FIVE PILLARS BUSINESS CONSULTING

MARKET INTELLIGENCE PACKAGE

Week of October 26, 2026

PREPARED OCTOBER 28, 2026

CONTENTS

2. Executive Summary 2
3. Reefer Market Intelligence 3
4. LTL Market Intelligence 4
5. Dry Van Market Intelligence 5
6. Flatbed Market Intelligence 6
7. Drayage Market Intelligence 7
8. Intermodal Market Intelligence 8
9. EDI Tender Decline Report 9
10. Fuel Surcharge Report — All Modes 10
11. Diesel Cost by PADD — Regional 11
12. Reefer Rate — 13-Week Comparison 12
13. Reefer ROTRI — 13-Week Comparison 13

Mike Cafarelli · Principal, Five Pillars Business Consulting

REVENUE GROWTH · COST MANAGEMENT · MARKET ACCESS · REMOVE ROADBLOCKS · HIGH-PERFORMANCE CULTURE

Executive Summary

WEEK OF OCTOBER 26, 2026 · MARKET SNAPSHOT

The rate decline changed character this week. For a month, falling all-in rates were a fuel artifact while base rates held; this week DAT reports surcharges **nearly unchanged** — the week-ending **10/24** print still runs off EIA's **$6.179** from 10/12 — so the whole decline came out of **linehaul**. Van fell **2¢ to $2.24**, reefer **2¢ to $2.73**, flatbed **2¢ to $2.63**; all-in landed at **$3.07 / $3.63 / $3.61**. The other half of the squeeze is loaded: diesel rose a **second straight week to $6.352** (**+7.6¢**, survey **10/26**) and DAT says that adds roughly **2¢/mile** next print — lower linehaul, higher fuel line, same week. Capacity says do not read it as a turn. All three ratios fell (van **9.51**, reefer **14.79**, flatbed **34.93**) but **truck posts rose** for the first time this quarter, reefer **+1.6%**, flatbed **+3.3%** — against van truck posts still **25.9% below** last year and linehaul **32.8% / 31.4% / 28.2%** above 2025. The operational story moved to the ports: **35,688** containers awaiting rail at LA/Long Beach on **10/26**, rail dwell **7.19 days**, appointment success **54%** — and a PMA warning on **10/27** of a possible **11/1** walkout at terminals carrying **85% of Long Beach** volume. That outranks Section 301, which USTR moved to defuse on **10/26** by proposing to extend the vessel-fee suspension to **1/9/2027**. Rail still took the freight: AAR week 42 printed **303,677** units, **+11.3% y/y**, with intermodal spot up only **7.6%** against truckload's **46.8%**. Three moves: take the linehaul give in base rate and refuse to hand back the fuel index; pre-book dray and plan for an 11/1 gate disruption; convert rail-tolerant lanes while the spread is **39 points**.

MARKET AT A GLANCE

Mode	All-In Rate	Linehaul	WoW (Linehaul)	YoY	Load:Truck	Signal
Reefer	$3.63/mi	$2.73/mi	−$0.02	+31.4%	14.79	Truck posts +1.6% — first capacity sign
Dry Van	$3.09→$3.07/mi	$2.24/mi	−$0.02	+32.8%	9.51	Truck posts still −25.9% y/y
Flatbed	$3.61/mi	$2.63/mi	−$0.02	+28.2%	34.93	Ratio eased on truck posts +3.3%; still 3.7× van
LTL	4.8–5.4% GRI	154.8 Cass TL LH	+0.6% m/m	+20.4% Cass exp.	—	ODFL took a 2nd 4.9% GRI effective 10/5
Drayage	$285–$420 MODELED	+22% FSC	+4% trend	+19% LA imports	—	35,688 containers awaiting rail; 11/1 strike risk
Intermodal	—	+7.6% y/y InTek	+0.9%	+11.3% units	—	303,677 units wk 42; 39-pt discount to truckload

Sources: DAT Freight & Analytics weekly spot data, week ending 10/24/2026 (Dry Van, Reefer and Flatbed Reports; all-in summary via TheTrucker, 10/26). EIA Weekly Retail On-Highway Diesel Prices, survey week ending 10/26/2026 (released 10/27). Cass Freight Index, September 2026 — the October release is not due until mid-November, so the LTL row carries the same reference month as last edition. AAR weekly rail traffic, week 42 ending 10/24/2026 (published 10/28). Ports of LA and Long Beach September 2026 cargo releases; October port volumes publish mid-November. NRF/Hackett Global Port Tracker, 10/8/2026. InTek Logistics Intermodal Index, week ending 10/19/2026. Drayage band is a DrayLocator indicative range, not a reported transaction index. Tender-rejection figures are the latest published prints, dated 10/20/2026.

WHY WORK WITH FIVE PILLARS BUSINESS CONSULTING — NOW

This week the headline and the mechanism split, and reading one without the other produces the wrong decision. All-in rates fell a fifth straight week — but the cause moved from fuel to linehaul, so the concession is real, while diesel rising into the same print takes the savings back. Rail set another double-digit volume week as rail *service* degraded to a 35,688-container backlog. **Five Pillars Business Consulting** provides market-advisory and rate-benchmarking support so teams enter carrier, drayage and 3PL negotiations with defensible lane-level targets split cleanly between base and fuel; contract-negotiation support that stress-tests proposed fuel tables, GRI asks and per-diem/chassis schedules against the DAT, EIA, Cass and AAR series in this package; mode-conversion analysis that prices the truckload-to-intermodal spread by lane against actual rail service levels, not just rail price; and ongoing 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 toward any particular carrier relationship.

THIS WEEK THE CONCESSION WAS REAL — TAKE IT IN BASE RATE

For four weeks the all-in decline was fuel while linehaul held. This week DAT says surcharges were **nearly unchanged**, so the whole 2–3¢ drop came from **linehaul**: van **$2.24**, reefer **$2.73**, flatbed **$2.63** — the first base-rate give since mid-September. Meanwhile diesel rose **7.6¢** and DAT expects **+2¢/mile** next print. Take the linehaul move; hold the fuel table on a weekly EIA index.

TRUCK POSTS ROSE — WATCH IT, DO NOT PRICE IT YET

Reefer truck posts rose **1.6%** and flatbed **3.3%** — the first increases this quarter — and all three ratios fell. But van truck posts remain **25.9% below** last year and linehaul is **28–33%** above 2025. One week of posting behavior inside a 25% capacity deficit is a signal to monitor, not a basis for a 2027 bid.

NOVEMBER 1 AT LA/LB IS THE WEEK'S OPERATIONAL RISK

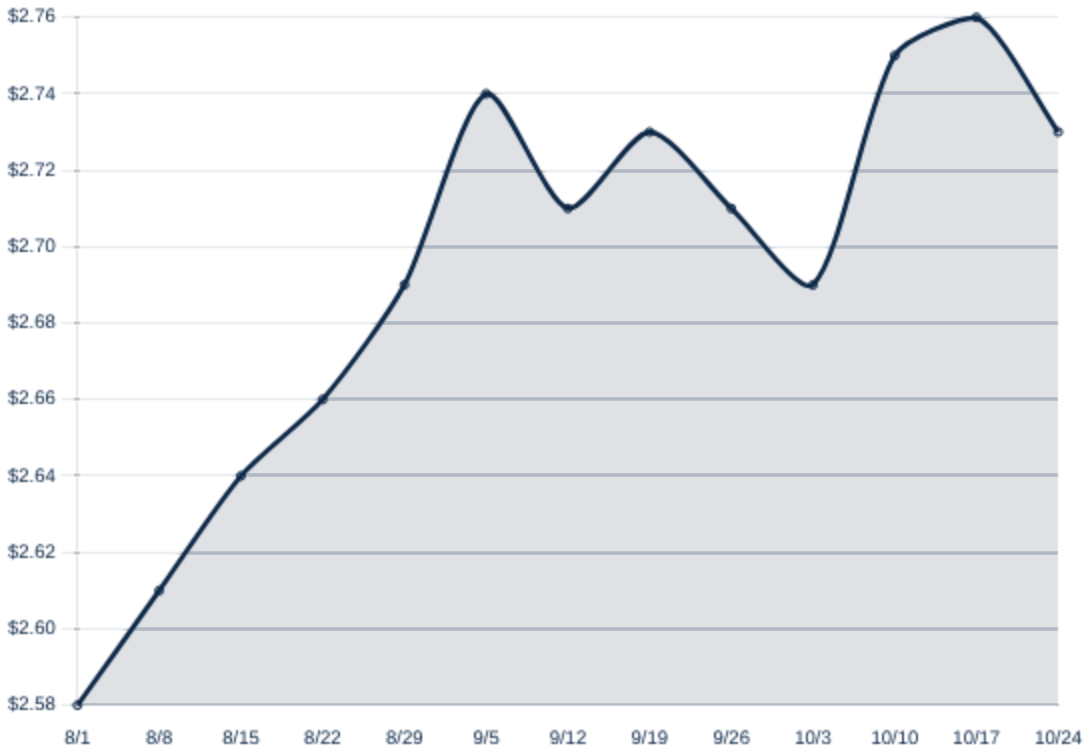
PMA warned **10/27** of a possible **11/1** walkout by ~250 ILWU Local 26 watchmen across terminals carrying **85% of Long Beach** cargo — atop a **35,688**-container rail backlog and **54%** appointment success. Section 301 went the other way: USTR's **10/26** notice proposes extending the fee suspension to **1/9/2027**. Pull dray forward and cap fee passthrough in Q1.

