



# IANA

INTERMODAL ASSOCIATION  
OF NORTH AMERICA



# OliverWyman

# Trends in Chassis Provisioning: What the Drayage Community Has to Say

Tuesday, October 29, 2024, 2:00 PM ET

Thank you for joining us.  
The program will begin shortly.





# IANA

INTERMODAL ASSOCIATION  
OF NORTH AMERICA

# Intermodal Insights

2024 Virtual Education Program

# Housekeeping

- Audience will be muted
- A question & answer session will follow the presentation
- Submit questions by clicking the Q&A icon at the bottom of your screen
- A recording of this webinar, including the slides, will be available in about a week from our Education On-Demand page



# Today's Presenter



**Eric Heller**

Director, Transportation

 **OliverWyman**

# TRENDS IN CHASSIS PROVISIONING

Survey of drayage carriers

October 2024

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Our clients' industries are extremely competitive, and the maintenance of confidentiality with respect to our clients' plans and data is critical. Oliver Wyman rigorously applies internal confidentiality practices to protect the confidentiality of all client information.

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Oliver Wyman requested input from **more than 11,000**  
UllA-registered drayage carriers and  
**received responses from 510 participants**

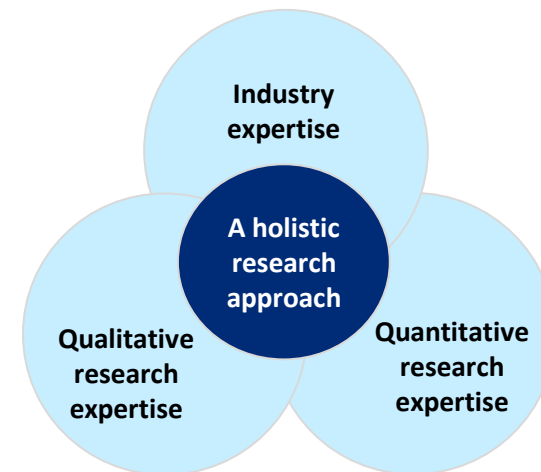
**THANK YOU TO ALL  
WHO PARTICIPATED!**



## OUR RESEARCH APPROACH

- IANA distributed an OW survey to 11,000 drayage providers registered in UIIA<sup>1</sup>
- N=510 respondents completed the survey between August 5-25, 2024, of which 437 are offering marine drayage
- To qualify, respondents had to be:
  - **Current employees or owners of a drayage carrier** that provides international marine container drayage and/or domestic container drayage services
  - **Knowledgeable about the company's drayage services**, including how they acquire chassis, volume and types of drayage, and markets serviced
- The survey focused mainly on international marine drayage; those with domestic-only services answered a shorter subset of questions

**Oliver Wyman combines our [Human Insights](#) research expertise with our firm's specialized industry expertise to deliver *unique market insights***



1. UIIA is the Uniform Intermodal Interchange and Facilities Access Agreement that is administered by IANA. Approx. 95% of motor carriers pulling intermodal equipment to and from a port or a rail facility will be a party to the UIIA.



