



Fall Line Logistics

Weekly Freight Market Update

Tuesday, 09/08/2026

Prepared for current partners and clients

Market Snapshot

The freight market enters the post-Labor Day week with a notable capacity signal: **available trucks contracted sharply while load postings increased**. The most recent published DAT data—covering the week ending August 28—shows flatbed truck postings down **8.8% WoW** while loads increased **8.8%**, and dry-van trucks down **10.0%** while loads increased **12.3%**. DAT has not yet published today's weekly report as of this morning, so these are the newest verified DAT figures available.

Fuel is the bigger immediate development. AAA's daily national diesel average reached approximately **\$5.90/gallon this morning**, about **30¢ higher than one week ago and \$2.19 higher YoY**. Meanwhile, September import volumes remain above year-ago levels, U.S. drilling activity is holding steady, and the principal domestic weather threat is heavy rain across parts of the Upper Midwest.

Metric	Latest	WoW	YoY	Read
Flatbed Linehaul	\$2.67/mi	▼ 1.2% / 3¢	▲ 32.2%	Strong
Flatbed Loads	—	▲ 8.8%	▲ 43.5%	Demand strengthened
Flatbed Trucks	—	▼ 8.8%	▼ 27.1%	Capacity tightening
Flatbed L/T Ratio	41.84	35.09 prior	21.27 LY	● Very tight
Dry Van Linehaul	\$2.19/mi	▼ 0.8% / 2¢	▲ 32.4%	Stable / elevated
Dry Van Loads	—	▲ 12.3%	▲ 22.2%	Demand strengthening
Dry Van Trucks	—	▼ 10.0%	▼ 31.9%	Capacity tightening
Dry Van L/T Ratio	12.01	9.62 prior	6.69 LY	● Tight
AAA National Diesel	\$5.9015	▲ ~30.1¢	▲ \$2.19	● Record-high area
California Diesel	\$7.83	▲ ~46¢	▲ ~\$2.69	● Extreme
U.S. Rig Count	588	—	▲ 51	Energy supportive
September Imports	2.16M TEU forecast	▼ from Aug.	▲ 2.8%	Normalizing
Atlantic Tropics	None active	—	—	● Low current risk

Metric	Latest	WoW	YoY	Read
Iowa Heavy Rain	Slight Risk	—	—	● Freight watch

FLL Take: Spot RPM is drifting lower, but the underlying capacity indicators are moving in the opposite direction. **Rates falling 1% while truck postings fall 9–10% is not a loose market.** This remains particularly important for step deck, RGN, multi-axle, permitted and site-delivery freight, where usable capacity represents only a fraction of generic open-deck supply.

Flatbed / Oversize

Market Condition: Strong / Capacity Tightening

The latest published national flatbed spot linehaul rate is approximately:

\$2.67/mile — excluding fuel

That is: ▼ 3¢ / 1.2% WoW but still: ▲ 32.2% / \$0.65 per mile YoY

and ▲ 26.5% above the nine-year seasonal average.

The more important numbers this week are capacity:

Flatbed loads: +8.8% WoW

Flatbed truck postings: -8.8% WoW

Load-to-truck: 35.09 → 41.84

One year ago: 21.27

Truck postings are now **27.1% lower YoY**, while load postings are **43.5% higher YoY**. The current load-to-truck ratio is therefore almost **97% higher than the comparable 2025 level**.

That is a much stronger capacity signal than the three-cent reduction in national linehaul.

Regional Flatbed Pricing

Region	Avg. Linehaul	WoW	YoY
Southeast	\$3.27	▼ 1.1%	▲ 42.9%
Ohio River	\$3.21	▼ 0.7%	▲ 43.5%
Carolinas	\$3.03	▼ 1.5%	▲ 42.6%
Great Lakes	\$2.85	● ▲ 0.3%	▲ 37.6%
South Central	\$2.64	▼ 4.3%	▲ 29.6%
Lower Midwest	\$2.58	▼ 2.8%	▲ 27.0%
Upper Atlantic	\$2.52	▼ 1.4%	▲ 32.4%
California	\$2.43	▼ 3.2%	▲ 39.6%
Florida / South Georgia	\$2.36	● ▲ 1.0%	▲ 38.7%
Lower Mountain	\$1.84	▼ 2.4%	▲ 27.0%

DAT linehaul rates exclude fuel.

Markets to Watch

Southeast: Still the most expensive major flatbed origin region at approximately **\$3.27/mile linehaul**.

Ohio River: Nearly as strong at **\$3.21**, with pricing more than 43% above last year.

