



FIVE PILLARS BUSINESS CONSULTING

MARKET INTELLIGENCE PACKAGE

Week of October 12, 2026

PREPARED OCTOBER 14, 2026

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Executive Summary

WEEK OF OCTOBER 12, 2026 · MARKET SNAPSHOT

The quarter-end freight surge washed out of the load counts this week — and rates went up anyway. That is the report in one sentence. DAT's print for the week ending **10/10** shows total load posts **down 18% to 2.7 million** and equipment posts **up 4% to 177,300**, collapsing the load-to-truck ratio in every mode: dry van **13.7 → 10.5**, reefer **21.6 → 16.8**, flatbed **44.1 → 36.6**. A loosening board is supposed to take rates down with it. Instead **linehaul rose in all three modes for a second straight week** — reefer **+6¢ to \$2.75**, dry van **+5¢ to \$2.26**, flatbed **+1¢ to \$2.65** — and FreightWaves' national tender-rejection index **spiked to 14.17%**, which SONAR attributes to a supply shortfall rather than demand because its tender-volume index showed no surge. Truck posts remain **more than 20% below** a year ago. Read those three facts together and the conclusion is uncomfortable for shippers: the easing is in the *posting* data, not in the capacity. Fuel, meanwhile, has stopped helping. EIA's survey for the week ending **10/12** printed **\$6.179/gallon, down just 2.0¢** after declines of 14.7¢ and 18.3¢ — and the entire West turned back up. The two-week windfall ends at **35.0¢** off the 9/21 record, with the illustrative truckload surcharge now only 3.1¢ below its September peak. Three consequences for the next thirty days. Base rates are being set by capacity exit rather than seasonal demand, so they will not reverse when volume normalizes. A fuel table anchored to September now over-recovers by only **3.1¢/mile** — the audit argument that was worth 5¢ last week is nearly spent. And a 14.17% rejection print in mid-October is the earliest peak-season tightening signal in three years. Sign base rate before November; index fuel weekly, not monthly.

MARKET AT A GLANCE

Mode	All-In Rate	Linehaul	WoW (Linehaul)	YoY	Load:Truck	Signal
Reefer	\$3.68/mi	\$2.75/mi	+\$0.06	+33%	16.8	Biggest base move; ratio still 57% over year-ago
Dry Van	\$3.12/mi	\$2.26/mi	+\$0.05	+35%	10.5	Loads -20% and rate up — supply-driven
Flatbed	\$3.68/mi	\$2.65/mi	+\$0.01	+29%	36.6	Still the tightest board; forecast eases to \$2.59
LTL (GRI)	4.9–7.1%	—	ODFL live 10/5	+20.4% Cass exp.	—	Q4 cost index projected +14.7 pts y/y

Sources: DAT Freight & Analytics weekly spot data, week of 10/4–10/10/2026 (DAT Dry Van and Flatbed Reports, 10/13/2026; all-equipment summary via AJOT and TheTrucker, 10/13/2026). U.S. EIA Weekly Retail On-Highway Diesel Prices, survey week ending 10/12/2026. Cass Freight Index, September 2026 (released 10/13/2026). FreightWaves SONAR tender-rejection commentary, 10/14/2026. Old Dominion 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

This is the week the market stopped being readable from a single number. Load postings fell 18% and rates rose; rejections spiked with no demand surge behind them; fuel relief ended mid-stride while the West reversed. Any one of those, read alone, points the wrong direction. **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.

A LOOSENING BOARD WITH RISING RATES MEANS SUPPLY

Ratios fell hard in all three modes, but on **falling load posts and rising truck posts** — and truck posts are still **more than 20% below** a year ago. Rejections went to **14.17%** with no demand surge behind them. Capacity exit, not peak demand, is setting the base rate. That does not unwind when October volume normalizes, so a renewal priced off “the market is easing” will be wrong by Q1.

THE FUEL WINDFALL IS OVER — AND REVERSED IN THE WEST

Diesel fell only **2.0¢** this week after 14.7¢ and 18.3¢, and **four of eleven regions rose**: Rocky Mountain +3.5¢, West Coast +1.1¢, W. Coast ex-CA +1.3¢, California +0.9¢. The illustrative truckload surcharge is **48.9¢/mile**, only **3.1¢** under the September peak. Stop budgeting further relief — the spread left to capture is nearly closed.

THE MID-OCTOBER REJECTION SPIKE IS EARLY

A move to **14.17%** in the second week of October is an unusual mid-month spike; published commentary had peak tightening starting late October into November, with **20%+ projected by December**. Roughly **16 carriers** have filed for bankruptcy or restructuring citing fuel costs. Build the Q4 contingency now — November spot coverage will cost more than last November's.



