



Fall Line Logistics

Weekly Shipper Freight Market Update

September 15, 2026

Flatbed • Heavy Haul • Dry Van • Energy • Imports / Drayage

What Shippers Need to Know This Week

Dry van has firmed and specialized heavy-haul equipment remains significantly less flexible.

The biggest cost pressure is currently **fuel**. National diesel reached \$5.967/gallon in the latest EIA weekly report. This means falling linehaul rates do not necessarily translate dollar-for-dollar into lower all-in transportation costs.

Importers also need to prepare for a stronger September than previously expected. Major U.S. ports are forecast to handle **2.31 million TEU this month, up 9.6% YoY**, potentially making September the busiest import month of 2026.

This Week at a Glance

Market	Current Direction What It Means for Shippers	
Flatbed	 Steady	Slightly better buying opportunity
Heavy Haul / RGN	 Tight	Advance planning still critical
Dry Van	 Firming	Less negotiating room in some regions
Energy / Project Freight	 Active	Specialized equipment competition remains
Imports	 Elevated	September volume higher than expected
Drayage	 Active	Plan around terminals, chassis and free time
Fuel	 Very High	Higher all-in carrier operating cost

Flatbed

Shippers Are Regaining Some Buying Power

Flatbed spot rates declined **5.7¢/mile WoW** following the pre-Labor Day increase.

Rates are still approximately **29% above the comparable 2025 period**, so this is a correction from an elevated market rather than a return to last year's pricing.

The Northeast was the exception last week, with rates increasing slightly while other major regions softened.

What This Means for Your Freight

If shipping **standard legal-dimension flatbed freight**, current conditions provide a better opportunity to control transportation costs than earlier this summer.

There is less reason to aggressively lock in a truck a week in advance on routine lanes when pickup dates are flexible.

A **3–5 day tender window** should generally provide a healthy balance between coverage and price.

Where to Expect More Resistance

Northeast outbound freight remains somewhat stronger.

Shippers moving freight from Pennsylvania, New Jersey, New York and surrounding markets should expect less negotiating leverage than in many Southern and Central markets.

Recommended Strategy

Standard flatbed: Tender 3–5 days ahead.

Flexible pickup date: Allow ± 1 day whenever possible. This gives carriers an opportunity to match the shipment with their inbound truck and can materially reduce deadhead.

High-volume projects: Consider securing capacity in blocks rather than individually sourcing each load.

Critical delivery: Do not sacrifice carrier quality simply because the broader market is softening.

Heavy Haul / Oversize

Do Not Treat Heavy Haul Like the Flatbed Market

This is currently the most important distinction for project shippers.

Standard flatbed pricing is softening.

RGN and heavy-haul capacity does not necessarily follow it.

A legal flatbed shipment can potentially be serviced by thousands of trucks. A shipment requiring a specific deck height, well length, axle configuration, permit route and delivery schedule may have only a small number of viable trucks in the area.

Current Equipment Risk

Equipment Needed	Shipper Risk
Standard Flatbed	 Moderate
Step Deck	 Moderate
Low-Pro Step Deck	 Moderate–High
Double Drop / RGN	 High
Stretch RGN	 High
Multi-Axle	 Very High
Specialized Conestoga	 High

Fuel Is Particularly Important Here

At **\$5.967/gallon diesel**, fuel alone represents approximately:

Truck Efficiency Fuel / 1,000 Miles

4 MPG	~\$1,492
3 MPG	~\$1,989

Heavy-haul tractors frequently operate closer to the lower end of that MPG range.

That means a heavy-haul carrier can face **\$1.50–\$2.00 per mile in fuel expense alone** before driver compensation, permits, escorts, equipment cost, insurance, maintenance or empty repositioning.

What Shippers Can Do

The largest savings opportunity on heavy haul often comes from **planning**, not negotiating the final \$100–\$200 from the carrier.

Provide dimensions and weights early.

Confirm whether dimensions are shipping dimensions or equipment dimensions.

Provide drawings when possible.

Identify crane appointments before dispatch.

Allow routing time before committing to delivery dates.

Avoid Friday pickup requirements when permitted travel could push the truck into weekend restrictions.

Recommended Lead Times

Simple oversize: 5–7 days

RGN / routed OD: 7–10 days

Multi-axle / superload: 2+ weeks

For critical project freight, equipment should be secured **before crane crews, installation teams or shutdown schedules are finalized around the truck's arrival.**

Dry Van

Rates Firmed This Week

Dry van moved differently from flatbed.

Spot rates increased **5.5¢/mile WoW**, with particularly strong increases in the Midwest and Northeast.

Dry van rates are approximately **43% above the comparable 2025 week**, although Labor Day timing distorts the YoY comparison.

What This Means for Shippers

There is still plenty of standard dry-van capacity nationally, but the negotiating environment has become less favorable in several industrial markets.

Watch These Origins

Midwest: Chicago, Indiana, Ohio and surrounding manufacturing markets.

Northeast: Pennsylvania, New Jersey, New York and surrounding markets.

Shippers with freight originating in these regions should avoid relying on same-day capacity.

Recommended Strategy

Normal freight: Tender 48–72 hours ahead.

