WEEKLY SHIPPER BRIEF / NOVEMBER 25, 2026



Secure holiday capacity early

Refrigerated demand is outpacing available trucks while diesel costs fall. Forza recommends securing time-sensitive capacity first, then refreshing fuel recovery under the agreed index. Broader truck availability improved on Truckstop, but its refrigerated segment tightened. Treat platform signals as a sourcing guide, then confirm the actual equipment, pickup and receiving plan.

DRY VAN

$2.29

DAT linehaul per mile

→ **+2.9% weekly**

REFRIGERATED

$2.84

DAT linehaul per mile

→ **+3.5% weekly**

U.S. DIESEL

$5.695

EIA retail per gallon

→ **-$0.242 weekly**

The executive take

→ **Prioritize refrigerated coverage.** Truckstop's reefer rate rose 5.1% to $3.73/mile as load availability grew 7.2% and truck availability rose only 1.7%. Its refrigerated MDI increased 19.2 points to 380.0.

→ **Test available capacity by lane.** Truckstop's overall MDI fell 5.0 points to 133.7 as trucks increased 6.1% and loads rose 2.3%. The overall posted rate still rose 0.8% to $3.19/mile.

→ **Separate fuel relief from capacity.** Lower retail diesel does not establish a lower linehaul offer. Compare service and fuel on the same basis before committing a shipment.

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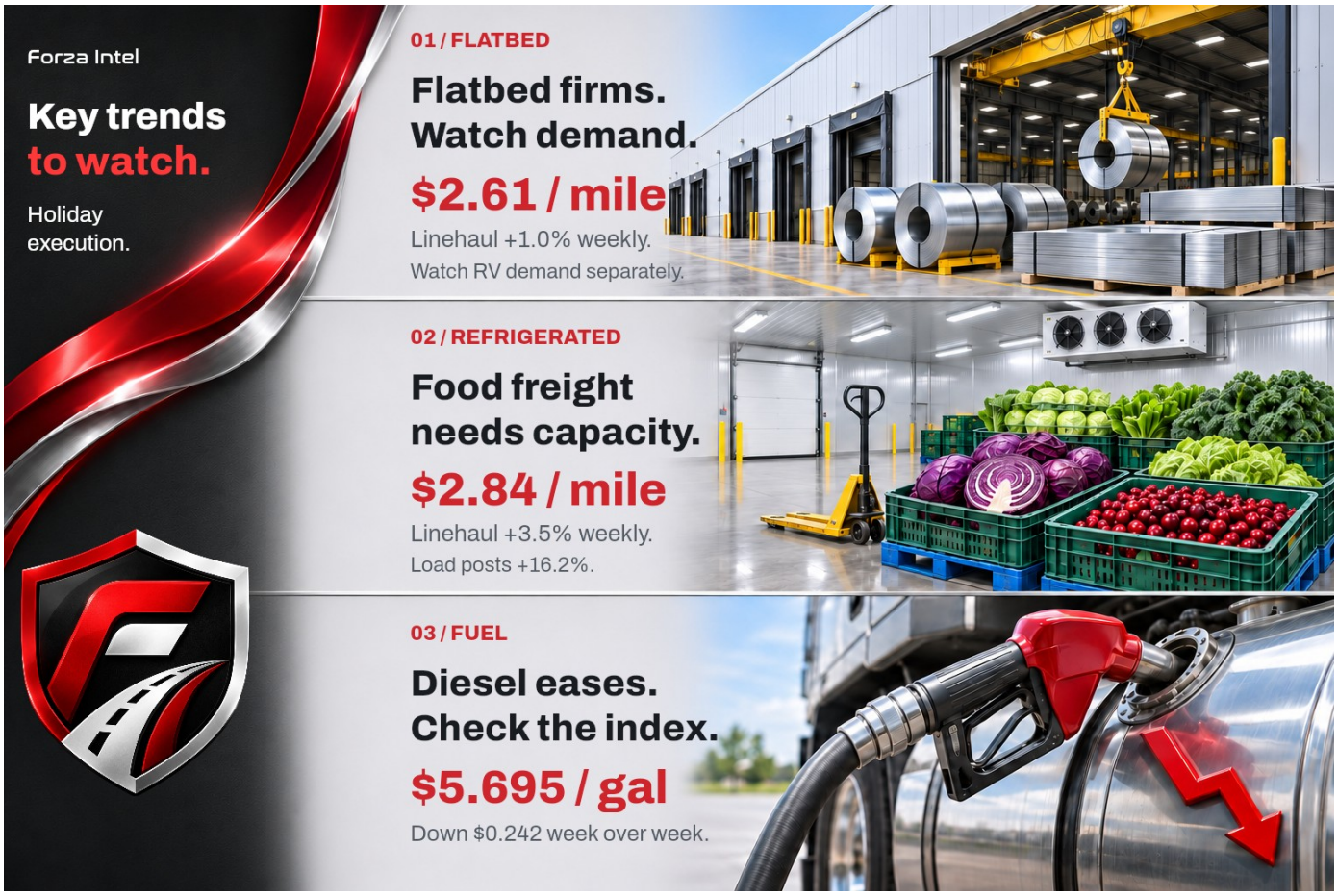
KEY TRENDS / HOLIDAY EXECUTION

Capacity first then fuel

Flatbed pricing remains firm despite a softer RV demand signal. Refrigerated capacity needs earlier attention. Diesel offers cost relief through the agreed adjustment mechanism.



