Plan your next move.



Protect your freight budget.

Freight pricing is uneven. Fuel exposure can shift quickly.
Your next advantage starts with a lane-by-lane plan.

DRY VAN	FLATBED	U.S. DIESEL
$2.17 / MI	**$2.59 / MI**	**$6.382 / GAL**
0.0% WOW | +31.9% YOY	-0.5% WOW | +28.0% YOY	-$0.147 WOW

THE EXECUTIVE TAKE

Capacity is doing more of the pricing work than freight volume. Dry van and flatbed linehaul remain near the top of their historical ranges even as underlying demand is uneven, while reefer pricing remains elevated into fall produce. Diesel eased this week but remains a major budget variable. For shippers, the priority is lane-level planning: protect critical capacity, separate linehaul from fuel, and avoid treating national averages as executable quotes.

Freight data: week ending Sept. 25, 2026 | EIA diesel release: Sept. 29, 2026 | DAT rates exclude fuel; Truckstop/FTR rates are broker-posted platform rates

Sources and methodology on pages 2-4. | Planning horizon: 30-45 days

What the market means for your lanes

01 / CAPACITY AND REGIONAL PRICING

Dry van linehaul held at $2.17/mi, unchanged week over week and 31.9% above last year. Load posts rose 1.9% while equipment posts fell 2.9%, lifting the load-to-truck ratio to 11.40. Great Lakes ($2.66) and Ohio River ($2.62) remained the highest major origins; California rose 2.1% to $2.49.

Flatbed linehaul averaged $2.59/mi, down 0.5% week over week but 28.0% above last year. Load posts slipped 0.8%, while equipment posts fell 5.7%, tightening the load-to-truck ratio to 41.38. Ohio River ($3.22) and Southeast ($3.21) led major origins. Softer farm-equipment demand is a headwind, but capacity remains constrained.

PROCUREMENT IMPLICATION
The market is not moving uniformly. Protect lanes where equipment supply is shrinking, especially flatbed and selected reefer origins, while using softer or stable lanes to negotiate. Regional averages are planning references, not executable quotes.

02 / AN INDEPENDENT MARKET CROSS-CHECK

TRUCKSTOP / FTR	RATE / MI	WEEKLY CHANGE
Dry van	$2.78	+1.6%
Refrigerated	$3.49	-2.1%
Flatbed	$3.32	+0.2%
Specialized	$3.40	+0.8%

Truckstop/FTR shows a market that remains materially tighter than a year ago. The total MDI reached 137.0, up 43.3% year over year, as truck availability declined 0.3%. Broker-posted dry van and flatbed rates increased, while reefer declined seasonally. These platform rates include a different transaction set than DAT carrier-paid linehaul, so direction and pressure are more useful than direct rate-to-rate comparison.

Interpretation: pair market indicators with tender acceptance, coverage time and service results. Platform postings do not measure total national shipments.

Turn market intelligence into action

03 / FUEL EXPOSURE

EIA reported U.S. on-highway diesel at $6.382/gal for Sept. 28, down $0.147 week over week. Midwest diesel was $6.526 (-$0.154), Gulf Coast $5.955 (-$0.222), and West Coast $7.357 (-$0.099); California remained highest at $8.181. EIA released the data Sept. 29, and prices include all taxes.

-$22.62 per 1,000 vehicle-miles
Illustrative effect of the weekly U.S. diesel change at 6.5 MPG: -$0.147 ÷ 6.5 × 1,000. Actual surcharge recovery depends on contract terms.

04 / YOUR 30-45 DAY PLAYBOOK

DAT's 35-day outlook points to dry van near $2.14/mi and flatbed near $2.56/mi by late October, both excluding fuel. DAT's latest reefer forecast is about $2.69/mi over 35 days, also excluding fuel. Separately, the supplied FTR outlook holds 2026 reefer loadings at +1.7% YoY, raises the 2026 reefer spot-rate forecast to +35.9%, and projects another +7.9% in 2027. Treat forecasts as planning ranges, not executable lane quotes.

FINANCE / WITHIN 48 HOURS

Recalculate surcharge exposure using the Sept. 28 EIA benchmark and test whether contract recovery lags current fuel movement.

PROCUREMENT / THIS WEEK

Reprice priority lanes against current regional conditions and pre-qualify backup capacity where equipment posts are falling.

OPERATIONS / THIS WEEK

Tighten appointment discipline, pickup communication and tender lead time to reduce avoidable premium freight.

LEADERSHIP / WEEKLY

Separate linehaul, fuel and accessorial variance; watch whether service metrics deteriorate before chasing headline rate moves.

RESEARCH NOTES / OCT. 1, 2026: DAT figures are carrier-paid linehaul and exclude fuel unless noted. Truckstop/FTR figures are broker-posted platform measures and are not directly comparable to DAT. EIA diesel prices include taxes. FTR reefer forecast figures are from the user-supplied market update. Recommendations are analytical judgments, not guarantees.

Reefer market pressure

05 / REFRIGERATED FREIGHT

Reefer remains the most exposed segment to produce-driven lane volatility. DAT's latest report put linehaul at $2.73/mi, up 0.7% week over week and 37.9% year over year, with the load-to-truck ratio at 19.06. California citrus and Pacific Northwest tree fruit are the clearest pressure points, while Truckstop/FTR shows a seasonal weekly reefer pullback but rates still 46.0% above last year.

REEFER LINEHAUL	LOAD-TO-TRUCK	35-DAY FORECAST
$2.73 / MI	19.06	$2.69 / MI
+0.7% WOW | +37.9% YOY	LOAD POSTS +8.3% WOW	± $0.07 DAT RANGE

WHERE PRESSURE IS BUILDING

CALIFORNIA CITRUS

California citrus repriced sharply higher across destinations; DAT reports year-over-year lane premiums of roughly 35%-72%. Budget earlier and avoid assuming coast-vegetable stability applies to citrus.

YAKIMA APPLES + PEARS

Yakima apple and pear lanes are running 48%-84% above last year, with eastern long-hauls among the highest-cost produce moves. Secure capacity before tender on exposed East Coast lanes.

SOUTH TEXAS / MEXICO CROSSINGS

South Texas continued to firm for a second week, with comparable lanes 27%-75% above last year. Treat border-origin reefer as a separate procurement exposure rather than a national-average move.

FORZA TAKE / SHIPPER ACTION

Segment reefer procurement by commodity and origin. Book California citrus, Yakima tree fruit and firming South Texas lanes earlier; confirm temperature requirements, pickup windows and backup carrier coverage before release. Do not use the national average as a substitute for lane-level pricing.

Source: DAT Reefer Report, Sept. 23, 2026. DAT rates exclude fuel. FTR forecast figures supplied by Forza. Forecasts and regional averages are planning references, not executable lane quotes.