



Fall Line Logistics

Weekly Shipper Freight Market Update

September 22, 2026

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

Executive Market Summary

The transportation market strengthened during the week ending September 18, but the change was concentrated heavily in **flatbed**.

Total spot-market load activity rebounded **26.7% WoW** following the Labor Day-affected week and reached its highest level in nine weeks. Truck postings also recovered, increasing **13.3%**, while the overall broker-posted spot rate increased approximately **2¢/mile**.

The important distinction for shippers is what happened underneath the national number:

Flatbed rates increased more than 5¢/mile WoW.

Flatbed loads increased 29.9% WoW.

Dry van rates decreased just under 3¢/mile WoW.

Dry van loads increased 27.8% WoW.

National diesel increased another 24.4¢/gallon to \$6.529.

Flatbed is therefore showing a materially different pattern than dry van. Standard dry van remains relatively manageable, while flatbed demand and pricing accelerated immediately following Labor Day.

This Week at a Glance

Market	Current Direction	What It Means for Shippers
Flatbed	 Firming	Less buying leverage than two weeks ago
Oversize / RGN	 Tight	Advance equipment planning remains critical
Dry Van	 Softer Rates	Good opportunity on planned freight
Energy / Infrastructure	 Strong	Specialized equipment competition continues
Imports	 Elevated	Peak season extended into September
Drayage	 Active	Operational planning matters more than truck availability

Diesel	● \$6.529	Major upward pressure on all-in cost
Southwest Weather	● High Risk	Flooding / routing exposure
East Coast Weather	● High Risk	Coastal rain, wind and flooding
Nebraska / Plains	● Elevated	Drought / wildfire-related disruption

Shipper Bottom Line

This is becoming a more expensive market to operate in even where base transportation rates are not rising.

Diesel has risen from **\$5.599 on August 31 to \$6.529 on September 21 — an increase of 93¢/gallon in three weeks.** At the same time, flatbed demand has returned sharply after Labor Day.

Shippers should take advantage of softer dry-van pricing where available, but should become more defensive on **flatbed, heavy haul, project freight and high-deadhead shipments.**

1. Flatbed Market

Flatbed Reversed Direction This Week

The flatbed market produced the most important freight-market change of the week.

Flatbed spot rates increased **more than 5¢/mile WoW** during the week ending September 18.

That increase is notable because flatbed rates normally decline during this part of September. FTR reports that this was the **largest flatbed rate increase for a comparable week since at least 2008.**

Flatbed rates are now approximately **42% above the comparable 2025 week.**

Volume strengthened even more dramatically:

Flatbed Loads: +29.9% WoW

Load activity reached its strongest level in eight weeks.

Rates increased in **every major U.S. region**, with the West Coast posting the largest increase at approximately **+9.6¢/mile WoW.**

What This Means for Shippers

The window of unusually favorable post-summer flatbed pricing appears to be narrowing.

This does **not** mean there is a nationwide flatbed shortage.

It does mean that shippers should no longer assume that waiting until 24–48 hours before pickup will produce a better rate.

A carrier with a well-positioned truck will still be competitive. A shipment requiring substantial deadhead is becoming much more expensive because diesel is now above \$6.50 nationally.

Current Flatbed Conditions

Factor	Current Condition
National Rates	↑ More than 5¢ WoW
Load Volume	↑ 29.9% WoW
YoY Rates	↑ ~42%
West Coast Rates	↑ 9.6¢ WoW
Regional Rate Direction	↑ All Regions
Standard Capacity	Moderate
Specialized Capacity	Tight
Fuel Pressure	Very High

Recommended Shipper Strategy

Routine legal flatbed: Tender 3–5 days ahead.

High-volume flatbed projects: Provide a rolling forecast rather than tendering individual loads at the last minute.

Remote pickup locations: Allow additional lead time. At current diesel prices, deadhead has become significantly more expensive.

Hard appointments: Secure the truck before finalizing narrow receiving windows whenever possible.