Reefer Market Intelligence

DAT PRINT WEEK ENDING 10/24/2026 · TEMPERATURE-CONTROLLED TRUCKLOAD

ALL-IN SPOT RATE	LINEHAUL RATE	LOAD-TO-TRUCK RATIO	TENDER REJECTIONS
$3.63/mi	**$2.73/mi**	**14.79**	**21.44%**
▼ −$0.03 w/w (linehaul)	▼ −$0.02 w/w · +31.4% y/y	▼ from 15.77 prior wk	▲ print of 10/20 — 1 in 5

REEFER LINEHAUL RATE — TRAILING 13 WEEKS



REEFER SNAPSHOT — WEEK ENDING 10/24/2026

Metric	Value	Chg
All-in rate	$3.63/mi	−$0.03
Linehaul rate	$2.73/mi	−$0.02
Implied fuel component	$0.90/mi	flat
Load-to-truck ratio	14.79	−0.98
Truck posts	+1.6%	w/w
Load posts	−4.7%	−4.4% y/y
Ratio vs. year ago (12.36)		+19.6%
vs. 9-yr seasonal avg ($2.12)		+28.6%
35-day DAT forecast		$2.78 (band $2.70–$2.86)

Source: DAT Freight & Analytics weekly reefer data, week ending 10/24/2026; all-in rate via TheTrucker, 10/26/2026. Implied fuel component is all-in less linehaul. DAT's 10/24 surcharge still runs off EIA's 10/12 price of $6.179, so the fuel line is flat this week by construction. Chart weeks before 9/5 are reconstructed from DAT's published weekly changes. **EST**

THIS TIME THE CUT CAME OUT OF THE BASE RATE

Reefer linehaul fell **2¢ to $2.73** — the first decline since mid-September, and this week it is not a fuel artifact. DAT reports surcharges nearly unchanged, so the **3¢** drop in all-in to **$3.63** is base-rate give. Linehaul is still **31.4% (+65¢)** above last year and **28.6% above** the nine-year seasonal average of $2.12. No top-ten origin region gained; **Lower Midwest fell 17¢ to $3.16** and the Southeast held flat at $2.42. DAT nonetheless still forecasts **$2.78** — reefer remains the only mode it has rising.

TRUCKS CAME BACK TO THE BOARD — ONE WEEK, TWO REGIONS STILL EXTREME

Reefer truck posts rose **1.6%**, the first increase this quarter, while load posts fell **4.7%** and now sit **4.4% below** last year. The ratio eased to **14.79**, still **19.6% above** the 12.36 of a year ago. But the tightness is regional and severe: Pacific Northwest reefer rejections averaged roughly **41%** through October against ~16% a year ago, and the Midwest is near **29%** from 15%. USDA volume rose **7% w/w** with Washington apple and pear lanes **63% above** last year. Lock PNW and Upper Midwest capacity on commitment, not on the national ratio.

LTL Market Intelligence

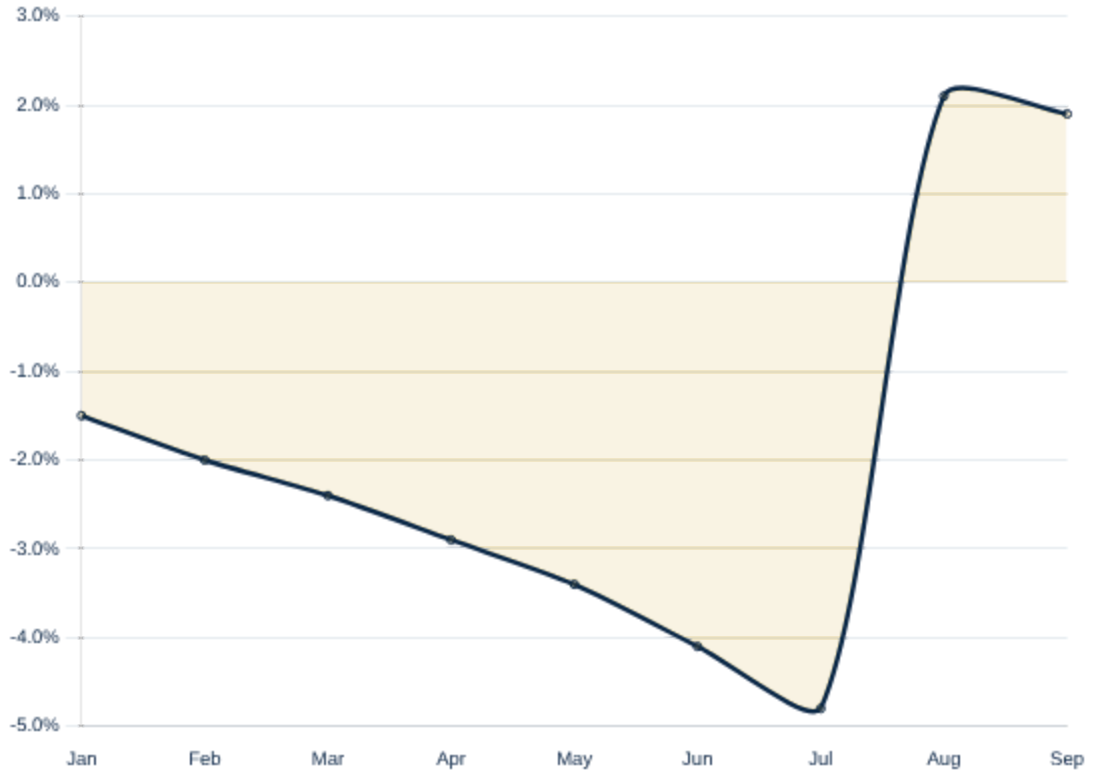
CASS DATA THROUGH SEPTEMBER 2026 · LESS-THAN-TRUCKLOAD

JAN 2026 GRI RANGE (6 CARRIERS)
4.8–5.4%
▲ plus off-cycle increases

CASS SHIPMENTS, SEP Y/Y
+1.9%
▲ +2.3% m/m · 2nd annual gain

CASS EXPENDITURES, SEP Y/Y
+20.4%
▲ from +19.0% in August

CASS FREIGHT INDEX — SHIPMENTS, YEAR-OVER-YEAR % BY MONTH (2026)



LTL & COST-INDEX SNAPSHOT

Item	Value
Cass shipments index, Sep	1.062 · +1.9% y/y
Shipments m/m · seas. adj.	**+2.3% · +1.4%**
Cass expenditures index, Sep	3.970 · +20.4% y/y
Expenditures m/m · seas. adj.	**+6.7% · +4.0%**
Implied rate + fuel, Sep y/y	**≈+18%** EST
Cass TL Linehaul Index	154.8 · +10.1% y/y
Cass October guidance	**≈+4% ship. / +23% exp.**
2026 full-year pace	**Exp. +12% · TL idx +7%**
Old Dominion / ABF / XPO GRI	4.9% / 5.0% / 5.1%
Saia / FedEx Frt. / Estes GRI	5.2% / 5.4% / 4.8%
Off-cycle: ODFL 10/5 · ArcBest 6/22	4.9% · 5.9%

Sources: Cass Transportation Index Report, September 2026 (cassinfo.com). ***September remains the latest Cass data*** *— the October report is not due until roughly 11/13/2026, so this page carries the same reference month as last edition with expanded index detail. January 2026 LTL general rate increases per published carrier tariffs. Off-cycle increases: Old Dominion 4.9% effective 10/5/2026 (announced 9/23); ArcBest/ABF Freight 5.9% effective 6/22/2026. Implied rate figure is a Five Pillars Business Consulting working estimate derived by dividing expenditure growth by shipment growth, not a Cass-published series.* EST

CARRIERS ARE NOW TAKING TWO INCREASES A YEAR

The new fact in LTL is not the January number, it is the second one. **Old Dominion took an additional 4.9% GRI effective 10/5/2026**, announced 9/23, across its 559 LTL, 670 cubic-meter and 550 fuel tariffs plus a minimum-charge bump — after a 4.9% January increase. **ArcBest/ABF took 5.9% on 6/22**. A shipper who modeled one annual increase at 4.9% has already absorbed closer to **10%**. Budget two events per carrier per year and put a cap on off-cycle GRIs in the contract language.