Florida / South Georgia: One of the few major markets that actually strengthened WoW, increasing roughly **1.0%**.

Great Lakes: Also maintained slight positive pricing momentum.

South Central / Texas: National regional pricing softened, but industrial, machinery and energy-related freight should continue to be viewed separately from commodity flatbed freight.

Hot Freight / Commodities

Current open-deck opportunities continue to favor:

- Machinery / Transformers / Generators / Structural steel / Electrical equipment / Pipe / Data-center infrastructure / Fabricated structures / Construction equipment / Energy equipment / Industrial skids / Tanks and vessels

FLL Take: Do not confuse lower RPM with improving capacity. Flatbed truck postings dropped by exactly as much as loads increased last week—**8.8% in opposite directions.**

RGN / Heavy Haul / Site Delivery

Market Condition: Tight

RGN and heavy-haul freight continue to operate in a different capacity market than standard flatbed.

There is still **no** trustworthy national RGN \$/mile index comparable to DAT's standard 48' flatbed series. For that reason, FLL does not recommend applying a generic national flatbed percentage directly to RGN or multi-axle freight.

Current Specialized-Freight Signals

Flatbed truck supply: -27.1% YoY

Flatbed load-to-truck: 41.84

National diesel: ~\$5.90/gallon

U.S. rigs: 588, +51 YoY

Construction / industrial freight: Southeast and Ohio River flatbed pricing remains above \$3.20 linehaul.

For RGN capacity, the effective truck pool can shrink further based on:

- Well length, Deck height, Trailer stretch capability, Axle count, Tractor weight, Cargo Dimensions, Driver experience, Permit requirements
- Escort requirements
- Route surveys
- Loading method
- Crane appointments
- State travel restrictions

A **10' wide, legal-weight step deck** is not competing for the same capacity as a **14' wide, 120,000-lb multi-axle RGN move**, even though both may appear under an "open deck" category.

Diesel Impact Is Especially Important Here

At today's AAA national diesel average of approximately **\$5.90/gallon**, fuel economics become much more significant for specialized equipment.

An ordinary tractor getting **6.5 MPG** consumes approximately 154 gallons every 1,000 miles.

An RGN/heavy-haul tractor may operate materially below that fuel economy depending on gross weight, terrain, axle configuration, idle time and route.

That means fuel exposure can become a **hundreds-of-dollars variable on a single long-haul move**, even before escorts, permits, tolls, deadhead or detention are considered.

Site Delivery

Confirm before dispatch:

- ✓ **Crane appointment**
- ✓ **Rigging crew**
- ✓ **Jobsite access**
- ✓ **Ground conditions**
- ✓ **Receiving window**
- ✓ **Permit route**
- ✓ **Overnight parking / staging**
- ✓ **Contact on site**
- ✓ **Weather conditions**

Shipper recommendation: Continue tendering standard flatbed approximately **3–5 days ahead**. RGN, stretch stepdeck, extendable double-drop, multi-axle and permitted freight should be secured earlier whenever possible.

Energy Transport

Market Condition: Active / Stable

Baker Hughes reported **588 active U.S. drilling rigs** on September 4.

That was:

No change WoW

but

+51 rigs YoY

Canada reported **204 active rigs**, down seven WoW but up 23 YoY.

The U.S. count holding flat for one week does not materially change the energy-freight outlook. The year-over-year gain remains more relevant for transportation demand.

Energy Freight Opportunities

Active energy markets support:

Flatbed — pipe, steel, matting, structural material

Step deck — pumps, generators, skids, compressors

RGN — production equipment, drilling machinery, heavy compressors

Multi-axle — oversized process equipment, vessels, transformers

Hotshot / expedited — field-critical parts

Dry van — parts, consumables and packaged components

Drayage — imported machinery and project cargo

Markets to Watch

Permian / West Texas

Eagle Ford / South Texas

Houston / Gulf Coast

Louisiana industrial corridor

Mid-Continent / Oklahoma

Appalachian gas markets

Dry Van

Market Condition: Balanced Nationally / Capacity Tightening

Dry-van spot linehaul averaged approximately:

\$2.19/mile excluding fuel That is: ▼ **2¢ / 0.8% WoW** but still: ▲ **32.4% YoY**

and

▲ **21.2% above the nine-year seasonal average.** Once again, capacity tells the more important story.

Dry Van Loads: +12.3% WoW

Truck Posts: -10.0% WoW

Load-to-Truck: 9.62 → 12.01

Last Year: 6.69

Truck postings are now approximately:

31.9% BELOW last year.