Reefer Market Intelligence

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

ALL-IN SPOT RATE

\$3.68/mi

▲ +\$0.03 w/w

LINEHAUL RATE

\$2.75/mi

▲ +\$0.06 w/w · +33% y/y

LOAD-TO-TRUCK RATIO

16.8

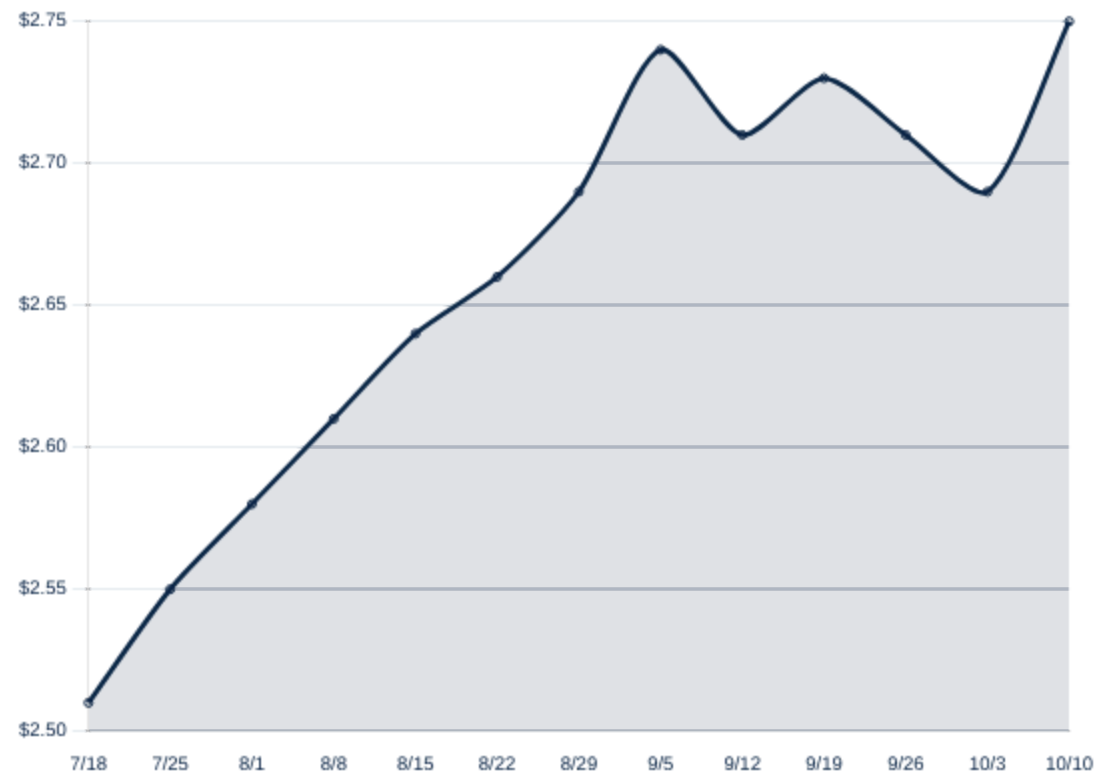
▼ from 21.6 prior wk

TRUCK POSTS

33,603

▲ +2% w/w

REEFER LINEHAUL RATE — TRAILING 13 WEEKS



REEFER SNAPSHOT — WEEK ENDING 10/10/2026

Metric	Value	Chg
All-in rate	\$3.68/mi	+\$0.03
Linehaul rate	\$2.75/mi	+\$0.06
Implied fuel component	\$0.93/mi	-\$0.03
Load-to-truck ratio	16.8	-4.8
Truck posts	33,603	+2%
Load posts	562,902	-21%
Ratio vs. year ago (10.7)		+57%
vs. 9-yr seasonal avg		+28%
Year-over-year (linehaul)		+33%

Source: DAT Freight & Analytics weekly reefer data, week of 10/4–10/10/2026. Implied fuel component is all-in less linehaul. DAT's +6¢ weekly move places the 10/3 linehaul at \$2.69, a downward revision from the \$2.74 originally published; the chart carries the revised basis. Chart weeks before 9/5 are reconstructed from DAT's published weekly changes. **EST**

REEFER TOOK THE BIGGEST BASE-RATE MOVE ON THE WEAKEST BOARD

Reefer load posts fell **21%** — the steepest drop of the three modes — while truck posts rose **2%**, cutting the ratio from 21.6 to **16.8**. And linehaul still rose **6¢ to \$2.75**, the largest increase in the market. That combination only happens when the trucks that left the board are not coming back: at 16.8 the ratio is still **57% above** the 10.7 it printed a year ago. DAT's own 35-day forecast is the tell — reefer is the only mode it has *rising*, to **\$2.77**.

THE SEASONAL PREMIUM IS NOW THE NUMBER THAT MATTERS

Reefer runs **28% above** its nine-year seasonal average, up from +27% last week and still the widest seasonal premium of any mode. The y/y figure held at **+33%** for a second week, so the 2025 base has stopped catching up. The 13-week average rose to **\$2.66** from \$2.64. Note that DAT revised the 10/3 print down to \$2.69 — the three soft weeks were softer than first reported, which makes this week's move a cleaner break, not a bounce off a false floor. Price renewals off the seasonal gap.