VOLUME IS FLAT AND THE BILL IS UP A FIFTH

September shipments rose **1.9% y/y** and **2.3% m/m** — a second straight annual gain after the longest downturn on record — while expenditures rose **20.4% y/y**. Roughly **18 points** is rate and fuel, not freight; on a two-year stack shipments are **−3.6%** while expenditures are **+23.1%**. Cass guides October to **+4% shipments on +23% expenditures** and has 2026 expenditures tracking **+12%** with the truckload index **+7%**. Assume the 2027 ask opens at or above **5.5%** and negotiate accessorials and dimensional rules, not the headline percentage.

Dry Van Market Intelligence

DAT PRINT WEEK ENDING 10/24/2026 · REGIONAL LINEHAUL DETAIL

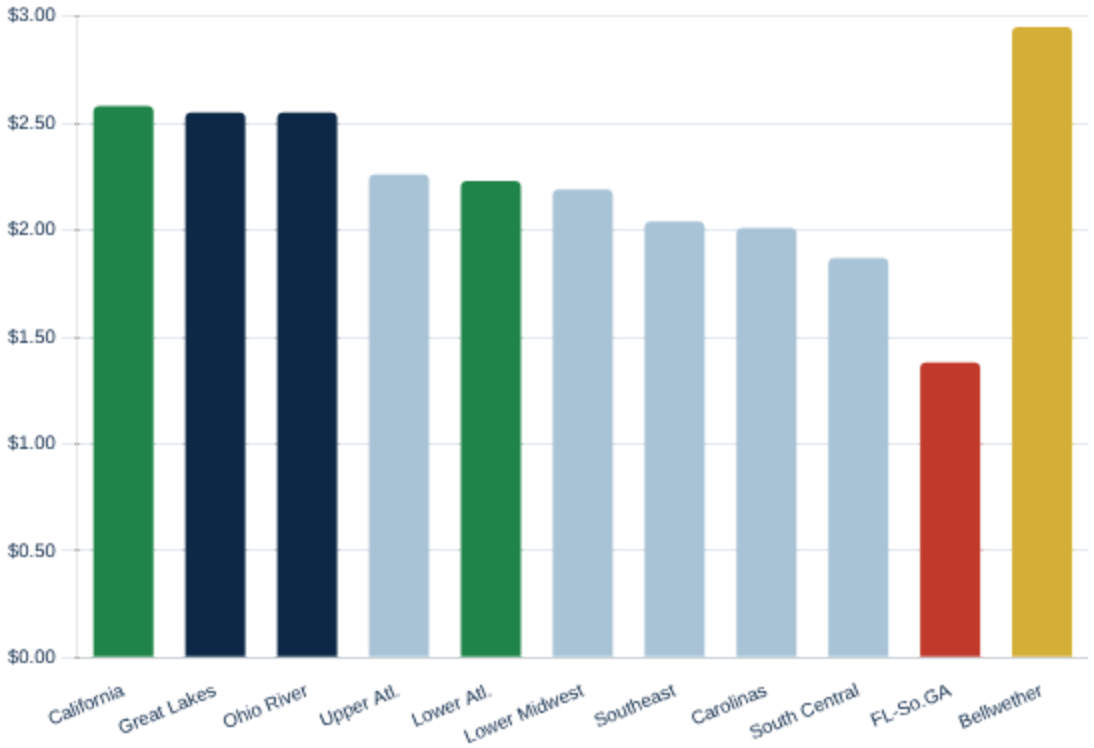
ALL-IN SPOT RATE
$3.07/mi
▼ −$0.02 w/w (linehaul)

LINEHAUL RATE
$2.24/mi
▼ −$0.02 w/w · +32.8% y/y

LOAD-TO-TRUCK RATIO
9.51
▼ from 9.70 prior wk

BELLWETHER STATES
$2.95/mi
▲ +36.7% y/y (−4¢ w/w)

DRY VAN LINEHAUL BY ORIGIN REGION — WEEK ENDING 10/24/2026 ($/MI)



REGIONAL DETAIL — RATE, WOW, YOY

Origin Region	$/mi	WoW	YoY
California	2.58	+2¢	+70¢
Great Lakes	2.55	−4¢	+60¢
Ohio River	2.55	−2¢	+62¢
Upper Atlantic	2.26	−4¢	+54¢
Lower Atlantic	2.23	+2¢	+56¢
Lower Midwest	2.19	−2¢	+40¢
Southeast	2.04	−6¢	+41¢
Carolinas	2.01	−4¢	+38¢
South Central	1.87	−4¢	+30¢
Florida – S. Georgia	1.38	−2¢	+23¢
Bellwether states	**2.95**	−4¢	+79¢

Source: DAT Freight & Analytics Dry Van Report, week ending 10/24/2026. Rates are linehaul only, excluding fuel surcharge. The ten listed origins carried 87.4% of national dry van outbound loads; the bellwether ten states carried 35.4%. No DAT revision to the prior-week ratio this edition: 9.70 carries unchanged from last week's report.

CALIFORNIA ROSE AGAIN — AND IT IS NOW THE HIGHEST REGION IN THE COUNTRY

California gained **2¢ to $2.58** for a second straight week and has moved *past* Great Lakes and Ohio River to lead all origins, up **70¢ (+37%)** year over year. Lower Atlantic also rose **2¢**. Eight of ten regions fell, with the Southeast off **6¢**. The Southwest premium is the record San Pedro Bay import wave working through the highway network — and it is building even as LA/LB rail service degrades, which pushes more boxes onto trucks. Expect California to keep leading the national number into November.

THE RATIO FELL ON SOFTER LOADS, NOT RETURNING TRUCKS

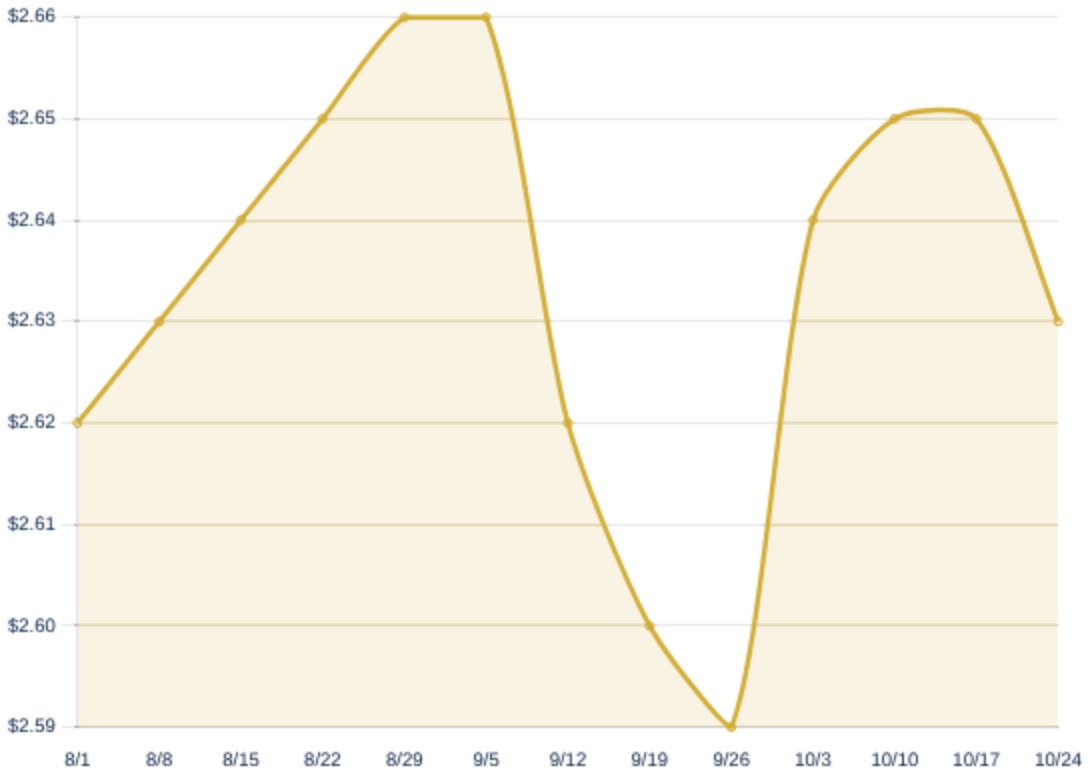
Van load-to-truck slipped from 9.70 to **9.51** on load posts **−2.1%** and truck posts **−0.2%**. Van capacity did *not* return this week — the truck-post increases were in reefer and flatbed. Load posts remain **16.9% above** last year while truck posts sit **25.9% below**, and the ratio is 9.51 against **6.03** a year ago. Linehaul gave 2¢ and is still **23.5% above** the nine-year seasonal average of $1.82. DAT's 35-day forecast is **$2.24** — flat, band $2.17–$2.31.

