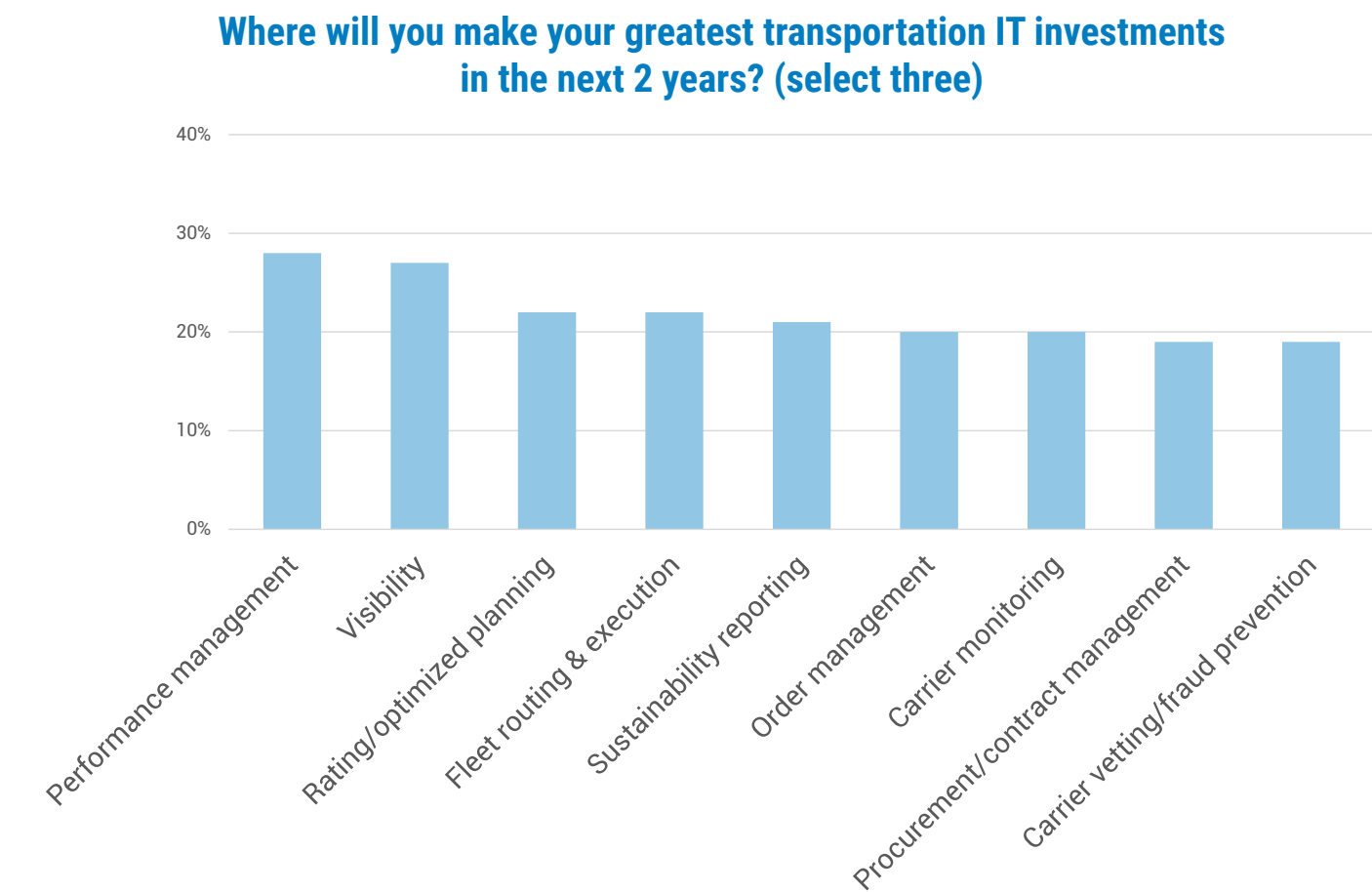
Greatest TMS value in the next 2 years

- Visibility (30%) once again was the top choice, but only by 1% over Performance Management (29%). Fleet Routing (24%) remained at third place this year just ahead of Sustainability Reporting (22%)
- Order Management dropped from 2nd place in 2024 to 5th place this year (possibly due to difference in mix of respondents)