That is an unusually large difference in available spot-market capacity.

Regional Dry Van Pricing

Region	Avg. Linehaul	WoW	YoY
Ohio River	\$2.61	▼ 0.3%	▲ 38.9%
Great Lakes	\$2.58	● ▲ 0.2%	▲ 36.2%
California	\$2.50	▼ 1.4%	▲ 30.5%
Upper Atlantic	\$2.32	● ▲ 2.0%	▲ 39.2%
Lower Midwest	\$2.32	▼ 1.3%	▲ 30.6%
Lower Atlantic	\$2.31	🔥 ▲ 2.1%	▲ 39.3%
Southeast	\$2.27	▼ 2.4%	▲ 36.4%
Carolinas	\$2.24	▼ 1.1%	▲ 36.4%

Region	Avg. Linehaul WoW		YoY
South Central	\$2.07	▼ 4.1%	▲ 26.6%
FL / South Georgia	\$1.49	▼ 2.5%	▲ 33.5%

Markets to Watch

Lower Atlantic: Strongest major WoW movement at approximately **+2.1%**.

Upper Atlantic: Also strengthened **2.0%**.

Ohio River: Highest major origin price at **\$2.61**.

South Central: Softer pricing at **-4.1% WoW**, giving flexible shippers more negotiating leverage.

Florida / South Georgia: Remains a low-priced outbound market around **\$1.49 linehaul**, despite being more than 33% stronger YoY.

Short-Term Outlook

DAT's 35-day forecast pointed toward roughly **\$2.15/mile linehaul in early October**, still approximately **\$0.46/mile above the comparable 2025 level**.

FLL Take: Standard dry van remains more buyer-friendly than open deck, but a market with **32% fewer available trucks YoY** can tighten quickly after holidays, weather disruptions or localized demand spikes.

Import / Drayage

Market Condition: Normalizing After Early Peak

The accelerated import peak continues to unwind.

Current Global Port Tracker forecasts:

Month	Import Volume YoY	
August	2.22M TEU	▼ 4.2%
September	2.16M TEU	▲ 2.8%
October	2.13M TEU	▲ 2.7%

Month	Import Volume YoY	
November	2.03M TEU	▲ 0.3%
December	2.06M TEU	▲ 2.5%

Full-year 2026 imports are projected at approximately **25.5 million TEU, +0.1% YoY.**

So September volume is expected to decline about **60,000 TEU from August**, but remain **2.8% stronger than September 2025.**

Ports to Watch

Savannah: Southeast retail, industrial and machinery gateway.

Houston: Energy equipment, machinery and project cargo.

LA / Long Beach: Large absolute volume, but peak-season pressure is easing.

NY / NJ: Strong import density and difficult appointment / urban-delivery environment.

Charleston / Norfolk: Important alternatives for Southeast and Mid-Atlantic freight.

A separate September ocean-market update notes that July U.S. imports were about **2.51 million TEU under Descartes' broader dataset**, with China-origin imports reaching roughly **873,129 TEU**, while major gateways generally did not show broad systemic congestion.

Drayage Risks

The major customer risks remain:

- Terminal appointments / Chassis / Free time / Demurrage / Detention / Empty-return requirements / Warehouse appointments / Live unloads / Project cargo handling / Port cutoff times

FLL Take: Broad container volumes are normalizing. That should gradually improve standard drayage capacity, but **specialized flat rack, overweight, machinery and project-container moves remain a separate market.**

Fuel — BIGGEST CHANGE THIS WEEK

Diesel Pushes Toward \$6 Nationally

This is the biggest freight cost story of the week.

AAA's daily national average on September 8 is:

\$5.9015/gallon

Compared with:

Yesterday: \$5.8970

One week ago: \$5.6002

One month ago: \$5.3313

One year ago: \$3.7088

That means diesel is approximately:

● **+30.1¢ in ONE WEEK**

● **+57.0¢ in ONE MONTH**

● **+\$2.19/gallon YoY**

● **~59% HIGHER YoY**

AAA's current figure is at a record-high level, while multiple national reports over Labor Day likewise described U.S. retail diesel around **\$5.85–\$5.90/gallon**.

Important Data Note

The latest official EIA weekly average remains **\$5.599/gallon for August 31** because the Labor Day holiday pushed EIA's next fuel release to **Wednesday, September 9**.

So for customers:

EIA official weekly: \$5.599

AAA current retail market: ~\$5.90

The daily market has moved materially since the government's last weekly survey.

