



Fall Line Logistics

Weekly Shipper Freight Market Update

October 7, 2026

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

What We're Watching This Week

The freight market strengthened again during the week ending October 2. Total spot loads increased 2.6% while truck postings fell 4.6%, pushing the load-to-truck ratio to its highest level since mid-July. More importantly for Fall Line customers, rates increased across all major equipment types.

Market	WoW	Fall Line View
Flatbed	Rates +3¢/mi	Third consecutive increase
Dry Van	Rates +7.6¢/mi	Strongest comparable-week gain since at least 2008
Heavy Haul / RGN	Tight	Specialized equipment remains location-dependent
Diesel	-18.3¢/gal	Second consecutive weekly decline
Imports	Elevated	August hit 2.34M TEU; October forecast 2.12M
Southeast Weather Watch		Florida heavy rain / tropical moisture
Industry Capacity	Tight	New trucks are not entering fast enough

The important message this week is that falling diesel is finally helping carrier operating costs, but truck rates are moving in the opposite direction. Capacity—not fuel—is becoming the more important issue heading deeper into Q4.

1. Flatbed

Flatbed rates increased another 3¢/mile last week, the third consecutive weekly increase, and remain more than 42% above the same week in 2025.

Load postings declined 2.2% nationally, but truck availability tightened enough for rates to continue rising.

Regional Flatbed Capacity

Region	Current Signal	Fall Line View
Midwest	Tightening	Loads increased; watch industrial/project origins

Region	Current Signal	Fall Line View
Mountain Central	Tightening	Loads increased
West Coast	Firm	Rates increased
Southeast	Firm	Rates increased
South Central	Balanced / Firm	Rates essentially flat
Northeast	Softer	Rates declined

The Midwest and Mountain Central regions deserve the most attention this week because they were the only major regions where flatbed load postings increased. The Northeast currently offers the best relative buying environment.

For normal legal flatbed, **3–5 days remains a reasonable planning window.** Hard appointments, tarps, remote pickups and jobsite deliveries should get additional lead time.

2. Oversize & Heavy Haul

The national flatbed market is tightening, but RGN and heavy-haul capacity remains its own market.

Deck height, well length, dimensions, weight, axle configuration, permits, escorts, crane appointments and jobsite restrictions can reduce a large carrier pool to only a handful of usable trucks. This distinction has been central to Fall Line's recent market reports. FLL 09.22

Specialized Equipment Outlook

Equipment	Capacity	Planning Target
Standard Flatbed	Moderate / Firm	3–5 days
Step Deck	Moderate	3–5 days
Low-Pro Step Deck	Elevated	5–7 days
RGN / Double Drop	Tight	7–10 days
Stretch RGN	Tight	1–2 weeks

Equipment	Capacity	Planning Target
Multi-Axle	Very Tight	2+ weeks
Escorts	Regional	Confirm with permitting
Crane Delivery	Schedule-Sensitive Coordinate before dispatch	

The biggest opportunity remains equipment positioning. Fuel is coming down, but an RGN or multi-axle truck hundreds of miles from pickup can still be materially more expensive than a properly positioned truck.

For crane and installation deliveries, transportation should be secured before the project schedule becomes immovable. Saving a few hundred dollars on transportation provides little value if a crane, rigging crew or installation team is waiting for the truck.

3. Dry Van

Dry van produced the largest market move this week.

Spot rates increased **7.6¢/mile WoW** to their highest level since mid-July. This was the strongest dry-van increase for this particular week of the year since at least 2008.

Loads also increased **10.5% WoW** and are approximately **27% above the comparable 2025 week**.

Regional Dry Van Capacity

Region	Current Signal	Fall Line View
South Central	Tightening Fastest	Largest rate increase
West Coast	Tightening	Strong load growth
Midwest	Firming	Less same-day flexibility
Mountain Central	Firming	Watch truck positioning
Northeast	Mostly Balanced	Capacity remains workable
Southeast	Most Stable	Rates comparatively steady

South Central is the market to watch. Rates increased across every region except the Southeast, with the largest increase occurring in South Central. West Coast load postings also increased sharply.

