



Fall Line Logistics

Weekly Shipper Freight Market Update

October 14, 2026

**Flatbed • Heavy Haul • Dry Van • Expedited • Energy & Infrastructure • Imports &
Drayage • Fuel • Weather**

What We're Watching This Week

The freight market is showing signs of stabilization following several consecutive weeks of strengthening. While national load activity moderated last week, transportation costs remain elevated compared with last year, and regional differences continue to affect equipment availability.

Flatbed pricing eased slightly after three consecutive weekly increases, while dry van continued to strengthen. These relatively small weekly movements should not be confused with a broad shift in transportation costs.

The latest diesel report also provides an important development: national fuel prices declined for the third consecutive week, but the rate of improvement slowed considerably. Fuel costs are already moving higher in portions of the western United States.

For industrial and project freight, national averages tell only part of the story. Equipment specifications, carrier location, fuel, permits, delivery appointments and jobsite requirements continue to influence actual transportation pricing.

This Week at a Glance

Market	Latest Movement	Fall Line View
Flatbed	-0.7¢/mi WoW	Pricing stabilizing after recent increases
Dry Van	+0.4¢/mi WoW	Recent pricing gains holding
Heavy Haul / RGN	Equipment-specific	Specialized capacity requires advance planning
Expedited / Regional	Location-dependent	Vehicle positioning and pickup readiness are critical
Diesel	\$6.179/gal, -2.0¢ WoW	Fuel relief slowing; western regions rising
Imports	2.25M TEU forecast	October activity remains elevated
Western Weather	Elevated	Mountain snow and route restrictions
Central Plains	Flooding risk	Potential disruptions through October 16

Industry Capacity Uneven

Truck availability varies by region and equipment

Fall Line Outlook: The market may be stabilizing, but transportation planning remains essential. Shippers providing advance visibility, accurate freight specifications and flexible scheduling will be better positioned to control costs and maintain reliable service as Q4 progresses.

1. Flatbed Market

Pricing Stabilizes Following Recent Increases

Flatbed spot rates declined approximately 0.7¢/mile during the week ending October 9, the first weekly decrease following three consecutive increases.

The change is modest and does not represent a significant shift in transportation costs. Flatbed rates remain elevated compared with the same period last year, and regional conditions continue to vary.

National flatbed load postings declined 10.6% last week. However, lower posting activity does not necessarily translate into more qualified equipment for individual shipments.

For manufacturers and project shippers, the larger consideration is whether properly equipped carriers are positioned near the shipment's origin.

Regional Flatbed Market

Region	Fall Line View
Northeast	Stronger regional pricing
Southeast	Routine capacity varies by lane
Midwest	Industrial demand remains an important factor
South Central	Equipment availability varies by origin
Mountain Central	Truck positioning remains important
West Coast	Regional pricing remains firm

The **Northeast** and **West Coast** were the primary regions showing increased flatbed pricing.

For industrial shipments, requirements such as tarping, securement, remote facilities, restricted receiving hours and construction-site delivery can significantly affect the usable carrier pool.

Fall Line Recommendation: Continue planning routine flatbed shipments 3–5 business days ahead. For projects involving multiple shipments, a rolling forecast helps coordinate carrier availability, reduce unnecessary repositioning and protect delivery schedules.

2. Oversize & Heavy Haul

Specialized Equipment Remains a Separate Market

National flatbed rate movements are useful for understanding broad market conditions, but they are not reliable pricing benchmarks for RGN, low-profile step deck, stretch, double drop or multi-axle transportation.

Specialized freight is governed by a smaller and more restrictive equipment pool.

A shipment requiring a particular deck height, well length, axle configuration, permitted route or crane appointment may have only a handful of qualified trucks within a practical distance of pickup.