High-volume lanes: Establish repeat carrier capacity where possible.

Flexible shipments: Giving a carrier pickup flexibility can be more valuable than extending the tender several additional days.

Same-day freight: Expect a premium. A truck that is technically available may still require significant empty repositioning.

Energy & Infrastructure

Why Energy Development Matters to Shippers

U.S. electricity demand is rising rapidly enough that EIA expects **record electricity generation in both 2026 and 2027**.

Electricity sales are forecast to rise almost **2% this year**, driven particularly by data-center development and increased manufacturing activity.

The West South Central region—including Texas—is expected to contribute the largest share of electricity-demand growth.

Why This Matters for Transportation Buyers

The issue is not simply that more energy projects create more freight.

These projects compete for the **same specialized transportation resources** used by manufacturers, construction projects and industrial shippers.

Large energy and data-center developments require movement of:

- Transformers
- Generators
- Switchgear
- E-houses
- Cooling equipment
- Structural steel
- Mechanical skids
- Turbine components

- Substation equipment

That freight **consumes** flatbeds, step decks, RGNs, multi-axle trailers, escorts and specialized carriers.

Shipper Impact

If your facility or project requires the same equipment—even if your freight has nothing to do with energy—you may experience localized capacity pressure around major project markets.

This is particularly important for freight moving through:

Texas / Gulf Coast

Arizona / Southwest

Ohio / Midwest

Virginia / Mid-Atlantic

Recommended Strategy

For project schedules involving repeated specialized loads, provide forecasts as early as possible.

Even an approximate **30-, 60- or 90-day shipment forecast** can help identify capacity conflicts before they become an emergency.

For high-value equipment, consider whether transportation should be planned around the **project schedule** rather than booking each shipment independently as it becomes ready.

Imports / Drayage

September Is Busier Than Previously Expected

Earlier this summer, the expectation was that peak import season had largely been pulled forward.

That has changed.

Major U.S. ports handled **2.30 million TEU in July**, up 3.2% from June.

September is now forecast at:

2.31 Million TEU

That is **9.6% above September 2025** and would make this month slightly busier than July.

What This Means for Importers

There is no reason to panic about nationwide drayage capacity.

However, importers should **not expect the normal post-peak September relief yet.**

The biggest risks are operational:

- Container availability
- Customs clearance
- Terminal appointments
- Chassis availability
- Free-time expiration
- Demurrage
- Per diem
- Empty returns
- Warehouse appointments
- Transload availability
- Final-mile equipment

Where Costs Get Created

A competitive drayage rate can quickly become expensive if the shipment generates:

\$0 linehaul savings + demurrage + chassis days + detention + storage + dry run.

For importers, controlling accessorial exposure is often more valuable than finding the absolute lowest base drayage rate.

Recommended Strategy

Before vessel arrival: Confirm customs/broker status and delivery requirements.

Before container availability: Identify the dray carrier and required chassis/equipment.

When available: Schedule pickup based on free-time expiration—not simply convenience.

Before delivery: Confirm the receiving facility can unload within the allowed free time.

Project cargo: Arrange the transload and specialized final-mile truck before the container is recovered.

Fuel

Fuel Is Currently the Largest Transportation Cost Risk

The latest EIA weekly national diesel average is:

\$5.967 / gallon

The previous week's average was \$5.599.

That represents an increase of:

+36.8¢ / gallon WoW

Fuel has therefore become increasingly important when comparing transportation quotes.

What Shippers Should Look At

Do not evaluate only the base linehaul rate.

Compare:

Linehaul + fuel + accessorial + expected operational risk

This is particularly important for:

Heavy haul , Long-distance flatbed, Remote jobsites, High-deadhead origins, Multi-stop shipments, Expedited freight

A carrier located 25 miles from pickup may now represent substantially better total value than a cheaper carrier repositioning 200 miles to the shipment.

What Shippers Should Do This Week

Freight	Recommended Action
Standard Flatbed	Tender 3–5 days in advance
Northeast Flatbed	Allow additional lead time
RGN / Oversize	Secure equipment before locking project appointments

Multi-Axle	Plan 2+ weeks ahead
Dry Van	Tender 48–72 hours
Midwest / Northeast Van	Expect firmer pricing
Energy Project Freight	Forecast specialized equipment demand early
Imports	Do not assume peak season is over
Drayage	Manage free time and accessorial exposure aggressively
All Modes	Expect fuel to remain a major pricing component

Weekly Bottom Line

For shippers, this is not simply a rising or falling freight market. Different equipment types are moving in different directions.

Standard flatbed conditions are improving and creating a better buying opportunity.

Dry van has firmed, particularly in the Midwest and Northeast.

Heavy haul remains constrained because the available equipment pool is much smaller and fuel represents an unusually large portion of carrier operating cost.

Energy and data-center development continue to consume specialized transportation capacity in key project markets.

And September import volumes are running stronger than previously expected, meaning importers should remain disciplined around drayage, free time and final-mile planning.

The best opportunity this week:

Use softer standard capacity to reduce transportation costs where possible—but give specialized, project and import freight more planning time rather than treating every shipment the same.