LTL Market Intelligence

CASS DATA THROUGH SEPTEMBER 2026 · LESS-THAN-TRUCKLOAD

ODFL GRI STATUS

LIVE

▲ 4.9% effective 10/5/2026

CASS SHIPMENTS, SEP Y/Y

+1.9%

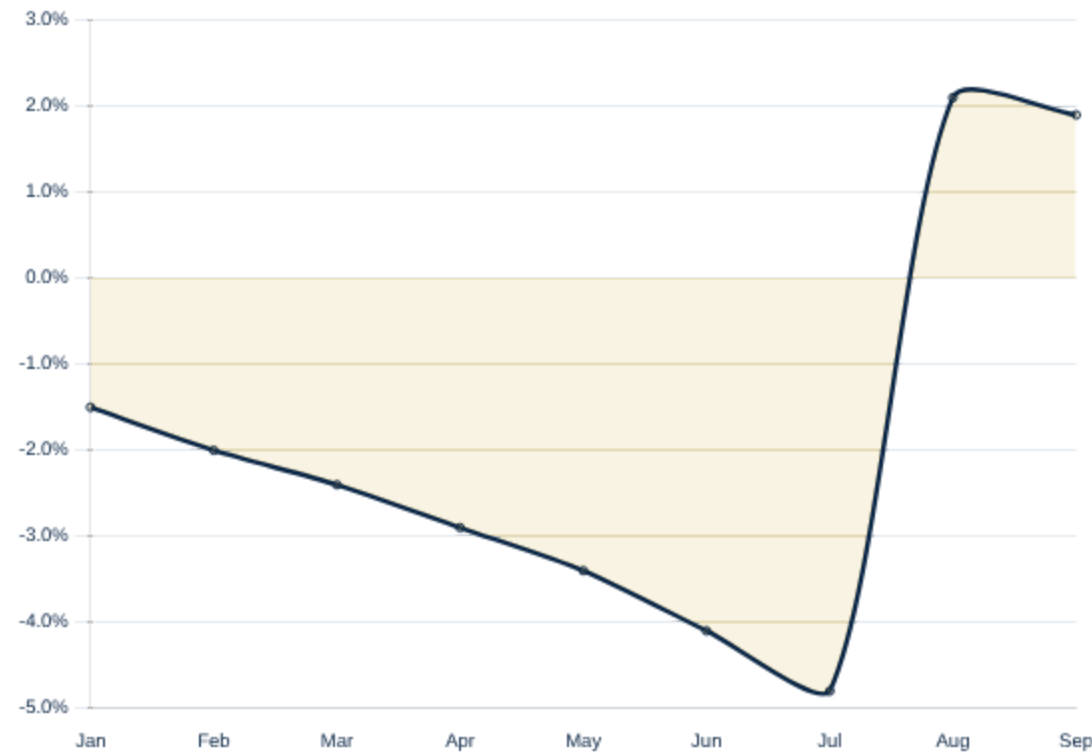
▲ second straight annual gain

EXPENDITURE INDEX, SEP

3.970

▲ +20.4% y/y

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



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, Sep y/y	+1.9%
Cass shipments, Sep m/m	+2.3% (+1.4% SA)
Cass expenditures, Sep	3.970 (+20.4% y/y)
Cass TL linehaul index, Sep	154.8 (+10.1% y/y)
Cass October guidance	~+4% shipments / +23% exp.
LTL cost index, Q3 vs. 2018 base	+78.8% (+11.9 pts y/y)
LTL cost index, Q4 projected	+82.5% (+14.7 pts y/y)
LTL fuel surcharges, Sep y/y	+79%

Sources: Cass Information Systems Freight Index, September 2026, released 10/13/2026 (shipments, expenditures, and truckload linehaul components; January–July y/y chart points carried forward from prior editions of this report). TD Cowen–AFS Freight Index Q3 2026 LTL rate-per-pound reading and Q4 projection, 10/14/2026. Carrier GRI announcements.

SEPTEMBER CONFIRMED IT: TWO GAINS, AND THE COST SIDE IS RUNNING AWAY

Shipments came in **+1.9% y/y** — a second consecutive annual gain after the 3.5-year downturn — with Cass guiding October to roughly **+4% y/y** on normal seasonality. But expenditures ran **+20.4%** against shipments at **+1.9%**. That gap is not volume; it is price and fuel. LTL fuel surcharges alone were **+79% y/y** in September. Cass itself cautions that two months do not make a trend, and names oil and interest rates as the limiters.

Q4 IS ALREADY PRICED HIGHER — AUDIT OCTOBER, BUDGET NOVEMBER

The TD Cowen–AFS index put Q3 LTL rate-per-pound **78.8% above** its 2018 base, up 11.9 points y/y, and projects Q4 at **82.5%** (+14.7 points). ODFL's **4.9%** went live 10/5, so October invoices are the first ones carrying it — pull them and verify the increase hit base rates only, not re-stacked accessorials. Then re-run your truckload-versus-LTL breakpoint against this week's **\$2.26** van linehaul; with TL linehaul rising again, the 8,000–10,000 lb arbitrage is narrowing.



Dry Van Market Intelligence

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

ALL-IN SPOT RATE

\$3.12/mi

▲ +\$0.03 w/w

LINEHAUL RATE

\$2.26/mi

▲ +\$0.05 w/w · +35% y/y

LOAD-TO-TRUCK RATIO

10.5

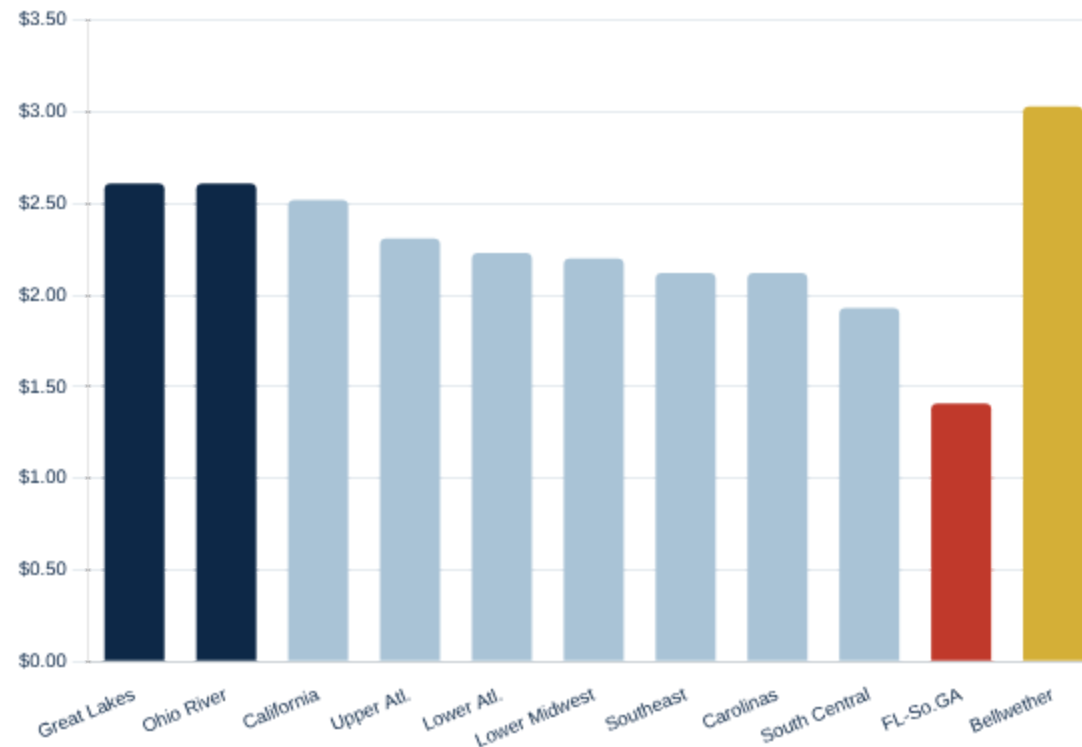
▼ from 13.7 prior wk

LOAD POSTS

1,264,195

▼ -20% w/w

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



REGIONAL DETAIL — WEEK ENDING 10/10/2026

Origin Region	\$/mi	WoW	YoY
Great Lakes	\$2.61	+2¢	+68¢
Ohio River	\$2.61	+7¢	+71¢
California	\$2.52	+7¢	+62¢
Upper Atlantic	\$2.31	+4¢	+58¢
Lower Atlantic	\$2.23	0¢	+57¢
Lower Midwest	\$2.20	-1¢	+43¢
Southeast	\$2.12	+1¢	+50¢
Carolinas	\$2.12	+1¢	+49¢
South Central	\$1.93	+2¢	+36¢
Florida–So. Georgia	\$1.41	-1¢	+25¢
Bellwether (10-State)	\$3.03	+3¢	+86¢

Source: DAT Freight & Analytics Dry Van Report, week ending 10/10/2026. The ten origin regions shown are 87.8% of national outbound loads; DAT published them by load-share rank this week rather than by percentage, so the year-over-year column replaces load share. Bellwether states are +39.7% y/y and hold 35.7% of national outbound volume.