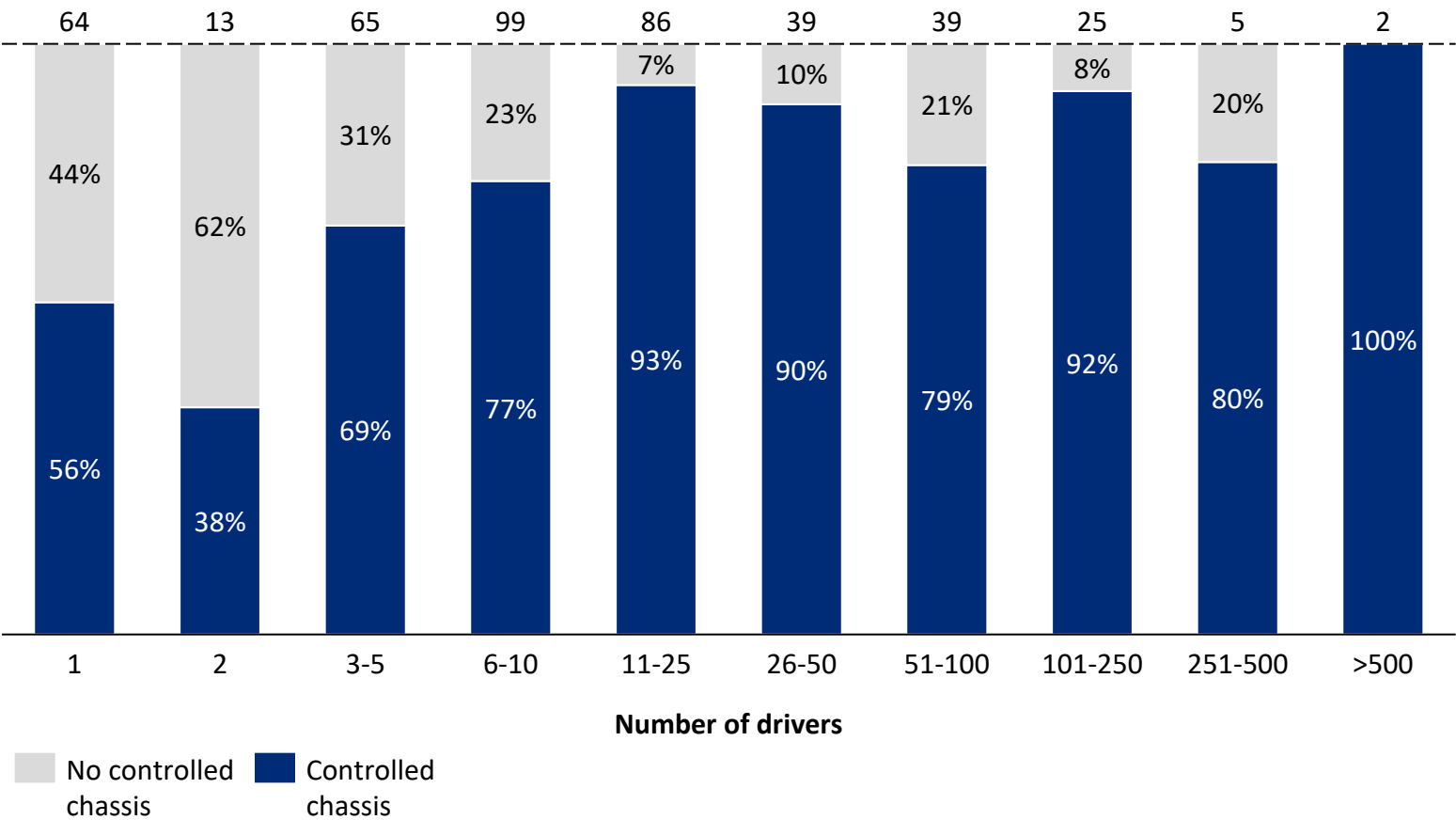


72%

of drayage carriers surveyed  
have **controlled chassis**

# IT HAS BECOME COMMON FOR MARINE DRAYAGE CARRIERS OF ALL SIZES TO OPERATE THEIR OWN CONTROLLED CHASSIS

Percent of marine drayage carriers with controlled chassis by count of drivers  
% of respondents; N = 437<sup>1</sup>