Greatest TMS investment in the next 2 years

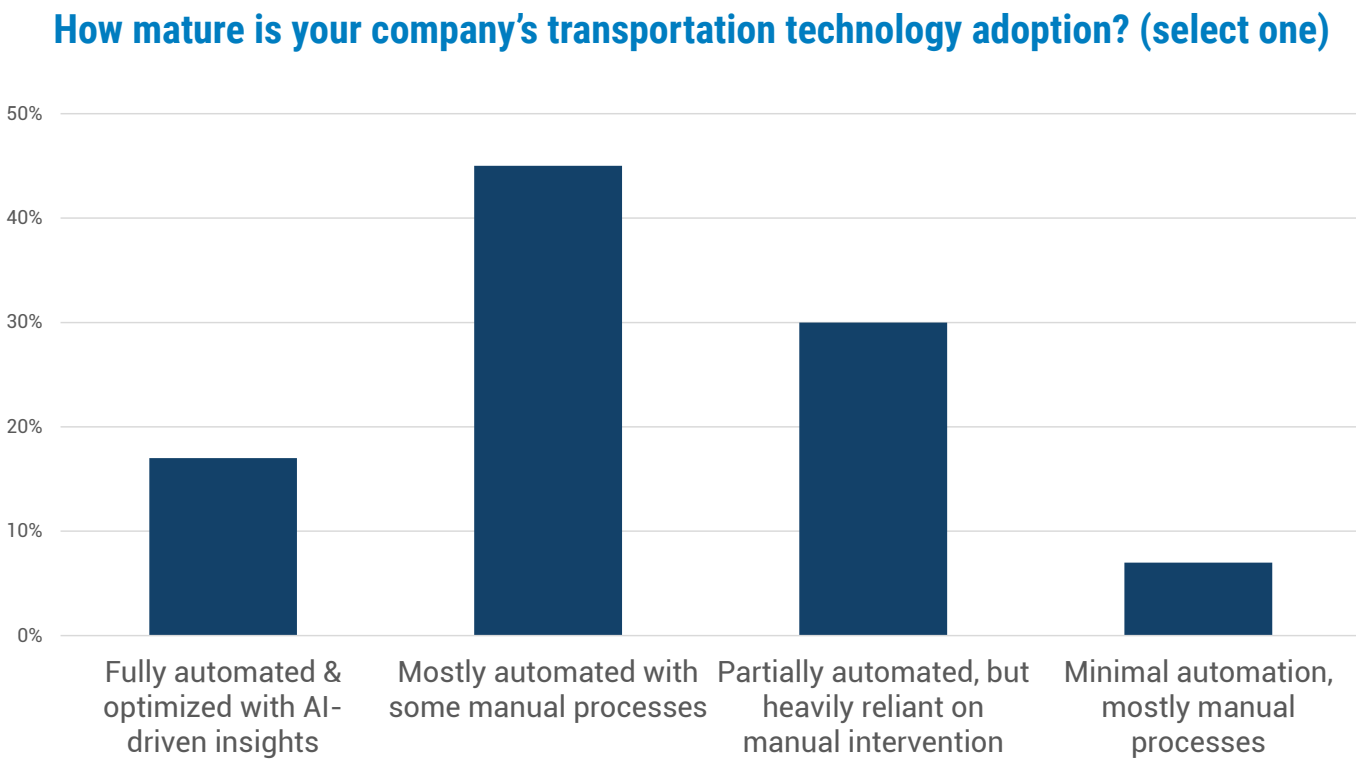
- Performance Management (28%) took over the top spot by 1% over Visibility (27%) this year. Fleet Routing (22%) remained in the third spot tied with Rating/Optimized Planning (22%). Interestingly Rating/Optimized Planning is tied for 3rd in investment, but was tied for 8th in delivering the greatest TMS value
- There is good alignment with TMS value and investment for the next 2 years for the top 3 most cited capabilities (Performance Management, Visibility, and Fleet Routing)



Technology Implications (cont'd)