EIGHT OF TEN REGIONS UP ON A 20% DROP IN LOAD POSTS

Load posts fell **20.4%** and truck posts rose **4.0%**, taking the ratio from 13.7 to **10.5** — and eight of ten origin regions still posted **higher** linehaul, led by Ohio River and California at **+7¢**. Only Lower Midwest and Florida–South Georgia slipped, by a penny each. When rates rise into a 20% volume decline, the binding constraint is trucks, not freight. The ratio is still **67% above** the 6.29 it printed a year ago.

GREAT LAKES AND OHIO RIVER NOW TIE AT THE TOP

Ohio River jumped **7¢ to \$2.61** and caught Great Lakes, which added only 2¢. Against Florida–South Georgia at **\$1.41** that is a **120¢/mile** spread, up from 117¢, with year-over-year gains ranging **+25¢ to +71¢** by origin. South Central at **\$1.93** carries the second-largest share of national volume at the second-lowest rate — the lane group where a blended national benchmark does the most damage. DAT's 35-day forecast eases to **\$2.23** (band \$2.16–\$2.30), so most of the remaining upside is already in this print.



Flatbed Market Intelligence

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

ALL-IN SPOT RATE

\$3.68/mi

▼ -\$0.02 w/w

LINEHAUL RATE

\$2.65/mi

▲ +\$0.01 w/w · +29% y/y

LOAD-TO-TRUCK RATIO

36.6

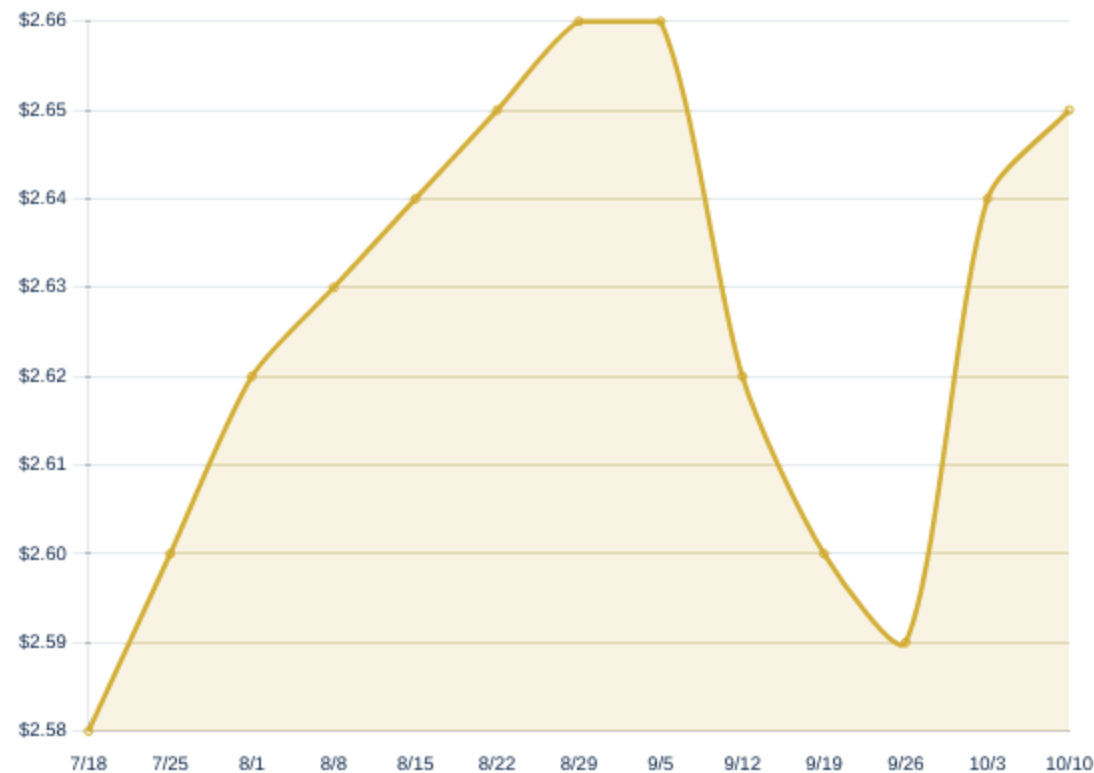
▼ from 44.1 prior wk

VS. 9-YR SEASONAL AVG

+25.4%

▲ \$0.54 over \$2.11

FLATBED LINEHAUL RATE — TRAILING 13 WEEKS



FLATBED SNAPSHOT — WEEK ENDING 10/10/2026

Metric	Value	Chg
All-in rate	\$3.68/mi	-\$0.02
Linehaul rate	\$2.65/mi	+\$0.01
Implied fuel component	\$1.03/mi	-\$0.03
Load-to-truck ratio	36.6	-7.5
Truck posts	23,349	+6%
Load posts	854,535	-12%
Bellwether roster (51.7% of vol.)	\$3.24/mi	+\$0.01
Ratio vs. year ago (27.16)		+34.8%
Year-over-year (linehaul)		+28.8%

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

FLATBED IS THE ONE MODE WHERE ALL-IN FELL

Linehaul rose **1¢ to \$2.65** while the all-in rate fell **2¢ to \$3.68** — a clean illustration of the week's mechanics: the base rate added a penny and the fuel component gave back three. The ratio dropped from 44.13 to **36.60** on load posts **-12.5%** against truck posts **+5.6%**. It is still the tightest board in the market and **34.8% tighter** than a year ago, but the momentum has clearly slowed from the +6¢ move of the prior week.

