

Flatbed rates rise as data centers, regulations tighten capacity



*High demand could keep flatbed and open-deck capacity tight and costs elevated throughout 2026.
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[Dan Ronan, Special Correspondent](#) | Jun 22, 2026, 3:06 PM EDT

After more than two years of excess truck capacity and weak freight demand, flatbed trucking is experiencing meaningful tightening, driven by data center construction and federal regulatory actions that are reducing available capacity.

Carriers, brokers and market analysts say flatbed equipment is becoming increasingly difficult to secure in several key freight markets, particularly across the South, where data center construction, power generation projects and infrastructure investment are driving demand for open-deck transportation.

The combination of stronger demand and tightening capacity is pushing rates higher and raising concerns among shippers facing higher transportation costs across modes.

“Data center construction is booming,” said Dean Croke, principal analyst at DAT Freight & Analytics. “Open-deck freight is being influenced by this pent-up demand and long lead times on

these data centers.”

What’s driving flatbed, especially in the spot market, is anything to do with AI and data centers.

“The freight story is structural steel, rebar, switchgear, generators, transformers and concrete, and much of that work is already booked well into next year, even as single-family housing starts remain down year over year,” Croke said.

David Spencer, vice president of market intelligence at Arrive Logistics, said many shippers are attempting to offset rising flatbed costs by shifting freight to dry-van equipment whenever possible.

“The market is being shaken up. The cage is being rattled,” Spencer said. “There is significant spot rate volatility. Shippers are pulling all of the tricks out of their bag this year.”

He said carriers operating open-deck equipment are benefiting from one of the strongest freight environments seen in several years.

“If you have open-deck equipment, it’s been a very good year,” Spencer said. “There are a lot of opportunities.”

The US construction backlog rose to slightly more than 10 months in May, up from nine months previously and the highest level in nearly three years, according to the Associated Builders and Contractors (ABC) Construction Backlog Indicator for June.

“This increase largely reflects the massive data center investments taking place across the nation,” ABC Chief Economist Anirban Basu said. ABC members under contract to work on data centers have a much higher backlog, 11.6 months, than those that are not, 8.6 months, he said.

Diverging truckload markets

Market data shows flatbed demand is increasingly diverging from broader truckload trends. According to DAT, overall truckload demand softened slightly during the week ending June 13. Spot rates for dry-van and refrigerated freight each declined by 1 cent to \$2.74 and \$3.05 per mile, respectively, excluding fuel surcharges. Flatbed rates, however, continued their upward trajectory, increasing 1 cent to \$3.30 per mile.

Linehaul rates showed a similar pattern. Dry-van and refrigerated rates slipped 1 cent to \$2.37 and \$2.68 per mile, sans fuel surcharges, while flatbed linehaul rates increased to \$2.94 per mile. Truckload broker Landstar System is seeing that strength firsthand.

While the company continues to report softer dry-van demand, executives said heavy-haul and specialized transportation activity remains robust.

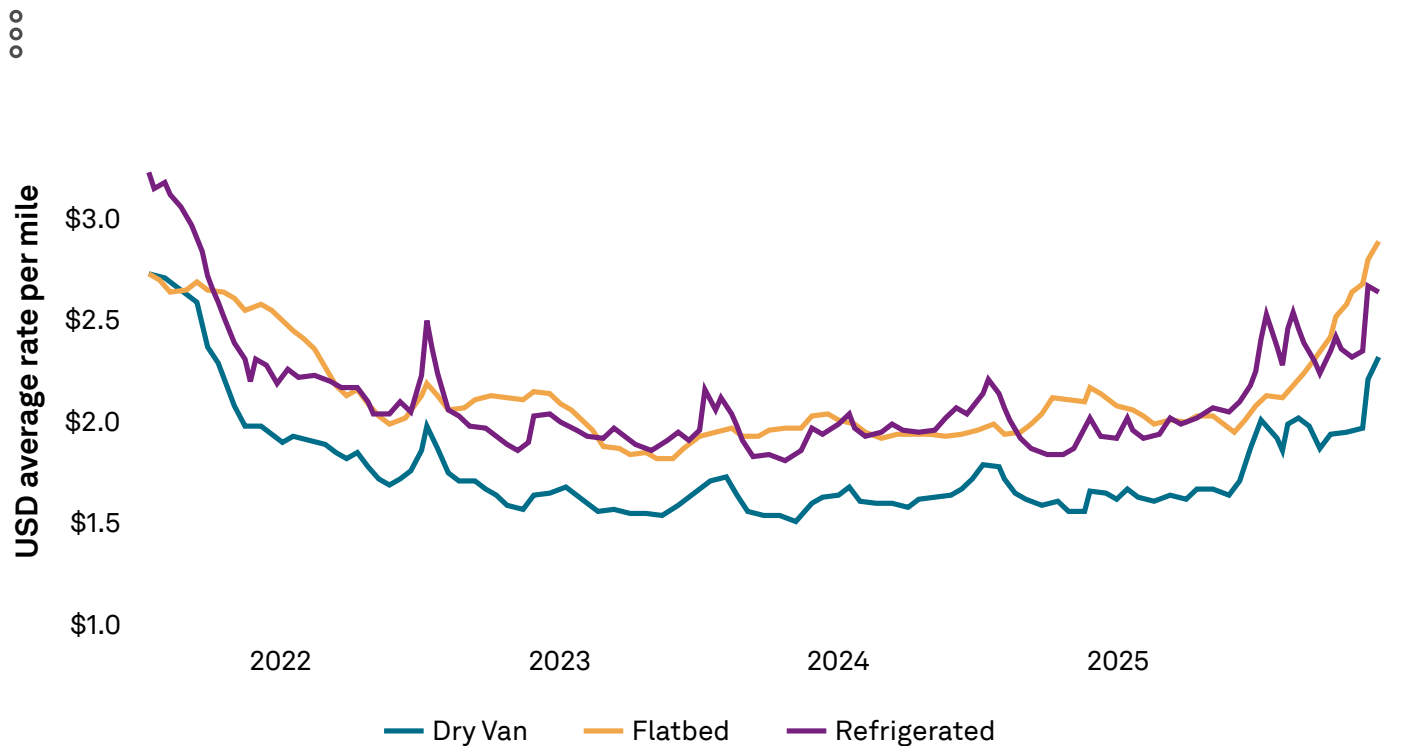
During Landstar’s first-quarter earnings call, James Todd, executive vice president and COO, said the company generated approximately \$134 million in heavy-haul revenue in the period, an 18% increase from a year earlier.