Flatbed Market Intelligence

DAT PRINT WEEK ENDING 10/24/2026 · OPEN-DECK TRUCKLOAD

ALL-IN SPOT RATE	LINEHAUL RATE	LOAD-TO-TRUCK RATIO	35-DAY FORECAST
$3.61/mi	**$2.63/mi**	**34.93**	**$2.59/mi**
▼ −$0.03 w/w (linehaul)	▼ −$0.02 w/w · +28.2% y/y	▼ from 36.53 — trucks +3.3%	▼ band $2.52–$2.65

FLATBED LINEHAUL RATE — TRAILING 13 WEEKS



FLATBED SNAPSHOT — WEEK ENDING 10/24/2026

Metric	Value	Chg
All-in rate	$3.61/mi	−$0.03
Linehaul rate	$2.63/mi	−0.9%
Implied fuel component	$0.98/mi	flat
Load-to-truck ratio	34.93	−1.60
Truck posts	+3.3%	w/w
Load posts	−1.2%	w/w
Ratio vs. year ago (23.06)		+51.5% tighter
vs. 9-yr seasonal avg ($2.09)		+25.8%
13-week average	$2.634/mi	

Source: DAT Freight & Analytics Flatbed Report, week ending 10/24/2026; all-in rate via TheTrucker, 10/26/2026. Rates are linehaul only, excluding fuel surcharge. Bellwether roster averaged $3.23/mi, +1¢ w/w and +28.8% y/y. No DAT revision to the prior-week ratio this edition: 36.53 carries unchanged. Chart weeks before 9/5 are reconstructed from DAT's published weekly changes. **EST**

THE TIGHTEST BOARD FINALLY EASED — BECAUSE TRUCKS SHOWED UP

Flatbed's ratio fell from **36.53 to 34.93**, and the mechanism matters: **truck posts rose 3.3%** while load posts fell only 1.2%. That is capacity returning, not demand collapsing — the first time this quarter an open-deck ratio moved on the supply side. At 34.93 the board is still **3.7× dry van** and **51.5% tighter** than the 23.06 of a year ago. Linehaul gave **2¢ to $2.63**, still **28.2% (+58¢)** above last year and **25.8% above** the $2.09 seasonal average.

DAT'S 6¢ FADE IS NOW 4¢ AWAY — AND THE BELLWETHER WENT THE OTHER WAY

The 35-day forecast holds at **$2.59**, band $2.52–$2.65 — a call DAT has carried for weeks. This week the print finally moved toward it, leaving a **4¢** gap. But the bellwether roster *rose* **1¢ to $3.23**, up **28.8% y/y**, so the decline is concentrated in secondary origins. Flatbed has now held **$2.59–$2.66** for fourteen straight weeks, averaging **$2.634**. Use $2.59 as the floor, price contracts off the 13-week average, and watch truck posts for a second week of increase before conceding more.

Drayage Market Intelligence

RAIL BACKLOG AND LABOR RISK · SEPTEMBER VOLUMES · IMPORT OUTLOOK TO FEBRUARY 2027

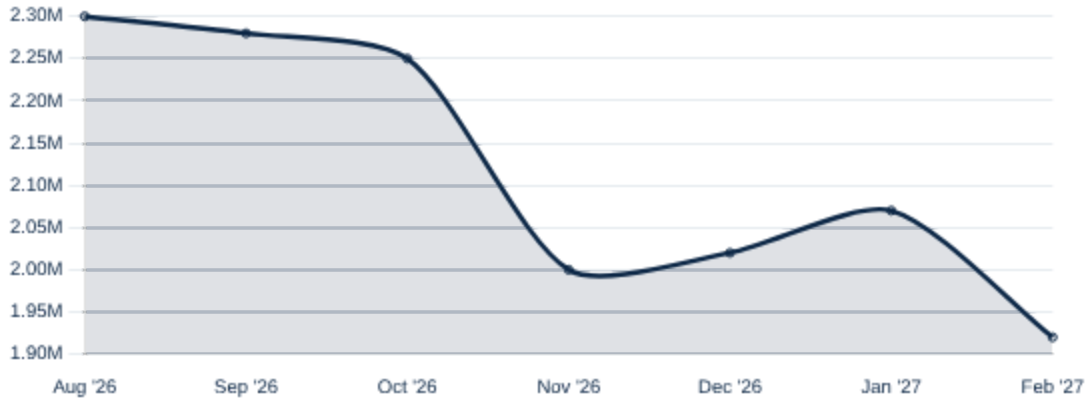
CONTAINERS AWAITING RAIL, 10/26
35,688
▲ 10,562 waiting 9+ days

LA/LB RAIL DWELL, SEP
7.19 days
▲ from 6.75 in August

APPOINTMENT SUCCESS RATE
54%
▼ all terminals · FMS 44%

NAT'L IMPORTS, NOV FORECAST
2.00M TEU
▼ −1% y/y — wave crests

U.S. CONTAINERIZED IMPORTS — MONTHLY TEU, ACTUAL AND FORECAST (MILLIONS)



FORWARD AND OPERATING SIGNALS

Signal	Reading
Aug 2026 imports (actual)	2.30M · −0.7%
Sep 2026 (f)	**2.28M · +8.2%**
Oct 2026 (f)	**2.25M · +8.5%**
Nov 2026 (f)	**2.00M · −1.0%**
Dec 2026 (f)	**2.02M · +0.6%**
Jan 2027 (f)	**2.07M · −1.9%**
Feb 2027 (f)	**1.92M · +1.0%**
Full-year 2026	**25.8M · +1.4%**
POLA planned vessels / boxes	132 · 304,666
POLA wk 43 TEU vs. 2025	**146,684 vs. 91,749**
Local truck dwell, Sep	**3.18 days (2.95 Aug)**

Imports: NRF / Hackett Associates Global Port Tracker, released 10/8/2026. Operating signals: Port Optimizer Control Tower, read 10/28/2026 — manifest-based and subject to change. Dwell: Pacific Merchant Shipping Association via FreightWaves, 10/28/2026.

MAJOR PORT DETAIL — SEPTEMBER VOLUME AND INDICATIVE DRAYAGE BANDS

MODELED BANDS

Port / Gateway	Sep Loaded Imports	y/y	Base Band, 40' ≤25 mi	Fuel Surcharge	Chassis Split	Trend
Los Angeles	545,696	**+19.0%**	$285 – $420	22%	$35 – $55	**+4%**
Long Beach	509,390	**+31.3%**	$285 – $420	22%	$35 – $55	**+4%**
New York / New Jersey	not published	—	$310 – $480	21%	$40 – $65	**+2%**
Savannah	not published	—	$220 – $340	20%	$30 – $45	**+6%**
Houston	not published	—	$195 – $295	23%	$25 – $40	**+1%**
Seattle / Tacoma	not published	—	$240 – $370	22%	$30 – $50	**+3%**
Charleston	not published	—	$210 – $320	20%	$30 – $45	**+5%**
Norfolk / Baltimore	not published	—	$225 – $355	21%	$30 – $50	**+1–2%**
Chicago rail ramps	inland	—	$175 – $270	22%	$25 – $40	**+2%**

*Volumes: Port of Los Angeles and Port of Long Beach September 2026 cargo releases — **October port volumes are not published until mid-November**, so September remains the latest actual. **Drayage has no single authoritative weekly spot index the way truckload has.** The bands above are DrayLocator's published indicative ranges for a one-way local move (40' dry, port to warehouse within 25 miles, excluding fuel surcharge, chassis and port fees); that rate table still carries a "last updated July 2026" stamp even though the site header reads 10.28.26, so treat the bands as a modeled benchmark, not a reported print, and confirm against carrier quotes. Volumes for NY/NJ, Savannah, Houston and Seattle-Tacoma were not published in time for this edition.* **MODELED**

THE CONSTRAINT IS RAIL SERVICE, AND IT IS MEASURABLE NOW

35,688 containers awaited on-dock trains at LA/Long Beach on **10/26**, **10,562** of them nine-plus days — **41.4%** of LA's rail boxes vs. **15.1%** at Long Beach. Rail dwell hit **7.19 days**, truck dwell **3.18**. Truck-destined boxes move near normal: **transload the time-critical SKUs**.

TWO DATES TO MANAGE: NOVEMBER 1 LABOR, JANUARY 9 FEES

PMA warned **10/27** that ~**250 ILWU Local 26 watchmen** may strike **11/1** across terminals handling **85% of Long Beach** and **33% of LA** cargo — on a system already at **54%** appointment success. USTR's **10/26** notice proposes extending the vessel-fee suspension to **1/9/2027**: a **proposal, not a final rule**; it still lapses 11/9. Hold the fee cap in Q1 terms.