West Coast outbound: Allow additional flexibility this week because pricing increased more sharply than elsewhere.

2. Oversize & Heavy Haul

Heavy Haul Remains a Different Market

The national flatbed rate is useful for understanding the direction of open-deck transportation, but it should **not** be used as the primary pricing benchmark for RGN, low-profile step deck, stretch, multi-axle or permitted freight.

The available carrier pool gets progressively smaller as requirements accumulate.

A shipment requiring:

- 20-inch deck height
- 35–40 feet of usable well
- 10+ feet of width
- Height permits
- State-specific routing
- Escorts
- Crane appointments
- Jobsite delivery
- Specific axle configuration

is not competing in the same capacity pool as a legal 48-foot flatbed shipment.

Current Equipment Risk

Equipment	Shipper Capacity Risk
Standard Flatbed	Moderate
Standard Step Deck	Moderate
Low-Pro Step Deck	Elevated

Double Drop / RGN	● High
Stretch RGN	● High
Multi-Axle	● Very High
Specialized Conestoga	● High
Escort Availability	● Regional
Crane-Specific Delivery	● Schedule Sensitive

Fuel Is Becoming a Major Heavy-Haul Cost

This is where the current diesel market matters most.

At **\$6.529/gallon**, approximate fuel expense per 1,000 operating miles is:

Truck Efficiency Fuel Cost / 1,000 Miles

6 MPG	\$1,088
5 MPG	\$1,306
4 MPG	\$1,632
3 MPG	\$2,176

A heavily loaded tractor operating at 3–4 MPG is now consuming approximately **\$1.63–\$2.18 of fuel per operating mile**.

That is before:

- Driver pay
- Tractor and trailer cost
- Insurance
- Maintenance
- Permits
- Escorts
- Tolls

- Deadhead
- Carrier margin

Why Location Matters More Now

Consider two qualified RGN trucks:

Truck A: 40 miles from pickup

Truck B: 300 miles from pickup

At 4 MPG and \$6.529 diesel, the additional 260-mile repositioning difference represents roughly **\$424 in fuel alone**.

That is before paying the driver or operating the equipment.

Shipper Takeaway

The best heavy-haul quote increasingly comes from finding the **correct truck in the correct location**, not simply finding the carrier willing to quote the lowest loaded-mile rate.

Recommended Planning Window

Simple oversize: 5–7 days

RGN / routed OD: 7–10 days

Stretch / unusual dimensions: 1–2 weeks

Multi-axle / superload: 2+ weeks

For crane or installation deliveries, transportation should be incorporated into the project schedule before the final crane appointment is established.

3. Dry Van

Dry Van Is Giving Shippers a Better Opportunity

Dry van moved in the opposite direction from flatbed this week.

Spot rates declined **just under 3¢/mile WoW**.

Rates nevertheless remain approximately **45% above the same 2025 week**, illustrating how different the overall freight environment remains from last year.

Dry van load volume rebounded **27.8% WoW** after the holiday week and was **28.5% above the comparable 2025 week**.

Importantly, loads increased across every major region.

Regional Rate Movement

West Coast: Strong rate increase

Mountain Central: Modest rate increase

Northeast: Decline

Midwest: Decline

Southeast: Decline

South Central: Decline

What This Means for Shippers

This remains a reasonably good environment for buying standard dry-van capacity.

Load activity is healthy, but rate pressure has not followed nationally.

That means shippers with **flexible, planned freight** should still have negotiating leverage.

The exception is freight originating in markets experiencing localized tightening, particularly parts of the West Coast.

Recommended Strategy

Normal dry van: 48–72 hour tender.

Flexible pickup: Provide ±1 day whenever operationally possible.

West Coast: Allow more lead time.

Recurring lanes: Use the current environment to establish repeat capacity rather than repeatedly buying the lane same-day.

Critical freight: Avoid using the national rate decline as justification for last-minute tendering. Volume is significantly higher than last year even though rates declined this week.