**77%**  
of marine drayage carriers  
have at least some  
**controlled chassis**

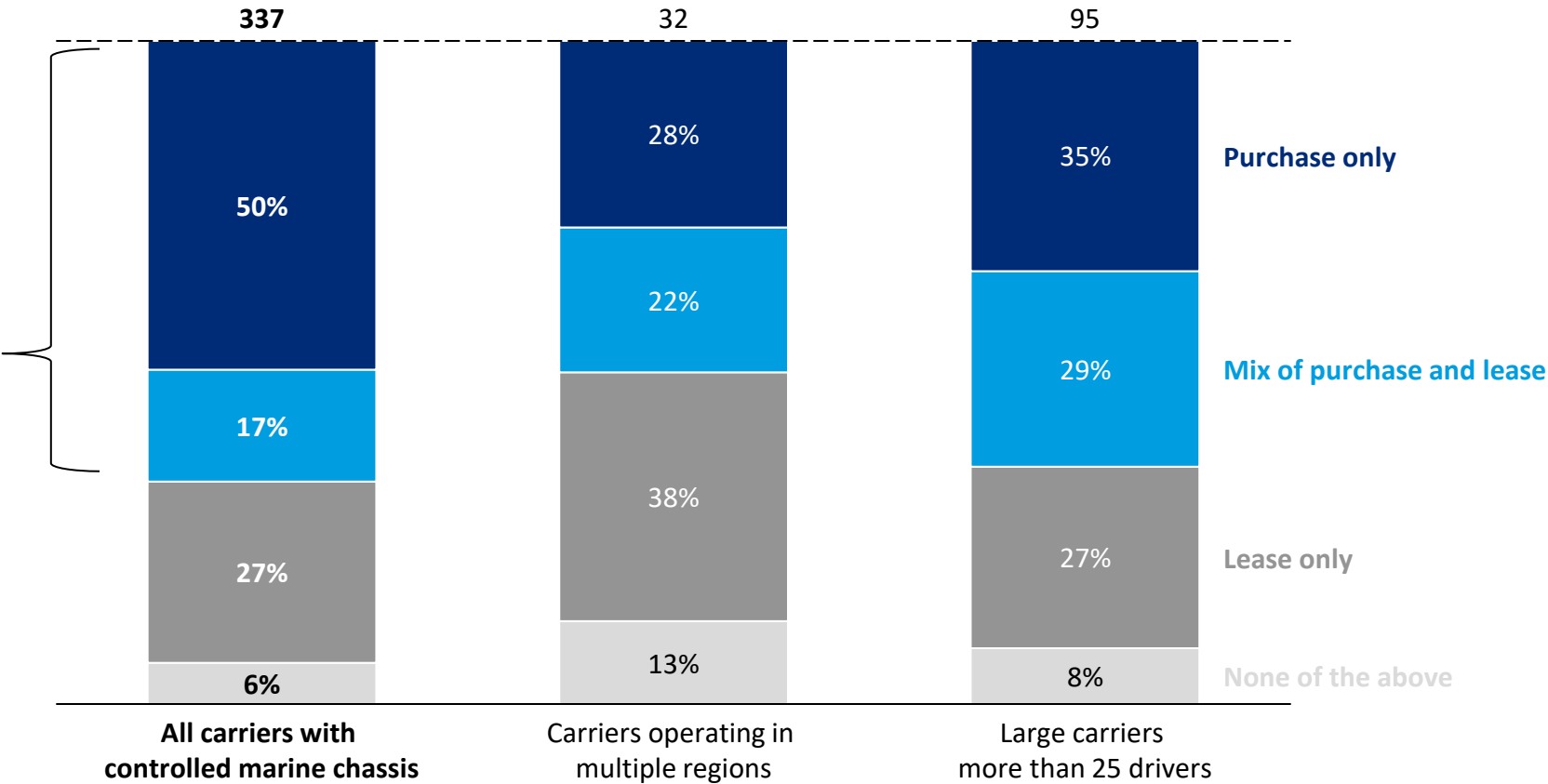
**57%**  
of marine drayage carriers  
have **added chassis since**  
**2019**

Source: Oliver Wyman 2024 Drayage Carrier Survey of UIIA Members

# DRAYAGE CARRIERS PURSUE A MIX OF PURCHASE AND LEASE STRATEGIES IN BUILDING THEIR CONTROLLED CHASSIS FLEETS

Financing strategy for controlled marine chassis  
% of respondents with controlled chassis; N = 337

