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The Cost of Transporting Pretty Much Everything Just Won't Stop Going Up

Trucking and cargo-shipping rates are at their highest levels in years—and it isn't just because of the price of fuel

By Esther Fung, Laura Cooper and Costas Paris | Photography by Aaron Agosto for WSJ
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It's costing more and more to get stuff in the hands of American shoppers.

Trucking expenses are at their highest level since the Covid pandemic snarled operations around the world. Diesel prices are up 77% in the past year. Freight railroads are adding surcharges. And the nation's busiest port is the busiest it's ever been.

There's virtually no way for businesses to avoid paying more, and they're passing on the pain to consumers. It all adds up to extra inflationary pressure on a U.S. economy that has been wrestling with rising prices for years.

Among the key drivers is the soaring price of diesel fuel. It hit a record of \$6.53 on Sept. 22, according to AAA.

Also contributing to the rise in trucking costs, companies say, is a shortage of truck drivers, a byproduct of the Trump administration's tightened enforcement of rules on who can qualify for a commercial driver's license. Tens of thousands of immigrants—often the ones most willing to handle the less popular long-haul trucking routes—have lost their certifications.

Container-shipping rates, meanwhile, are up. The Port of Los Angeles, America's biggest import hub, handled a record number of containers in the June-to-August stretch, in large part because retailers were rushing in goods to avoid new tariffs.

There's virtually no way for businesses to avoid paying higher freight costs these days. Railroads, parcel-delivery companies like FedEx, and even the U.S. Postal Service are also raising prices.



A driving factor in high transportation prices is a lack of truckers, like Adam Kulig (and his dog Rocky).

It is a very American problem. We are a nation of consumers—and a huge nation, at that. The ports of the world's biggest importer unload more than \$1 trillion of *stuff* each year, and then businesses move that stuff over longer distances than almost any other major economy. The U.S. has some of the largest and most extensive highway networks and the world's largest railway network, with around 140,000 miles of track dedicated mostly to freight.

The rise in transportation costs is likely to bleed through to virtually all corners of the U.S. economy, from food to clothing to construction materials. Refrigerated groceries and other perishable goods typically feel the squeeze faster than other products, as their deliveries can't be delayed for long. Eventually other businesses are likely to feel the bite too.

“Any goods that you see in a grocery store or a department store got there in a truck,” said Joseph Firrincieli, sales manager at OEC Group New York, a logistics and freight-forwarding company. “Inevitably, there will be an impact on the everyday consumer.”

The chief financial officers of Clorox, beer importer Constellation Brands and Primo Brands—the company behind Poland Spring and La Croix—have all cited the rise in trucking costs as a factor that is crimping margins, in remarks to investors in recent days.