Intermodal Market Intelligence

AAR WEEK 42, ENDING 10/24/2026 · RAIL INTERMODAL AND MODE CONVERSION

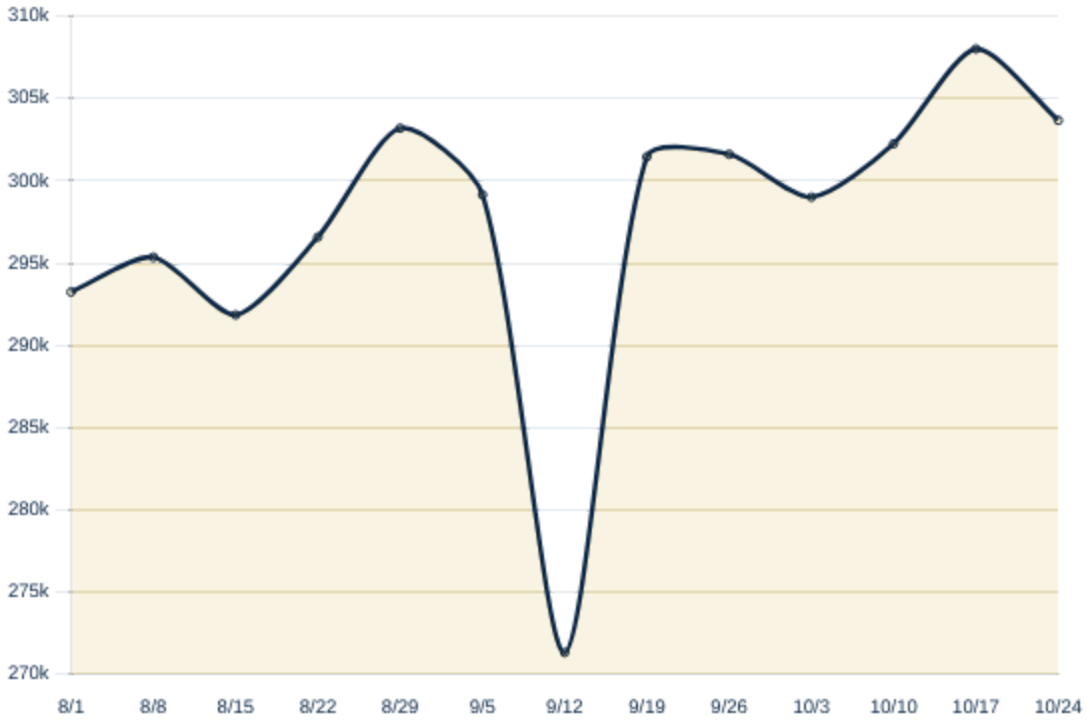
U.S. INTERMODAL UNITS, WK 42
303,677
▲ +11.3% y/y — 2nd double digit

U.S. CARLOADS, WK 42
234,826
▲ +3.6% y/y

YTD INTERMODAL, 42 WEEKS
11.99M
▲ +4.7% y/y

INTERMODAL SPOT VS. TRUCKLOAD
39 pts
▼ +7.6% vs. +46.8% y/y

U.S. WEEKLY INTERMODAL UNITS — TRAILING 13 WEEKS (AAR)



INTERMODAL SNAPSHOT — WEEK 42

Metric	Value	y/y
U.S. intermodal units	303,677	+11.3%
U.S. carloads	234,826	+3.6%
U.S. combined total	538,503	+7.8%
YTD intermodal (42 wks)	11,991,641	+4.7%
YTD carloads (42 wks)	9,609,543	+2.7%
Canada intermodal	75,316	+5.5%
Mexico intermodal	14,291	+33.4%
North America intermodal	393,284	+10.8%
13-week average, U.S.	297,436	wk 42 +2.1% vs. avg
InTek intermodal spot, wk 10/19	+0.9% w/w	+7.6%
DAT truckload spot, same basis	+1.6% w/w	+46.8%

*Sources: Association of American Railroads weekly rail traffic, week 42 ending 10/24/2026 (published 10/28/2026, via AJOT). All thirteen chart weeks are actual AAR prints, including the 9/12 Labor Day week. Pricing: InTek Logistics Intermodal Index, week ending **10/19/2026** — InTek updates Thursdays, so on a Wednesday run the newest entry is one week behind the AAR week and is labeled with its own date, not the AAR week. InTek publishes the index as percentage changes, not a dollar-per-mile level.*

STILL DOUBLE DIGIT, BUT THE ACCELERATION STOPPED — AND SERVICE IS WHY

Intermodal y/y growth ran **+6.9%, +6.3%, +7.4%, +10.4%, +12.6%, +11.3%** across weeks 37–42. Week 42's **303,677 units** is the second-highest of the trailing thirteen and **2.1% above** the 297,436 average, but it is the first deceleration in five weeks — and it coincides with the **35,688-container** rail backlog and **7.19-day** dwell at LA/LB. Volume is not constrained by demand; it is constrained by railcars. Eight of ten carload groups also rose, led by motor vehicles **+2,234** and petroleum **+1,565**. Mexico intermodal at **+33.4%** remains the fastest-growing leg in North America.

THE SPREAD NARROWED TO 39 POINTS — CONVERT ON SERVICE, NOT JUST PRICE

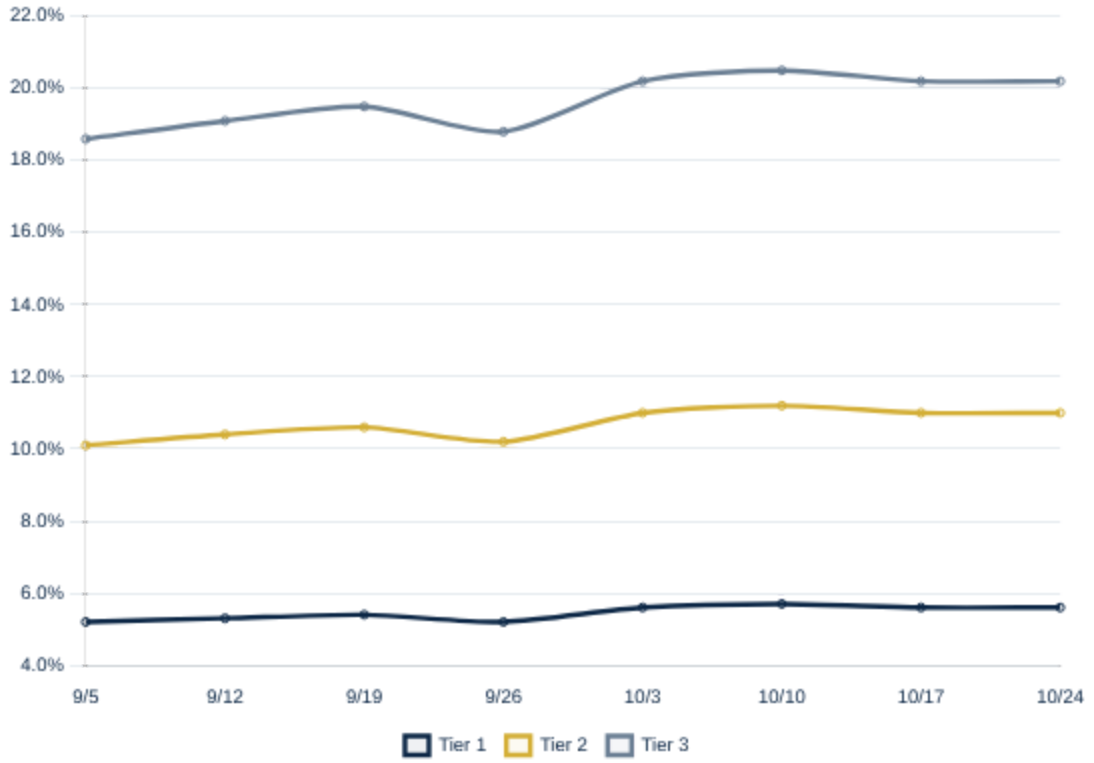
Intermodal spot is up **7.6% y/y** against truckload spot **+46.8%**, a **39-point** gap that closed roughly a point this week as intermodal rose **0.9% w/w**. ACT projects **19.3 million** North American loads for 2026, beating the 2018 record of 18.9 million, and another record in 2027. But the LA/LB backlog is the caution: a 39-point price advantage is worth nothing on a lane where the box sits nine days. Qualify lanes over roughly **700 miles** with **2+ days** of transit tolerance, and for West Coast origins price the conversion against *current* dwell, not published rail transit.

