

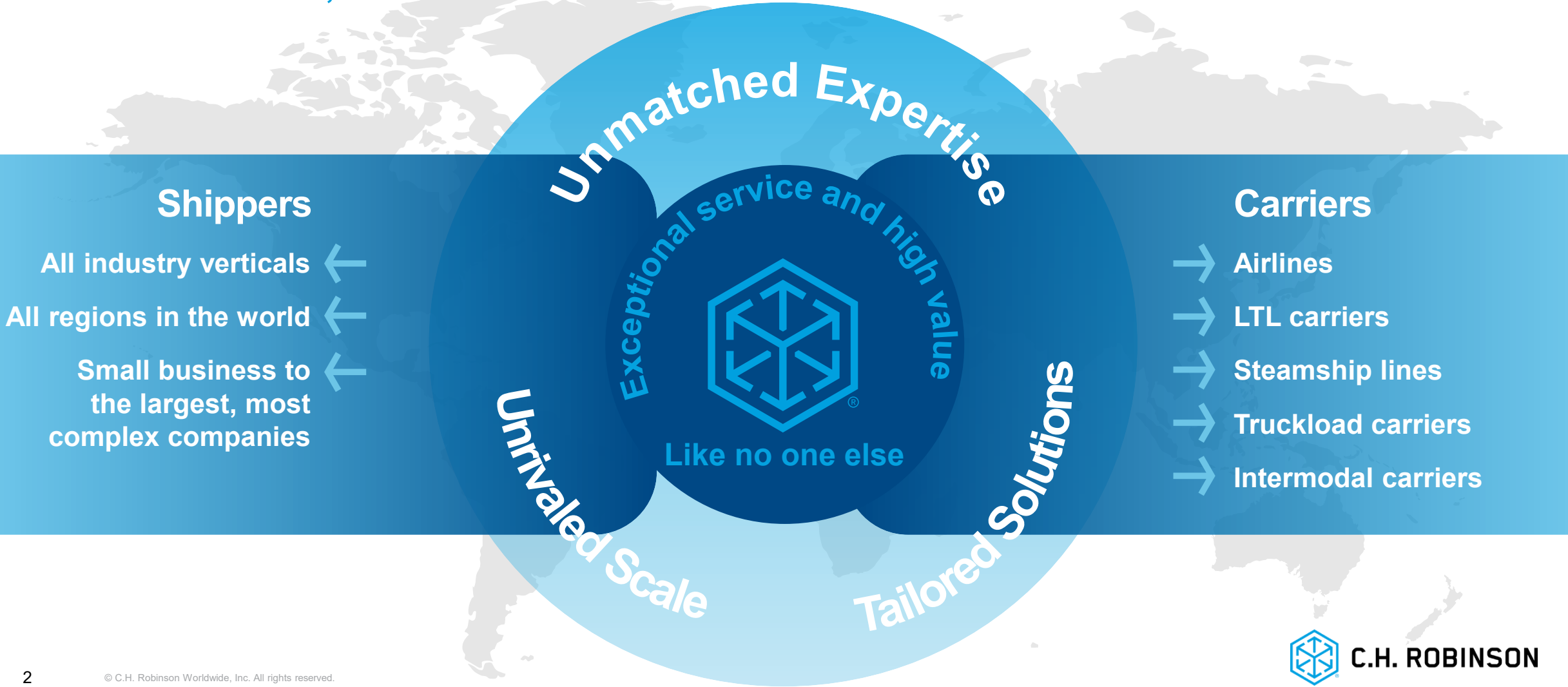
JUNE 2026 REPORT

**C.H. Robinson**

**Edge™**

# → Simplifying logistics—across the world

We solve challenges through our unmatched expertise, unrivaled scale, and tailored solutions