**67%**  
of marine drayage carriers  
with controlled chassis  
have purchased at least  
some chassis

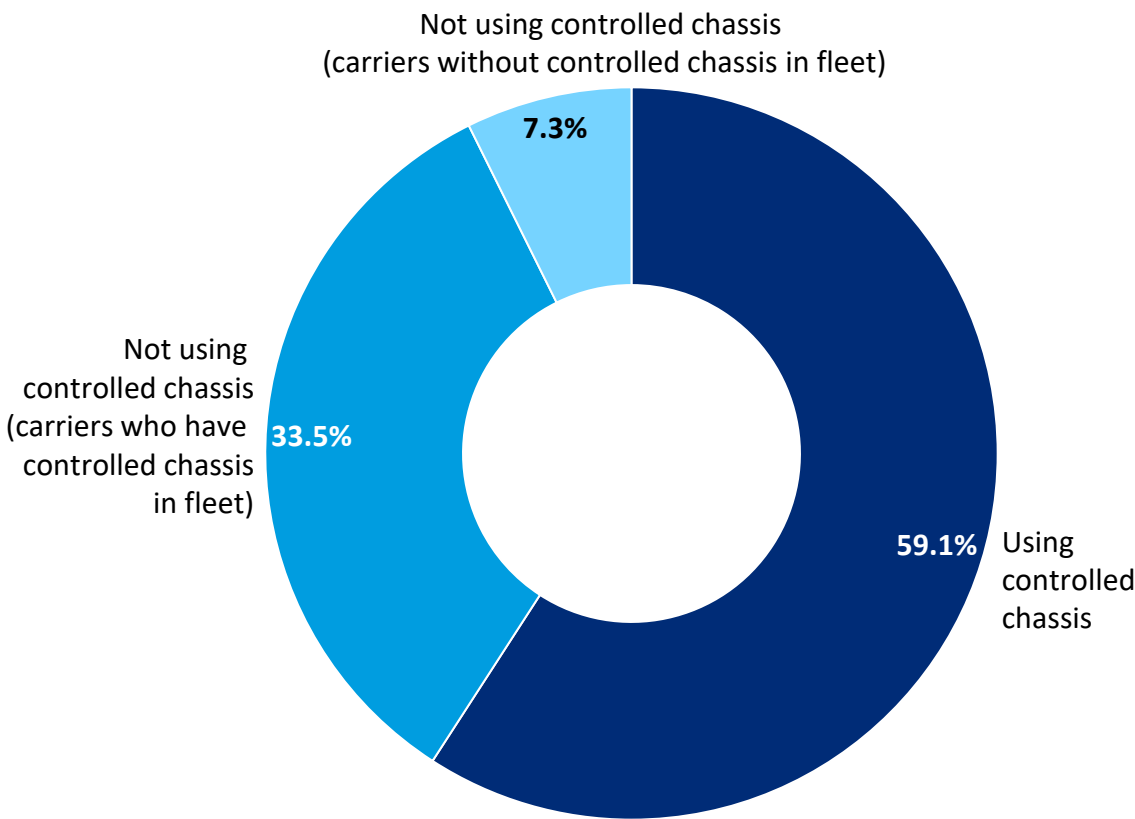


Source: Oliver Wyman 2024 Drayage Carrier Survey of UIIA Members; Q25: “What is your company’s ownership or financing strategy for its controlled marine chassis fleet?”