California Fuel — EXTREME

California diesel has reached approximately:

\$7.83/gallon

AAA reports:

Current: \$7.8276

Week ago: \$7.3673

Month ago: \$6.8663

Year ago: \$5.1404

That's approximately:

+46¢ WoW

and

+\$2.69 YoY

For long-haul machinery, RGN and heavy-haul freight entering California, fuel has become a major pricing component.

Actual Carrier Fuel Cost Impact

Using a standard tractor assumption of **6.5 MPG**, the approximately **30.1¢ weekly diesel increase** adds roughly:

Miles Additional fuel cost from this week's increase alone

500 **+\$23**

1,000 **+\$46**

1,500 **+\$70**

2,000 **+\$93**

3,000 **+\$139**

Compared with **one year ago**, today's \$2.19/gallon difference equates to roughly:

+\$337 per 1,000 miles

at 6.5 MPG.

For a heavy-haul tractor operating at **4.0 MPG**, that YoY difference approaches:

+\$548 per 1,000 miles

before deadhead, idling or permit-route mileage.

FLL Take: Fuel has moved from a surcharge conversation to a **base carrier-cost problem**. This matters most for RGN, heavy haul, expedited, team, West Coast and high-deadhead freight.

Weather & High-Sensitivity Areas

1. Iowa / Upper Midwest

Risk Level:  **MODERATE-HIGH**

The Weather Prediction Center has issued a **Slight Risk of excessive rainfall across Iowa today into early Wednesday**.

A frontal boundary moving through the region may slow from eastern Nebraska / northeast Kansas into Iowa, allowing thunderstorms to train over the same areas.

Corridors to Watch

I-80 — Nebraska → Des Moines → Davenport

I-35 — Kansas City → Des Moines → Minnesota

I-29 — Omaha / Council Bluffs corridor

I-380 — Cedar Rapids

I-90 — Southern Minnesota / Upper Midwest connections

Freight Impact

- Reduced visibility / Hydroplaning / Local flash flooding / Loading delays / Jobsite / Shutdowns / Agricultural freight delays / Slower flatbed securement / Secondary-road closures

This corridor matters heavily for industrial, machinery, agricultural and open-deck freight.

2. Florida Peninsula

Risk Level: ● MODERATE

WPC is also monitoring the Florida Peninsula, where moisture levels around **2.25 inches** and slow-moving thunderstorms may support localized rainfall rates of approximately **2–3 inches per hour**, particularly along portions of the western side of the state.

Freight Impact

Watch:

Tampa / I-4 / Central Florida / I-75 / Local construction sites / Port / warehouse access / Flatbed loading and tarping

Localized flooding is more likely to affect **surface streets and jobsites** than create a broad statewide trucking shutdown.

3. Atlantic Hurricane Watch

Risk Level: ● LOW CURRENT RISK

As of early Tuesday morning:

There are no active tropical cyclones in the Atlantic basin.

That means there is currently no direct tropical threat to Houston, New Orleans, Savannah, Charleston or the East Coast port network.

This is a meaningful improvement from last week's Gulf Coast risk.

However, September remains peak hurricane-season territory, so Gulf and Southeast project freight should continue to be monitored closely.

4. Southern California / Pacific

Risk Level: ● LIMITED FREIGHT IMPACT

Tropical Storm Marie remains well offshore in the eastern Pacific.

As of 2:00 a.m. PDT:

Maximum winds: 45 mph

Location: approximately 760 miles southwest of San Diego

Movement: WNW at 8 mph

There are **no coastal watches or warnings**, although dangerous surf and beach conditions are expected along portions of Southern California and Baja California.

FLL Take: Marie is currently more of a marine/coastal issue than a major trucking disruption.

Freight Industry News

Brake Safety Week — Results Still Pending

CVSA's 2026 Brake Safety Week took place **August 23–29** with inspectors emphasizing **brake drums and rotors**.

As of this morning, CVSA's public results page **has not yet posted final 2026 Brake Safety Week totals**.

That means any specific national inspection or OOS percentage being circulated for this year's Brake Safety Week should be treated cautiously until CVSA releases the official data.

What We Do Know

Earlier this year, CVSA's **2026 Unannounced Brake Safety Day** resulted in:

4,021 inspections

574 vehicles placed out of service

14.3% brake-related OOS rate

Approximately **85.7%** of inspected vehicles had no brake-related OOS violation.

The 2025 Brake Safety Week produced:

15,175 inspections

2,296 vehicles OOS

or approximately:

15.1% of inspected vehicles

Freight Takeaway

The temporary avoidance behavior associated with Brake Safety Week should be fading.