Routine dry van should now be tendered **48–72 hours ahead**. Same-day freight in tightening markets is increasingly likely to require a premium.

4. Fuel

This is the second consecutive week of meaningful fuel relief.

U.S. Diesel — Six-Week Trend

Week	National Diesel	WoW Change
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Aug. 31	\$5.599	—
Sept. 7	\$5.967	+36.8¢
Sept. 14	\$6.285	+31.8¢
Sept. 21	\$6.529	+24.4¢
Sept. 28	\$6.382	-14.7¢
Oct. 5	\$6.199	-18.3¢

Six-week movement: \$5.599 → \$6.529 peak → **\$6.199 current**

Source: U.S. Energy Information Administration

National diesel fell from \$6.382 to \$6.199 this week, a decline of 18.3¢/gallon. Combined with last week's 14.7¢ decline, diesel has now fallen **33¢ from its September 21 peak**.

Diesel nevertheless remains **\$2.488/gallon above a year ago**.

Regional Diesel Prices

Region	Current	WoW
U.S.	\$6.199	-18.3¢
East Coast	\$5.951	-18.6¢

Region	Current WoW	
New England	\$6.476	-3.4¢
Central Atlantic	\$6.485	-4.6¢
Lower Atlantic	\$5.699	-25.4¢
Midwest	\$6.286	-24.0¢
Gulf Coast	\$5.819	-13.6¢
Rocky Mountain	\$6.267	-14.0¢
West Coast	\$7.229	-12.8¢
California	\$8.082	-9.9¢

The Lower Atlantic saw the largest weekly improvement, followed closely by the Midwest. California remains above \$8/gallon.

The important freight-market signal is that **fuel and truck rates are currently moving in opposite directions**. Diesel fell another 18.3¢, but flatbed and dry-van rates both increased.

That suggests underlying capacity is currently exerting more upward pressure on transportation pricing than falling fuel is providing downward pressure.

5. Energy, Data Centers & Project Freight

Energy, grid and data-center construction remain important to Fall Line customers because these projects consume the same equipment used for normal industrial and project freight:

Flatbeds • Step Decks • RGNs • Multi-Axle Trailers • Cranes • Escorts • Rigging

The freight itself includes transformers, switchgear, E-houses, generators, cooling equipment, structural steel, mechanical skids, battery systems and other large electrical components.

Even a manufacturer with no direct exposure to the energy industry can feel this effect. An industrial shipper looking for an RGN in a major project market may be competing against a transformer or data-center shipment for the same truck.

New \$15 Billion Iowa Steel Project

Mesabi Metallics announced plans for a **\$15 billion steel complex in southeast Iowa**, targeting roughly 7.5 million tons of annual production initially and up to 10 million tons at full buildout. Construction is expected to support approximately 6,000 jobs.

The transportation impact begins well before steel production. Structural steel, electrical equipment, process machinery and oversized plant components will require years of flatbed, RGN, crane and rigging capacity.

For recurring project freight, Fall Line recommends providing a **30-, 60- or 90-day equipment forecast** whenever possible. Exact shipping dates are not necessary. Approximate volume, geography and equipment requirements allow transportation capacity to be positioned around the project rather than sourced one shipment at a time.

6. Imports & Drayage

U.S. imports remain elevated, although the market is expected to begin cooling as Q4 progresses.

U.S. Container Import Outlook

Month	Volume	YoY / Status
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July	2.30M TEU	Actual
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August	2.34M TEU	+19.3% YoY
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September	2.29M TEU	+12.9% YoY
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October	2.12M TEU	+3.1% YoY
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Trend: 2.30M → 2.34M → 2.29M → **2.12M TEU**

Source: NRF Global Port Tracker

August imports reached 2.34 million TEU, while September is projected at 2.29 million and October at 2.12 million.