What to act on

Confirm an actual carrier commitment and receiving appointment for time-sensitive freight. Review flatbed demand by commodity and lane. Recalculate fuel from the contracted index, region and adjustment date rather than assuming immediate savings.

01 / CAPACITY AND PRICING

Spot pressure varies by equipment

DAT equipment	$/mi	WoW	YoY	Load/truck
Dry van	2.29	+2.9%	+37.5%	11.37
Reefer	2.84	+3.5%	+35.8%	19.88
Flatbed	2.61	+1.0%	+32.7%	37.64

Posting activity

DAT equipment	Load posts WoW	Truck posts WoW	Prior ratio
Dry van	+16.8%	-1.8%	9.56
Reefer	+16.2%	+3.1%	17.65
Flatbed	+7.3%	-5.0%	33.34

Regional checks

DAT origin linehaul: Great Lakes reefer $3.30/mile (+$0.01 weekly), Lower Midwest $3.22 (+ $0.05), Florida and South Georgia $1.47 (+$0.08). Van: California $2.81 (flat), Great Lakes $2.57 (+$0.03). Flatbed: Ohio River $3.09 (-$0.04), South Central $2.17 (-$0.06). These aggregates are not lane quotes.

Commodity demand watch

DAT’s RV commentary cites RVIA towable shipments down 15.6% through September, with fifth wheels down 20.1%. That is a discretionary-demand warning, not proof of broad industrial contraction. Forza recommends validating steel, construction and other flatbed requirements separately. Do not infer that a weaker RV category guarantees easier equipment access.

02 / INDEPENDENT CROSSCHECK

Reefer tightens within Truckstop

Truckstop market	Rate /mi	WoW	YoY	MDI
Overall	$3.19	+0.8%	+41.1%	133.7
Dry van	$2.91	+0.8%	+48.9%	255.0
Refrigerated	$3.73	+5.1%	+47.8%	380.0
Flatbed	$3.20	+0.6%	+40.0%	147.9
Specialized	$3.27	-2.8%	+33.9%	35.9

Availability within Truckstop

Market	Load change	Truck change	MDI change
Dry van	+1.0%	+9.0%	-20.2 points
Refrigerated	+7.2%	+1.7%	+19.2 points
Flatbed	+1.7%	+5.7%	-5.7 points
Specialized	+4.1%	+5.9%	-0.6 points

Interpret the differences

Truckstop truck availability grew faster than loads overall, but refrigerated loads grew faster than refrigerated trucks. DAT posting ratios increased across all three equipment types. The platforms measure different activity. MDI cannot be converted into a DAT ratio, and the rate differences are not a broker-margin estimate.

What to ask the team

→ **Coverage.** Which refrigerated shipments have a confirmed carrier and holiday receiving window, and which remain exposed to spot sourcing?

→ **Commercial terms.** Compare linehaul, the fuel mechanism and the service commitment together. A posted truck or a model forecast does not establish accepted capacity.

03 / FUEL AND HOLIDAY EXECUTION

Convert diesel relief into savings

EIA national diesel was $5.695/gallon on November 23, down $0.242 weekly and up $1.864 yearly. The November 24 release puts Midwest diesel at $5.671, Gulf Coast at $5.294 and West Coast at $6.709; California was $7.436. Apply the contract's region, base, efficiency and lag before estimating invoice savings.

The planning outlook

DAT 35-day outlook	Midpoint /mi	Published range
Dry van	$2.42	$2.34 to $2.49
Reefer	$2.92	$2.82 to $3.01
Flatbed	$2.68	$2.61 to $2.75

Before the holiday pickup

→ **Timing.** Book temperature-sensitive and fixed-window freight before the last available holiday departure. Confirm what happens if the receiving site closes.

→ **Equipment.** Verify capacity against the actual product and handling requirements. Do not substitute a national equipment average for a service commitment.

→ **Ownership.** Assign the person who can approve a changed appointment or added cost, with a reachable backup and a clear decision deadline.

→ **Cost.** Reconcile linehaul, indexed fuel and additional charges after delivery. Measure accepted service as well as the transportation invoice.

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Sources and methodology

DAT Freight & Analytics, November 23 equipment reports, freight week ended November 20, 2026. Carrier-paid spot linehaul excludes fuel. Weekly and yearly changes are source-reported and may differ from rounded-rate arithmetic. Posting activity is not a fleet census or tender acceptance. Regional rates are origin aggregates. The 35-day model ranges are not commitments or guaranteed bounds. RV commentary cites RVIA through September.

Truckstop/FTR Week 46 Spot Market Insights, November 23 edition, freight week ended November 20, 2026. Rates reflect broker-posted activity; fuel inclusion is unspecified in the supplied PDF. MDI differs from DAT ratios. The PDF's older rounded fuel figure is not the newer EIA benchmark used here.

U.S. Energy Information Administration, Gasoline and Diesel Fuel Update, November 24 release, November 23, 2026 benchmark. Retail diesel includes taxes. Fuel recovery depends on the contract's region, base, efficiency and adjustment lag.

Forza Logistics Group analysis. Recommendations are planning judgments, not customer results or guaranteed forecasts. National averages are not shipment quotes. Do not average DAT and Truckstop series or subtract their rates as a margin.