CAROLINAS +19¢ WHILE THE SOUTHEAST GAVE BACK — 157¢ SPREAD HOLDS

Carolinas jumped **+19¢ to \$3.00** and Great Lakes **+11¢ to \$2.91**, while Upper Atlantic **-5¢** and Southeast **-4¢** retreated. Ohio River at **\$3.28** against Lower Mountain at **\$1.71** is a **157¢/mile** spread, unchanged in width. South Central remains the volume leader at \$2.35. DAT's 35-day forecast now eases to **\$2.59** from \$2.65 last week, on the narrowest band of the three modes (\$2.52–\$2.65) — the clearest signal in the report that open-deck upside is spent. Sign open-deck now and index fuel separately.

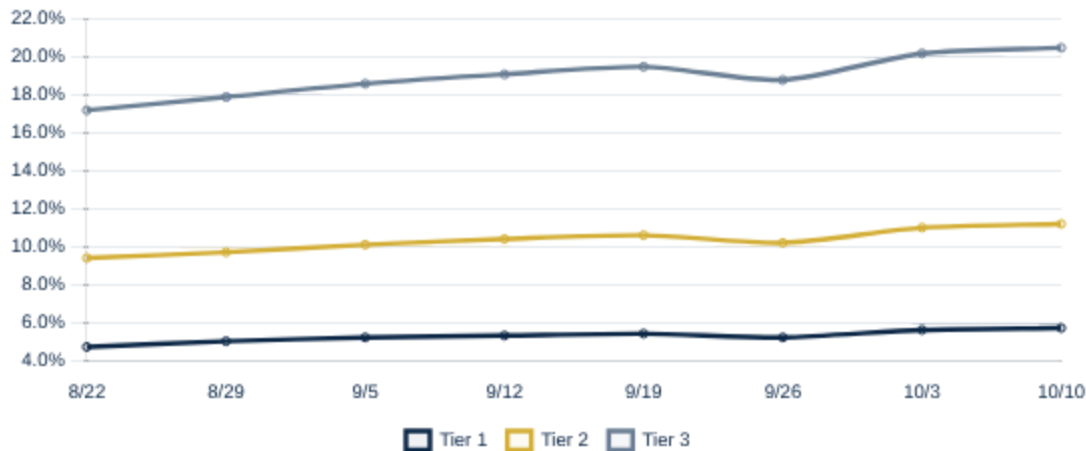


EDI Tender Decline Report ILLUSTRATIVE / BENCHMARK DATA

WEEK OF OCTOBER 12, 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)	5.7%	22 min
Tier 2 (Secondary)	11.2%	49 min
Tier 3 (Spot/Backup)	20.5%	1h 54m

Illustrative benchmark data, not a live carrier feed. Tier curves are shaped to the published national tender-rejection trend (14.17% on 10/14/2026, up from roughly 14% in early October and 12.54% on 9/21).

EDI TRANSACTION ERRORS — ILLUSTRATIVE BENCHMARK

Error Type	Weekly Volume	% of EDI Transactions	Typical Root Cause
Rate Mismatch (210 vs. tariff)	289	0.8%	Monthly fuel tables still carrying the September peak as diesel flattens
Late Status Update (214)	412	1.1%	Post-quarter-end staffing normalization against a 14%+ reject rate
Duplicate PRO / Load Number	466	1.3%	TMS retry logic on 990 timeout as declines climbed in all tiers
Missing Appointment Window (204)	318	0.9%	Incomplete load tender at ship-from
Invalid / Retired SCAC	221	0.6%	Carrier bankruptcies and restructurings not reflected in onboarding records

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

RETIRED-SCAC ERRORS ARE THE ONE TO WATCH THIS QUARTER

Published commentary counts roughly **16 carriers** filing for bankruptcy or restructuring recently, citing fuel costs. In a real 990/204 feed that shows up as rising **invalid-SCAC rejects and duplicate load numbers** — the TMS re-tenders to a carrier that no longer exists, times out, and retries. It is the cheapest exception class to fix and the one most likely to be mis-coded as a “carrier service failure.” Reconcile your active-carrier roster against current authority this month, not at renewal.

ALL THREE TIERS ROSE AGAIN — AND THE RATE CASE IS NEARLY SPENT

Tier 3 declines run roughly **3.6x** Tier 1's in this panel and every tier rose for a second week, the pattern a network shows when national rejections climb to **14.17%** and core carriers run out of trucks. Note the change from last week: diesel fell only 2.0¢, so the stale-fuel-table argument is now worth **3.1¢/mile**, not 5.1¢. The rate-mismatch queue will shrink; the capacity-driven decline queue will not. **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 12, 2026 · EIA ON-HIGHWAY DIESEL & ILLUSTRATIVE FSC MODEL

U.S. AVG DIESEL (EIA)