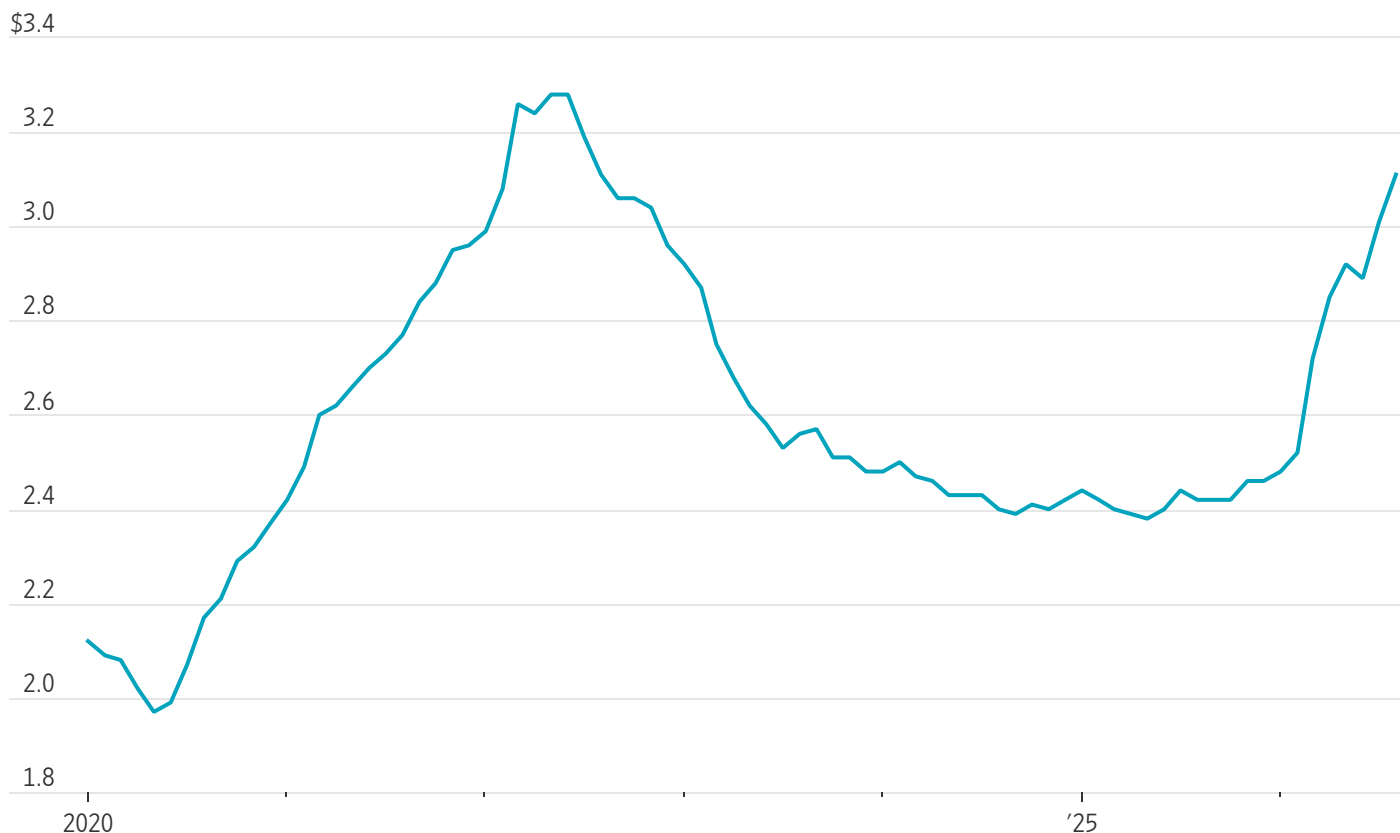
“We just don’t have the drivers,” said Michael Kirban, co-founder of coconut-water maker Vita Coco, which outsources its U.S. domestic logistics.

Kirban said that ocean freight rates are also affecting the company, since it imports millions of liters of coconut water a year from its factories abroad. However, Kirban said he believes heightened ocean freight rates are “probably more temporary in nature” because “fluctuations of this magnitude have historically been temporary.”

The U.S. Transportation Department says it has removed more than 28,000 truck drivers from the road for failing English-proficiency tests since early 2025. It has also pushed states to cancel over 30,000 commercial driving licenses illegally issued to foreign drivers and purged over 8,000 unqualified training schools from the federal motor carrier registry. There are around 3.5 million truck drivers in the country.

Trucking Rates

Monthly contract rates shippers pay per mile



Source: DAT Freight & Analytics

Trucking giant J.B. Hunt Transport Services is making a big push to hire new drivers, but chief financial officer Brad Delco warned investors last week that the effort will be costly.

“The cost of recruiting, advertising, onboarding, training, sign-on bonuses—help me if I’m missing one of them, we’re going to see about \$25 million more in Q3 versus Q2,” said Delco at a Morgan Stanley investor conference. J.B. Hunt also faces at least a \$10 million headwind sequentially from the rapid rise in fuel prices.

“We have seen some of the most radical and abnormal swings in fuel prices that we’ve ever seen,” said Delco.

The Iran war is already prolonged, and businesses must decide how much of the increased costs they absorb and how much they pass on to consumers. For goods coming by ship, costs won’t return to normal until the war ends. Ships bringing merchandise from Asia to Europe have been diverting from the Red Sea and the Suez and sailing instead around South Africa. This adds at least 10 days to the trip, increasing freight rates, which consumers ultimately pay.