EDI Tender Decline Report

CARRIER TIER DECLINE BEHAVIOR · ILLUSTRATIVE BENCHMARK MODEL ILLUSTRATIVE / BENCHMARK DATA

This page is a **benchmark model, not a live client TMS or EDI feed.** Tier decline curves are calibrated to the most recent published national tender-rejection level — **13.9%**, print dated **10/20/2026**, with no newer public print available this week — and to the typical dispersion between primary, secondary and tertiary routing-guide positions. Use it to frame routing-guide depth and award concentration questions, and to size the EDI error categories worth auditing. Client-specific figures require a TMS data extract.

TENDER DECLINE RATE BY CARRIER TIER — TRAILING 8 WEEKS ILLUSTRATIVE



TIER DETAIL — WEEK ENDING 10/24/2026 ILLUSTRATIVE

Tier	Decline %	WoW	Award Share
Tier 1 — primary	5.6%	flat	62%
Tier 2 — secondary	11.0%	flat	24%
Tier 3 — tertiary	20.2%	flat	9%
Spot fallout	—	—	5%
Blended decline	**8.4%**	flat	100%
National index, 10/20 print	13.9%	no new print	—
Reefer index, 10/20 print	21.44%	**1 in 5 loads**	—
Pacific NW, all equipment	20.27%	**6.2% yr ago**	—
Pacific NW reefer, Oct avg	≈41%	**≈16% yr ago**	—

EDI ERROR CATEGORIES TO AUDIT

Error	Share of Declines	Fix
990 timeout / no response	31%	Shorten response SLA
Appointment conflict (214)	24%	Pre-clear dock windows
Equipment mismatch (204)	18%	Correct equipment codes
Rate / accessorial mismatch	15%	Sync tariff to TMS
Lane not in routing guide	12%	Re-bid orphan lanes

*Five Pillars Business Consulting illustrative benchmark model. Tier curves are anchored to the FreightWaves SONAR national truckload rejection index (13.9%) and reefer index (21.44%), both printed 10/20/2026; **no newer public print was available for this edition**, so the modeled tiers are held flat rather than extrapolated. Regional figures via IndexBox summary of SONAR data, 10/11/2026 (Northwest reading dated 10/8). Error-category shares are a Five Pillars working estimate reflecting typical shipper EDI audit findings, not client data.* EST

THE NATIONAL INDEX HIDES A TWO-SPEED ROUTING GUIDE

The national figure has held a **13–14%** band since August, and nothing in it tells you where your cost is. Underneath: Pacific Northwest all-equipment rejections are **20.27%** against **6.2%** a year ago; Midwest is **18.61%** from 7.6%. Northwest *reefer* averaged roughly **41%** in October. Northwest *van* is below **5%**. A single blended decline target across that dispersion guarantees over-paying in the easy lanes and failing in the hard ones. Segment the guide by region and equipment before the 2027 bid.

NEARLY A THIRD OF DECLINES ARE PROCESS, NOT PRICE

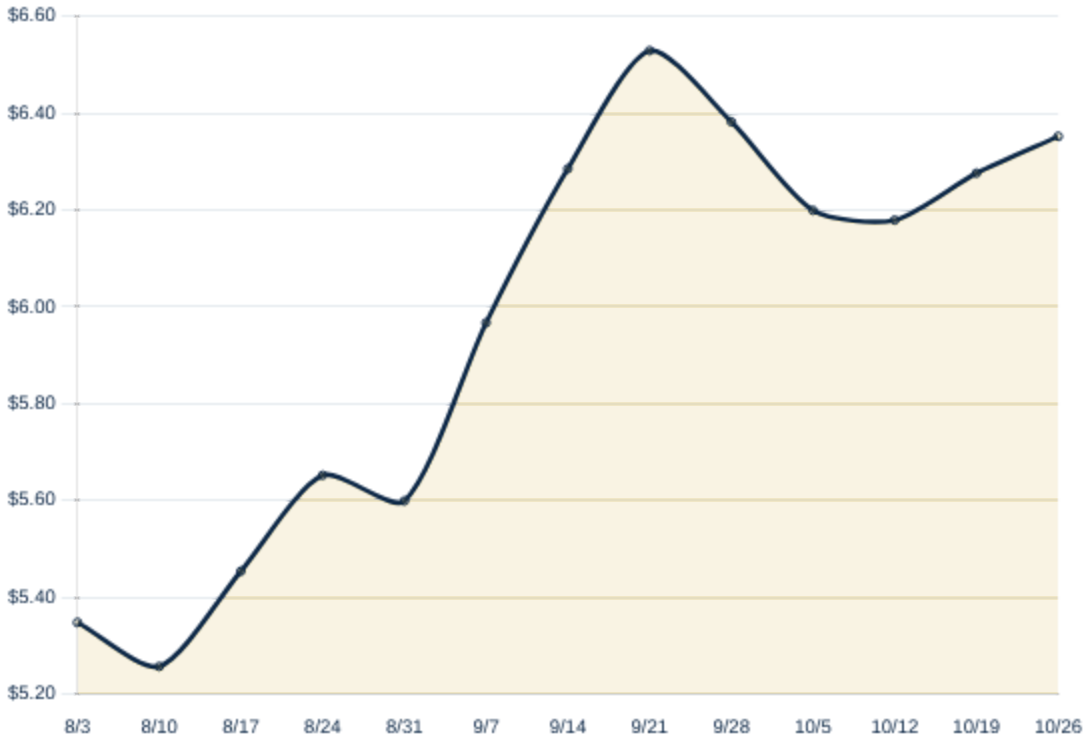
In typical audits, **31%** of declines trace to 990 timeouts and **24%** to appointment conflicts — **55% before anyone argues about rate**. That matters more this week, not less: with LA/LB terminal appointment success at **54%**, appointment-driven failures are being manufactured upstream of the routing guide. Tightening the 990 response SLA and pre-clearing dock windows costs nothing in linehaul. Pull the actual 204/990/214 extract and measure it; a routing guide that fails on process looks like one that is underpriced.

Fuel Surcharge Report — All Modes

EIA SURVEY WEEK ENDING 10/26/2026 · ILLUSTRATIVE SURCHARGE MODEL MODELED

U.S. ON-HIGHWAY DIESEL	YEAR-OVER-YEAR	MODELED TL SURCHARGE	BELOW 9/21 RECORD
$6.352	**+$2.634**	**$0.516/mi**	**17.7¢**
▲ +7.6¢ w/w — 2nd straight rise	▲ +70.8% vs. $3.718	▲ +1.2¢ w/w	▲ was 25.3¢ last week

U.S. AVERAGE ON-HIGHWAY DIESEL — TRAILING 13 WEEKS ($/GAL)



ILLUSTRATIVE SURCHARGE BY MODE MODELED

Mode	MPG	FSC $/mi	WoW
Truckload — dry van	6.5	$0.516	+$0.012
Truckload — reefer (unit load)	5.9	$0.568	+$0.013
Flatbed / open deck	6.2	$0.541	+$0.012
Drayage (short-haul, idle-heavy)	5.0	$0.670	+$0.015
Intermodal dray leg	5.5	$0.609	+$0.014
LTL (per-cwt equivalent)	6.0	$0.559	+$0.013
Baseline assumption		$3.00/gal peg, linear $/mi	
13-week average diesel		$5.960/gal	
Peak surcharge (9/21)		$0.543/mi — now 2.7¢ under	

Model: FSC $/mi = (EIA U.S. average price − $3.00 baseline) ÷ MPG. Source price: U.S. EIA Weekly Retail On-Highway Diesel Prices, survey week ending 10/26/2026 ($6.352, released 10/27), verified against the EIA by-area weekly series page, which agrees exactly on the national figure and on all eleven regions. All thirteen chart points are actual weekly EIA prints, including the 8/10 dip. ***This is a Five Pillars Business Consulting illustrative model, not a carrier tariff.*** *Actual surcharges follow each carrier's published table, peg and MPG assumption.* MODELED

TWO WEEKS UP, AND THE CARRIER RECOVERY LAGS BY A FULL PRINT

Diesel rose **9.7¢** and now **7.6¢** to **$6.352**, cutting the gap to the 9/21 record from 35.0¢ to **17.7¢** in two weeks. The modeled truckload surcharge is **51.6¢/mile**, only **2.7¢** under the September peak. The timing is the exposure: DAT's week-ending 10/24 surcharge still runs off the **10/12** price of $6.179, so carriers are currently recovering against a number **17.3¢/gallon** stale — roughly **2.7¢/mile** under-recovered. Expect fuel-related rate requests, and stop budgeting further relief.

