



FIVE PILLARS BUSINESS CONSULTING

MARKET INTELLIGENCE PACKAGE

Week of October 5, 2026

PREPARED OCTOBER 7, 2026

CONTENTS

2. Executive Summary	2	7. EDI Tender Decline Report	7
3. Reefer Market Intelligence	3	8. Fuel Surcharge Report — All Modes	8
4. LTL Market Intelligence	4	9. Diesel Cost by PADD — Regional	9
5. Dry Van Market Intelligence	5	10. Reefer Rate — 13-Week Comparison	10
6. Flatbed Market Intelligence	6	11. Reefer ROTRI — 13-Week Comparison	11



Executive Summary

WEEK OF OCTOBER 5, 2026 · MARKET SNAPSHOT

Last week's report said the all-in rate and the cost driving it had moved in opposite directions. This week they inverted again — and this time the direction favors the carrier. **Linehaul rose in all three modes** for the first time since early September: dry van **+7¢ to \$2.25**, flatbed **+6¢ to \$2.65**, reefer **+2¢ to \$2.74**. Meanwhile diesel fell for a **second straight week** — EIA's survey for the week ending **10/5** printed **\$6.199/gallon, down 18.3¢**, with **all eleven regions lower**. So the base rate is now doing the work and fuel is *subtracting* from it. The capacity data explains why. DAT's quarter-end print for the week ending **10/3** shows load posts up **9%** to 3.3 million while equipment posts fell **8%** to 170,691 — and load-to-truck ratios jumped hard in every mode: dry van **11.1 → 13.7**, reefer **17.6 → 21.7**, flatbed **40.3 → 44.1**. Published tender-rejection commentary now puts the national index back **above 14%**, up from the 12.54% print cited on 9/21. Two consequences follow, and both cut the opposite way from last week. Base rates are rising on real tightness, not a fuel artifact, so a linehaul renewal signed next month costs more than one signed this month. And a fuel table still anchored to the 9/21 record now over-recovers by **5.1¢/mile**. Lock base, index fuel weekly, and do it before the November–December bid window closes.

MARKET AT A GLANCE

Mode	All-In Rate	Linehaul	WoW (Linehaul)	YoY	Load:Truck	Signal
Reefer	\$3.69/mi	\$2.74/mi	+\$0.02	+33%	21.7	Trucks –12%, back to the 9/5 high
Dry Van	\$3.13/mi	\$2.25/mi	+\$0.07	+34%	13.7	Biggest base-rate move of the three
Flatbed	\$3.71/mi	\$2.65/mi	+\$0.06	+28%	44.1	Tightest board in the market
LTL (GRI)	4.9–7.1%	—	ODFL live 10/5	+18.7% Cass exp.	—	Increase is now in your rates

Sources: DAT Freight & Analytics weekly spot data, week of 9/27–10/3/2026 (DAT Dry Van and Flatbed Reports, 10/6/2026; reefer via TheTrucker, 10/6/2026). U.S. EIA Weekly Retail On-Highway Diesel Prices, survey week ending 10/5/2026. Cass Freight Index, August 2026 (latest published month; September report due 10/13). Old Dominion Freight Line GRI effective 10/5/2026; Saia and ArcBest 2026 GRIs. LTL YoY reflects the Cass expenditures index.

WHY WORK WITH FIVE PILLARS BUSINESS CONSULTING — NOW

The market just handed shippers and carriers opposite instructions in the same week: base rates are climbing on genuine capacity exit, and the fuel component is falling. Those two facts get settled in a single number on a rate confirmation unless somebody splits them. **Five Pillars Business Consulting** provides market-advisory and rate-benchmarking support so procurement teams walk into carrier and 3PL negotiations with defensible, lane-level target rates split cleanly between base and fuel; contract-negotiation support that stress-tests proposed fuel-surcharge tables and GRI asks against the DAT, EIA, and Cass indices in this report; and ongoing market monitoring so budget assumptions get corrected before they go stale. This is independent advisory work — Five Pillars does not broker loads or hold carrier capacity, so the analysis has no incentive to point you toward any particular carrier relationship.

LOCK BASE RATE — THE WINDOW IS CLOSING

Linehaul rose in **every mode** while capacity left the board. DAT's own 35-day forecast has dry van near **\$2.24** and flatbed easing to **\$2.62**, but the confidence bands run to \$2.31 and \$2.68. Published guidance is to price before mid-October or wait for Q1 2027. A base rate signed this week beats one signed in November.

YOUR FSC TABLE NOW OVER-RECOVERS BY 5¢

The illustrative truckload surcharge fell from 52.0¢ to **49.2¢/mile** on the 10/5 print — **5.1¢ below** the 9/21 record peak of 54.3¢. A monthly table reset at the September high over-charges for all of October, and over-payments generate no disputes. Audit the fuel line on every October invoice against the weekly EIA print.

REJECTIONS TURNED BACK UP

National tender rejections are back **above 14%** after easing to 12.54% in late September. Ratios jumped in all three modes on a **9% load-post surge against an 8% equipment-post decline**. Last week's read — leverage moving to shippers — reversed. Treat the easing as a pause, not a trend.