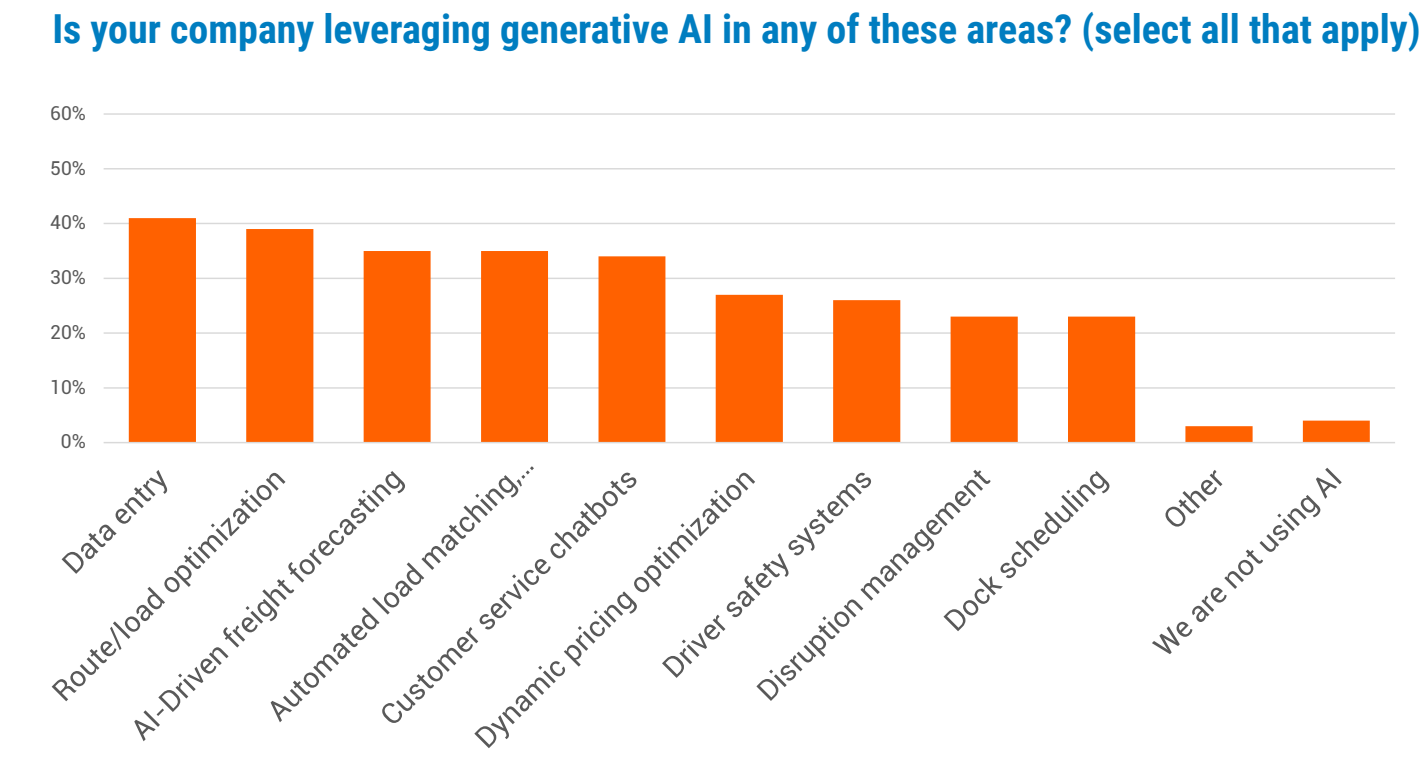
Technology Adoption Maturity

- Only 17% of respondents are fully automated, with 37% heavily or mostly reliant on manual processes
- Companies that have Industry Leading Financial Positioning chose Fully Automated at 51% while companies with Middle of the Pack chose Fully Automated at 8% and Below Average Financial Positioning chose Fully Automated at 5%
- Results were similar across North America and Europe