4. Fuel Market

Diesel Reaches \$6.529/Gallon

Fuel is the single largest transportation cost development affecting shippers right now.

The September 21 EIA national diesel average is:

\$6.529 / gallon

That represents another:

+24.4¢ / gallon WoW

And approximately:

+\$2.78 / gallon YoY

Regional prices are even more significant.

Region	Diesel WoW
U.S.	\$6.529 +24.4¢
East Coast	\$6.268 +11.0¢
New England	\$6.517 +31.5¢
Central Atlantic	\$6.546 +23.4¢
Lower Atlantic	\$6.139 +4.3¢
Midwest	\$6.680 +43.0¢
Gulf Coast	\$6.177 +15.0¢
Rocky Mountain	\$6.340 +27.4¢
West Coast	\$7.456 +20.6¢
California	\$8.246 +20.7¢

Midwest Is the Major Concern

Midwest diesel increased **43¢/gallon in one week**.

That has direct implications for:

- Chicago
- Detroit
- Indianapolis

- Ohio
- Wisconsin
- Minnesota
- Great Lakes manufacturing lanes

California is now above **\$8.24/gallon**.

What Shippers Should Do

At these fuel levels, evaluate transportation using:

Linehaul + fuel + deadhead + accessorial risk

rather than simply comparing the carrier's base linehaul rate.

This is particularly important for flatbed and heavy haul because those trucks frequently travel significant distances empty to reach the next specialized shipment.

5. Energy & Infrastructure

Power Demand Continues to Reshape Project Freight

Energy infrastructure remains highly relevant to industrial and project shippers because large power and data-center developments compete for the same transportation equipment used by manufacturers.

Texas provides the clearest example.

ERCOT's average hourly electricity load reached a record **74.5 GW during the week ending August 22**, approximately **10% above the highest weekly average from summer 2023**.

Six consecutive weeks through late August exceeded ERCOT's previous 2023 record.

The important transportation implication is the amount of electrical infrastructure required to support that demand.

Transformer Manufacturing Expanding

Hitachi Energy announced a **\$528 million transformer manufacturing investment in Mississippi** that will more than double its U.S. production capacity for small and medium power transformers.

The equipment produced will range from approximately **10 MVA to 160 MVA** and support voltages up to 230 kV.

The investment is specifically intended in part to address ongoing U.S. transformer supply constraints.

Why This Matters to Industrial Shippers

The energy buildout consumes:

- Flatbeds
- Step decks
- RGNs
- Multi-axle trailers
- Crane capacity
- Escorts
- Rigging crews
- Specialized warehouses

The freight itself includes:

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

Texas Data-Center Development

Texas regulators also adopted revised large-load interconnection standards this week as ERCOT deals with an enormous queue of proposed data-center loads.

The state has been reviewing proposed connections as rapid data-center growth puts additional pressure on generation and transmission infrastructure.

What This Means for Shippers

A manufacturer does **not** need to be in the energy industry to feel this impact.

A manufacturer trying to secure an RGN in Texas may be competing with a transformer project.

A construction company needing step decks may be competing with a data-center development.

A factory requiring a crane appointment may be competing with utility work.

Recommended Strategy

For projects requiring repeated specialized shipments, provide a **30-, 60- or 90-day forecast** whenever possible.

Approximate information is more useful than no forecast at all.

The objective is to identify periods when project schedules overlap with regional demand before transportation becomes an emergency.

6. Imports & Drayage

Peak Import Season Is Not Finished

The expected early end to peak import season did not materialize.

U.S. ports covered by Global Port Tracker handled **2.30 million TEU in July**, up 3.2% from June.

September is currently forecast at:

2.31 Million TEU

That represents:

+9.6% YoY

and could make September the **busiest import month of 2026**.

NRF attributes part of the extended peak to vessel delays caused by weather in China and routing changes, while consumer demand has continued supporting import volumes.

Import Outlook

Period	TEU	YoY
July Actual	2.30M	-3.9%
August Forecast	2.29M	-1.3%

September Forecast 2.31M +9.6%

What This Means for Importers

There is not a nationwide drayage-capacity emergency.