Reefer Market Intelligence

DAT PRINT WEEK ENDING 10/3/2026 · TEMPERATURE-CONTROLLED TRUCKLOAD

ALL-IN SPOT RATE

\$3.69/mi

▲ +\$0.07 w/w

LINEHAUL RATE

\$2.74/mi

▲ +\$0.02 w/w · +33% y/y

LOAD-TO-TRUCK RATIO

21.7

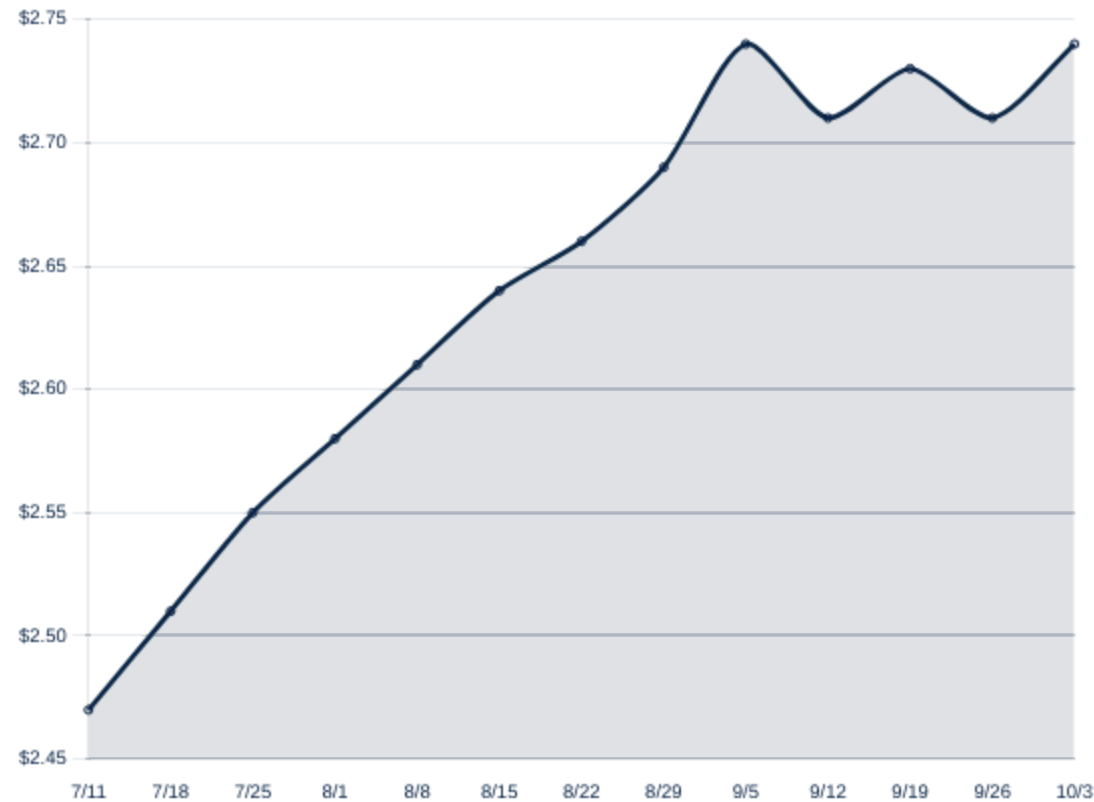
▲ from 17.6 prior wk

TRUCK POSTS

32,806

▼ -12% w/w

REEFER LINEHAUL RATE — TRAILING 13 WEEKS



REEFER SNAPSHOT — WEEK ENDING 10/3/2026

Metric	Value	Chg
All-in rate	\$3.69/mi	+\$0.07
Linehaul rate	\$2.74/mi	+\$0.02
Implied fuel component	\$0.95/mi	+\$0.03
Load-to-truck ratio	21.7	+4.1
Truck posts	32,806	-12%
Load posts	710,211	+9%
vs. 9-yr seasonal avg		+27%
Year-over-year (linehaul)		+33%

Source: DAT Freight & Analytics weekly reefer data, week of 9/27–10/3/2026. Implied fuel component is all-in less linehaul. Chart weeks before 9/5 are reconstructed from DAT's published weekly changes. **EST**

CAPACITY LEFT, FREIGHT ARRIVED — RATIO UP 4 POINTS

Reefer truck posts fell **12%** while load posts rose **9%**, driving the load-to-truck ratio from 17.6 to **21.7** — the largest one-week move of the three modes and the tightest reefer board since produce season. Linehaul recovered the 2¢ it gave back last week, returning to **\$2.74**, matching the 9/5 high. Last week's "rollover" read did not hold; the 13-week average rose to **\$2.64**.

THE Y/Y GAP IS NARROWING — WATCH THAT, NOT THE LEVEL

At **+33% y/y**, reefer's annual premium has stepped down from +38% (9/19) and +36% (9/26) even as the absolute rate hit a new high. That is the 2025 base catching up, not 2026 weakening — and it is the number a carrier will quote back at you. Reefer still runs **27% above its nine-year seasonal average**, the widest seasonal premium of any mode. Price the renewal off the seasonal gap, not the y/y.



LTL Market Intelligence

CASS DATA THROUGH AUGUST 2026 · LESS-THAN-TRUCKLOAD

ODFL GRI STATUS

LIVE

▲ 4.9% effective 10/5/2026

CASS SHIPMENTS, AUG Y/Y

+2.1%

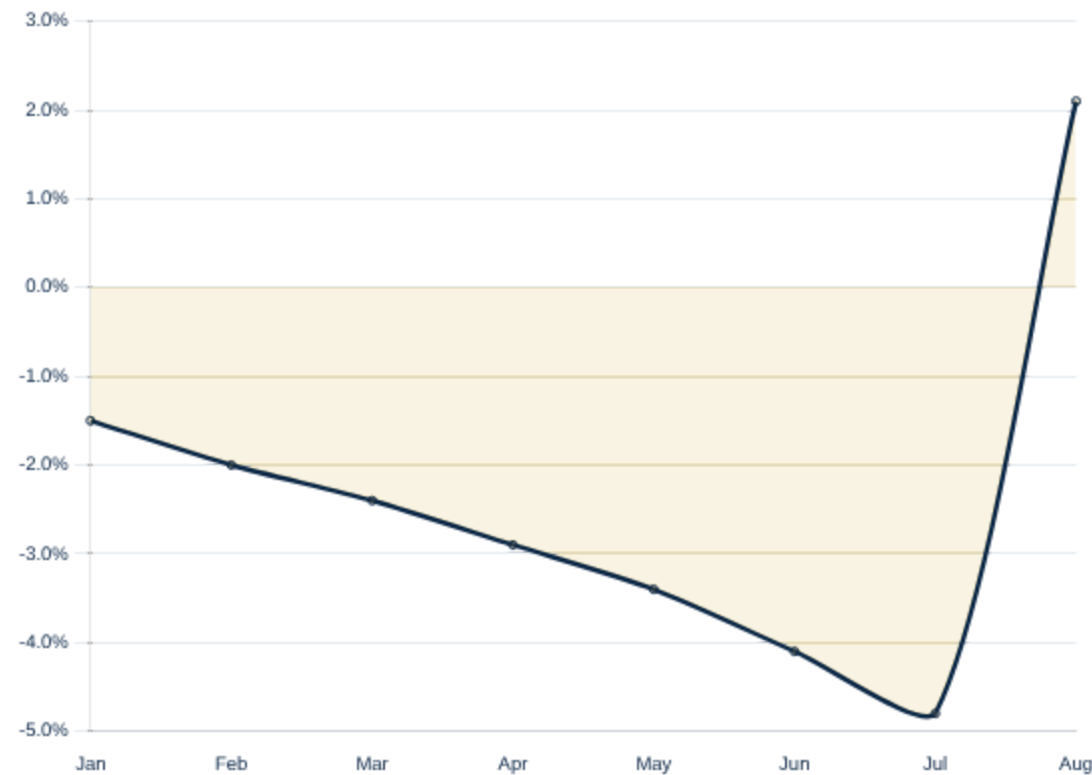
▲ Sept report due 10/13

EXPENDITURE INDEX, AUG

3.722

▲ +18.7% y/y

CASS FREIGHT INDEX — SHIPMENTS, YEAR-OVER-YEAR % CHANGE (2026, THROUGH AUGUST)