Specialized Equipment Outlook

Equipment	Planning Risk	Recommended Lead Time
Standard Flatbed	Moderate	3–5 days
Standard Step Deck	Moderate	3–5 days
Low-Pro Step Deck	Elevated	5–7 days
RGN / Double Drop	High	7–10 days
Stretch RGN	High	1–2 weeks
Multi-Axle / Superload	Very High	2+ weeks
Escorts	Regional	Confirm during permitting
Crane Delivery	Schedule-sensitive	Coordinate before dispatch

These are recommended planning windows rather than guaranteed equipment availability.

Fall Line Recommendation: Confirm freight dimensions, weights, equipment specifications, delivery restrictions and crane requirements before finalizing project appointments. Securing the correct trailer in the correct location is often the most effective way to manage cost and execution risk.

3. Dry Van

Recent Pricing Gains Continue to Hold

Dry-van spot rates increased approximately 0.4¢/mile last week, extending a period of relatively firm pricing.

Although national dry-van load postings declined 14.7%, pricing remained stable following several weeks of increases.

Lower weekly freight activity does not automatically indicate a meaningful reduction in carrier operating costs or improved availability on a specific lane.

Regional Dry Van Market

Region	Weekly Rate Direction Fall Line View	
Northeast	Decreasing	Routine freight remains workable
Southeast	Increasing	Localized pricing pressure
Midwest	Decreasing	Industrial origins remain active
South Central	Decreasing	Recent pricing gains remain relevant
Mountain Central	Increasing	Truck positioning deserves attention
West Coast	Decreasing	Conditions vary by origin

The Southeast and Mountain Central regions were the primary areas showing increased dry-van pricing.

For time-critical freight, a carrier's actual location, available driving hours and ability to meet pickup and delivery requirements remain more important than the national average.

Fall Line Recommendation: Tender routine dry-van shipments 48–72 hours ahead. Expedited, team-service and critical appointment freight should be evaluated separately because the qualified carrier pool is more limited.

4. Expedited & Regional Freight

Regional expedited transportation remains essential for time-sensitive shipments, including urgent replacement parts, manufacturing support and direct-to-jobsite deliveries.

Unlike standard truckload freight, expedited pricing and availability depend heavily on vehicle positioning, shipment size and delivery urgency.

Equipment & Regional Outlook

Equipment	Common Application	Capacity Consideration
Sprinter / Cargo Van	Urgent parts, small freight	Local vehicle availability
16–26 ft Box Truck	Palletized regional freight	Payload, liftgate and dock requirements
Dedicated Straight Truck	Larger time-critical shipments	Driver availability and transit time
Team Expedited	Long-distance urgent freight	Team positioning

Fall Line Recommendation: Confirm cargo dimensions, weight, pickup readiness and delivery deadlines before dispatch. Proper vehicle positioning and direct delivery help reduce handling, avoid unnecessary delays and protect production schedules.

Airport Recovery

Major air cargo markets such as ATL, ORD, DFW, MIA and LAX remain important origins for time-sensitive expedited freight.

Airport recovery requires coordination beyond standard pickup scheduling, particularly for international cargo.

Airport Recovery Procedures

1. Confirm flight arrival and shipment identification (MAWB/HAWB).
2. Verify customs release and freight availability.
3. Confirm cargo terminal, handling agent, pickup hours and release requirements.
4. Verify dimensions, weight and loading equipment.

5. Dispatch the appropriate vehicle once cargo is confirmed available.
6. Coordinate direct delivery and monitor transit through POD.

Fall Line Recommendation: Confirm cargo release before committing a vehicle to airport pickup. Proper coordination reduces detention, storage exposure and missed delivery appointments.

5. Fuel

National Diesel Declines for Third Consecutive Week

The U.S. Energy Information Administration released its latest diesel figures on October 14, reflecting prices surveyed October 12.

National diesel declined from \$6.199 to \$6.179 per gallon, a decrease of **2.0¢ WoW**.

The national average has now declined for three consecutive weeks and is 35.0¢ below its September 21 peak of \$6.529.

However, the pace of improvement slowed substantially from the previous week's 18.3¢ decline.