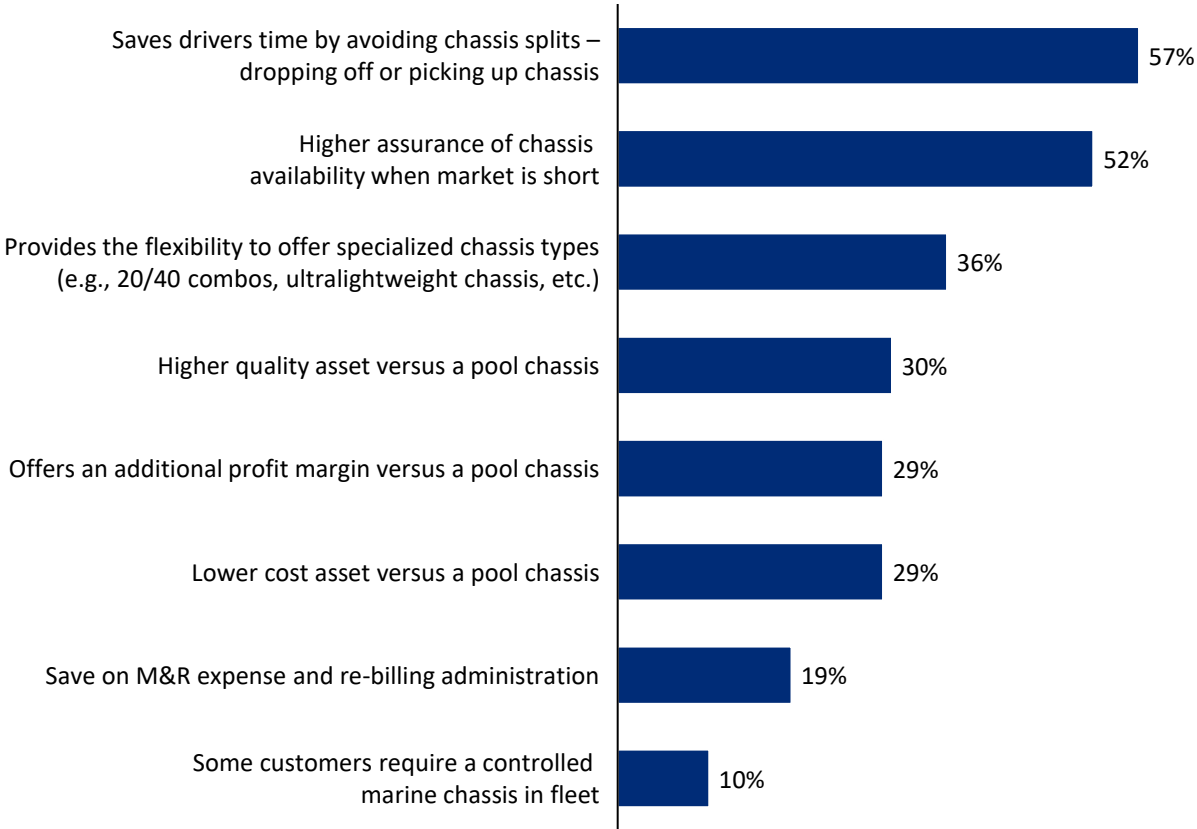


# BASED ON THE SURVEYED CARRIERS, TRUCKER OR BCO CONTROLLED CHASSIS ARE USED FOR ~60% OF MARINE CONTAINERS SAVING CARRIERS TIME AND MONEY

Marine loads using a controlled chassis  
% of total loads<sup>1</sup>



Reasons why marine drayage carriers with controlled chassis have them  
% of total respondents; N = 337



1. Estimated market share for controlled chassis is based on reported annual load volumes and mix between controlled chassis and the pool for marine volumes  
Source: Oliver Wyman 2024 Drayage Carrier Survey of UIIA Members

# SMALLER DRAYAGE CARRIERS FIND THE POOLS SERVE THEIR OPERATIONAL NEEDS

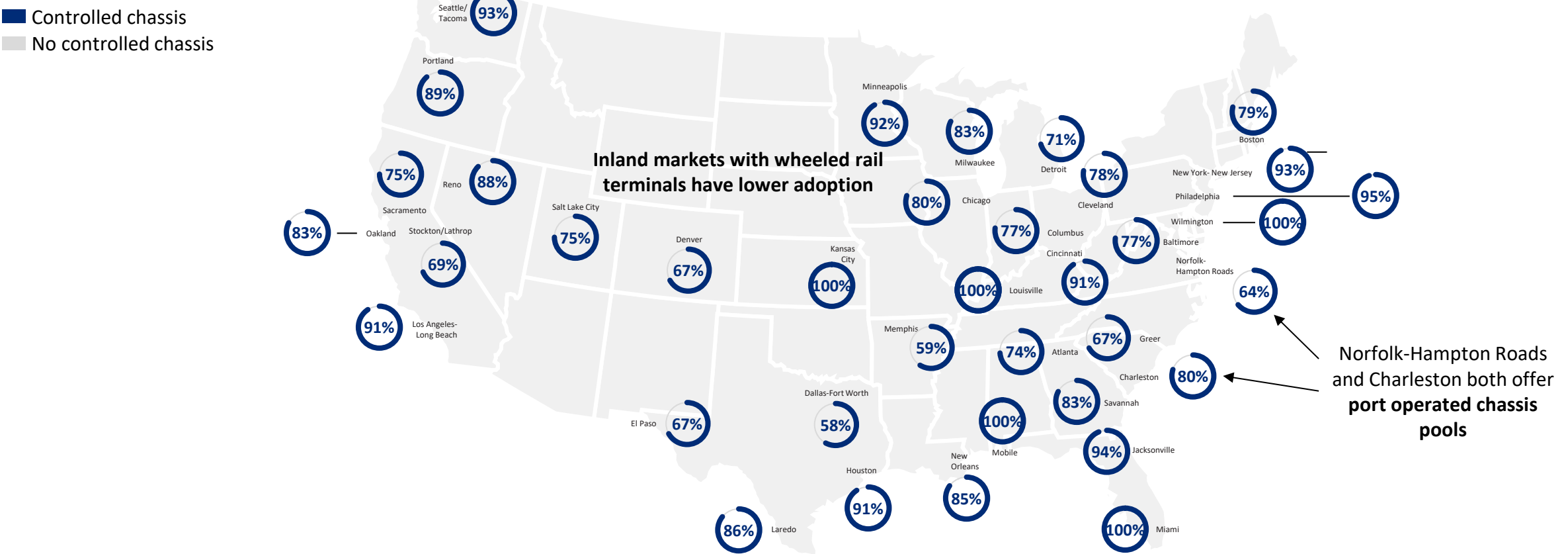
## Top 5 reasons carriers do not have controlled chassis *(n=100)*