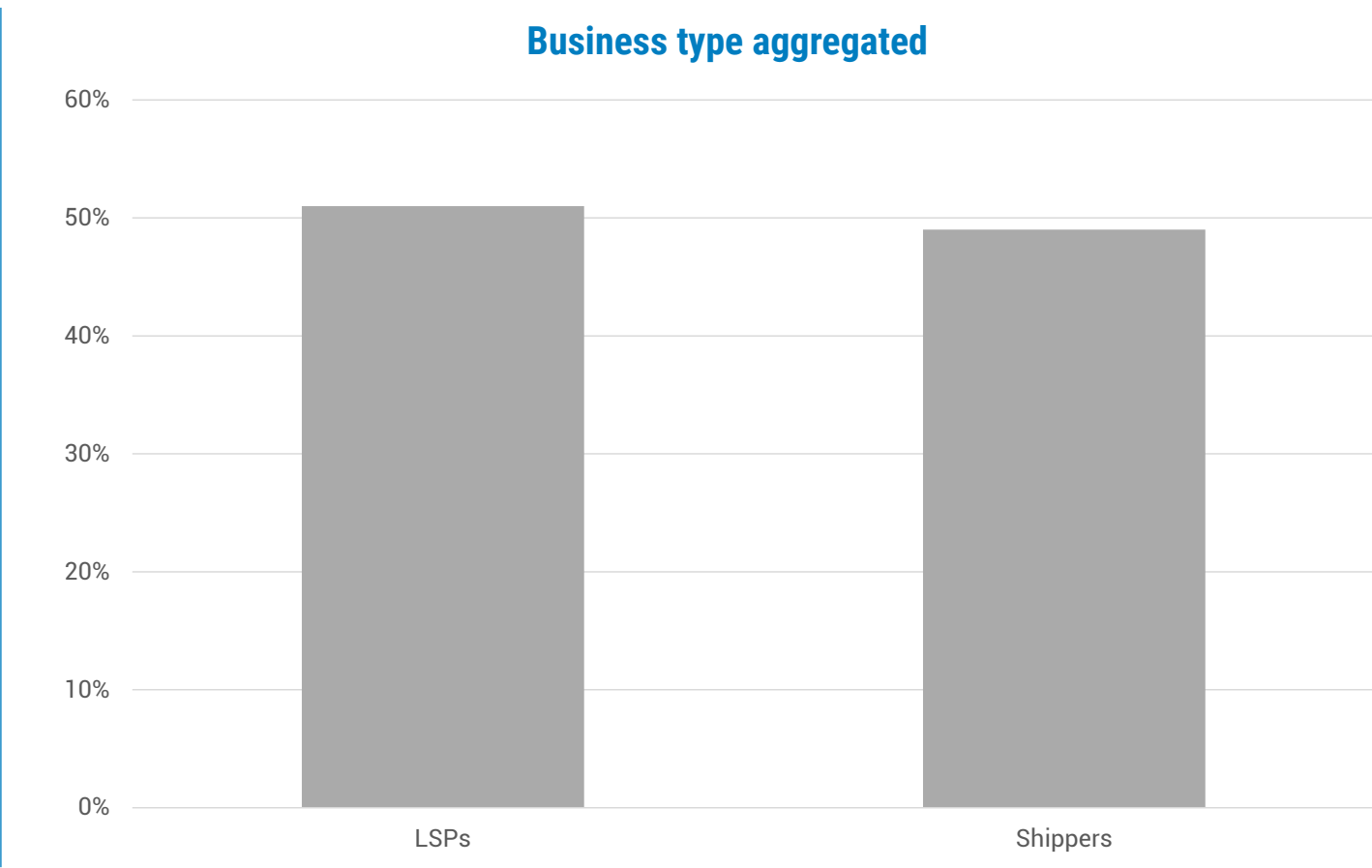
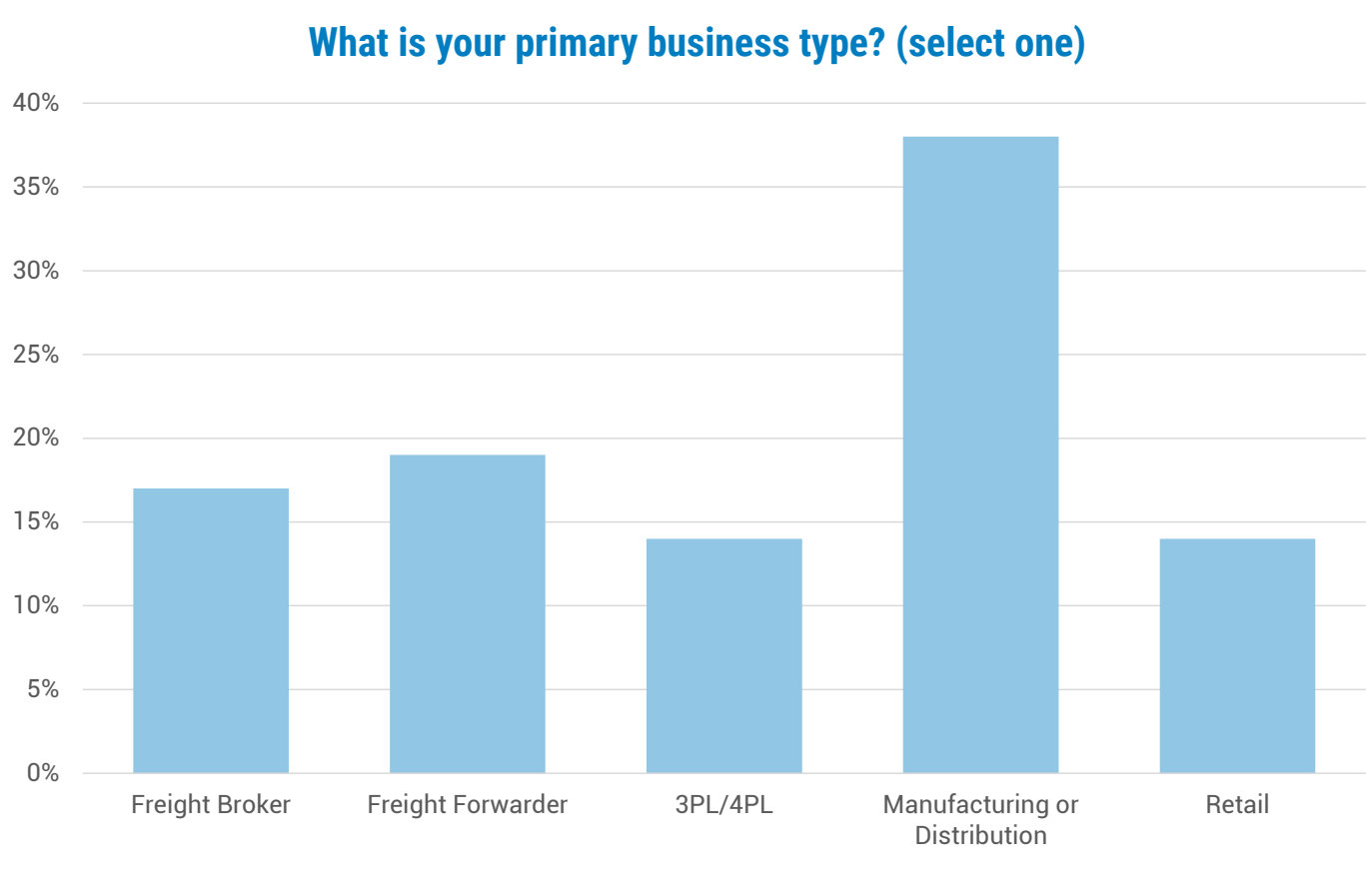
Generative AI Adoption