\$6.179/gal

▼ -\$0.020 w/w · wk end 10/12

DOWN OFF THE 9/21 RECORD

-\$0.350

▼ third straight decline

YEAR-OVER-YEAR

+68.6%

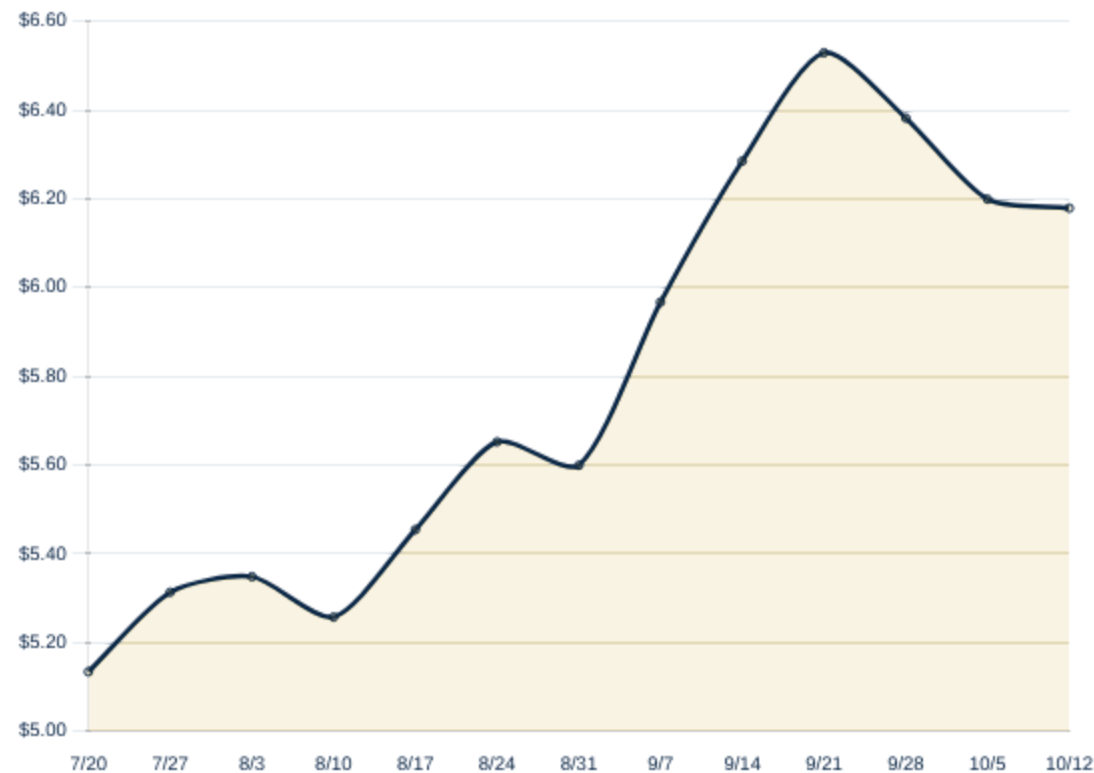
▲ vs. \$3.665/gal, Oct 2025

CALIFORNIA DIESEL

\$8.091/gal

▲ +\$0.009 w/w · +63.8% 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	48.9¢	49.2¢	10.2¢
LTL (% of linehaul) 10.7 pts per \$1.00 over \$3.00/gal	34.0%	34.2%	7.1%

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 \$6.179/GAL

MODELED

Baseline	5.5 MPG	6.0 MPG	6.5 MPG	7.0 MPG
\$2.50/gal	\$0.669	\$0.613	\$0.566	\$0.526
\$3.00/gal	\$0.578	\$0.530	\$0.489	\$0.454
\$3.50/gal	\$0.487	\$0.447	\$0.412	\$0.383

The baseline and MPG assumptions a carrier writes into a fuel table move the recovery by **28.6¢/mile** across this grid at today's price — a larger swing than any linehaul negotiation this quarter. Both are negotiable terms; verify them before signing. [MODELED](#)

THE DECLINE STALLED — 2.0¢ AFTER 14.7¢ AND 18.3¢

National on-highway diesel printed **\$6.179/gal** for the week ending 10/12/2026, down just **2.0¢** after two steep weekly declines. Cumulatively diesel is **35.0¢ below** the 9/21 record of \$6.529, but **four of eleven regions rose** this week — the West reversed entirely. The move off the 7/6 low of \$4.578 is still **+\$1.601 (+35.0%)** and the year-over-year gap **+68.6%** against \$3.665/gal, up from +67.0% last week because the year-ago base fell faster than the current price did. Two weeks of relief, then a floor.

YOUR AUDIT ARGUMENT SHRANK FROM 5¢ TO 3¢ IN ONE WEEK

At 6.5 MPG against a \$3.00/gal baseline the illustrative truckload surcharge eased from 49.2¢ to **48.9¢/mile**, and the LTL equivalent from 34.2% to **34.0%** of linehaul. A shipper still on a monthly table reset at the September peak is now over-recovering by only **3.1¢/mile**, down from 5.1¢. The asymmetry has flipped: with the West turning up, the next monthly reset is more likely to *under-recover* than over. Move to a weekly index now, while the switch is still cheap to argue. Regional detail on page 9.



