



INTERMODAL AT THE HEART OF AMERICA'S SUPPLY CHAIN

As freight becomes more visible, scrutinized, and strategically essential, intermodal sits at the center of the nation's economic and operational resilience.

The Intermodal Association of North America (IANA) is the industry's leading voice, driving the collaboration, innovation, and investment shaping the future of North America's supply chain.

Freight Is No Longer Invisible

Freight has become a public-facing economic indicator. Once behind-the-scenes, it is now a visible measure of national stability, consumer confidence, and economic health.

[The Freight Transportation Services Index](#) – the federal government's official measure of domestic freight activity – reached **136.7** in October, underscoring the scale and significance of goods movement across trucking, rail, water, pipeline, and air.

Investors, policymakers, and the public increasingly view freight reliability as a proxy for economic strength, a shift accelerated during the COVID-19 pandemic, when supply chain performance became a national focus. As a result, intermodal stakeholders are now expected to explain, defend, and improve performance in high-visibility settings, from media coverage to infrastructure hearings.

This heightened visibility reflects the magnitude of the system itself.

FREIGHT AT A GLANCE

Domestic Activity

136.7 Freight TSI (Oct. 2025)
Nearly 37% above the 2000 baseline

Intermodal Scale (U.S.)

14.06M Intermodal Rail Units (2025)
Nearly 1.6% increase over 2024

Cross Border Trade

\$144.8B (May 2025 Release)
Highest monthly total ever recorded (BTS)

18.5M

Total North American intermodal volume increased 2.3% in 2025, reaching **18.5 million** moves.

Source: IANA 2024 Year-End Intermodal Summary

11.27B

Trucks moved **11.27 billion tons** of freight in 2024, representing **67%** of surface trade with Canada and **85%** with Mexico.

Source: ATA American Trucking Trends 2025

\$144.8B

Cross-border freight reached **\$144.8 billion** in March 2025, the highest monthly total on record.

Source: Bureau of Transportation Statistics, TransBorder Freight Data, March 2025

This convergence of pandemic-driven public attention, rising performance expectations shaped by the Amazon effect, and the sheer scale of the system shows why freight has become a central barometer of economic health rather than a backstage function.

Intermodal Takes Center Stage

Intermodal has shifted from a tactical workaround to a strategic solution for long-haul disruption, sustainability pressures, and capacity volatility. Its relevance continues to grow as shippers seek stability in an increasingly unpredictable environment. Intermodal's momentum is visible across current performance, near-term trends, and long-range forecasts, underscoring its role as a stabilizing force in the freight economy.

Current Performance

23% YTD U.S. intermodal traffic reached **1,526,080 units in December 2025**, down **0.1% YoY** but showed a **23% YTD** increase.

Source: TTX-IANA Monthly Report Dec. 2025

↑ 2.9% International intermodal for NA (IPI traffic) was down **3.1% YoY** in December 2025 but posted a **2.9% gain** over 2024.

Source: TTX-IANA Monthly Report Dec. 2025

5.6% YoY Domestic intermodal freight is expected to grow **1.4% in 2025**, supported by a strong **5.6% YoY** gain in Q1 2025.

Source: Intermodal In Depth Dec. 2025

↑ 2.6% Domestic intermodal freight is forecast to increase **2.6% in 2026**.

Source: Intermodal In Depth Dec. 2025

Long-Term Outlook

↑ 2.9% Intermodal rail tonnage is projected to grow **2.9% through 2030**, reinforcing its long-term strategic value.

Source: Intermodal In Depth Dec. 2025

As labor and capacity shortages, fuel volatility, infrastructure constraints, and shifting tariff policies challenge traditional modes, shippers are turning to intermodal not just to survive but to thrive. Investments in terminals, automation, and rail connectivity are accelerating across North America reflecting a shared recognition that intermodal capacity and reliability are now foundational to supply chain resilience.

Source: Newstrail, U.S. Intermodal Freight Transportation Market Overview 2025–2035, Nov. 2025

IANA plays a central role in convening carriers, rail partners, and technology providers to ensure these investments align with industry goals and deliver reliability across the network.