- Only 4% of respondents are not using generative AI within their operations, these respondents were much more likely to view transportation management as a Necessary Evil, and more likely to expect Limited or No Growth over the next 2 years
- Data Entry (41%) and Route/Load Optimization (39%) were the top categories
- Shippers (46%) was more likely to use AI in Data Entry compared to LSPs (37%)
- Overall companies that have Industry Leading Financial Positioning chose all but one AI category (Driver Safety) at double digit higher rates than companies with Below Average Financial Positioning



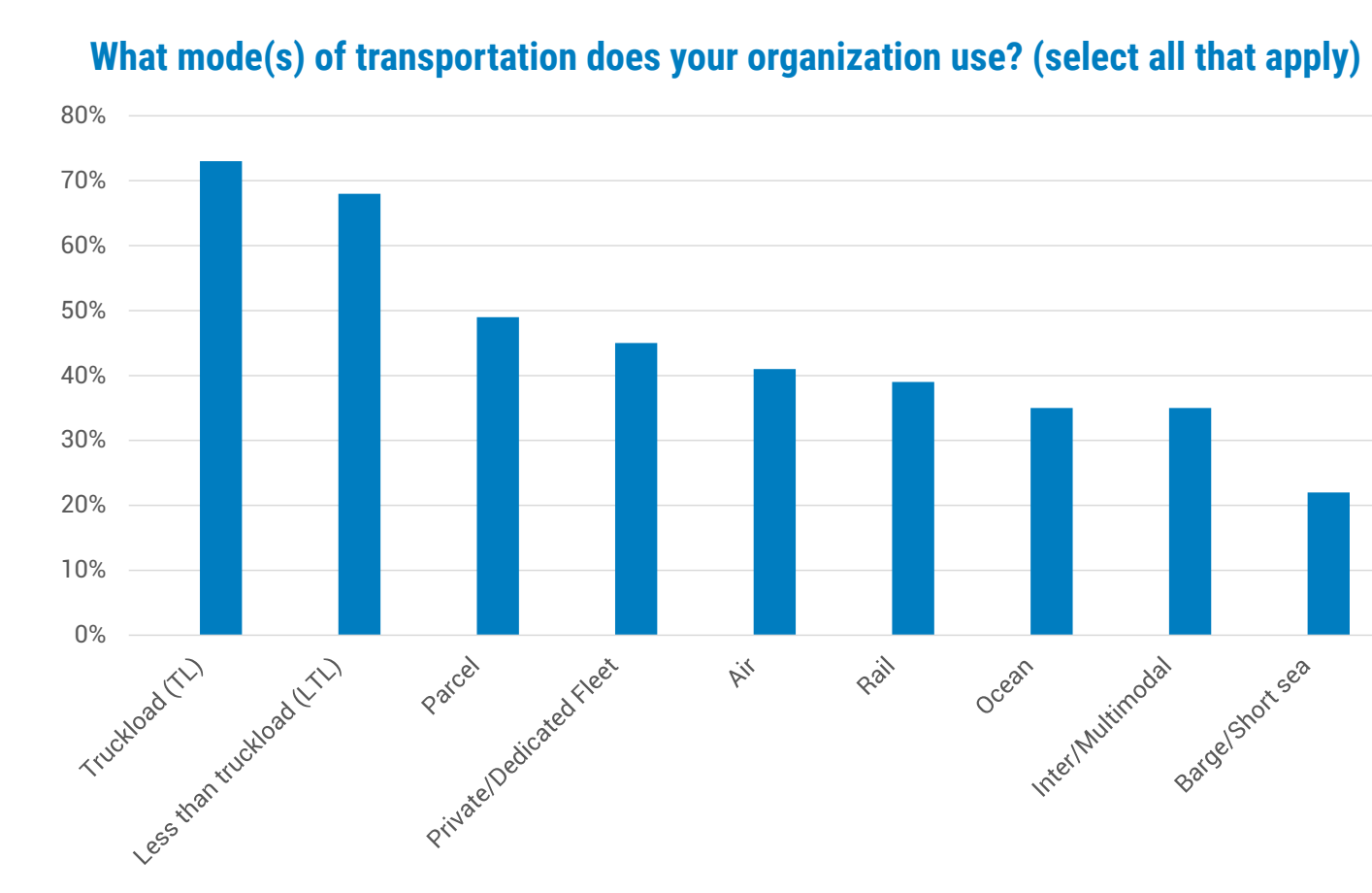
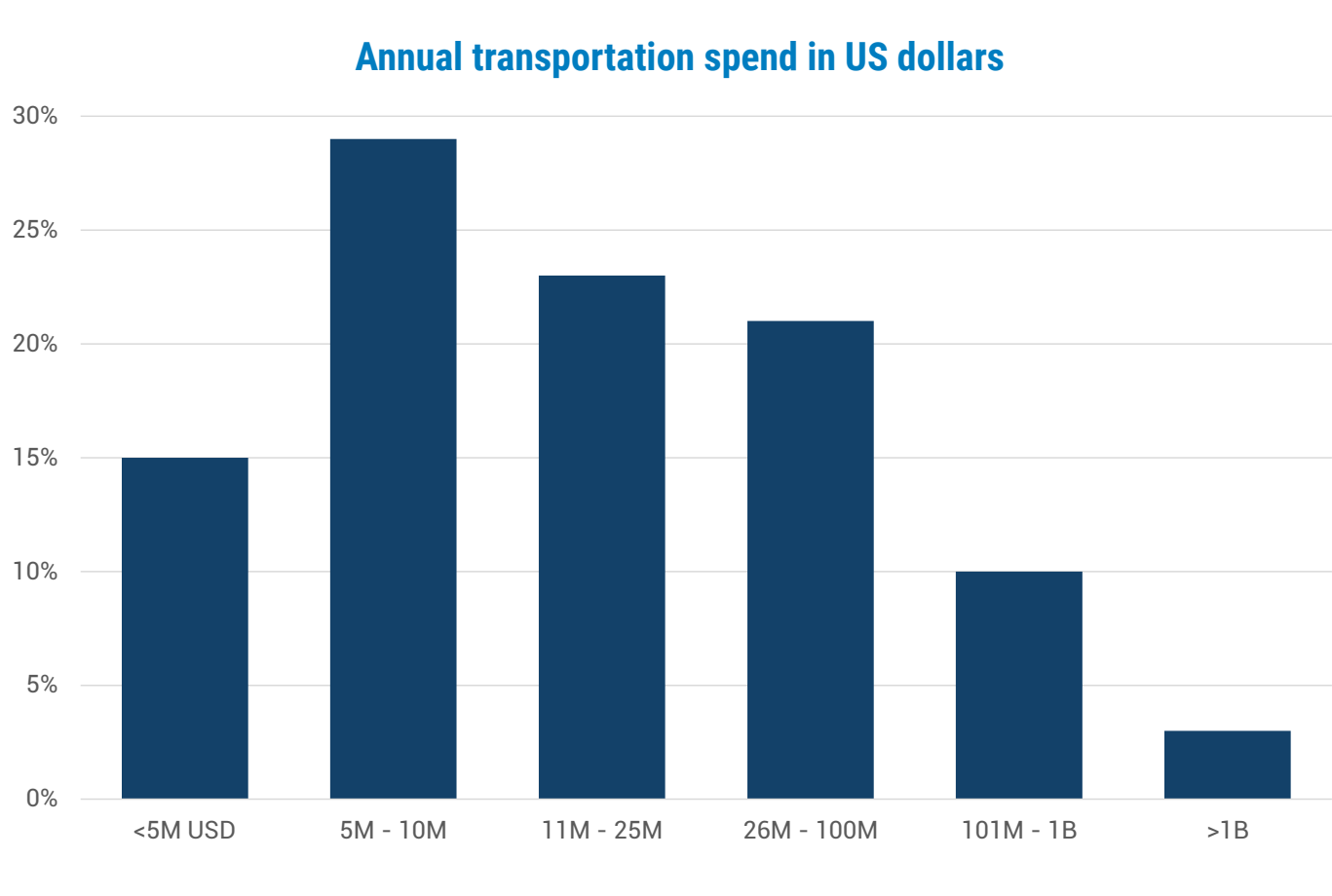
Who We Surveyed

This year’s 616 survey participants were evenly split between logistics service providers (LSPs) and shippers from a wide variety of industries. Our survey was conducted in early July 2025 and focused only on Managers and above that are heavily involved with, or have responsibility for transportation in their organization.