Diesel Fuel Cost by PADD — Regional Detail

EIA ON-HIGHWAY DIESEL SURVEY, WEEK ENDING OCTOBER 12, 2026 · ALL REGIONS

WIDEST REGIONAL SPREAD

\$2.446

▲ California over Lower Atlantic

STEEPEST YOY

+76.1%

▲ PADD 3 Gulf Coast

REGIONS LOWER THIS WEEK

7 of 11

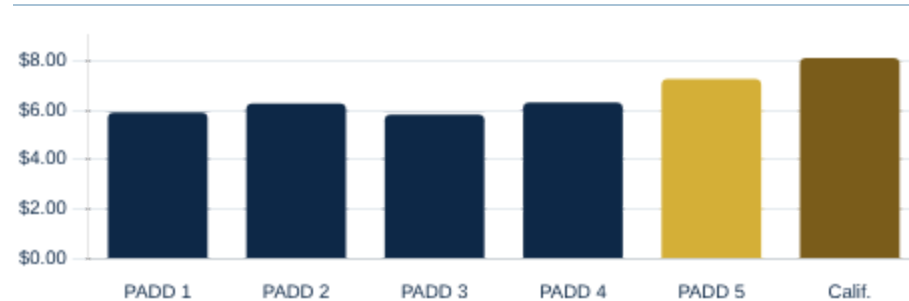
▼ the entire West turned up

PADD 5 FSC PREMIUM

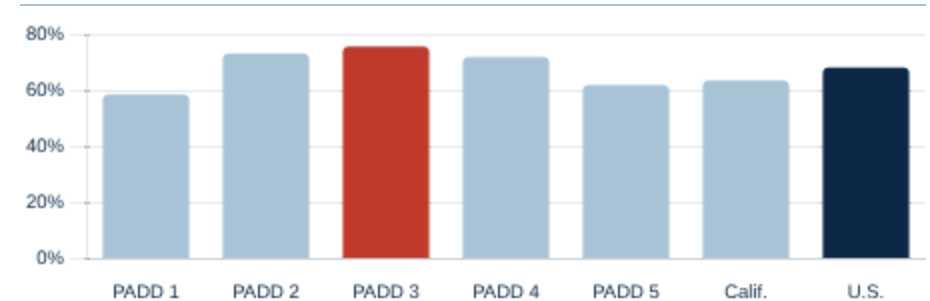
+16.3¢/mi

▲ over U.S. benchmark

ON-HIGHWAY DIESEL PRICE BY PADD (\$/GAL) — WEEK ENDING 10/12/2026



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



DIESEL COST & YEAR-OVER-YEAR CHANGE BY REGION — EIA WEEK ENDING 10/12/2026

Region	PADD	10/12/2026	WoW	Year Ago	YoY \$	YoY %	FSC \$/mi 6.5 MPG, \$3.00 base
U.S. Average		\$6.179	−\$0.020	\$3.665	+\$2.514	+68.6%	\$0.489
East Coast	PADD 1	\$5.908	−\$0.043	\$3.721	+\$2.187	+58.8%	\$0.447
New England	1A	\$6.441	−\$0.035	\$3.949	+\$2.492	+63.1%	\$0.529
Central Atlantic	1B	\$6.471	−\$0.014	\$3.877	+\$2.594	+66.9%	\$0.534
Lower Atlantic	1C	\$5.645	−\$0.054	\$3.639	+\$2.006	+55.1%	\$0.407
Midwest	PADD 2	\$6.259	−\$0.027	\$3.606	+\$2.653	+73.6%	\$0.501
Gulf Coast	PADD 3	\$5.809	−\$0.010	\$3.299	+\$2.510	+76.1%	\$0.432
Rocky Mountain	PADD 4	\$6.302	+\$0.035	\$3.658	+\$2.644	+72.3%	\$0.508
West Coast	PADD 5	\$7.240	+\$0.011	\$4.464	+\$2.776	+62.2%	\$0.652
W. Coast ex-CA	5 ex-CA	\$6.503	+\$0.013	\$4.052	+\$2.451	+60.5%	\$0.539
California	CA	\$8.091	+\$0.009	\$4.940	+\$3.151	+63.8%	\$0.783

Source: U.S. Energy Information Administration, Weekly Retail On-Highway Diesel Prices, survey week ending 10/12/2026 (eia.gov/petroleum/gasdiesel), cross-checked against the EIA weekly by-area series table, which prints the same 10/12 values. 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**

THE WEST REVERSED — AND THAT IS THE SIGNAL, NOT THE NATIONAL AVERAGE

Four regions rose this week: **Rocky Mountain +3.5¢**, **W. Coast ex-CA +1.3¢**, **West Coast +1.1¢**, **California +0.9¢**. The declines left were small — Lower Atlantic −5.4¢ was the steepest, against −25.4¢ a week ago. PADD 1C at **\$5.645** keeps the national low from Gulf Coast at \$5.819, but **Gulf Coast is +76.1% y/y** and **Midwest +73.6%**, the two steepest annual moves in the country. A national average that fell 2¢ conceals a market that has bifurcated by region.

A SINGLE NATIONAL FSC TABLE STILL MISPRICES BY 37.6¢

California at **\$8.091/gal** carries a **78.3¢/mile** illustrative surcharge — **29.4¢ above the national benchmark** — while Lower Atlantic sits **8.2¢ below** it, a **37.6¢/mile** span inside one blended table. PADD 5 runs a 16.3¢/mile premium and the California-to-Lower-Atlantic spread widened to **\$2.446/gal** from \$2.383. With the West rising and the East flattening, that spread grows from here. Origin-PADD-aware fuel mechanisms remain the highest-return change available in a Q4 bid.