Drayage lanes, inland ports and rail terminals have also emerged as strategic connectors within the intermodal ecosystem. Their performance directly shapes freight flow, visibility, and cost efficiency. In mid-2025, major chassis providers repositioned equipment to inland hubs to meet demand surges, a reminder that these nodes are critical enablers of modal integration and velocity.

At the same time, resilience and visibility are attracting significant investment from both public and private sectors. Public infrastructure funding and significant private capital are converging to modernize intermodal corridors, digitize freight flows, and build adaptive networks capable of responding in real time. According to Gartner, **95% of organizations increased investment** in supply chain analytics, with more planned over the next two years.

Source: Forbes, The Great Supply Chain Reset, Nov. 2025

Policy is increasingly shaping modal efficiency. Emissions regulations, labor rules, and infrastructure access increasingly determine how efficiently freight moves across rail, truck, and port systems. Today, efficiency depends as much on what is permitted and prioritized as on what is operationally possible.

Source: BCG, Cost and Resilience: The New Supply Chain Challenge, July 2025

What speed and transparency mean in today's supply chain has been redefined: one-day delivery, real-time tracking, and seamless returns are now the norm, a shift *Forbes* notes has pushed retailers and carriers to invest heavily in automation, predictive analytics and last mile innovation. By pairing rail efficiency with enhanced tracking and tighter service windows, intermodal is increasingly aligned with the speed and consistency consumers expect in the Amazon era.

Source: Forbes, Supply Chain Predictions and Outlook for 2025, Jan. 2025

Freight as America's Economic Bellwether

Reliable freight is more than a logistics achievement - it is a measure of national economic health. When goods move predictably, shelves stay stocked, prices stabilize, and businesses gain the confidence to invest. Conversely, disruptions quickly translate into empty shelves, price spikes, and consumer frustration, creating visible signals of economic stress.

Intermodal plays a unique role in absorbing shocks and stabilizing the system. Its ability to flex capacity across rail, truck, and port networks allows it to buffer against volatility caused by weather, labor disputes, or policy changes. This adaptability helps stabilize prices and sustain consumer confidence during turbulence. Federal data shows that shifts in freight activity typically precede broader economic changes, making logistics performance a reliable leading indicator of national economic momentum.

Forward-Looking Economic Indicators

↑ 8% U.S. containerized imports rose **8% year over year in 2025**, reflecting resilient consumer demand and signaling continued economic momentum.

Source: National Retail Federation

↑ 3.2% **Retail inventories increased 3.2% year over year in 2025**, pointing to stronger freight flows and steady replenishment activity.

Source: US Census Bureau



Freight TSI changes lead broader economic cycles by roughly four months, underscoring freight's role as an early signal of turning points in the economy.

Source: Bureau of Transportation Statistics, TransBorder Freight Data, March 2025

In sum, freight tells the story of the economy before the numbers do. Intermodal remains one of the clearest signals of where that story is headed.

INTERMODAL'S MOMENT



A stabilizing force: Predictable long-haul capacity amid trucking volatility.



A lower carbon pathway: A proven tool for meeting rising emissions requirements.



Strengthened by investment: Terminals, rail corridors and inland hubs are scaling.



Visibility-driven: Digitization and analytics are making performance transparent.



A rail growth engine: Intermodal continues to anchor rail's long-term expansion.

The Next Frontier: Shifting Long-Haul Freight to Rail

New research from NC State and Railinc, reported in *Commercial Carrier Journal (CCJ)*, is giving the industry its clearest roadmap yet for shifting long-haul freight from truck to rail. This shift aligns directly with IANA's mission to strengthen the collaboration, performance and resilience of the intermodal supply chain. Early modeling shows that even modest shifts could unlock meaningful gains in efficiency, emissions reduction, and infrastructure planning, reinforcing intermodal's central role in building a more resilient North American freight network.

Source: CCJ, "NC State, Railinc partner on truck-to-rail freight study," 2025

Data from the Surface Transportation Board underscores this potential. The Union Pacific - Norfolk Southern (UP-NS) rail merger is expected to shift **105,000 truckloads** to rail annually by transforming existing interline service into **10,000 new single-line service lanes**. This example demonstrates how network design improvements can unlock significant truck-to-rail diversion at scale.