More importantly, the national average conceals growing regional differences. Diesel increased in the Rocky Mountain and West Coast regions, while California remains above \$8 per gallon.

U.S. Diesel — Six-Week Trend

Week	National Diesel	WoW Change
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Sept. 7	\$5.967	+36.8¢
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Sept. 14	\$6.285	+31.8¢
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Sept. 21	\$6.529	+24.4¢
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Sept. 28	\$6.382	-14.7¢
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Oct. 5	\$6.199	-18.3¢
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Oct. 12	\$6.179	-2.0¢
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Source: U.S. Energy Information Administration.

Regional Diesel Prices — October 12

Region	Price / Gallon WoW Change	
United States	\$6.179	-2.0¢
East Coast	\$5.908	-4.3¢
New England	\$6.441	-3.5¢
Central Atlantic	\$6.471	-1.4¢
Lower Atlantic	\$5.645	-5.4¢
Midwest	\$6.259	-2.7¢
Gulf Coast	\$5.809	-1.0¢
Rocky Mountain	\$6.302	+3.5¢
West Coast	\$7.240	+1.1¢
California	\$8.091	+0.9¢

Source: EIA, released October 14, 2026.

What Fuel Means for Transportation Buyers

The national decline is encouraging, but the slowing rate of improvement and renewed increases in western markets show that fuel remains a significant and uneven transportation expense.

At the current national average of \$6.179 per gallon, approximate fuel expenses per 1,000 operating miles are:

Truck Efficiency Fuel Cost / 1,000 Miles

4 MPG	\$1,545
3 MPG	\$2,060

These figures exclude driver pay, equipment, maintenance, insurance, deadhead, permits, escorts and carrier margin.

For heavy-haul carriers operating at 3–4 MPG, fuel alone represents approximately \$1.54–\$2.06 per operating mile before other expenses.

Fall Line Recommendation: Evaluate freight costs using the complete transportation requirement rather than national fuel movements alone. Equipment positioning, regional fuel exposure, empty miles and delivery requirements can have a greater effect on the final cost than a small weekly change in diesel.

6. Energy, Data Centers & Project Freight

Power Infrastructure Continues to Support Specialized Freight

Data-center construction and electrical infrastructure investment continue to create demand for open-deck and specialized transportation.

On September 30, Schneider Electric, Wärtsilä and Stanley Consultants announced a coordinated approach to delivering on-site power generation and electrical infrastructure for U.S. data centers.

The initiative combines modular power generation, electrical distribution and engineering to support faster project delivery.

For Fall Line customers, the transportation implications extend beyond data-center buildings themselves.

Equipment and Commodities in Demand

Commodity	Typical Transportation Requirements
Transformers	RGN, multi-axle, heavy haul
Switchgear	Flatbed, step deck, enclosed equipment
E-Houses	Step deck, RGN, permitted transport
Generators	Flatbed, step deck, RGN
Cooling Equipment	Flatbed, step deck, oversize
Structural Steel	Flatbed, stretch trailers
Mechanical Skids	Flatbed, step deck, RGN

Substation Equipment Flatbed, heavy haul, crane delivery

The larger transportation challenge is that these projects compete for the same specialized carriers, cranes, escorts and rigging crews used by industrial manufacturers and construction contractors.

Midwest Industrial Development

The previously announced \$15 billion Mesabi Metallics steel project in southeast Iowa remains a major long-term development worth monitoring.

Construction of a facility of this scale can create substantial demand for structural steel, electrical equipment, process machinery and oversized industrial components before production begins.

For manufacturers supporting these projects, transportation planning should begin during fabrication rather than after equipment is ready to ship.

Fall Line Recommendation: Provide rolling 30-, 60- or 90-day equipment forecasts for major projects. Approximate shipping dates, equipment types and destinations help identify potential capacity conflicts before they affect installation schedules.