“We have been particularly pleased with the sustained strong performance of our heavy-haul service offering,” Todd said.

He said the company’s heavy-haul revenue was up an “impressive” 18% year over year in the first quarter, outperforming core truckload revenue. Heavy-haul loadings, meanwhile, were up approximately 6% year over year, with revenue per heavy-haul load increasing 12%.

Flatbed spot rates on upward trajectory since late 2025

US dry-van, flatbed and refrigerated truckload spot rates.



Source: DAT Solutions

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Analysts say flatbed capacity is tightening not only because of stronger industrial demand, but also because regulatory changes could reduce the available supply of qualified drivers. Under a final Federal Motor Carrier Safety Administration (FMCSA) rule that took effect March 30, states must conduct additional immigration status verification before issuing or renewing non-domiciled commercial driver's licenses; eligibility is limited to specific employment-based visa classifications.

Additional evidence of tightening conditions is emerging from freight brokers.

Broker C.H. Robinson Worldwide said in its monthly Edge report that capacity is expected to remain constrained through the summer, even though the market may be moving beyond its most volatile period.

"May proved to be an especially volatile month for the flatbed market, driven largely by the combined impacts of Roadcheck Week and the Memorial Day holiday period," the report said.

"These events compounded already-tight capacity and contributed to sharp swings in both pricing and truck availability across several key regions."

The company said national flatbed load-to-truck ratios peaked at approximately 87-to-1 during May, the highest level observed since 2022.

Despite the tightness, C.H. Robinson said historical patterns suggest market conditions may gradually stabilize through June, with broader relief potentially emerging after the July 4 holiday. Sustained demand ahead

Construction and industrial freight indicators continue to point toward underlying strength. Vulcan Materials recently reported truck transportation rates excluding fuel were running 20% to 30% above year-earlier levels. Steel Dynamics reported sharply higher order backlogs and strong steel lead times, reflecting continued demand from manufacturing, infrastructure and industrial customers that rely heavily on flatbed transportation.

C.H. Robinson also reported that flatbed contract rates, excluding fuel, increased more than 5% month over month in April and were up more than 9% year to date.

The broker said some carriers are increasingly willing to walk away from underpriced freight while shippers are relying more heavily on mini-bids and efforts to become preferred shipping partners.

DAT's Croke said the current truckload market remains highly segmented.

"Freight demand overall is very flat, but in some sectors it's through the roof, and supply is doing all of the heavy lifting," he said. "Data center freight is largely spot-market freight rather than contract freight, and that's what's driving much of the activity we're seeing in flatbeds right now."

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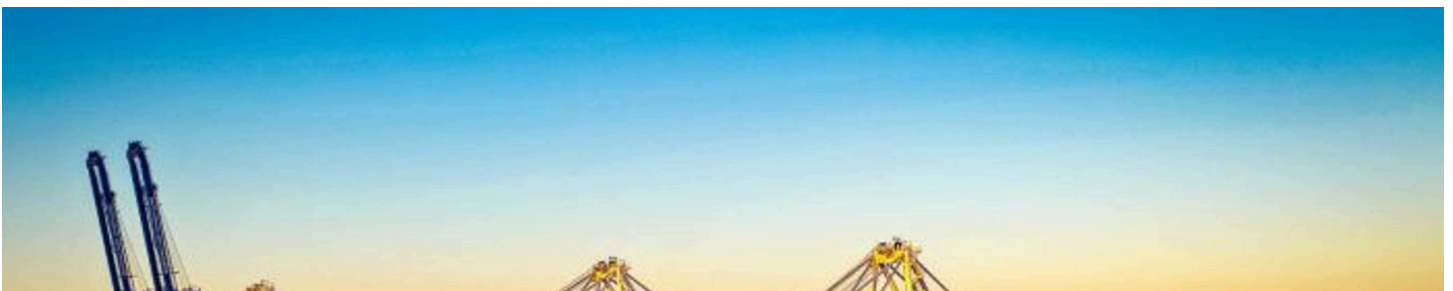
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SC Ports said an uncertain trade outlook in the back half of 2026 coupled with the need to lower costs drove the decision to shutter the terminal for a “short-term pause.”

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