LTL PROGRAM SNAPSHOT

Metric	Reading
Old Dominion GRI (live 10/5)	4.9%
Saia GRI (eff. 7/6)	7.1%
ArcBest GRI (eff. 6/22)	5.9%
Cass shipments, Aug y/y	+2.1%
Cass shipments, Aug m/m	+5.6% (+5.0% SA)
Cass expenditures, Aug	3.722 (+18.7% y/y)
Cass TL linehaul index, Aug	153.9 (+11.3% y/y)
Cass September guidance	~+1% y/y (seasonal)
ISM Manufacturing PMI, Aug	54.6
Diesel (national, EIA 10/5)	\$6.199/gal

Sources: Cass Information Systems Freight Index, August 2026 — still the latest published month; the September report is due 10/13/2026. January–July y/y chart points carried forward from prior editions of this report. Carrier GRI announcements (ODFL 9/21/2026). ISM Manufacturing PMI, August 2026.

THE GRI IS NO LONGER A DEADLINE — IT IS IN YOUR RATES

Old Dominion's **4.9% increase went live Monday, October 5**. Every exception list and accessorial schedule not renegotiated before that date repriced at the new base two days ago. Three carriers have now pulled increases forward — ODFL by a month, Saia by three, ArcBest by six weeks — which raises the *annualized* rate above every headline percentage. The correct audit now is backward-looking: pull October invoices and verify the 4.9% was applied to base only, not re-stacked on accessorials.

VOLUME RECOVERY IS REAL, MODEST, AND PARTLY BORROWED

August shipments came in **+2.1% y/y** — a second consecutive annual gain after the 42-month slump — with Cass guiding September to roughly **+1% y/y**. Expenditures ran **+18.7%** and the truckload linehaul index **+11.3%**. But part of LTL's tonnage growth is freight in the 8,000–10,000 lb band migrating *out* of truckload. With truckload linehaul now rising again, that arbitrage narrows. Re-run your mode-selection breakpoint against this week's \$2.25 van linehaul.



Dry Van Market Intelligence

DAT PRINT WEEK ENDING 10/3/2026 · DRY VAN TRUCKLOAD

ALL-IN SPOT RATE

\$3.13/mi

▲ +\$0.11 w/w

LINEHAUL RATE

\$2.25/mi

▲ +\$0.07 w/w · +34% y/y

LOAD-TO-TRUCK RATIO

13.7

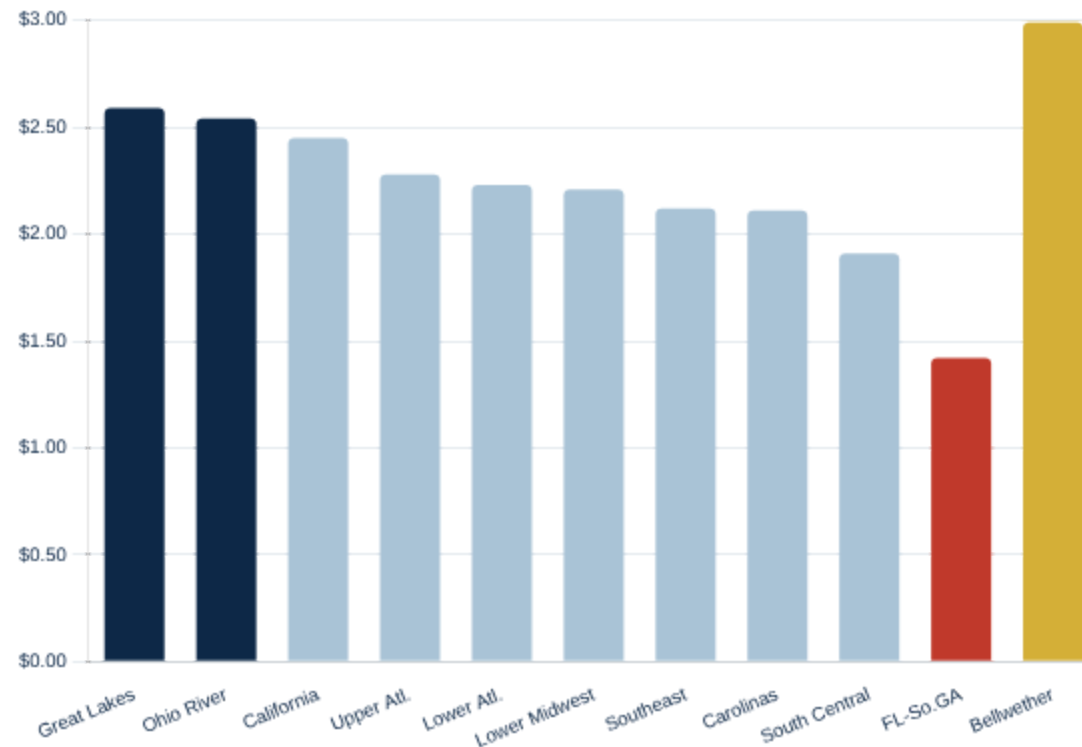
▲ from 11.1 prior wk

LOAD POSTS

1,588,410

▲ +15% w/w

OUTBOUND LINEHAUL RATE BY ORIGIN REGION (\$/MI) — DAT REGIONAL PRINT, WEEK ENDING 10/3/2026



REGIONAL DETAIL — WEEK ENDING 10/3/2026

Origin Region	\$/mi	WoW	Load Share
Great Lakes	\$2.59	+10¢	17.0%
Ohio River	\$2.54	+7¢	7.7%
California	\$2.45	+7¢	7.8%
Upper Atlantic	\$2.28	+3¢	10.3%
Lower Atlantic	\$2.23	+5¢	3.9%
Lower Midwest	\$2.21	+5¢	4.9%
Southeast	\$2.12	+3¢	10.6%
Carolinas	\$2.11	+3¢	6.4%
South Central	\$1.91	+2¢	15.0%
Florida–So. Georgia	\$1.42	+2¢	4.2%
Bellwether (10-State)	\$2.99	+8¢	35.6%

Source: DAT Freight & Analytics Dry Van Report, week ending 10/3/2026 — a fresh regional print this week (prior editions carried the 9/4 detail). The ten origin regions shown are 87.8% of national outbound loads. Bellwether states are up 38.6% y/y.