However, fleets that discovered maintenance issues before or during inspection week may still have equipment in shops, and this can matter disproportionately in **RGN, lowboy, stretch and other specialized fleets**.

Post-Labor Day Capacity

Labor Day was yesterday, and the first several business days afterward can produce an artificial tightening as freight that was delayed over the holiday re-enters the network.

The latest available DAT data was already showing a substantial reduction in truck postings before the holiday:

Flatbed trucks: -8.8% WoW

Dry van trucks: -10.0% WoW

FLL Take: Expect **Tuesday–Thursday to be less predictable than the national rate averages imply**, particularly for same-day recovery freight.

Biggest WoW Freight Signals

Market Indicator	Current Signal
AAA Diesel	● +\$0.301/gal WoW
AAA Diesel YoY	● +\$2.19/gal
California Diesel	● ~+\$0.46/gal WoW
California Diesel Current	● ~\$7.83/gal
Flatbed Loads	● +8.8%
Flatbed Trucks	● -8.8%
Flatbed Load-to-Truck	● 35.09 → 41.84

Market Indicator	Current Signal
Flatbed L/T YoY	● 41.84 vs. 21.27
Flatbed Linehaul	▼ 3¢ → \$2.67
Flatbed Rate YoY	● +32.2%
Dry Van Loads	● +12.3%
Dry Van Trucks	● -10.0%
Dry Van L/T	● 9.62 → 12.01
Dry Van Linehaul	▼ 2¢ → \$2.19
Dry Van Rate YoY	● +32.4%
U.S. Rig Count	— 588
Rig Count YoY	● +51
September Imports	2.16M TEU
September Imports YoY	● +2.8%
Iowa Heavy Rain	● Slight Risk
Atlantic Tropical Systems	● None active
2026 Brake Week Results	⌚ Pending

FLL Recommendation to Shippers

Flatbed / Oversize: National linehaul declined three cents, but that is not the important number. **Loads increased 8.8% while truck postings fell 8.8%.** Secure normal flatbed 3–5 days ahead and avoid relying on same-day capacity.

Step Deck: Keep pricing separate from generic 48' flatbed. Taller machinery, generators, construction equipment and industrial freight compete for a narrower equipment pool.

RGN / Heavy Haul: Continue planning early. Capacity is already structurally limited, and diesel approaching \$6 nationally materially increases the cost of long deadheads, escorts and permit-route mileage.

Site Delivery: Confirm the site before the truck rolls. Crane delays, mud, poor access, missed receiving windows and permit restrictions can cost substantially more than small differences in linehaul.

Energy Transport: U.S. drilling remains **51 rigs higher YoY**. Texas, Louisiana, Oklahoma and other energy regions remain attractive specialized-freight markets.

Dry Van: Standard freight remains easier to source than RGN/open deck, but truck postings are approximately **32% below last year**. Tender normal loads 48–72 hours ahead.

Drayage: September imports are forecast at **2.16M TEU, +2.8% YoY**. Capacity should become more manageable as the early peak fades, but terminal appointments, chassis and free time remain critical.

Fuel: This is the biggest customer conversation this week. National diesel has moved from roughly **\$5.60 to \$5.90 in seven days** on AAA's daily measure. California is approaching **\$7.83**.

Weather: Watch Iowa / I-80 / I-35 today and Wednesday. There is currently **no Atlantic tropical cyclone**, reducing immediate Gulf and East Coast hurricane exposure.

All Freight: Post-holiday recovery + dramatically higher diesel + fewer posted trucks creates a market where **planned freight and emergency freight can price very differently**.

Bottom Line

The rate index is cooling. The truck pool is not.

Flatbed

Rates: -1.2%

Loads: +8.8%

Trucks: -8.8%

L/T: 41.84 vs. 21.27 LY

Dry Van

Rates: -0.8%

Loads: +12.3%

Trucks: -10.0%

L/T: 12.01 vs. 6.69 LY

At the same time:

National diesel is approximately \$5.90/gallon.

California diesel is approximately \$7.83/gallon.

U.S. drilling is +51 rigs YoY.

September imports are forecast +2.8% YoY.

Iowa faces elevated heavy-rain risk today.

There are currently no Atlantic tropical cyclones.

Brake Safety Week results are still pending.

FLL Bottom Line to Clients:

Standard rates have eased from summer highs, but underlying capacity remains tight and fuel has become substantially more expensive. Shippers should use the current rate correction to plan freight earlier—not assume trucks are plentiful. That distinction is especially important for flatbed, step deck, RGN, heavy haul, site delivery, energy and project freight.