Source: UP-NS News release, Dec. 19, 2025

This research arrives at a pivotal moment. As freight patterns evolve and supply chains face mounting pressure from congestion, labor constraints, and environmental expectations, the ability to rebalance freight across modes becomes a strategic advantage.

Source: CCJ, "NC State, Railinc partner on truck-to-rail freight study," 2025

For IANA and its members, these insights represent a clear opportunity: to translate emerging research into coordinated action by aligning carriers, rail partners, drayage providers, and technology firms around a shared vision for a more efficient and sustainable freight ecosystem.

Data-Driven Signals Pointing to Strategic Freight Shifts



A **2% shift** in long-haul truck freight to rail yields measurable efficiency and sustainability gains, with specific corridors identified as high-impact opportunities.



Modal shift benefits include reduced highway congestion, lower emissions, and more targeted infrastructure investment.



Rail capacity in key corridors is expanding through network upgrades and terminal modernization, increasing the feasibility of modal shifts.

Source: CCJ, "NC State, Railinc partner on truck-to-rail freight study," 2025.

53%

The merged UP-NS network is projected to handle **53% of its total volume** via intermodal, reflecting a structural shift toward rail-based freight.

Source: Top Worldwide: "The \$250B Rail Merger Reshaping U.S. Supply Chains" August 2025.



Rail-merger modeling shows a **5-8% diversion of truckload freight to rail** over 3-5 years, far exceeding the 2% shift modeled in the NC State study.

Source: Transportation Tax: "Mega Rail Acquisition Will Impact Trucking Freight Volumes" August 2025.

Together, these insights point to a future where intermodal is not just an alternative but the backbone of long-haul freight strategy.

Why it Matters: The Future of Freight Runs Through Intermodal

North America's freight system is evolving rapidly, and intermodal sits at the center of that transformation. Freight's visibility as an economic indicator, the rapid expansion of intermodal solutions, and the growing national focus on resilience all point to the same reality: the future of freight will be shaped by systems that can flex, adapt, and scale under pressure. **Intermodal is uniquely equipped to deliver exactly that.**

Emerging research on the shift from long-haul freight to rail highlights the scale of the opportunity ahead. Data-driven modeling is revealing where targeted modal shifts can unlock efficiency gains, reduce emissions and strengthen network performance offering a clearer blueprint for building a more resilient and economically competitive freight system. These insights align directly with IANA's mission to strengthen intermodal performance through collaboration, innovation, and shared standards.

In a market defined by labor shortages, infrastructure strain, and rising customer expectations, these advantages are not optional; they are competitive differentiators. For decision makers across the freight ecosystem, the message is clear: Intermodal is not simply part of the future of freight. It is the foundation of a more resilient, efficient, and sustainable system. The organizations that embrace it now will define the next decade of North American freight.

Looking ahead, the implications extend well beyond individual studies. Intermodal will play an increasingly central role in supporting economic growth, advancing environmental stewardship, and sustaining long-term competitiveness. IANA's leadership through industry convening, data expertise, and stakeholder alignment will be essential in turning these insights into coordinated action across the North American supply chain.

About the Intermodal Association of North America (IANA)

The Intermodal Association of North America (IANA) is North America's leading industry association representing the combined interests of intermodal freight providers, including railroads, motor carriers, marine carriers, equipment suppliers, and technology companies. IANA promotes safe, efficient, and reliable intermodal transportation through industry standards, data and analytics, education, and collaborative initiatives that strengthen the performance and resilience of the intermodal supply chain. The association serves as a central forum for addressing operational, regulatory, and technological issues that impact freight movement across North America. For additional information about IANA and its programs, visit www.intermodal.org.

INTERMODAL: A STRATEGIC ADVANTAGE



Cost stability: Fuel efficiency and reduced exposure to long-haul volatility



Network resilience: Diversified capacity beyond congested highways



Sustainability: Supports environmental goals and regulatory expectations.



Service reliability: Predictable schedules backed by improved visibility



Scalability: Ability to absorb volume surges without sacrificing performance.