EVERY REGION UP — THIS WAS NOT A MIX EFFECT

All ten reporting origin regions posted **higher** linehaul, from +2¢ in South Central and Florida to +10¢ out of Great Lakes. When the national average rises because every region rises, the move is demand, not a shift in where freight originated. Load posts +15%, truck posts +7%, ratio 11.1 → 13.7 — versus 7.67 a year ago. Dry van is **21.6% above** its \$1.85 nine-year seasonal average.

THE 117¢ REGIONAL SPREAD SURVIVED THE RALLY

Great Lakes at **\$2.59** against Florida–South Georgia at **\$1.42** is a **117¢/mile** gap — essentially unchanged from the 9/4 print despite every region moving up. Year-over-year gains run **+28¢ to +68¢/mile** depending on origin. South Central carries **15.0%** of national volume at the second-lowest rate on the board; that is where a national benchmark does the most damage. Build Q4 targets region by region and re-check them against DAT's 35-day forecast of **\$2.24** (band \$2.17–\$2.31).



Flatbed Market Intelligence

DAT PRINT WEEK ENDING 10/3/2026 · FLATBED TRUCKLOAD

ALL-IN SPOT RATE

\$3.71/mi

▲ +\$0.11 w/w · highest mode

LINEHAUL RATE

\$2.65/mi

▲ +\$0.06 w/w

LOAD-TO-TRUCK RATIO

44.1

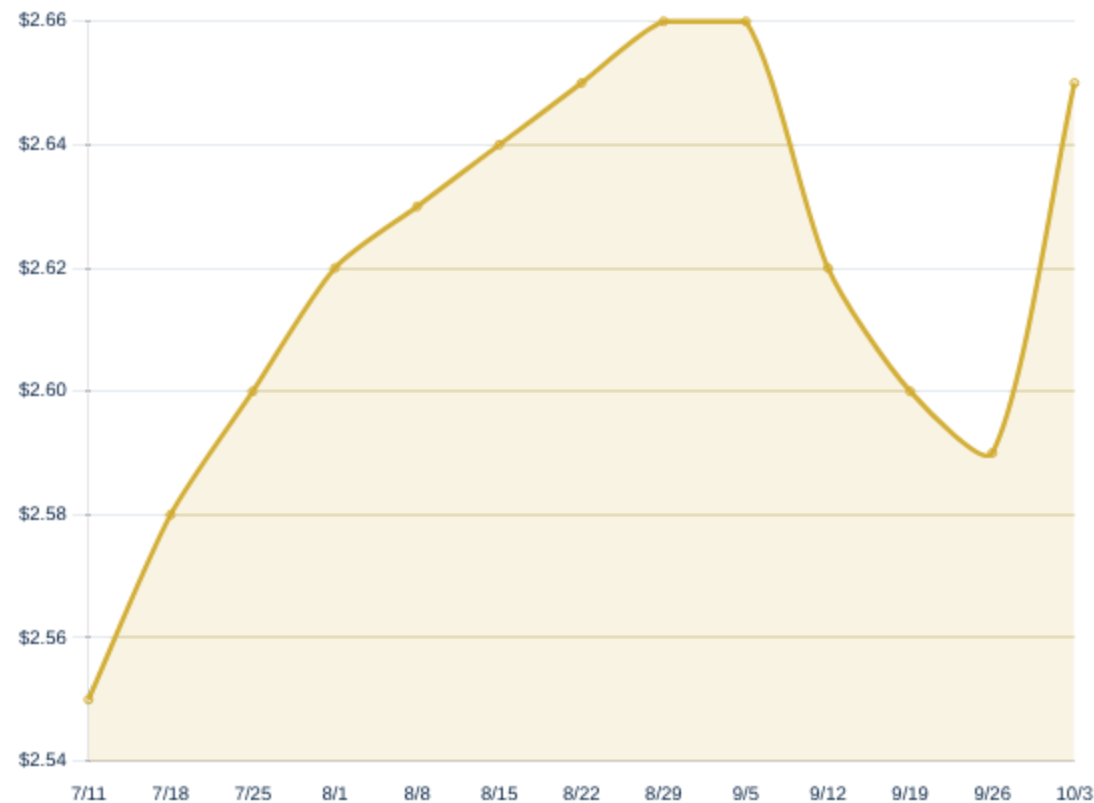
▲ from 40.3 prior wk

YEAR-OVER-YEAR

+28%

▲ +\$0.58/mi

FLATBED LINEHAUL RATE — TRAILING 13 WEEKS



FLATBED SNAPSHOT — WEEK ENDING 10/3/2026

Metric	Value	Chg
All-in rate	\$3.71/mi	+\$0.11
Linehaul rate	\$2.65/mi	+\$0.06
Implied fuel component	\$1.06/mi	+\$0.05
Load-to-truck ratio	44.1	+3.8
Truck posts	22,121	-7%
Load posts	976,193	+1%
Bellwether roster	\$3.23/mi	+\$0.03
Year-over-year (linehaul)		+28%

Source: DAT Freight & Analytics Flatbed Report, week ending 10/3/2026. Implied fuel component is all-in less linehaul. Chart weeks before 9/5 are reconstructed from DAT's published weekly changes. **EST**

THE FALLING-LINEHAUL STREAK BROKE AT FIVE WEEKS

Flatbed linehaul had declined five consecutive weeks off the 8/22–8/29 plateau. This week it rose **6¢ to \$2.65** — the resolution of the contradiction flagged in last week's report, where a 41.4 ratio sat alongside a falling base rate. The ratio was right. It has since gone to **44.1**, versus **30.02** a year ago, on truck posts **-4.2%** against loads **+2.2%**. Open-deck capacity is still exiting.

REGIONAL DISPERSION IS THE WIDEST OF ANY MODE

Ohio River at **\$3.24** and Southeast at **\$3.20** against Lower Mountain at **\$1.67** is a **157¢/mile** spread — and Lower Atlantic jumped **+21¢** in a single week. South Central is **23.7%** of national open-deck volume at \$2.34. DAT's 35-day forecast eases to **\$2.62** on the narrowest confidence band of the three modes (\$2.55–\$2.68), so the upside here is close to spent. Sign open-deck now and index the fuel separately.