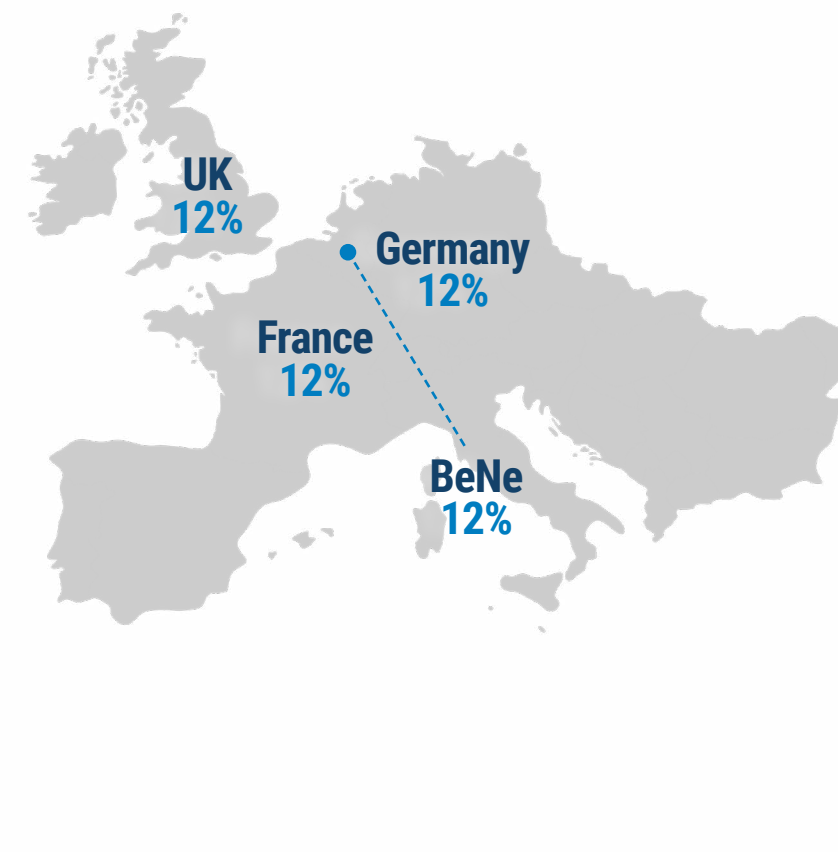
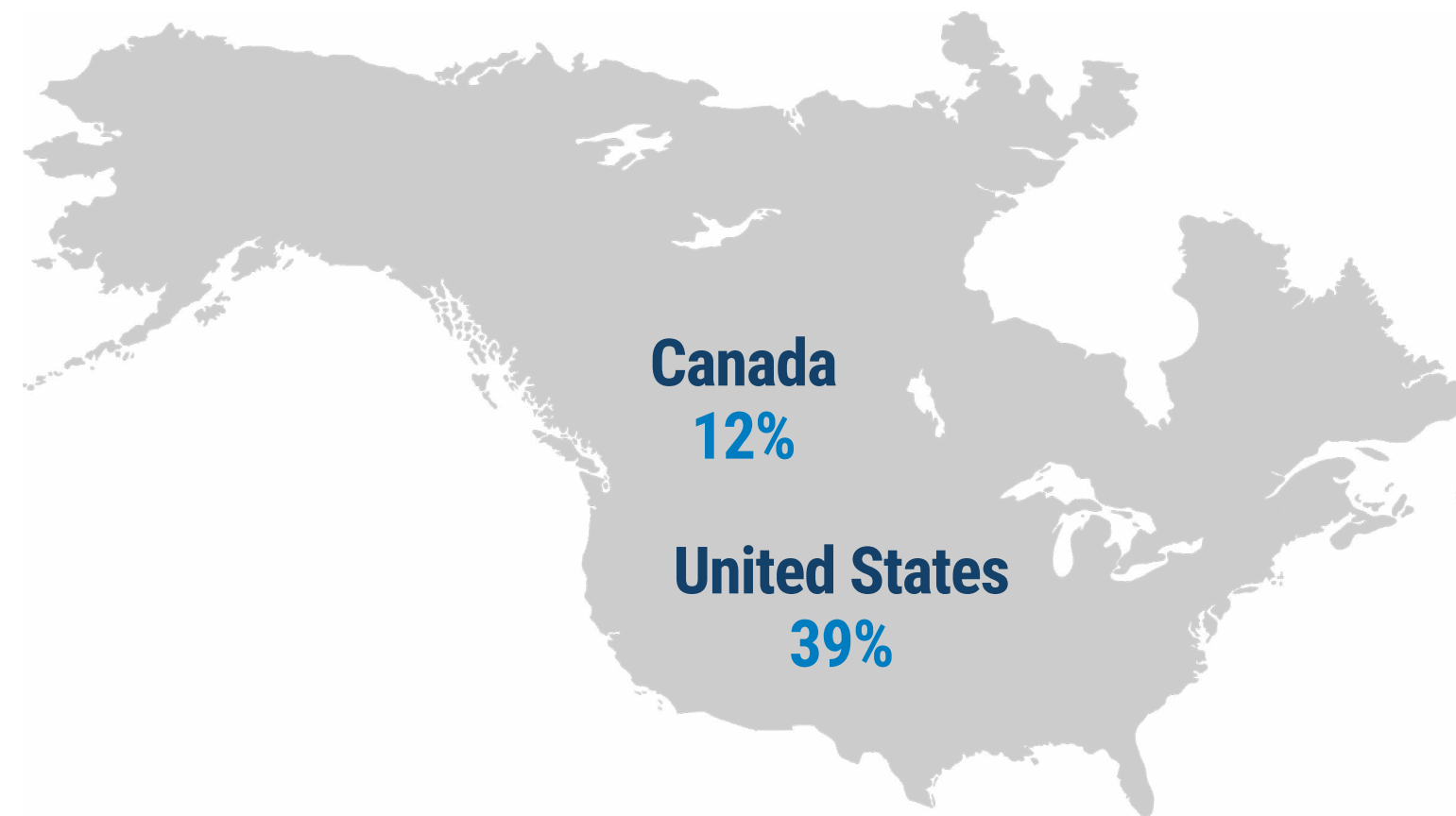