## → Freight Market Update

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# → Key Takeaways

## High-level insights at a glance

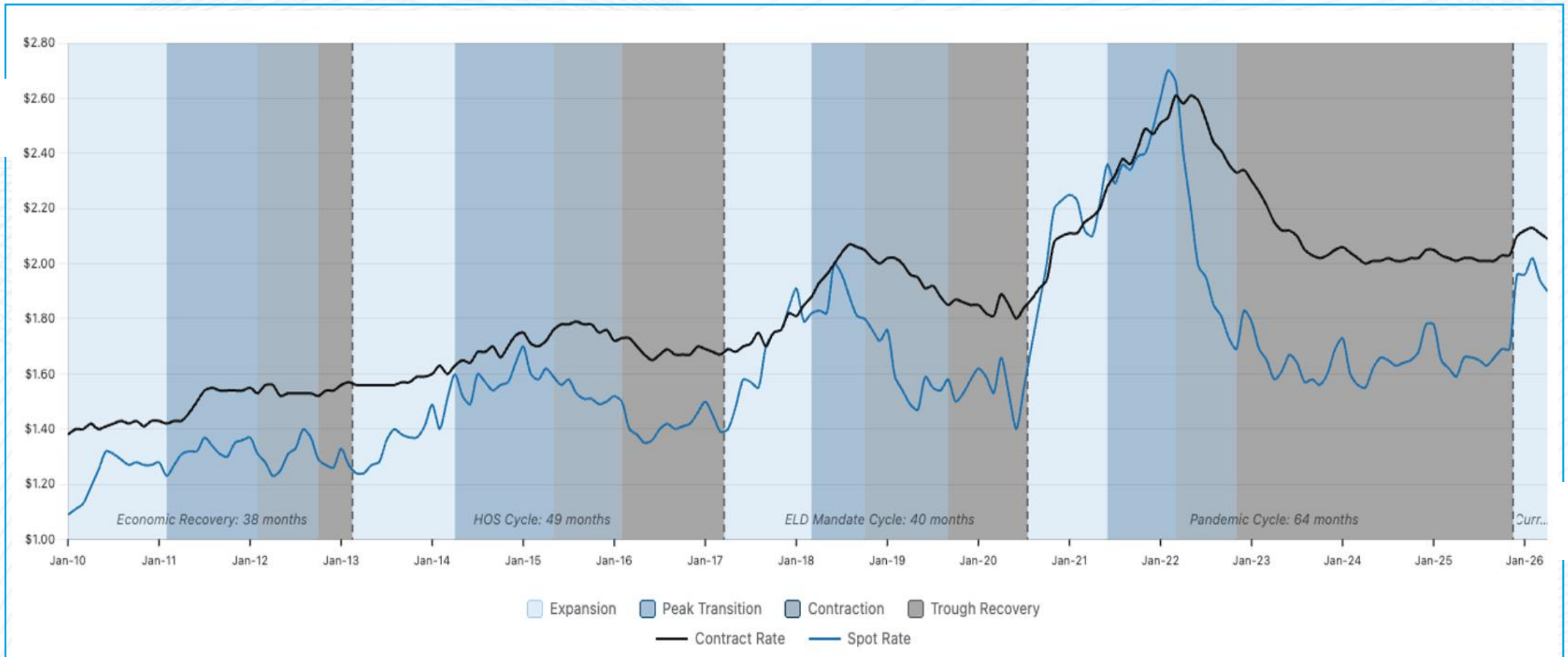
- Challenging **Truckload** conditions continued in May as Roadcheck Week exhibited great volatility in price and load-to-truck ratio. June is expected to see increases in seasonal demand from produce and beverage shipments. Execution dynamic continues to favor well-structured freight with consistent schedules and ample lead time.
- **LTL** remains stable but early signals materializing that conditions in the Truckload market are beginning to rebalance freight, with more tonnage slowly entering the LTL market. LTL carriers remain disciplined with pricing and freight selectivity.
- Earlier booking activity, tighter sailing windows, and carrier service adjustments are making departure timing more important than headline capacity across **ocean** freight.
- **Air** capacity remains available, though longer routings, tighter booking windows, and operating costs are making shipment timing less predictable in some markets.
- Legal rulings, trade policy changes, and USMCA review creating uncertainty for shippers