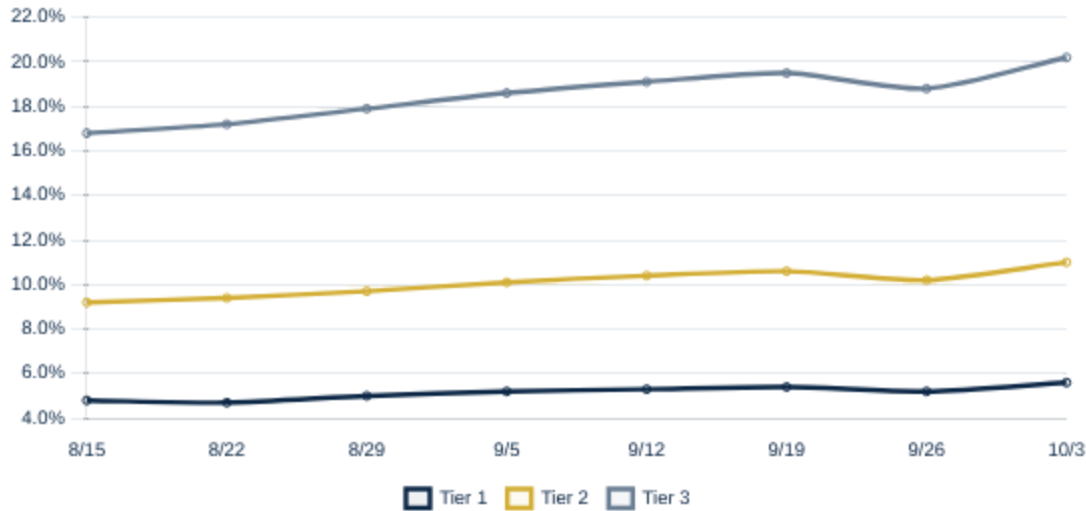


EDI Tender Decline Report ILLUSTRATIVE / BENCHMARK DATA

WEEK OF OCTOBER 5, 2026 · SIMULATED CARRIER PANEL, NOT A LIVE EDI FEED

This section uses a simulated carrier panel calibrated to typical industry decline-rate patterns by carrier tier — it is a benchmark for what a real TMS/EDI 990 feed commonly shows, not a live read of any specific shipper's network. It illustrates the analysis Five Pillars Business Consulting runs directly against a client's own TMS/EDI data.

TENDER DECLINE RATE BY CARRIER TIER — TRAILING 8 WEEKS (ILLUSTRATIVE)



CARRIER TENDER PERFORMANCE SNAPSHOT (ILLUSTRATIVE)

Carrier Tier	Avg Decline	Avg Response
Tier 1 (Core/Committed)	5.6%	21 min
Tier 2 (Secondary)	11.0%	48 min
Tier 3 (Spot/Backup)	20.2%	1h 51m

Illustrative benchmark data, not a live carrier feed. Tier curves are shaped to the published national tender-rejection trend (back above 14% entering Q4, up from the 12.54% print cited on 9/21).

EDI TRANSACTION ERRORS — ILLUSTRATIVE BENCHMARK

Error Type	Weekly Volume	% of EDI Transactions	Typical Root Cause
Rate Mismatch (210 vs. tariff)	347	0.9%	Fuel table still at the 9/21 peak, diesel down 33.0¢ in two weeks
Late Status Update (214)	556	1.4%	Quarter-end volume surge outran check-call coverage
Duplicate PRO / Load Number	438	1.2%	TMS retry logic on 990 timeout as declines rose
Missing Appointment Window (204)	301	0.8%	Incomplete load tender at ship-from
Invalid / Retired SCAC	176	0.5%	Small-carrier exits not reflected in onboarding records

Illustrative benchmark data reflecting typical EDI transaction error patterns across a mid-size shipper network; not a live feed.

TWO WEEKS OF FALLING DIESEL MAKES STALE TABLES EXPENSIVE

Diesel has now fallen **33.0¢** from the 9/21 record — 14.7¢ then 18.3¢. A fuel table anchored to that peak overbills by **5.1¢/mile**, and 210-versus-tariff exceptions that used to surface as carrier complaints now surface as shipper over-payments that nobody disputes. Reconcile the fuel line on every October invoice against the weekly EIA print, not the monthly one. The exception queue will not find this for you.

ALL THREE TIERS TICKED BACK UP

Tier 3 declines run roughly **3.6x** Tier 1's in this panel, and every tier rose this week — the pattern a network shows when rejections climb from 12.5% back above 14% and core carriers run out of trucks. Re-tendering off Tier 3 gets expensive again, fast. **Contact Five Pillars Business Consulting to run this same tender-decline and EDI-error analysis on your own TMS/EDI data** and get a prioritized, carrier-by-carrier remediation plan.



Fuel Surcharge Report — All Modes

WEEK OF OCTOBER 5, 2026 · EIA ON-HIGHWAY DIESEL & ILLUSTRATIVE FSC MODEL

U.S. AVG DIESEL (EIA)