1	Marine pool chassis work better for the types of loads (drop-and-hook at terminal or customer location, live load, etc.) that we typically carry <b>(34%)</b>
2	Marine pool chassis available to us are typically well-maintained and of good quality <b>(21%)</b>
3	We have a positive relationship with pool chassis providers, or receive favorable rates from them <b>(19%)</b>
4	We lack storage space or other operational capabilities needed to operate controlled marine chassis <b>(19%)</b>
5	Marine pool chassis availability has rarely been an issue <b>(17%)</b>

Source: Oliver Wyman 2024 Drayage Carrier Survey of UIIA Members

# DRAYAGE CARRIERS HAVE ACQUIRED CHASSIS IN ALL MAJOR COASTAL PORT MARKETS, WITH POCKETS OF SLOWER ADOPTION DRIVEN BY TERMINAL FACTORS

Percentage of marine drayage carriers with controlled chassis  
Carriers with offices in multiple cities are counted in all cities; N = 437



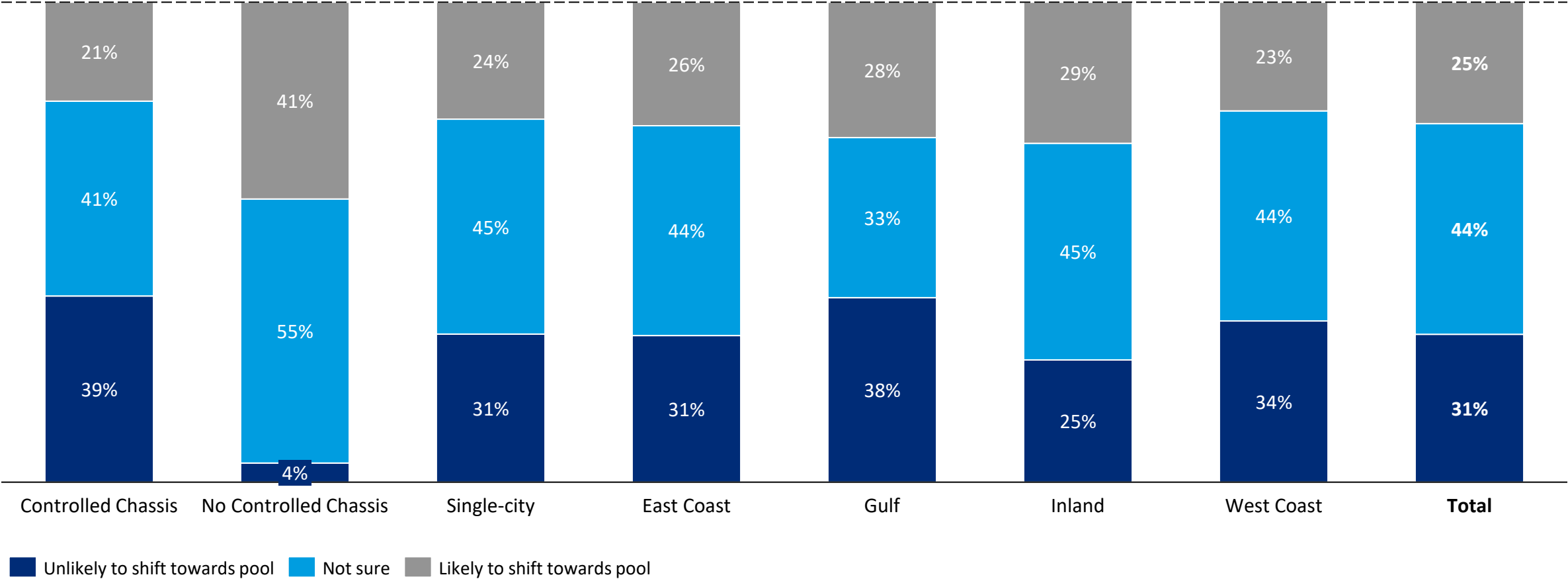
Source: Oliver Wyman 2024 Drayage Carrier Survey of UIIA Members



# FEW DRAYAGE CARRIERS WITH CONTROLLED CHASSIS THINK IT IS LIKELY THAT THE MARKET WILL SHIFT BACK TO THE POOL

Expected shift in industry between 2024 and 2027

N = 435



Source: Oliver Wyman 2024 Drayage Carrier Survey of UIIA Members, Q35: "From your perspective, what is the likelihood that the industry will shift toward more use of pool chassis (over controlled chassis) over the next three years?"