# Truckload

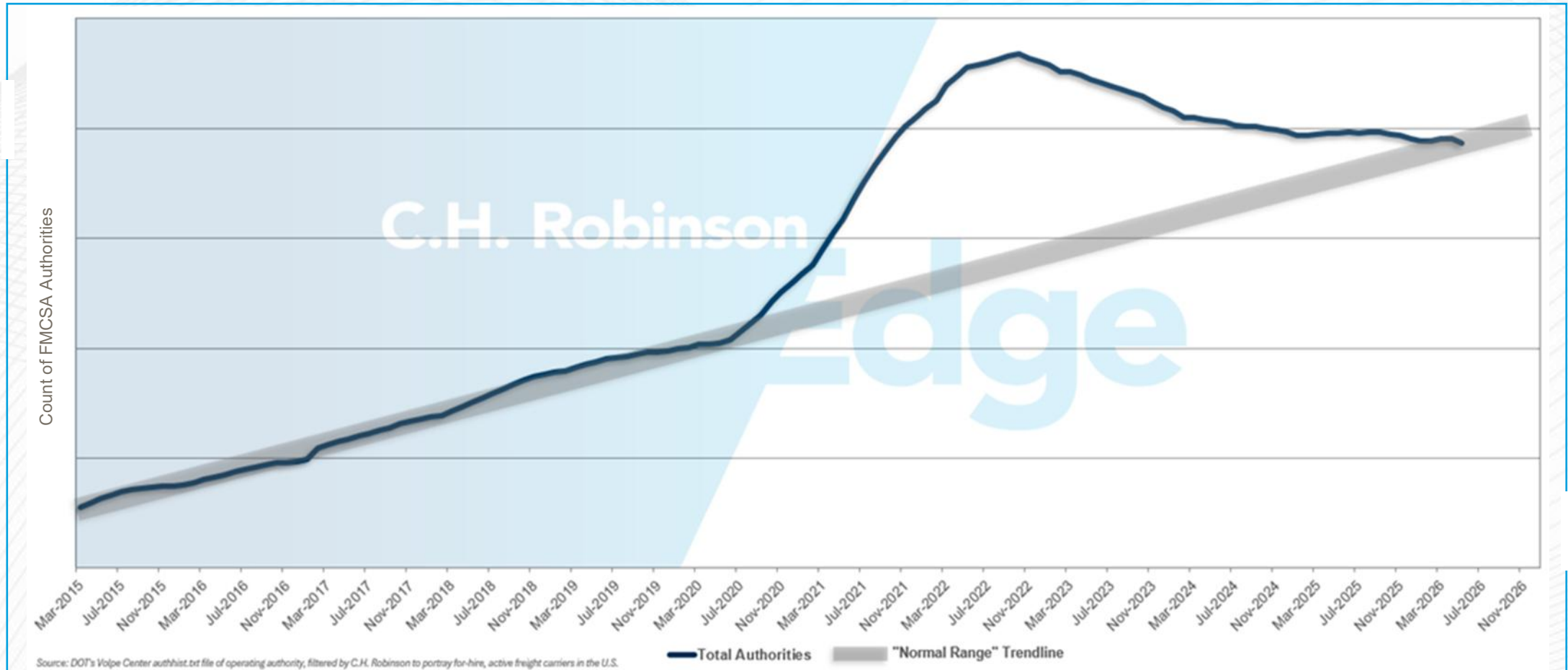
# → U.S. Truckload | Market Cycles

Recent C.H. Robinson blog post defines phases of market cycles and significance of current supply-influenced shift into Expansion phase



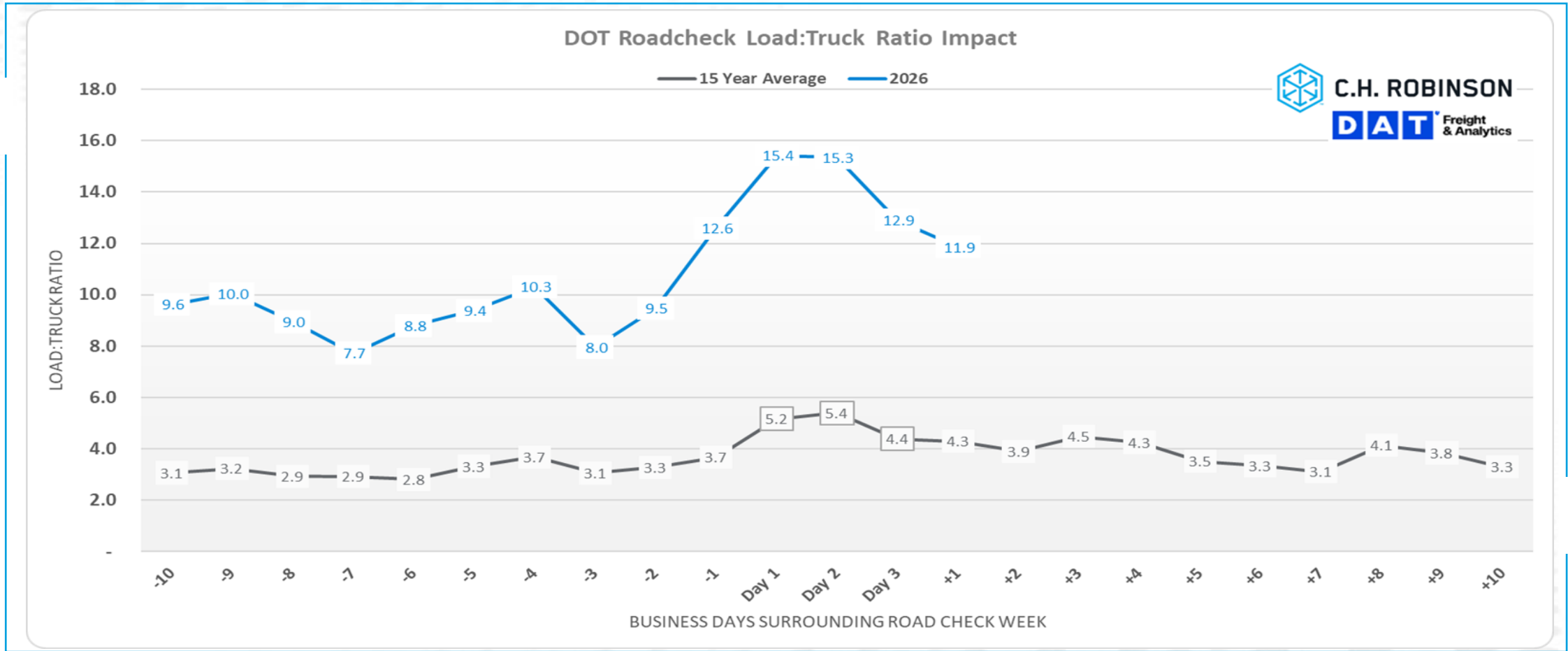
# → U.S. Truckload | Carrier Authorities