\$6.199/gal

▼ -\$0.183 w/w · wk end 10/5

DOWN OFF THE 9/21 RECORD

-\$0.330

▼ two straight declines

YEAR-OVER-YEAR

+67.0%

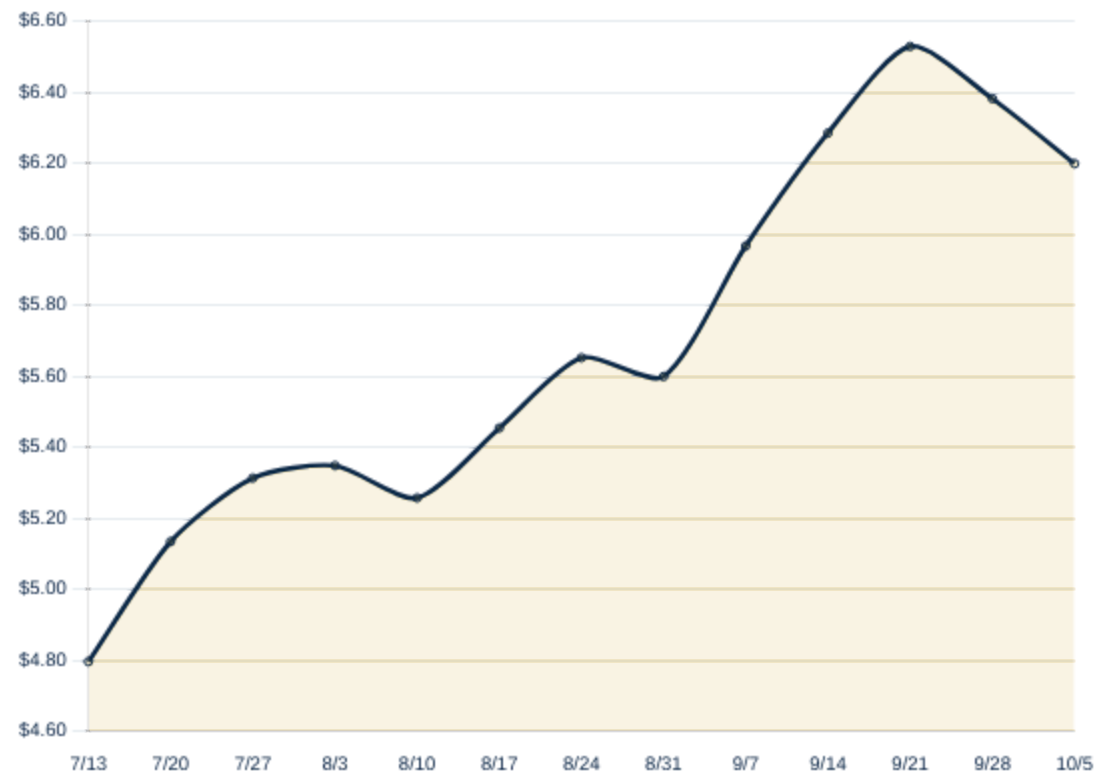
▲ vs. \$3.711/gal, Oct 2025

CALIFORNIA DIESEL

\$8.082/gal

▼ -\$0.099 w/w · +62.6% y/y

U.S. AVERAGE ON-HIGHWAY DIESEL — TRAILING 13 WEEKS



ILLUSTRATIVE FUEL SURCHARGE IMPACT BY MODE

MODELED

Mode	This Wk	Prior Wk	Year Ago
Truckload (cents/mi) 6.5 MPG, \$3.00/gal baseline	49.2¢	52.0¢	10.9¢
LTL (% of linehaul) 10.7 pts per \$1.00 over \$3.00/gal	34.2%	36.2%	7.6%

Five Pillars Business Consulting illustrative model, not a specific carrier's published table — actual carrier FSC programs vary by baseline, MPG assumption, and update cadence. **MODELED**

TRUCKLOAD FSC SENSITIVITY — \$/MILE AT \$6.199/GAL

MODELED

Baseline	5.5 MPG	6.0 MPG	6.5 MPG	7.0 MPG
\$2.50/gal	\$0.673	\$0.616	\$0.569	\$0.528
\$3.00/gal	\$0.582	\$0.533	\$0.492	\$0.457
\$3.50/gal	\$0.491	\$0.450	\$0.415	\$0.386

The baseline and MPG assumptions a carrier writes into a fuel table move the recovery by more than **28¢/mile** at today's price — a larger swing than any linehaul negotiation this quarter. Both are negotiable terms; verify them before signing. **MODELED**

TWO WEEKS DOWN, ALL ELEVEN REGIONS LOWER

National on-highway diesel printed **\$6.199/gal** for the week ending 10/5/2026, **down 18.3¢** and a larger decline than the prior week's 14.7¢. Cumulatively diesel is **33.0¢ below** the 9/21 record of \$6.529. **Every one of the eleven EIA regions fell**, the first clean sweep of the run. The move off the 7/6 low of \$4.578 is now **+\$1.621 (+35.4%)** and the year-over-year gap **+67.0%** against \$3.711/gal — down from +70.0% last week. Two weeks is a pullback with momentum, not yet a trend; East Coast distillate inventories remain the binding constraint.

FUEL IS NOW SUBTRACTING WHILE BASE RATE ADDS

At 6.5 MPG against a \$3.00/gal baseline the illustrative truckload surcharge fell from 52.0¢ to **49.2¢/mile**, and the LTL equivalent from 36.2% to **34.2%** of linehaul. Note what that means against pages 3, 5, and 6: linehaul rose in every mode while the fuel mechanism gave money back. A shipper on a weekly index captured **5.1¢/mile** of relief over two weeks; a shipper on a monthly table reset at the September peak captured none and will not until November. Regional detail on page 9.



Diesel Fuel Cost by PADD — Regional Detail

EIA ON-HIGHWAY DIESEL SURVEY, WEEK ENDING OCTOBER 5, 2026 · ALL REGIONS

WIDEST REGIONAL SPREAD

\$2.383

▲ California over Lower Atlantic

STEEPEST YOY

+73.0%

▲ PADD 3 Gulf Coast

REGIONS DOWN THIS WEEK

11 of 11

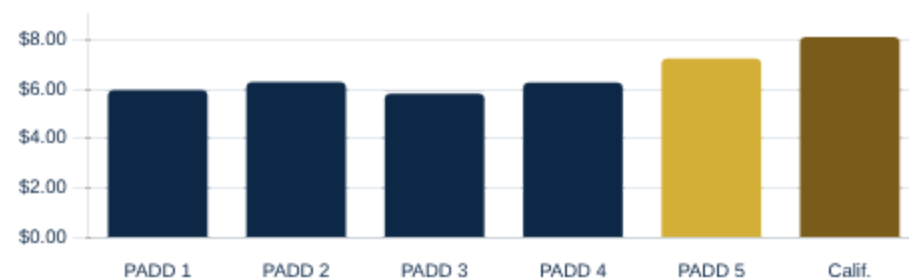
▼ first clean sweep

PADD 5 FSC PREMIUM

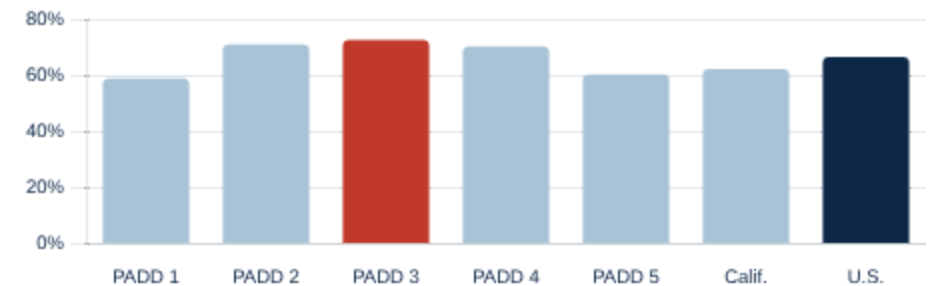
+15.9¢/mi

▲ over U.S. benchmark

ON-HIGHWAY DIESEL PRICE BY PADD (\$/GAL) — WEEK ENDING 10/5/2026



YEAR-OVER-YEAR CHANGE IN DIESEL COST BY PADD (%)



