

Service Quality and Industry Structure

Concentration in the LTL Motor Carrier Industry

By Dong Liu*

1. Introduction

The Motor Carrier Act of 1980 largely deregulated the US interstate motor carrier industry. By lifting restrictions on entry and rates, deregulation has greatly enhanced the efficiency of carrier operations and brought substantial benefits to shippers (see Winston, Corsi, Grimm and Evans, 1990).

Deregulation has also led to some significant changes in the industry structure. This is particularly the case in the less-than-truckload (LTL) sector, the largest class of general freight carriers. Since deregulation, intense competition has driven many LTL carriers out of business and the industry has become increasingly concentrated (Rakowski, 1988; Keeler, 1989; Kling, 1990; Emerson, Grimm and Corsi, 1992). As documented by Emerson, Grimm, and Corsi (1992), the total number of LTL carriers has declined from 552 in 1977 to 274 in 1988, and the revenue share of those large LTL carriers (with revenues more than 1 per cent of the total) has grown from 37.6 per cent of the industry total in 1977 to 68.5 per cent in 1988.

It is puzzling that both early and more recent empirical cost studies have found no evidence of scale economies in the motor carrier industry. There have been more than a dozen such studies between 1977 and 1991. With few exceptions, they have consistently concluded that the motor carrier industry as a whole, and the LTL sector in particular, have a constant returns-to-scale cost structure. The study by Grimm, Corsi and Jarrell (1989) contains a review of many of them. The results of these studies, together with the fact that the trucking technology and inputs are easily accessible, seem to indicate that the LTL motor carrier industry is inherently competitive; once the regulatory controls on rates and entry were removed, the industry structure would approximate to that of perfect competition and a large number of competing carriers would survive. This certainly has not been the case.

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The Art Of Giving Quality Service In The Motor Carrier Industry

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