Truckload supply continues decreasing trend, more clearly in historic range than any point in last 6 years



# → International Roadcheck Week

Pronounced impact of Commercial Vehicle Safety Alliance's annual event May 12-14 demonstrates state of current market tightness



# LTL Shipping

# → LTL Market Update

## LTL market shows firmer conditions amid uncertainty

### Demand showing early rebalancing signals

- “Bubble” freight beginning to return to LTL as truckload prices rise, modestly increasing network density
- Growth remains uneven, but incremental volume is tightening capacity in select regions and lanes

### Pricing discipline and fuel dynamics shaping cost

- Carriers maintain yield focus and freight selectivity, limiting rate volatility
- Elevated May fuel surcharges pressured all-in pricing, with late-month diesel declines providing near-term relief

### Capacity tightening gradually, not constrained

- Capacity still available but increasingly dependent on network fit, shipment profile, and carrier preferences
- Market expected to firm gradually as modal rebalancing continues and carrier discipline reinforces tightening conditions



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# Ocean Freight

# → Ocean Freight

## Ocean planning windows tighten in June

- **Earlier booking behavior:** Peak-season shipping patterns are arriving sooner, particularly on Asia-linked lanes, reducing flexibility around preferred sailings.
- **Departure timing:** Cargo continues moving across major trade lanes, though shipments tied to inventory timing, inland connections, or fixed delivery schedules may require earlier planning to secure preferred departures.
- **Carrier service adjustments:** Blank sailings, carrier space allocation, and network changes are reducing sailing choice in parts of the market, particularly for time-sensitive cargo.
- **Longer booking lead times:** Booking recommendations are extending, especially for inland point intermodal (IPI), rail-dependent, and tightly sequenced freight.
- **Northern Europe coordination:** Elevated yard utilization and inland disruption in northern Europe are slowing cargo handoffs and reducing schedule precision even where vessel space remains available.



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# Air Freight



# → Air Freight

Air

## Shipment timing takes on greater importance in June

- **Available capacity:** Air freight capacity remains available across many lanes, though longer routings and reduced aircraft productivity are making shipment timing less predictable.
- **Longer booking lead times:** Spot and non-contract shipments are facing fewer early departure options and longer booking windows, particularly across Asia-linked flows.
- **Operating costs:** Longer routings, fuel-related costs, and aircraft utilization constraints continue carrying more influence over pricing than broad demand growth.
- **Europe outbound conditions:** Belly capacity remains steady, though freighter deployment is becoming more selective and pricing has begun moving higher in some corridors.
- **Shipment planning:** Where production schedules, inventory timing, or fixed delivery windows leave little room for delay, earlier forecasting and booking may help reduce timing risk.

# Trade Policy & Customs

# → Navigating Government & Trade Impacts

## Legal rulings and trade policy shifts creating uncertainty for shippers

- **Supreme Court freight liability ruling increases regulatory uncertainty**
  - Montgomery decision allows state-level negligence claims against brokers (and potentially shippers), increasing litigation exposure
  - Shift toward fragmented liability standards raises compliance complexity, insurance costs, and need for strong carrier vetting
- **Tariff and trade environment driving uncertainty again**
  - Ongoing tariff activity (IEEPA refund disputes, new Section 301 proposals, targeted Section 232 changes) creating cost and compliance volatility
  - USMCA review expected to extend uncertainty, with continued friction around enforcement and tariffs on key inputs and cross-border supply chains
- **Policy outlook points to prolonged complexity**
  - Congressional review and potential regulatory response to the ruling could reshape liability standards and industry practices
  - Trade policy expected to remain fluid, with elevated demand on shippers, customs broker capacity, and risk management capabilities
- Utilize C.H. Robinson's [Client Advisories](#) for critical updates and the [North American Trade & Tariff Insights](#) page for the most up-to-date tariff deal announcements

# Thank you

For more content, reach out to a C.H. Robinson account manager