DIESEL COST & YEAR-OVER-YEAR CHANGE BY REGION — EIA WEEK ENDING 10/5/2026

Region	PADD	10/5/2026	WoW	Year Ago	YoY \$	YoY %	FSC \$/mi 6.5 MPG, \$3.00 base
U.S. Average		\$6.199	-\$0.183	\$3.711	+\$2.488	+67.0%	\$0.492
East Coast	PADD 1	\$5.951	-\$0.186	\$3.735	+\$2.216	+59.3%	\$0.454
New England	1A	\$6.476	-\$0.034	\$3.958	+\$2.518	+63.6%	\$0.535
Central Atlantic	1B	\$6.485	-\$0.046	\$3.886	+\$2.599	+66.9%	\$0.536
Lower Atlantic	1C	\$5.699	-\$0.254	\$3.656	+\$2.043	+55.9%	\$0.415
Midwest	PADD 2	\$6.286	-\$0.240	\$3.670	+\$2.616	+71.3%	\$0.506
Gulf Coast	PADD 3	\$5.819	-\$0.136	\$3.364	+\$2.455	+73.0%	\$0.434
Rocky Mountain	PADD 4	\$6.267	-\$0.140	\$3.671	+\$2.596	+70.7%	\$0.503
West Coast	PADD 5	\$7.229	-\$0.128	\$4.499	+\$2.730	+60.7%	\$0.651
W. Coast ex-CA	5 ex-CA	\$6.490	-\$0.153	\$4.090	+\$2.400	+58.7%	\$0.537
California	CA	\$8.082	-\$0.099	\$4.971	+\$3.111	+62.6%	\$0.782

Source: U.S. Energy Information Administration, Weekly Retail On-Highway Diesel Prices, survey week ending 10/05/2026 (eia.gov/petroleum/gasdiesel), cross-checked against the EIA weekly series EMD_EPD2D_PTE_NUS_DPG. Prices include all taxes. Year-ago price is derived by subtracting EIA's published year-over-year change from the current price; YoY % is that change divided by the derived year-ago price. FSC \$/mi is a Five Pillars Business Consulting illustrative model at 6.5 MPG against a \$3.00/gal baseline — not a carrier's published table. **MODELED**

LOWER ATLANTIC LED DOWN — AND IS NOW THE CHEAPEST IN THE COUNTRY

PADD 1C fell **25.4¢**, the steepest weekly decline of any region, to **\$5.699/gal**, taking the national low away from Gulf Coast at \$5.819. Midwest fell 24.0¢ to \$6.286. Yet **Gulf Coast is +73.0% y/y and Midwest +71.3%** — the two steepest annual moves, and both still carry the heaviest repricing of the year. New England and Central Atlantic barely moved (−3.4¢, −4.6¢), so Northeast-origin lanes got almost none of this week's relief.

A SINGLE NATIONAL FSC TABLE MISPRICES BY 37¢

California at **\$8.082/gal** carries a **78.2¢/mile** illustrative surcharge — **29.0¢ above the national benchmark** — while Lower Atlantic sits **7.7¢ below** it, a **36.7¢/mile** span inside one blended table. PADD 5 overall runs a 15.9¢/mile premium and the California-to-Lower-Atlantic spread is **\$2.383/gal**, wider than last week. Origin-PADD-aware fuel mechanisms remain the single highest-return change available in a Q4 bid, and the math does not depend on which way diesel moves next.

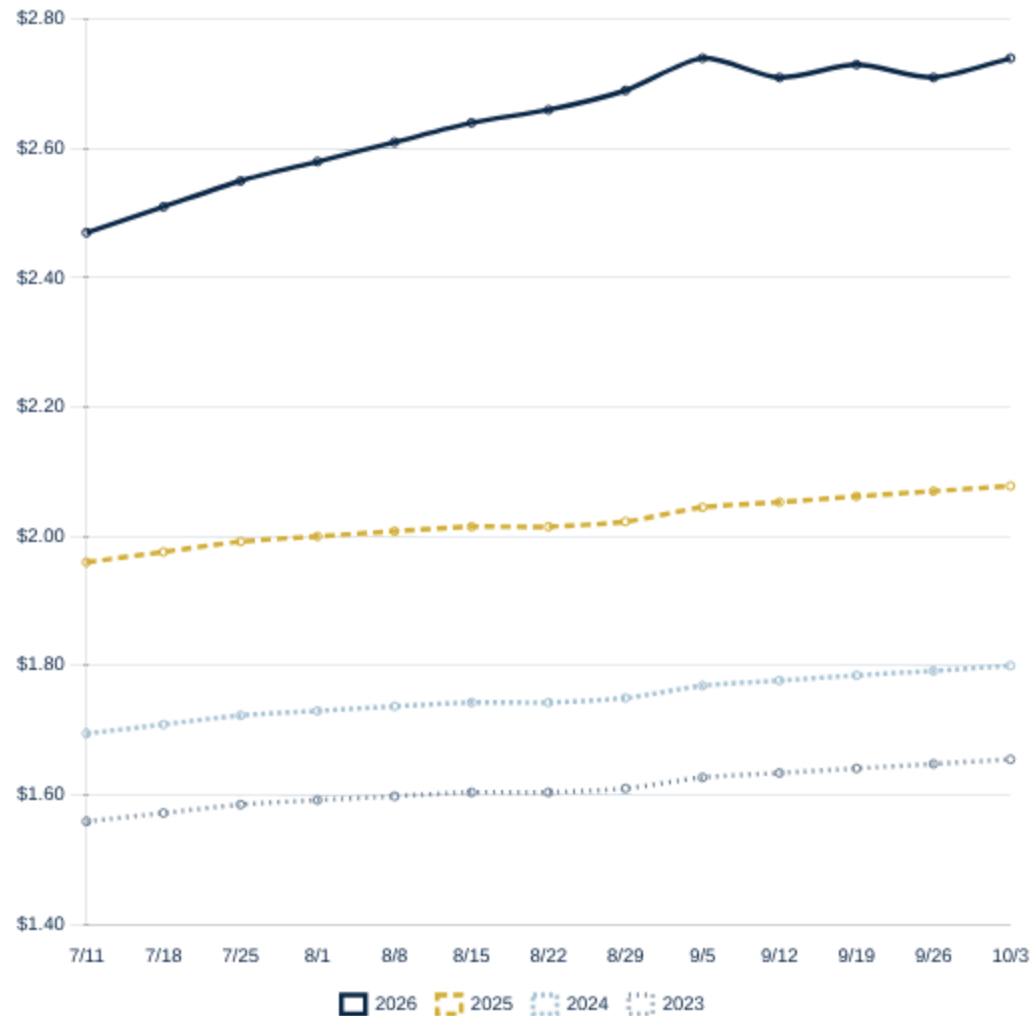


Reefer Rate — 13-Week Comparison

ROLLING WINDOW: WEEK ENDING 7/11/2026 — 10/3/2026 · LINEHAUL \$/MILE BY YEAR

The rolling 13-week window advances one week from last edition's 7/4–9/26 to **7/11–10/3**, picking up DAT's newest print. **Last edition's rollover call did not hold.** The 2026 series printed 2.71, 2.73, 2.71 after its 9/5 high of \$2.74 — and has now returned to **\$2.74**, a new equal high rather than a confirmed top. The 13-week average rose to **\$2.64** from \$2.62 last edition. Read the three soft weeks as consolidation, not reversal: the move came back on a 12% drop in posted trucks, not on a produce bounce. Current-year figures are DAT-reported actuals; 2023–2025 comparison years are analyst estimates **Analyst Est.** indexed to DAT's published year-over-year deltas and the broadly reported 2023 freight-recession trough / 2025–2026 tightening cycle, since full historical weekly series require a paid DAT/SONAR subscription.