The greater risk is **execution around the container**.

Watch:

- Customs clearance
- Container availability
- Terminal appointments
- Chassis availability
- Last free day
- Demurrage
- Per diem
- Empty returns
- Warehouse availability
- Transload appointments
- Final-mile equipment

Important New Customs Risk

CBP has begun enhanced enforcement involving **Importer of Record numbers**.

Existing and new importer records with inaccurate or incomplete information can be voided. Once voided, the IOR number cannot be used to make entry into the United States until the issue is resolved.

For affected importers, that can turn an administrative problem into a physical freight problem: containers or shipments can remain uncleared while storage, demurrage or other port-related costs continue accumulating.

Recommended Importer Action

Importers should confirm that their **CBP Form 5106 / Importer of Record information is complete and current** with their customs broker.

This is particularly important before high-value or project cargo arrives.

Savannah Project Cargo Development

Savannah also added additional project-cargo capability with the opening of a new **25-acre multimodal breakbulk facility** on the Savannah River.

The facility includes an **810-foot heavy-capacity dock**, more than 14,000 feet of onsite rail and connections to I-16 and I-95.

For machinery, steel, energy and project cargo importers, the development expands the range of breakbulk and multimodal options available through the Savannah gateway.

7. Weather & Climate Risk

Southwest — HIGH RISK

The most significant freight-weather event this week is developing across **New Mexico and West Texas**.

A multi-day heavy rainfall event is expected Tuesday through Wednesday, with tropical moisture supporting potentially significant rainfall.

The Weather Prediction Center has identified a **Moderate Risk of excessive rainfall** across portions of New Mexico.

Flash flooding and debris flows are possible, particularly around burn-scar areas.

Freight Corridors to Watch

I-10: El Paso → Las Cruces → Arizona

I-25: New Mexico north/south

I-40: Albuquerque / northern New Mexico

US-54 / US-285: Energy and industrial freight corridors

Shipper Impact

- Permit-route disruption
- Flash-flood closures
- Reduced secondary-road access
- Jobsite delays
- Oversize routing complications
- Driver delays
- Outdoor loading / unloading delays

Oversize shipments should have routes rechecked before dispatch rather than assuming the originally permitted route remains operational.

East Coast / Mid-Atlantic — HIGH RISK

A strong coastal low is expected to develop offshore of the Mid-Atlantic during the middle of the week.

Heavy rainfall, strong winds and coastal flooding could affect portions of the East Coast through Friday.

Markets to Watch

- Virginia
- Maryland
- Delaware
- New Jersey
- Pennsylvania
- New York / New England depending on storm track

Freight Impact

Potential disruption includes:

- Port operations
- Bridge restrictions
- High-profile vehicle restrictions
- Airport operations
- Container recovery
- Jobsite deliveries
- Oversize travel
- Crane operations

High-profile and oversize loads are particularly sensitive to wind restrictions even when roads remain open to normal traffic.

Plains / Nebraska — DROUGHT & WILDFIRE RISK

Nebraska remains under an extended emergency declaration related to **widespread wildfires and severe drought conditions**.

FMCSA extended emergency regulatory relief through October 11 for qualifying commercial vehicles providing direct assistance to wildfire-related emergency operations, including transportation associated with livestock-feed needs.

The emergency declaration does **not** broadly exempt normal commercial freight from hours-of-service requirements.

Shipper Impact

The primary transportation implications are:

- Regional agricultural truck demand
- Wildfire-related road disruptions
- Smoke
- Emergency freight competition
- Longer livestock/feed movements

- Potential secondary-road restrictions
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8. Freight & Regulatory Watch

Trucking Capacity Continues to Exit the Market

A broader issue developing beneath current spot-rate movements is continued carrier attrition.

Industry reporting indicates small and midsize fleets continue to exit the market under pressure from prolonged weak economics, regulatory enforcement and rapidly increasing diesel costs.