7. Imports & Drayage

Import Volumes Remain Elevated Despite Seasonal Moderation

The National Retail Federation's October 8 Global Port Tracker report indicates that the extended import peak is beginning to ease.

However, volumes remain elevated, with October imports forecast at approximately 2.25 million TEU.

U.S. Container Import Outlook

Month	Volume	Status
August	2.30M TEU	Actual
September	2.28M TEU	Estimate
October	2.25M TEU	Forecast
November	2.00M TEU	Forecast

December 2.02M TEU Forecast

Source: National Retail Federation, Global Port Tracker, October 8, 2026.

The anticipated decline in total import volumes does not eliminate the operational challenges associated with port freight.

For industrial and project cargo, transportation requirements are often more complex than a standard container movement.

Port-to-Site Transportation

Imported machinery, structural steel, electrical equipment and oversized components may require several coordinated transportation stages:

Port Recovery → Drayage → Transload → Specialized Trailer → Permits / Escorts → Final Jobsite

The greatest avoidable costs often arise from coordination failures rather than the base drayage rate.

Common exposure includes demurrage, container per diem, chassis rental, detention, failed terminal appointments, transload delays, specialized equipment availability and missed jobsite delivery windows.

For project cargo, a container arriving before the receiving facility or specialized trailer is ready can quickly generate unnecessary expenses.

Fall Line Recommendation: Confirm customs status, container availability, last free day, chassis requirements, transload arrangements and final-mile equipment before scheduling cargo recovery.

8. Weather & Freight Corridors

Southern Plains — Elevated Flooding Risk

The National Weather Service Weather Prediction Center identifies heavy rainfall and severe weather along a slow-moving front across the Southern Plains.

Between October 14 and 16, portions of the region could receive 2–4 inches of rainfall, with localized flash flooding possible.

For industrial and energy freight, the most significant concerns may be access roads and project locations rather than major interstate corridors.

Central Rockies — Significant Mountain Snow

A western storm system is bringing significant mountain snow to higher elevations of Utah, Colorado and Wyoming.

NOAA indicates that snowfall could affect high mountain passes, including the I-70 corridor near Eisenhower Tunnel and Vail Pass. Some high-elevation areas have more than a 50% probability of receiving at least eight additional inches of snow.

Regional Weather Outlook

Region	Primary Concern	Transportation Impact
Oklahoma	Heavy Rain / Flooding	Secondary-road closures and site access
North Texas	Heavy Rain	Localized delays
Southern Plains	Flash Flooding	Route and jobsite restrictions
Colorado Rockies	Mountain Snow	High-elevation travel restrictions
Utah / Wyoming	Snow / Changing Conditions	Mountain grades and permitted routes
Remote Project Sites	Ground Conditions	Loading, unloading and crane operations

For standard freight, a weather-related closure may result in a detour.

For permitted oversize freight, the same closure may require revised routing or permit authorization.

Fall Line Recommendation: Reconfirm road conditions, permitted routing and receiving-site access before dispatching weather-sensitive project freight.

9. Industry News

Truckload Pricing Holds Firm Despite Lower Weekly Freight Activity

The October 13 FTR report shows total spot-market load activity declining 11.6% while truck postings increased 4.9%.

Flatbed rates declined approximately 0.7¢/mile, while dry van increased 0.4¢/mile.

Importantly, flatbed rates remained approximately 43% above the comparable 2025 week, while dry-van rates were nearly 49% higher.

The year-over-year comparison reinforces that recent weekly stabilization has not erased the substantial increases experienced over the past year.

DAT Reports Continued Linehaul Strength

Separate DAT market reporting shows national linehaul spot rates increasing 1¢/mile for flatbed and 5¢/mile for dry van during the latest week.

These figures use a different rate methodology than the FTR/Truckstop figures, but they provide an additional indication that pricing remains firm despite the reduction in freight postings.

Fuel Relief Is Becoming More Regional

The newest EIA report shows a third consecutive national diesel decline, but the weekly reduction slowed to just 2¢ per gallon.