REEFER LINEHAUL RATE (\$/MI) — 13-WEEK TREND BY YEAR



13-WEEK AVERAGE BY YEAR

Year	13-Wk Avg \$/mi	vs. 2026	Basis
2026	\$2.64	—	DAT actual
2025	\$2.02	+31%	Analyst est. EST
2024	\$1.75	+51%	Analyst est. EST
2023	\$1.61	+64%	Analyst est. EST

Source: DAT Freight & Analytics (2026 weekly actuals; weeks before 9/5 reconstructed from DAT's published weekly changes). 2023–2025: Five Pillars Business Consulting working estimate.

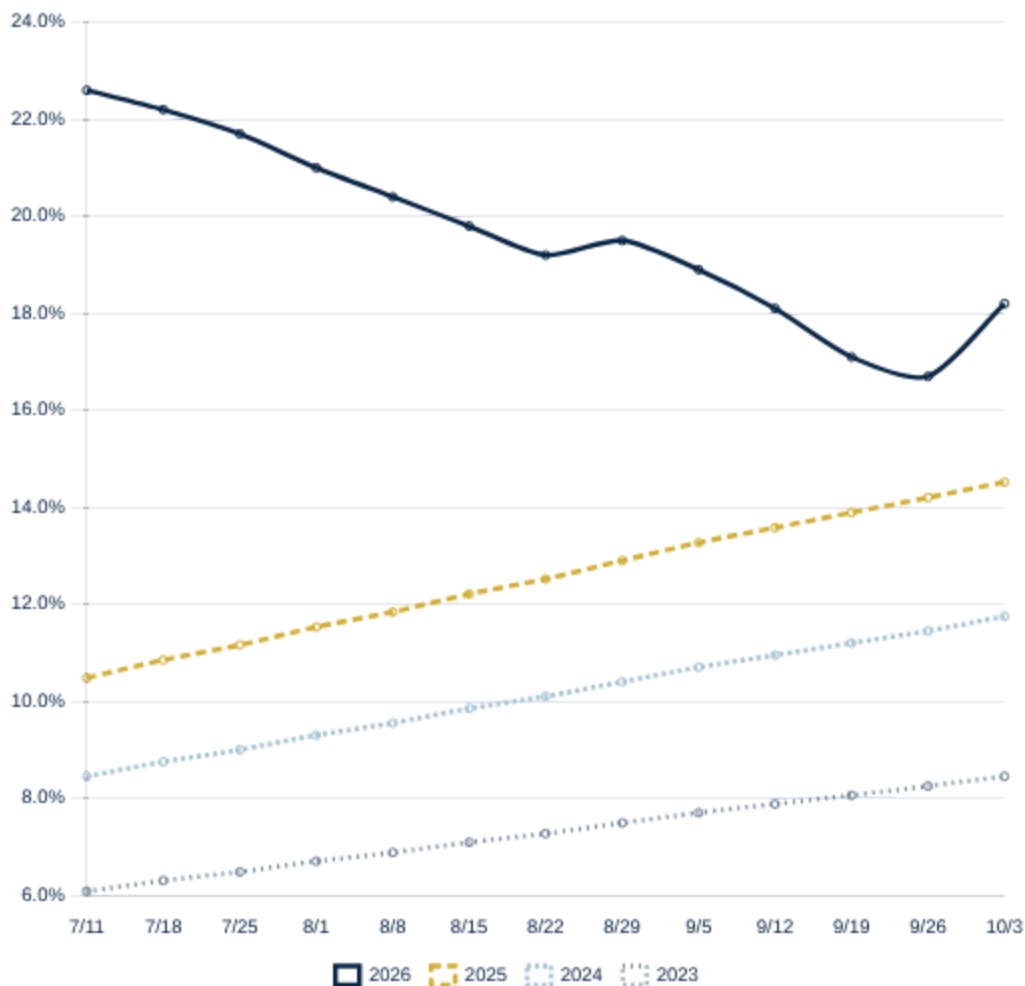


Reefer ROTRI — 13-Week Comparison

ROLLING WINDOW: WEEK ENDING 7/11/2026 – 10/3/2026 · OUTBOUND TENDER REJECTION % BY YEAR

The 2026 line turns back up this edition. Published commentary now puts national outbound tender rejections **above 14%** entering Q4 — FreightWaves SONAR data cited at roughly 14% in late September — versus the 12.54% print carried in last week's report. The reefer estimate below therefore reverses from a nine-week decline to a **rising** final week, consistent with reefer truck posts falling 12% and the reefer load-to-truck ratio jumping from 17.6 to 21.7. ROTRI figures are Five Pillars Business Consulting working estimates **Analyst Est.** built from the published national OTRI level plus reefer's typical premium over the national index (held constant at roughly 4.2 points); exact equipment-specific SONAR series require a paid subscription and were not independently verified. Treat the *shape* as the signal and the *level* as an estimate. The actionable part: the leverage that was moving to shippers through September has started moving back.

REEFER ROTRI (%) — 13-WEEK TREND BY YEAR



13-WEEK AVERAGE BY YEAR

Year	13-Wk Avg ROTRI	vs. 2026	Basis
2026	19.7%	—	Analyst est. EST
2025	12.5%	+7.1 pts	Analyst est. EST
2024	10.1%	+9.5 pts	Analyst est. EST
2023	7.3%	+12.4 pts	Analyst est. EST

Basis: published SONAR/FreightWaves national OTRI commentary (13.45% on 9/10/2026; 12.54% on 9/21/2026; approximately 14% in late September and holding above 14% entering Q4). Reefer-specific and historical detail are Five Pillars Business Consulting working estimates.