INDEX WEEKLY, AND PRICE THE SHORT LEGS SEPARATELY

A monthly-reset table set from the 10/12 print under-recovers by roughly **2.7¢/mile** today and more if diesel keeps climbing. The exposure is worst where MPG is lowest: a **drayage move at 5.0 MPG carries 67.0¢/mile** against 51.6¢ for dry van, and reefer at 56.8¢. Any contract applying one dry-van fuel table across dray, reefer and LTL is mispricing by **5–15¢/mile** on the short legs — and dray is exactly where LA/LB congestion is adding idle time that the MPG assumption already understates. Index weekly to the EIA Monday survey and set mode-specific pegs.

Diesel Fuel Cost by PADD — Regional Detail

EIA SURVEY WEEK ENDING 10/26/2026 · EAST AND MIDWEST UP, WEST DOWN

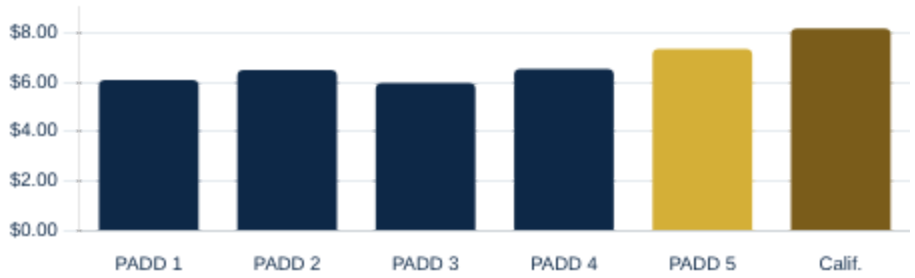
HIGHEST — CALIFORNIA
$8.155
▼ −8.7¢ w/w · +65.3% y/y

LOWEST — LOWER ATLANTIC
$5.890
▲ +15.0¢ w/w · +61.7% y/y

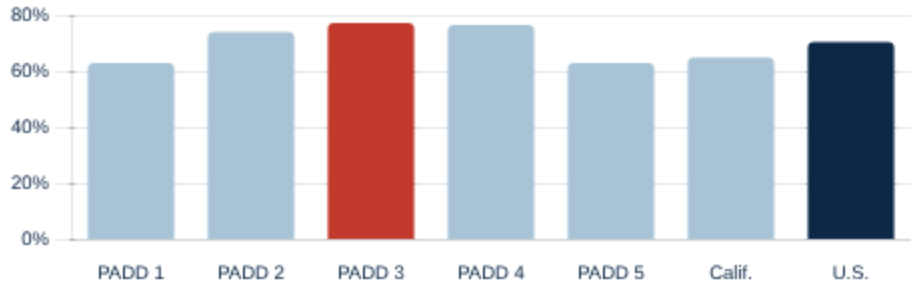
WIDEST SPREAD
$2.265
▼ from $2.502 — narrowing

STEEPEST Y/Y — GULF COAST
+77.6%
▲ +$2.601 on a $3.350 base

DIESEL PRICE BY REGION ($/GAL)



YEAR-OVER-YEAR CHANGE BY REGION (%)



REGIONAL DETAIL — PRICE, WEEKLY CHANGE, YEAR-AGO BASIS AND MODELED SURCHARGE

Region	PADD	Price $/gal	WoW	Year Ago	YoY $	YoY %	FSC $/mi MODELED
U.S. average	—	**6.352**	**+0.076**	3.718	**+2.634**	**70.8%**	$0.516
East Coast	PADD 1	6.079	**+0.095**	3.723	**+2.356**	**63.3%**	$0.474
New England	PADD 1A	6.421	**−0.049**	3.933	**+2.488**	**63.3%**	$0.526
Central Atlantic	PADD 1B	6.496	**−0.012**	3.881	**+2.615**	**67.4%**	$0.538
Lower Atlantic	PADD 1C	5.890	**+0.150**	3.642	**+2.248**	**61.7%**	$0.445
Midwest	PADD 2	6.480	**+0.128**	3.715	**+2.765**	**74.4%**	$0.535
Gulf Coast	PADD 3	5.951	**+0.048**	3.350	**+2.601**	**77.6%**	$0.454
Rocky Mountain	PADD 4	6.521	**+0.099**	3.686	**+2.835**	**76.9%**	$0.542
West Coast	PADD 5	7.329	**−0.065**	4.485	**+2.844**	**63.4%**	$0.666
W. Coast less California	PADD 5	6.614	**−0.045**	4.095	**+2.519**	**61.5%**	$0.556
California	PADD 5	8.155	**−0.087**	4.934	**+3.221**	**65.3%**	$0.793

*Source: U.S. Energy Information Administration, Weekly Retail On-Highway Diesel Prices, survey week ending **Monday 10/26/2026** (released 10/27/2026); cross-checked against the EIA by-area weekly series page, which agrees on every region. Note the EIA survey week differs from the DAT spot week ending 10/24. EIA publishes the year-ago column as a change, not a price; the Year Ago column above is the current price less that change, and YoY % is the change divided by that year-ago price. FSC $/mi = (price − $3.00) ÷ 6.5 MPG — a Five Pillars Business Consulting illustrative model, not a carrier tariff.* **MODELED**

THE CLEAN SWEEP BROKE — FIVE UP, FIVE DOWN

Last week all eleven regions rose. This week the move split by geography: **Lower Atlantic +15.0¢**, **Midwest +12.8¢**, **Rocky Mountain +9.9¢** and **East Coast +9.5¢** against **California −8.7¢**, **West Coast −6.5¢** and **New England −4.9¢**. The national average still rose **7.6¢** because the East and Midwest carry the weight, and the CA-to-Lower-Atlantic spread narrowed from **$2.502 to $2.265**. A national fuel factor now mis-states *both* coasts: West Coast lanes carry **66.6¢/mile** against **47.4¢** on the East Coast.

LOW-BASE REGIONS STILL CARRY THE WORST BUDGET SHOCK

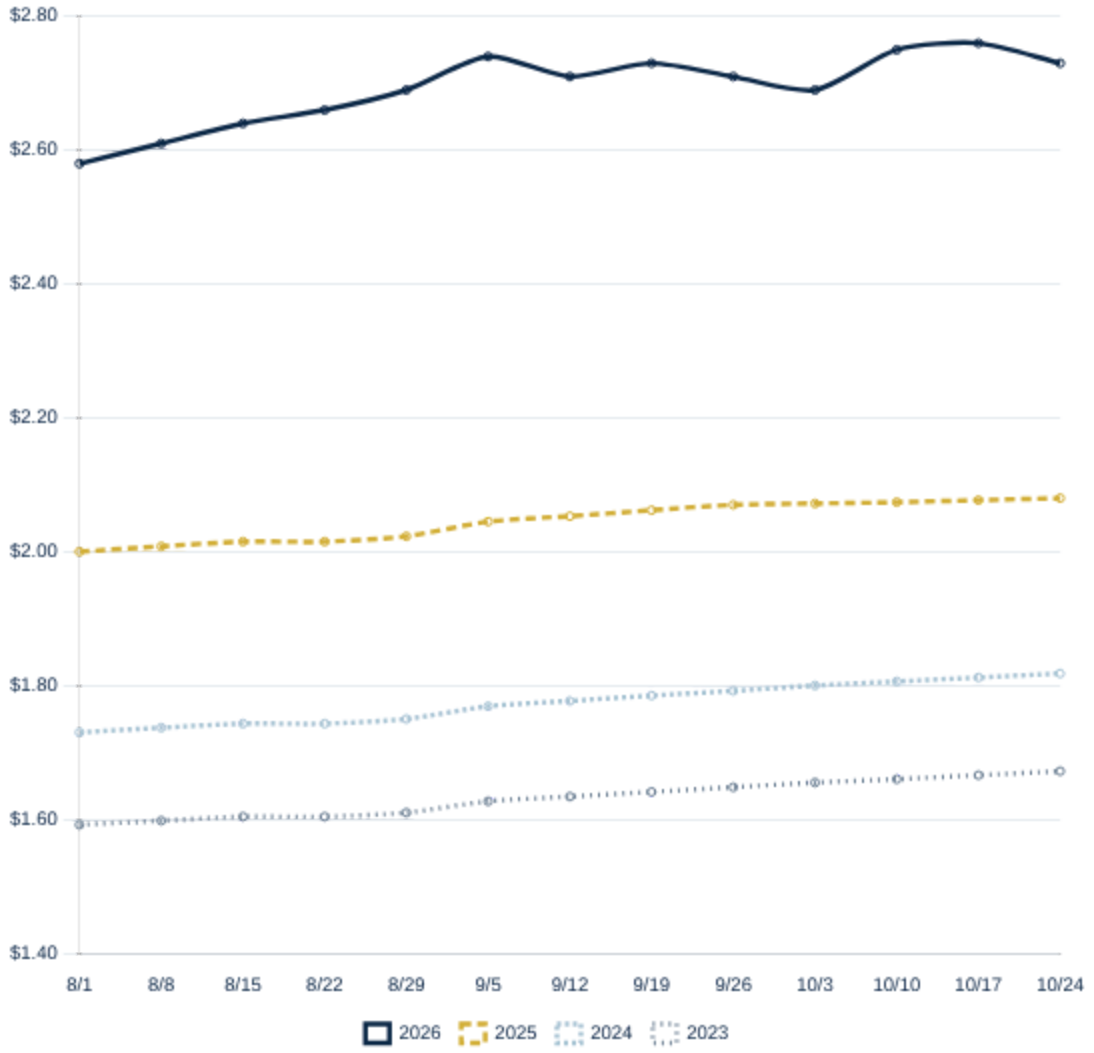
Gulf Coast (**+77.6%**), Rocky Mountain (**+76.9%**) and Midwest (**+74.4%**) show the steepest annual increases — not because they are expensive, but because their year-ago base was low ($3.350, $3.686, $3.715). California's **+65.3%** sits on a $4.934 base. For budget variance, **Houston, Denver and Chicago origins are where a 2025-anchored fuel assumption breaks hardest**. Re-peg regional tables off the current year-ago column, not a national factor.