That matters to shippers because the effects of carrier exits often appear **after demand improves**, not while freight is slow.

What This Means

A shipper may currently see plenty of bids on routine freight.

That does not guarantee the same depth of capacity during:

- Q4 peak
- Severe weather
- Holiday weeks
- Project surges
- Regional produce seasons
- Major construction schedules

Maintaining dependable carrier relationships remains important even when spot capacity appears readily available.

FMCSA Hours-of-Service Pilot Programs

FMCSA is moving forward with two pilot programs designed to study whether giving drivers greater scheduling flexibility can maintain or improve safety.

The programs are still pilots—not a broad change to current HOS rules.

Motor carriers interested in expanded 2027 participation can register interest with FMCSA.

9. This Week's Biggest Shipper Signals

Indicator	Weekly Movement	Shipper Impact
Flatbed Loads	+29.9%	● Demand strengthened
Flatbed Rates	+5¢+/mi	● Less negotiating leverage
West Coast Flatbed	+9.6¢/mi	● Regional pressure
Dry Van Loads	+27.8%	● Demand rebound
Dry Van Rates	~3¢/mi	● Buying opportunity
Total Spot Loads	+26.7%	● Market active again
Truck Postings	+13.3%	● Capacity also recovered
National Diesel	\$6.529	● Major cost pressure
Diesel WoW	+24.4¢	● Rising rapidly
Midwest Diesel	+43¢	● Major regional impact
California Diesel	\$8.246	● Extreme fuel cost
September Imports	2.31M TEU	● Extended peak
September Imports YoY	+9.6%	● Higher port activity
Southwest Weather	Moderate excessive-rain risk	● Routing exposure
Mid-Atlantic Coast	Heavy rain / wind	● Transit exposure

10. Recommended Shipper Actions This Week

Freight Type	Recommended Action
Standard Flatbed	Tender 3–5 days ahead

West Coast Flatbed	Allow additional lead time
Repetitive Project Flatbed	Provide rolling forecast
Simple Oversize	5–7 days
RGN / Routed OD	7–10 days
Stretch / Specialized	1–2 weeks
Multi-Axle / Superload	2+ weeks
Dry Van	48–72 hours
Imports	Verify IOR/customs information
Drayage	Manage last free day proactively
Project Imports	Arrange final-mile equipment before recovery
Southwest Freight	Recheck routes for flooding
East Coast Freight	Build weather buffer into appointments
Energy / Infrastructure	Provide 30–90 day equipment forecast

Weekly Bottom Line

This week's freight market is sending a clearer signal than the previous several weeks.

Flatbed is tightening again.

Rates increased more than 5¢/mile and loads jumped almost 30% in one week. That does not constitute a nationwide capacity shortage, but it does mean shippers should stop assuming that delaying a flatbed tender will automatically produce a lower rate.

Dry van remains the better buying opportunity.

Rates declined despite a substantial rebound in load activity, giving planned shippers continued leverage.

Heavy haul remains equipment-specific.

A softer or stronger national flatbed market only partially matters when a shipment requires an RGN, stretch trailer, low deck height, permits or escorts. Equipment location and deadhead remain critical.

Fuel is now impossible to ignore.

National diesel reached **\$6.529/gallon**, the Midwest reached **\$6.680**, and California reached **\$8.246**. At those levels, truck positioning materially affects the final cost of transportation.

Imports remain stronger than expected.

September is forecast at **2.31 million TEU**, potentially making it the busiest import month of 2026. Importers should focus on execution—customs clearance, free time, chassis, appointments and final-mile planning—rather than assuming peak season is finished.

Energy and infrastructure development continue to consume specialized transportation resources.

Transformer manufacturing is expanding, Texas power demand remains near record levels, and data-center development continues to create additional electrical-infrastructure requirements.

Shipper Strategy for the Week

The cheapest transportation plan this week is increasingly the one that minimizes **deadhead, detention, accessorials and schedule failures**, not necessarily the quote with the lowest base linehaul rate.