Who We Surveyed

Respondents span a wide array of transportation spend and modes utilized providing insights from many perspectives. Over 70% have annual transportation spend between \$5M and \$100M, with Truckload being the most utilized mode followed closely by Less-than-Truckload.



Who We Surveyed (cont'd)



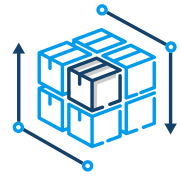
Greater geographic coverage

- Coverage remained close to the 2024 benchmark study
- We had an almost even split between North America 51% and Europe 49%

Descartes Transportation Solutions

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Descartes' transportation solutions suite provides standard and advanced capabilities that improve transportation efficiency, coordination and visibility.



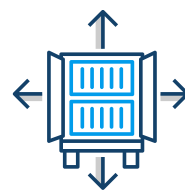
Shipper Transportation Management System

- Optimize and execute transportation across modes
- Easily maintain multimodal contracts
- Automatically rate shipments, optimize loads, select carriers
- Streamline carrier interaction (tendering, booking, tracking, delivery)
- Audit freight bills to identify discrepancies



Supply Chain Visibility Platform

- Enhance performance with real-time shipment statuses and predictive ETAs
- Know load location and status (temperature, customs, etc.)
- Find available capacity using real-time data with AI
- Communicate load status with customers and suppliers



Freight Broker/3PL TMS

- Robust transportation management for freight brokers and managed transportation providers
- Shorten cycle times and reduce costs through streamlined user interface, systems integrations, and optimization
- Track loads in real-time and vet carriers using Descartes MacroPoint™ and Descartes MyCarrierPortal™



Dynamic Dock Appointment Scheduling

- Automate and improve visibility for dock door scheduling
- Reduce load/unload times, DC congestion, labor costs, and inventory
- Gain control over supplier-managed freight

Descartes Transportation Solutions (cont'd)

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Reporting & Analytics

- Transform data into actionable insights
- Better understand operations, customers, and suppliers
- Visualize data with intuitive charts and graphics
- Create accurate scorecards to support contract negotiations



Fleet Management

- Route planning, optimization & dispatch to maximize fleet
- Reduce delivery costs
- Improve customer experience
- Improve driver and vehicle performance and safety



Parcel Shipping

- Automate and optimize small package shipments
- Optimize multi-carrier shipments
- Ensure rate and label compliance
- Manifest support for parcel and LTL
- Streamline the pick, pack and ship process
- Track deliveries and evaluate service performance



Carrier Connectivity

- Single connection to Descartes provides connections to tens of thousands of carriers and providers
- Supports all connection protocols and message types
- Global, multi-mode coverage
- Reduce manual labor, eliminate errors, streamline booking through billing process

About Descartes Systems Group

Descartes is the global leader in providing on-demand, software-as-a-service solutions focused on improving the productivity, security, and sustainability of logistics-intensive businesses.

Customers use our modular, software-as-a-service solutions to:

- route, track and help improve the safety, performance and compliance of delivery resources
- plan, allocate and execute shipments
- rate, audit and pay transportation invoices
- access global trade data
- file customs and security documents for imports and exports
- complete numerous other logistics processes by participating in the world's largest, collaborative multimodal logistics community

Our headquarters are in Waterloo, Ontario, Canada and we have offices and partners around the world.

Learn more at www.descartes.com, and connect with us on [LinkedIn](#) and [Twitter](#).



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Uniting the People & Technology
That Move the World

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