Reefer Rate — 13-Week Comparison

2026 VS. 2025 / 2024 / 2023 · LINEHAUL $/MI, WEEKS ENDING 8/1 – 10/24

Reefer linehaul closed the window at **$2.73**, off the **$2.76** thirteen-week high set on 10/17 — the first down week since mid-September, and this one came out of base rate rather than fuel. The 2026 line averages **$2.692** against **$2.046** in 2025 — a **$0.646**, or **31.6%**, premium that has now held within half a point for four straight weeks. Against 2024 the gap is **$0.918** and against 2023 **$1.060**. The shape still matters more than the level: 2025, 2024 and 2023 drift upward in a narrow seasonal channel, while 2026 steps — and a single 2¢ give does not break a step pattern.

REEFER LINEHAUL — FOUR-YEAR OVERLAY, TRAILING 13 WEEKS



13-WEEK AVERAGES AND SPREAD

Year	13-Wk Avg	Final Week	2026 Premium
2026	**$2.692**	**$2.730**	—
2025	$2.046	$2.080	**+$0.646 (+31.6%)**
2024	$1.774	$1.818	**+$0.918 (+51.7%)**
2023	$1.632	$1.672	**+$1.060 (+65.0%)**
2026 window low			$2.580 (wk ending 8/1)
2026 window high			$2.760 (wk ending 10/17)
2026 window range			18¢ — 7.0% of the low
Reported y/y, 10/24			+31.4% (+$0.65)
9-yr seasonal avg			$2.12 — 2026 is +28.6%

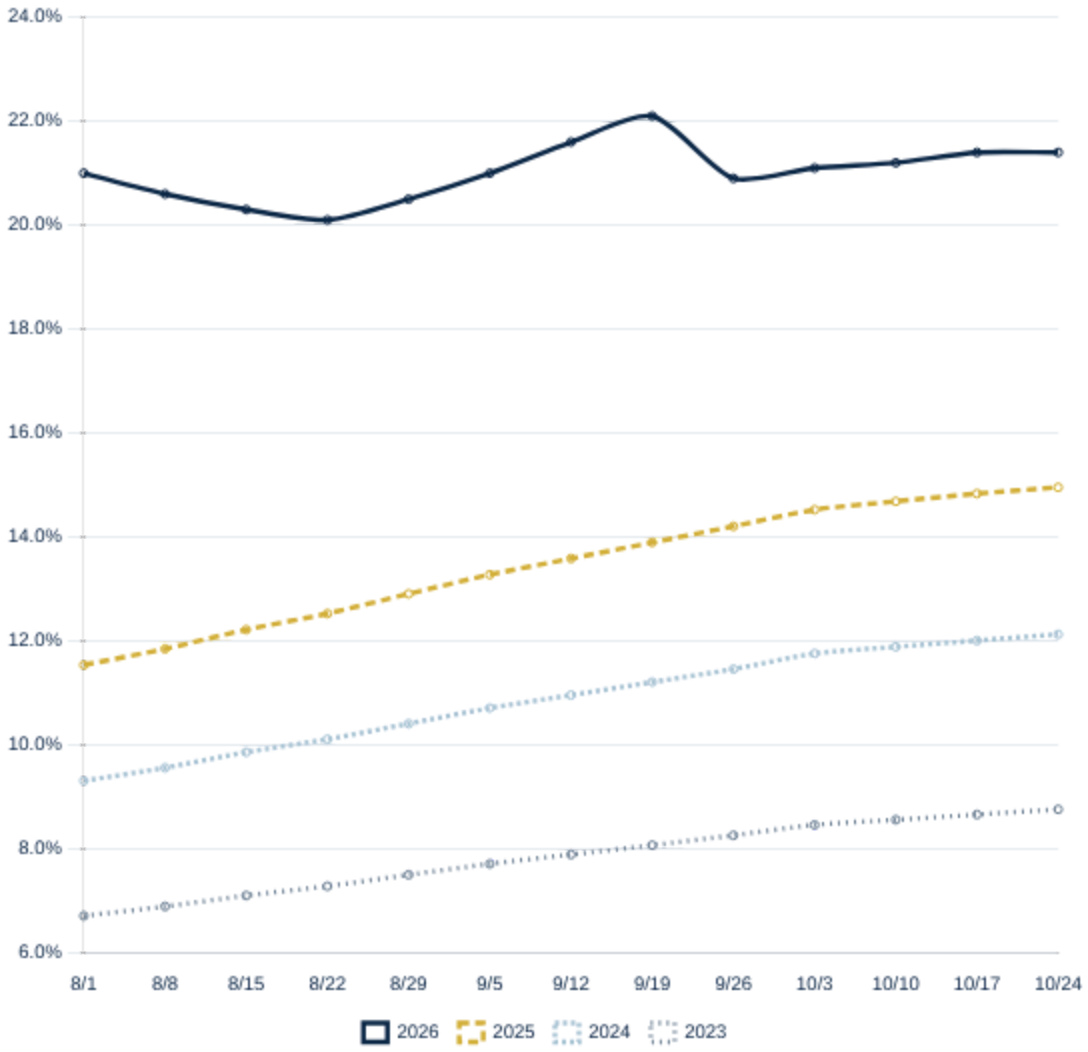
2026 series: DAT Freight & Analytics weekly reefer linehaul prints, weeks ending 8/1–10/24/2026; weeks before 9/5 are reconstructed from DAT's published weekly percentage changes. Prior-year series are Five Pillars Business Consulting reconstructions built from DAT's published year-over-year comparisons and anchored to the reported 10/24 y/y figure (+$0.65 places the 2025 week at $2.08); treat them as a working estimate of the prior-year path, not a reported weekly series. **EST**

Reefer ROTRI — 13-Week Comparison

REEFER TENDER REJECTION % · 2026 VS. 2025 / 2024 / 2023 NO NEW PRINT

No new reefer tender-rejection print published this week. The most recent public reading remains **21.44% dated 10/20/2026**, against reported anchors of **22.13% on 9/17** and **20.89% on 9/24**. The 2026 line below therefore carries **21.4% flat** through the 10/24 week position rather than extrapolating a direction the data does not support. The substantive point is unchanged and worth repeating: reefer rejections have been **above 20% for more than six weeks** while the national all-mode index sits at **13.9%** — and the regional detail is far more extreme than either figure, with Pacific Northwest reefer averaging roughly **41%** through October.

REEFER TENDER REJECTION % — FOUR-YEAR OVERLAY, TRAILING 13 WEEKS



13-WEEK AVERAGES AND SPREAD

Year	13-Wk Avg	Final Week	2026 Gap
2026	**21.0%**	**21.4%**	—
2025	13.5%	15.0%	**+7.5 pts**
2024	10.9%	12.1%	**+10.1 pts**
2023	7.8%	8.8%	**+13.2 pts**
Reported peak, 9/17			22.13%
Reported trough, 9/24			20.89%
Latest print, 10/20			21.44% — 1 load in 5
National all-mode index			13.9% — reefer is +7.5 pts
Pacific NW reefer, Oct			≈41% · Midwest ≈29%

2026 anchors: FreightWaves SONAR reefer tender-rejection prints reported 10/20/2026 — 22.13% (9/17), 20.89% (9/24), 21.44% (10/20). ***No newer print was published for this edition****, so the final two chart weeks both carry 21.4%. Intervening and earlier 2026 weeks, and all prior-year series, are Five Pillars Business Consulting reconstructions and are a working estimate of the path, not reported weekly data. Regional reefer figures via IndexBox summary of SONAR data, 10/11/2026.* EST