# WHAT SHOULD LEASING/POOLING COMPANIES DO DIFFERENTLY IF THEY WANT TO RECOVER MARKET SHARE?

Truckers suggested improving:

- dependability of chassis
- chassis availability
- customer service
- rates to be more competitive

“

*Pool chassis have had maintenance problems and thus safety concerns...we had plenty pool chassis break down in the middle of the road, tires popping, which takes a lot of energy to resolve*

“

*I want better communication, better tracking of where you can return and pick up chassis, better condition*

“

*I want a more spread out version of pool chassis, the furthest chassis have all of them and the local ones have only 10, pools could shift their availability more equally per location*

“

*I don't know what it would take for me to shift back to pool chassis.....some of them don't have good booking websites, it was great when they used to work.... I want actual accountability, fewer touchpoints*

“

*It's very difficult in dealing with pool chassis companies, constantly fighting tire charges, it's a headache and a burden on the business, time consuming.....it's a whole lot easier to lease*

“

*Something would have to change for me to use pool chassis. I used some a few months ago and those were suspect looking, with taillights missing. The stress of not knowing if I'll be able to get chassis – that's the pain of it all*

“

*Make it worth my time with a happy medium between cost and efficiency*

# WHAT ARE TRUCKERS PLANNING TO DO IN THE FUTURE?

- Carriers that currently have controlled chassis will continue to prefer this model and do not expect to reverse this trend
- Truckers will continue to find the chassis solution that best meets their needs for a given load – is it a grounded or wheeled environment, what does the BCO require, is it drop and hook or live load, is there specialty equipment involved, what are the market conditions and supply/demand balance?

“

*If could completely depend on pool chassis, I still wouldn't heavily favor them, **I would use a hybrid approach....**  
The ideal world is to lease and use pool as needed*

“

*I don't anticipate a big shift from our current strategy of procurement of chassis and current use. **Leasing will stick around,** for the majority of our experience*

“

*We're happy with our purchase—accessibility is always there and we have that advantage to give that to our customers. After our leases are over, **we will probably buy** and look into getting a warranty on them*

“

*We would buy – **we would probably do a lease-to-buy** first if we could get a good maintenance deal and then pay the difference, so that what you're paying on the lease goes toward the buying price*

“

***I will absolutely buy** more chassis in the future*



# THE OLIVER WYMAN TEAM BEHIND THE RESEARCH



**ADRIENE BAILEY**

Senior Partner, Transportation

[adriene.bailey@oliverwyman.com](mailto:adriene.bailey@oliverwyman.com)

+1 (904) 228 8834



**FRED DUIVEN**

Partner, Private Capital

[fred.duiven@oliverwyman.com](mailto:fred.duiven@oliverwyman.com)

+1 (202) 331 8639



**AMY LASATER-WILLE**

Partner, Human Insights

[amy.lasaterwille@oliverwyman.com](mailto:amy.lasaterwille@oliverwyman.com)

+1 (347) 697 9631



**MATTHEW SCHABAS**

Principal, Transportation

[matthew.schabas@oliverwyman.com](mailto:matthew.schabas@oliverwyman.com)

+1 (917) 755 4012



**ERIC HELLER**

Director, Transportation

[eric.heller@oliverwyman.com](mailto:eric.heller@oliverwyman.com)

+1 (312) 345 3313



**RYAN GOODALL**

Engagement Manager, Private Capital

[ryan.goodall@oliverwyman.com](mailto:ryan.goodall@oliverwyman.com)

+1 (617) 816 7955

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A large container ship is docked at a port at night. The ship's deck is filled with stacks of colorful shipping containers. Several large gantry cranes are positioned around the ship, their structures illuminated by bright lights. The water in the foreground is dark and reflects the lights from the ship and cranes. The sky is a deep blue, and the overall scene is lit with a cool, blue-toned light.

Q & A

# IANA Announcements

- Visit the Upcoming Education page for more information about 2024's Intermodal Insights Virtual Education Program @ [intermodal.org/upcoming-education](https://intermodal.org/upcoming-education)



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IANA, 11785 Beltsville Drive, Calverton, MD 20705-4048.