The price of diesel fuel hit a record of \$6.53 on Sept. 22, according to AAA.

Customers moving products by truck paid an average contract rate of \$3.11 a mile to move their goods in August, up 29% from a year ago and the highest since August 2022, according to data from DAT Freight & Analytics. That includes the cost of fuel surcharges that come on top of the contract rate.

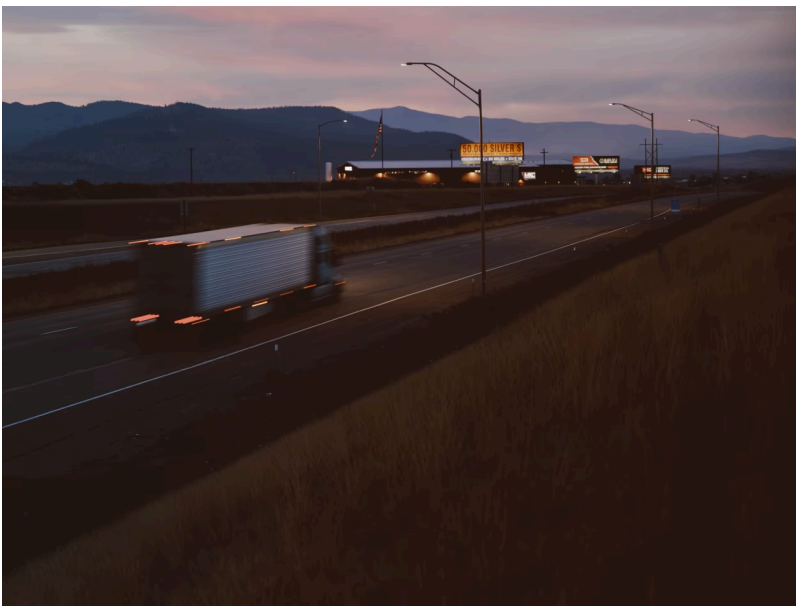
A driver who drives 500 miles a day, six days a week would have paid \$15,000 more in diesel since the war in Iran started, said DAT's principal analyst Dean Croke. Transportation companies typically impose fuel surcharges that pass along higher diesel prices to their customers.

Customers of the freight railroads have also seen higher fuel surcharges this year. U.S. railroads typically use diesel-electric locomotives, which are cheaper for shippers and more fuel-efficient than trucks. Some businesses have diverted some of their freight from truck to train to find relief from higher trucking costs. Existing customers of railroads—including chemical companies, manufacturers and agricultural producers—are facing higher bills. Farmers shipping grain paid a 48-cent fuel surcharge per mile per railcar in mid-September, more than double the 19-cent surcharge from a year earlier, according to data from the U.S. Department of Agriculture.

Meanwhile, the spot price of sending a shipping container from Shanghai to Los Angeles hit a recent high of \$8,102 for the week of Sept. 18, according to the Freightos Baltic Index. That is the highest since mid-2022, when prices soared amid the supply-chain disruptions resulting from the Covid pandemic that led to insufficient inventory, labor shortages and bottlenecks at ports and railroads.



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The Port of Los Angeles handled 2.9 million containers from June through August, a record for any three-month stretch at the port. Importers were speeding in deliveries over the summer ahead of the expiration of a set of Trump administration tariffs in late

July, largely because they weren't sure if the next round of tariffs would be higher, said Gene Seroka, the port's executive director.

"People knew what they had to pay and hustled in products like back-to-school and fall fashion to beat the deadline," Seroka said.

Package-delivery costs are up too, with United Parcel Service and FedEx both imposing higher fuel surcharges. The cost of shipping a ground-parcel package increased 5.2% on average in the third quarter compared with the same period a year earlier, according to data from AFS Logistics.

Even the Postal Service added a fuel and transportation surcharge on parcels for the first time earlier this year.

Constant shifts in diesel prices, transportation costs and the tariff environment have emboldened business to feel justified in passing costs on to consumers, said Firrincieli, the sales manager from the logistics company.

"I don't see this ending soon," said Firrincieli. "Chaos increases prices."

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