For Fall Line project cargo, the important issue is often not the port itself—it is the handoff from the port to the final destination.

Machinery, steel, electrical equipment and oversized components may require:

Port Drayage → Transload → Specialized Trailer → Permits/Escorts → Final Site Delivery

The major cost risks remain customs release, terminal availability, last free day, chassis, demurrage, per diem, storage, warehouse appointments and having cargo available before the correct final-mile equipment is secured.

For oversized or specialized imports, the final-mile truck should be planned **before the cargo becomes available**, not after.

7. Weather & Freight Corridors

Florida / Southeast — WATCH

Florida is the primary excessive-rainfall concern this week. A slow-moving front combined with tropical moisture is producing repeated rainfall across much of the peninsula.

The **I-4 corridor and areas generally south of I-10** have the greatest exposure to locally heavy rainfall.

For project freight, the larger concern may be jobsite conditions, crane operations and outdoor loading/unloading rather than interstate closures.

Western U.S. — HEAT

California is also experiencing unusual October heat.

This creates less highway disruption than flooding or winter weather but can affect construction schedules, outdoor loading and unloading, driver operations and jobsites.

Winter Weather — LOW CURRENT RISK

No significant ≥ 4 -inch heavy-snow area or ≥ 0.25 -inch ice area is currently identified through October 9.

Most northern freight corridors therefore remain relatively clean from an early-season winter-weather standpoint this week.

8. Industry News

Trucking Capacity Is Not Rebuilding Quickly

One of the more important freight-market developments is what is **not** happening: rising rates are not bringing large amounts of new truck capacity back into the market.

Industry data indicates tractors entering through new for-hire fleets fell to approximately 19,520 in August, about 14% below the first-half average, while tender rejections remain elevated.

The implication is important for shippers.

The current market tightening does not require a massive freight-demand boom. If the available truck population is already constrained, relatively modest increases in freight demand can produce much larger changes in rates and availability.

This becomes particularly important around:

Q4 peak periods • Holiday weeks • Severe weather • Major project starts • Regional construction surges • Produce seasons

For Fall Line customers, dependable carrier relationships and advance equipment planning become more valuable as the underlying capacity pool gets thinner.

9. What Fall Line Customers Should Do This Week

Freight Type	Recommended Action
Standard Flatbed	Tender 3–5 days ahead
Midwest Flatbed	Allow additional flexibility
Repetitive Project Freight	Provide rolling equipment forecast
Simple Oversize	Plan 5–7 days ahead
RGN / Routed OD	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
South Central Van	Avoid relying on same-day capacity
Imports	Track customs status and last free day
Project Imports	Arrange specialized final-mile equipment early

Freight Type	Recommended Action
Crane Deliveries	Secure transportation before finalizing crane schedule
Florida / Southeast	Build weather flexibility into appointments
Energy / Infrastructure	Provide 30–90 day equipment outlook
Cross-Border	Coordinate border and U.S. transportation as one plan

Weekly Bottom Line

The most important signal this week is the divergence between **fuel and capacity**.

Diesel fell another **18.3¢/gallon**, bringing the two-week decline to 33¢. That is good news for transportation buyers.

But freight rates did not follow fuel lower.

Dry van increased 7.6¢/mile. Flatbed increased another 3¢/mile. Truck postings declined 4.6%.

That points to capacity becoming the more important pricing variable heading further into Q4.

For standard freight, trucks remain available with reasonable planning. For the freight Fall Line handles most often—flatbed, RGN, oversize, project cargo, jobsite delivery and cross-border industrial freight—the best cost control continues to come from **equipment positioning and execution rather than waiting for the market to get cheaper**.

Get the correct trailer close to the origin. Give specialized freight enough lead time. Coordinate crane and jobsite schedules before dispatch. For imports, build the port-to-site plan before cargo becomes available.

That is where transportation costs are being won or lost this week.

Fall Line Logistics | Flatbed • Heavy Haul • Project Freight • Expedited • Cross-Border