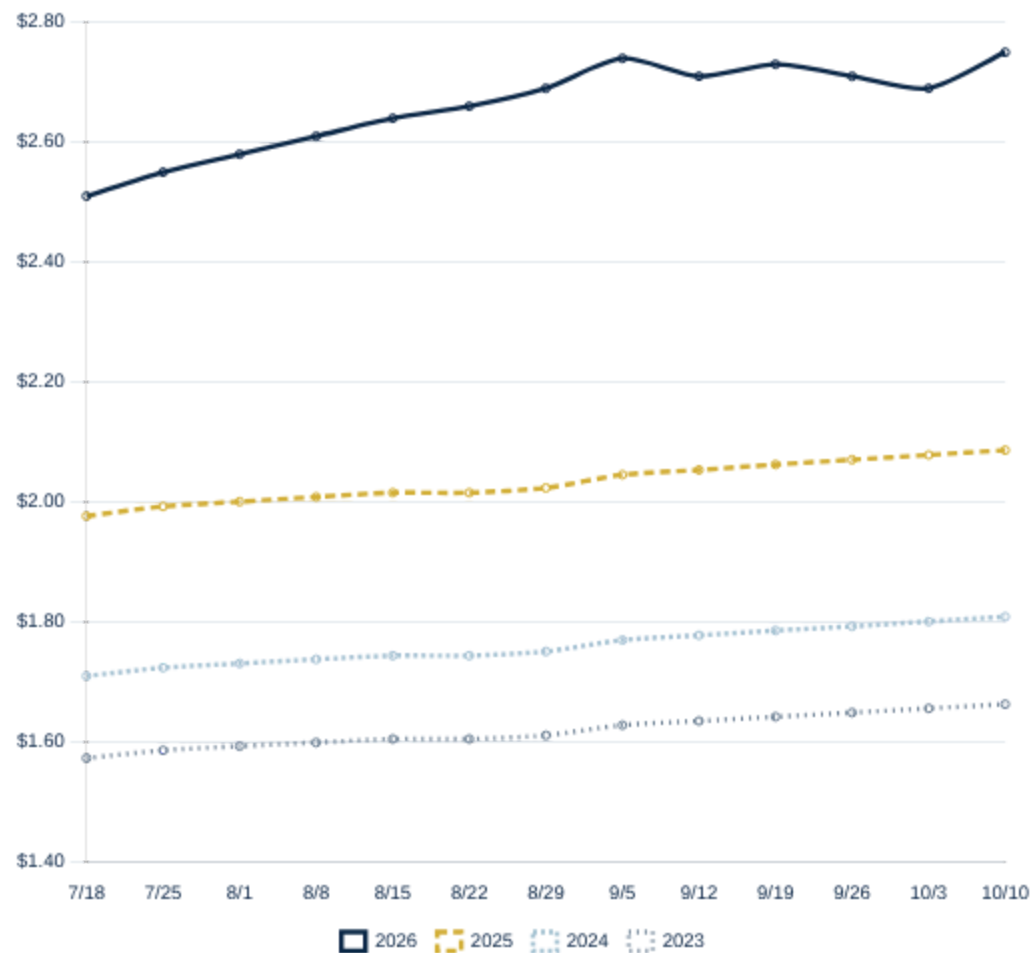


Reefer Rate — 13-Week Comparison

ROLLING WINDOW: WEEK ENDING 7/18/2026 – 10/10/2026 · LINEHAUL \$/MILE BY YEAR

The rolling 13-week window advances one week from last edition's 7/11–10/3 to **7/18–10/10**, picking up DAT's newest print. Two changes matter this edition. First, the 2026 series made a **new high at \$2.75**, clearing the \$2.74 double top set on 9/5 and matched on 10/3 — so the “consolidation, not reversal” read from last edition is confirmed. Second, DAT's reported +6¢ weekly move implies the **10/3 print was revised down to \$2.69** from the \$2.74 originally published; the series below carries the revised basis, which makes the three-week pause deeper than first shown and this week's break correspondingly cleaner. The 13-week average rose to **\$2.66** from \$2.64. The move came on load posts falling 21% and truck posts rising 2% — a rate high set into a loosening board, which is what a supply-constrained market looks like. 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	\$2.66	—	DAT actual
2025	\$2.03	+31%	Analyst est. EST
2024	\$1.76	+51%	Analyst est. EST
2023	\$1.62	+64%	Analyst est. EST

Source: DAT Freight & Analytics (2026 weekly actuals, with the 10/3 print on DAT's revised basis; weeks before 9/5 reconstructed from DAT's published weekly changes). 2023–2025: Five Pillars Business Consulting working estimate.

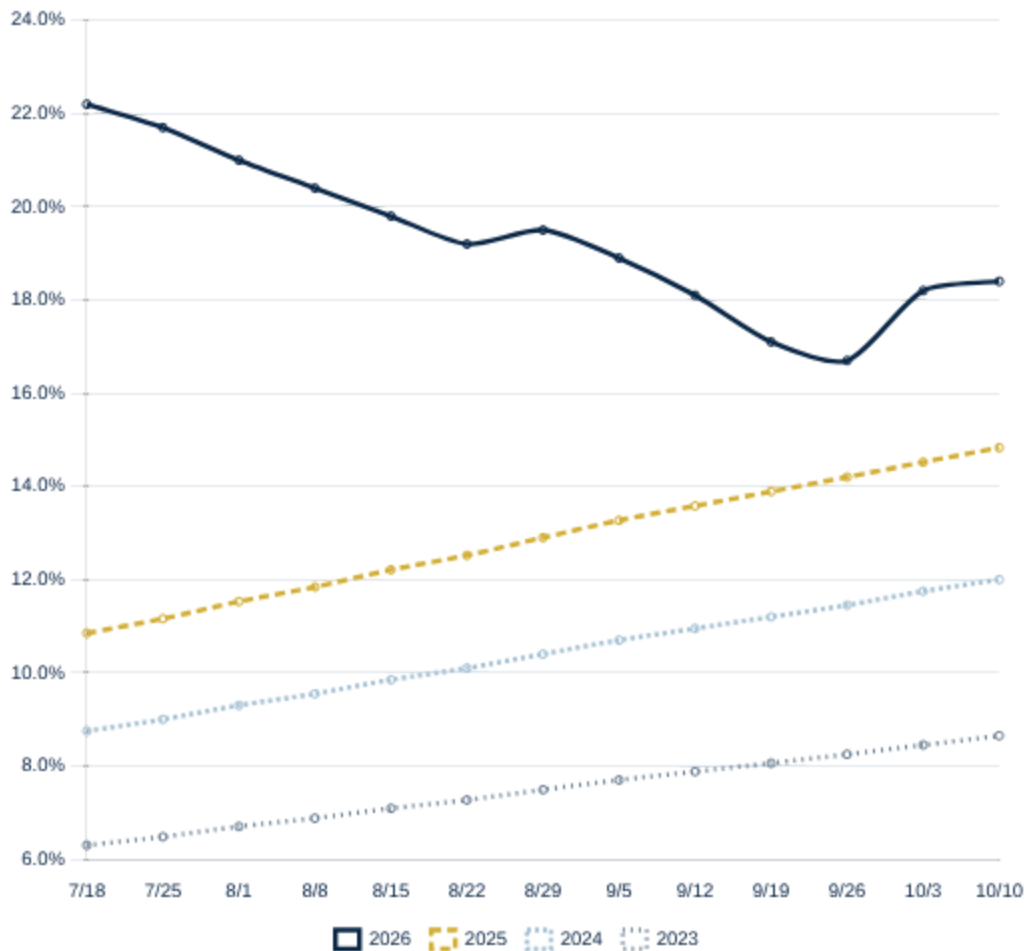


Reefer ROTRI — 13-Week Comparison

ROLLING WINDOW: WEEK ENDING 7/18/2026 – 10/10/2026 · OUTBOUND TENDER REJECTION % BY YEAR

The turn flagged last edition extended into a second rising week. FreightWaves reported the national SONAR tender-rejection index at **14.17%** on 10/14/2026 — an unusual mid-October spike, up from roughly 14% in early October and the **12.54%** print carried two editions ago. The analysis that matters is *why*: SONAR's tender-volume index showed **no demand surge**, so the rise is read as a supply shortfall, and that is corroborated here by truck posts running more than 20% below year-ago across all three modes. The reefer estimate below therefore rises to **18.4%**, consistent with reefer's load-to-truck ratio holding **57% above** its year-ago level even after falling from 21.6 to 16.8. ROTRI figures are Five Pillars Business Consulting working estimates **Analyst Est.** built from the published national index plus reefer's typical premium over it (held constant at roughly 4.2 points); 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: published commentary now projects the national index **above 20% by December**, and October was supposed to be the soft part of Q4.

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



13-WEEK AVERAGE BY YEAR

Year	13-Wk Avg ROTRI	vs. 2026	Basis
2026	19.3%	—	Analyst est. EST
2025	12.9%	+6.5 pts	Analyst est. EST
2024	10.4%	+8.9 pts	Analyst est. EST
2023	7.5%	+11.8 pts	Analyst est. EST

Basis: published FreightWaves SONAR national tender-rejection commentary (13.45% on 9/10/2026; 12.54% on 9/21/2026; approximately 14% on 10/7/2026; 14.17% on 10/14/2026, with 20%+ projected by December). Reefer-specific and historical detail are Five Pillars Business Consulting working estimates.