At the same time, the Rocky Mountain and West Coast regions recorded increases.

This creates a more complicated cost environment for carriers operating across multiple regions, especially those moving heavy or specialized equipment over long distances.

10. Recommended Shipper Actions This Week

Freight Type	Recommended Action
Standard Flatbed	Tender 3–5 business days ahead
Northeast Flatbed	Expect stronger regional pricing
Multi-Load Projects	Provide rolling equipment forecasts
Simple Oversize	Plan 5–7 days ahead
RGN / Double Drop	Plan 7–10 days ahead
Stretch / Specialized	Plan 1–2 weeks ahead
Multi-Axle / Superload	Plan 2+ weeks ahead
Dry Van	Tender 48–72 hours ahead

Sprinter / Cargo Van	Verify dimensions, payload and pickup readiness
Box Truck	Confirm capacity, dock access and liftgate requirements
Airport Recovery	Confirm customs release, cargo availability and terminal requirements
Time-Critical Regional	Provide delivery deadlines and allow immediate vehicle sourcing
Imports	Verify customs release and last free day
Project Imports	Arrange specialized final-mile equipment early
Southern Plains	Monitor flooding and road access
Western Mountain Freight	Verify snow restrictions
Crane Deliveries	Secure transportation before crane scheduling
Energy / Data Centers	Provide 30–90 day equipment forecasts
Cross-Border	Coordinate border, U.S. transport and final-site requirements

Weekly Bottom Line

The freight market is showing signs of stabilization, but that does not necessarily mean transportation is becoming easier or less expensive.

Recent flatbed pricing gains have largely held, dry-van rates remain firm, and specialized equipment continues to operate under its own supply-and-demand conditions.

The latest fuel figures provide a useful reminder that transportation costs do not move uniformly across the country.

National diesel declined another 2¢ per gallon, marking the third consecutive weekly decrease. However, the pace of improvement slowed sharply, and prices have already begun increasing again in the Rocky Mountain and West Coast regions.

Meanwhile, national flatbed and dry-van spot rates remain approximately 43% and 49% above their respective year-ago levels, according to FTR.

Imports remain elevated, and energy and data-center construction continue to create demand for specialized transportation resources.

Regional expedited freight presents a different set of challenges from traditional truckload transportation. Airport recovery times, local vehicle availability, payload restrictions and delivery commitments can be more important than national rate movements. For urgent parts, production-critical materials and project-site deliveries, properly coordinated Sprinter van and box-truck service can help prevent operational delays and unnecessary handling.

Weather-related disruptions across the Southern Plains and central Rockies add another consideration for project freight moving through affected regions.

For industrial shippers, the greatest transportation challenges are rarely explained by a national rate index alone. A shipment requiring a specific trailer configuration, remote pickup, crane appointment or permitted route has a much smaller pool of qualified carriers than a standard truckload.

Fall Line's focus remains on controlling the total cost of transportation—not simply finding the lowest linehaul quote.

That means identifying properly positioned equipment, anticipating operational requirements, coordinating delivery schedules and preventing avoidable delays and accessorial charges.

As Q4 progresses, these fundamentals remain more important than small weekly fluctuations in national spot rates.

Fall Line Logistics

Flatbed • Heavy Haul • Project Freight • Expedited • Cross-Border

Prepared October 14, 2026. Freight-market movements reflect the week ending October 9. Fuel figures reflect the October 12 EIA survey, released October 14. Equipment lead times are planning guidance rather than guaranteed availability.

Market Data Sources

- FTR / Truckstop — Weekly Spot Market Report, October 13, 2026:
<https://spot.ftrintel.com>
- U.S. Energy Information Administration — Weekly On-Highway Diesel Prices:
<https://www.eia.gov/petroleum/gasdiesel/>

- National Retail Federation — Global Port Tracker: <https://nrf.com>
- NOAA Weather Prediction Center: <https://www.wpc.ncep.noaa.gov/>